
**Monitoring Report on the Sustainable Tourism
Development of Changshu
(2021)
Simplified Version**

**Changshu Municipal Bureau of Culture, Radio, Television and
Tourism**

**Monitoring Centre for UNWTO Sustainable Tourism
Observatories**

2021

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CONTENTS

1 Overview of the monitoring.....	6
1.1 Origin of monitoring.....	6
1.2 Monitoring process	7
2 Tourism, environmental protection, and resource conservation	10
2.1 Air quality improved compared to the previous year.....	10
2.2 Surface water quality improved, and drinking water quality remained stable	10
2.3 Stable environmental quality of noise was reported, and more attention should be paid to regulating nighttime noise	11
2.4 A rise in industrial waste gas emissions and a decrease in industrial wastewater emissions were reported.....	11
2.5 Changshu continued to advance environmental projects in 2020, with air and water environment management as the focal point.....	12
3 Tourism and community	13
3.1 The image of Changshu as a leisure and livable city was most recognised by residents, and residents were most proud of natural and ecological resources and were increasingly interested in cultural and educational activities.....	13
3.2 Residents recognised the positive impacts of tourism on the economy but were quite concerned about the increase in housing prices and prices of goods due to tourism	15
3.3 Residents had an overall positive attitude towards the social impacts of tourism, but more people believed that tourism led to greater traffic congestion and parking challenges.....	16
3.4 A trend towards uncertainty over and indifference to the cultural impacts of tourism development among residents was observed.....	17
3.5 Residents had a high recognition rate of environmental protection but	

lacked a comprehensive understanding of the achievements in environmental protection in the context of tourism development in Changshu	18
3.6 Level of community participation in tourism declined in the post-pandemic era, with an increase in the awareness of participation and more difficulties in performing actions	20
4 Tourist behaviour and satisfaction	23
4.1 Most tourists visiting Changshu were mainly young and middle-aged people aged 18-45, with the proportion of highly educated visitors increasing ..	23
4.2 Word-of-mouth communication was the primary approach to promoting Changshu's tourism, and self-guided tours recovered fastest in the post-pandemic era.....	24
4.3 The pursuit of leisure and relaxation was still the most important motivation for tourists visiting Changshu, and the opening of the high-speed railway brought great convenience	25
4.4 The pandemic led to the shorter length of stay, with overnight visitors mainly choosing to stay with friends and relatives	28
4.5 Inadequate tourist destination attractiveness and tourism facilities reduced visitor satisfaction	29
4.6 Changshu should focus on optimising the ticket prices for attractions, the transport links between the attractions, the room facilities, and the fun and uniqueness of the recreational facilities and programs	30
4.7 There was a high degree of uncertainty about tourists' willingness to revisit and recommend Changshu, and Changshu should further promote its tourism via multimedia	32
4.8 Overall tourist satisfaction was high, and there were growing expectations for the sustainable tourism development of Changshu	33
5 Economic influence of tourism	35

5.1 The tourism market in Changshu was significantly influenced in 2020 due to the pandemic, but the tourism market recovered steadily in the first half of 2021	35
5.2 The share of total tourism revenue in the value-added of the tertiary industry increased	36
5.3 Gradual improvement of external transport and steady expansion of sharing and rental businesses could be observed	37
5.3 Tourists had a growing demand for accommodation, and the diversification and quality of the homestays received more attention	38
5.4 Gastronomy helped to enhance the tourism experience, and characteristic catering brands should be further supported	39
5.5 The number of cultural venues and museums was large, and their quality was high; however, the tourism experience should be further improved	40
5.6 Changshu boasted diversified tourism products, but it should further publicise its IP and extend its influence	41
5.7 The nighttime economy and cultural and creative industry were valued, and the leisure districts were well-developed	43
5.8 Changshu faced issues related to the weak city image and ineffective branding	44
6 Urban leisure and residents' well-being	46
6.1 Leisure venues in Changshu were more suitable for senior citizens, and those venues were not diversified	46
6.2 The rate of revisiting leisure destinations was low, and there was a lack of innovation	47
6.3 In terms of leisure consumption, Changshu was not attractive enough, and the surrounding cities distracted tourists to some extent.	48
6.4 Residents faced leisure time pressure, and the spending power was limited	

.....	49
6.5 Suggestion I: Leisure venues can be more youthful to heighten the experience for people.....	51
6.5 Suggestion II: Changshu should address leisure-related issues to enhance the attractiveness.....	52
6.5 Suggestion III: Changshu should safeguard people's rights to enjoy leisure activities to enhance participation.....	53
7 Evaluation of media communication of Changshu's city image as a tourist destination.....	55
7.1 The communication via the government was the most important approach, and the unofficial body as the communication subject was not distinctive enough.....	55
7.2 Changshu should integrate the resources of different communication subjects and strengthen their cooperation to enhance the credibility of communication subjects.....	57
7.3 Tourism-related services provided by Changshu were not adequate.....	58
7.4 The delivered content did not fully embody local characteristics, lacking integration and not being able to get feedback from the audience	60
7.5 Changshu should focus on conveying content with local characteristics, highlight its brand identity, and improve the mechanism for promoting its image.....	62
7.6 The use of media platforms was not sufficient, and Changshu should further integrate communication approaches.....	63
7.7 Suggestion I: Changshu should promote the integrated development of traditional and new media, trying to get more feedback and interact more with the audience to use multiple communication channels effectively.....	65
7.8 Suggestion II: Changshu should attach importance to interpersonal	

communication to increase emotional resonance and magnify the effect of word of mouth.....	66
8 Analysis of the potential of Changshu's study tours.....	68
8.1 Changshu had multiple places for developing study tours; however, it should follow an internal logic while developing study tours	68
8.2 Changshu had built an online platform, but it should pay more attention to the content and interaction.....	69
8.3 Changshu's resources were not distinctive, and its overall competitiveness should be improved	70
8.4 The study tours of Changshu did not offer tourists memorable and deep experiences, and Changshu should attach more importance to the design of the travelling part and the learning part	70
8.5 The official body continuously promoted study tours, but it should further energise the market	71
8.6 Changshu boasted a solid local customer base for developing study tours, and humanistic education activities were popular	72
8.7 Changshu boasted a solid non-local customer base for developing study tours, with study tours becoming popular.....	73
8.8 Suggestion I: Safety is the basis for further development, and it is necessary for Changshu to improve the quality of study tours.....	73
8.10 Suggestion II: Changshu should pay attention to the brand building of study products and regulate the market to create more opportunities	75
Acknowledgements.....	77

1 Overview of the monitoring

1.1 Origin of monitoring

On September 28, 2010, the United Nations World Tourism Organisation (UNWTO) signed a cooperation agreement with Sun Yat-sen University to establish the Monitoring Centre for UNWTO Sustainable Tourism Observatories (UNWTO MCSTO, hereinafter referred to as the monitoring centre). Changshu, together with Yangshuo, Zhangjiajie, Huangshan, Kanas, Luoyang, Jiaozuo, Chengdu, and Xishuangbanna, belongs to the sustainable tourism development monitoring system of UNWTO.

As a highly developed economic region in the context of rapid urbanisation, industrialisation, and modernisation, Changshu was the first observatory set up by the UNWTO in China to monitor residents' leisure and the conservation of urban tourism resources. The primary purpose of setting up this observatory is to collect real-time data for assessment indicators through periodic monitoring of tourism resources and environmental, economic, social, urban leisure and urban-rural integration in Changshu and to establish a database of indicators for monitoring the sustainable tourism development of Changshu. The observatory aims to facilitate analysis and assessment of the development of tourism in Changshu, identify problems in tourism development in a timely manner, and take corrective and remedial measures, hoping to promote a sustainable tourism development mode for urban tourism destinations featuring the coordination between urban economic development, the development of the leisure industry, tourism industry, and cultural industry, and the conservation of tourism resources for residents on a global scale.

In July 2020, the monitoring centre officially launched the second round of the five-year monitoring of sustainable tourism development for the Changshu Observatory. Based on the experience of the first round of the five-year monitoring from 2015 to 2019, the monitoring team of the monitoring centre has optimised and enriched the

actual content of the monitoring based on the indicator system and operational methods recommended by UNWTO, with further emphasis on the needs of local tourism development. In addition, on the basis of the monitoring conducted in 2020, the present monitoring investigated some new topics, such as the development of the cultural and creative industries and relevant activities as well as the development of Changshu's study tours concerning the fields of nature and humanities, making the monitoring richer and better. The monitoring team performed the monitoring analysis and compiled the monitoring report of Changshu at the end of October 2021.

1.2 Monitoring process

From 14 July to 19 July 2021, the monitoring team successfully completed the seventh field research on sustainable tourism development of the Changshu Observatory with the indispensable cooperation of the Changshu Municipal Bureau of Culture, Radio, Television and Tourism. The research team consisted of two faculty members, two PhD students, three graduate students, and 14 undergraduate students from the School of Tourism Management and the Centre for Tourism Development and Planning of Sun Yat-sen University, as well as three undergraduate students from Changshu Institute of Technology.

Accompanied and arranged by officials of the Changshu Municipal Bureau of Culture, Radio, Television and Tourism, the research team was divided into two groups. The group responsible for monitoring representative scenic areas (mainly composed of students who had not yet participated in the monitoring in 2020) focused on visiting attractions, distributing questionnaires, and surveying residents and tourists. The questionnaires and interviews were conducted in the urban area (shopping areas, Yushan Park, cultural venues, and museums) and Shajiabang Scenic Area. The group surveyed people aged between 13 and 75 years old taking up different occupations. The sample showed great diversity.

The group responsible for exploring potential resources (mainly composed of professors and postgraduate students) focuses on visiting sites with resources and conducting interviews with experts. More specifically, these sites included sites with tourism resources and development potential, sites for developing cultural and creative tourism, and other emerging sites with tourism resources. Moreover, the group conducted interviews with the following experts: officials of the Changshu Municipal Bureau of Culture, Radio, Television and Tourism, owners of cultural and creative enterprises, inheritors of intangible cultural heritage (e.g., Baimao mountain songs, mahogany, and steamed food), artisans, experts on local culture, cultural institutions and organisations, residents related to the revitalisation and utilisation of cultural heritage, and other relevant personnel.

Through a five-day visit, a transcript of 22,000 characters was made according to the interviews, and a total of 987 valid responses to electronic questionnaires were collected.

**Table 1-1 Number of Valid Responses and Interviews in the Monitoring in 2021
in Changshu**

Resident Interviews	Visitor Interviews	Resident Questionnaire	Satisfaction Questionnaire	City Image Questionnaire	Long Questionnaire Distributed to Tourists
63	7	315	380	281	11

The monitoring report is divided into two parts: the regular report and the thematic report. The regular report includes six parts: “Foreword”, “Tourism, environmental protection, and resource conservation”, “Tourism and community”, “Tourist behaviour and satisfaction”, “Economic influence of tourism”, and “Conclusions and suggestions”. The thematic report includes the research into urban leisure and residents’ well-being, the evaluation of media communication of Changshu’s city image as a tourist

destination, and the analysis of the potential of Changshu's study tours concerning the fields of nature and humanities.

Please refer to the following sections for more details on the topics mentioned above.

2 Tourism, environmental protection, and resource conservation

2.1 Air quality improved compared to the previous year

Compared to 2018 and 2019, Changshu met the standards in the annual assessment of air pollutants and made achievements in dealing with fine particulate matter in 2020. The non-exceedance probability of ozone improved compared to 2019, but it was not as high as the non-exceedance probability in 2018. Compared to 2019, the annual average ambient air concentrations of sulphur dioxide, nitrogen dioxide, respirable particulate matter, and fine particulate matter in the urban area of Changshu in 2020 all decreased.

2.2 Surface water quality improved, and drinking water quality remained stable

During the “13th Five-Year Plan” period, the main pollution indicators of the city’s surface water environment included ammonia nitrogen, total phosphorus, biochemical oxygen demand, chemical oxygen demand, and dissolved oxygen. Ammonia nitrogen, total phosphorus, and biochemical oxygen demand have still been the main factors affecting the water quality of Changshu. There have been two sources of drinking water in Changshu, namely, the Changshu Shanghu Lake water source (a surface source of water, mainly stored in lakes and reservoirs) and the Changshu Yangtze water source (a surface source of water, mainly stored in rivers). Changshu conducted source assessment monitoring once a month. The overall drinking water quality in Changshu met Class III or higher standards for drinking water quality from 2013 to 2020. Although a slight decline in water quality in 2013 and 2014 was reported, the water quality met Class II standards in 2015 and 2016. In 2020, the water quality of the

Yangtze River still met Class II standards, whereas the water quality of Shanghu Lake met Class III standards.

2.3 Stable environmental quality of noise was reported, and more attention should be paid to regulating nighttime noise

During the “13th Five-Year Plan” period, the overall environmental quality of road traffic noise in Changshu remained stable, with the noise intensity level remaining at Level 1. The average equivalent daytime sound level fluctuated slightly. The environmental quality of road traffic noise in the urban area during the nighttime decreased. Overall, the regional environmental quality of noise remained stable (Level 2). In 2020, the sources of noise changed significantly. Traffic noise exceeded domestic noise for the first time. The environmental quality of noise in functioned areas generally remained stable. The annual average equivalent sound levels during the daytime and nighttime met the standards; however, the nighttime noise of some areas exceeded the limits.

2.4 A rise in industrial waste gas emissions and a decrease in industrial wastewater emissions were reported

During the “13th Five-Year Plan” period, Changshu reported a rise in the total industrial waste gas emissions. Compared with industrial waste gas emissions at the end of the 12th Five-Year Plan period, industrial waste gas emissions at the end of the 13th Five-Year Plan period increased by 110.5%. The total industrial wastewater emissions generally showed a fluctuating and declining trend. Compared to the 12th Five-Year Plan period, the total industrial wastewater emissions in the 13th Five-Year Plan period decreased by 39.1%, and the total amount of wastewater treated decreased by 37.1%.

2.5 Changshu continued to advance environmental projects in 2020, with air and water environment management as the focal point

Between 2015 and 2020, Changshu paid special attention to environmental rectification and increased investments in environmental protection. Over the past few years, Changshu focused on coordination and prioritised ecology. Changshu made achievements in preventing and controlling pollution. Besides, the ecological environment improved. The progress of environmental projects in Changshu is listed as follows.

(1) The wastewater treatment plant in Chengdong, Changshu, was ready for debugging. Three urban sewage treatment plants were expanded, and five industrial sewage plants were upgraded. The urban domestic sewage treatment capacity increased to 105,000 tons per day. Moreover, Changshu had more than 150 kilometres of sewer lines. The domestic wastewater of 419 villages and more than 12,000 rural households was treated. The total daily treatment capacity of domestic sewage reached 330,000 tons. Changshu was awarded the “National Demonstration County of Rural Domestic Sewage Treatment”.

(2) Changshu emphasised the prevention and control of pollution and green development. Compared to 2015, the rate of the water quality of water sections meeting the standards increased by 48%. The proportion of III Standard water sections increased by 46%. The percentage of days with good air quality improved by 20%. PM 2.5 concentration decreased by 48%. The domestic waste incineration capacity reached 3,300 tons per day.

(4) The protection rate of natural wetlands increased by 15%. Changshu was honoured as one of the first international wetland cities in the world.

(5) Over 10 million square metres of illegal buildings were demolished and renovated, and nearly 2,000 beautiful villages of various types were built.

3 Tourism and community

3.1 The image of Changshu as a leisure and livable city was most recognised by residents, and residents were most proud of natural and ecological resources and were increasingly interested in cultural and educational activities

When describing Changshu's city image as a tourist destination, 87.09% of the residents chose "livable" as the most important label for Changshu. It indicated that residents recognised the city image of Changshu featuring livability. The second and third most important labels were "suitable for sightseeing and leisure activities" and "suitable for work", showing that residents in Changshu focused on both work and leisure life and had a strong sense of leisure and demand for leisure. It should be noted that the cumulative ratio of "suitable for sightseeing and leisure activities" had been consistently higher than that of "suitable for work" for seven years.

Residents considered "excellent natural resources" and a "good ecological environment" to be the two most important conditions for tourism development in Changshu, proving that the environmental protection and restoration measures taken by various institutions in Changshu were effective to some extent. Besides, residents recognised that Changshu boasted an "abundance of tourist attractions and activities" and a "quiet and relaxing atmosphere", showcasing that residents believed that Changshu's comfortable living environment and relaxing lifestyle, as well as the abundance of attractions and activities, were potentially attractive to tourists. In the future, in terms of tourism development, Changshu should further explore leisure life

and develop more high-quality activities and attractions characterised by the leisure culture of Changshu.

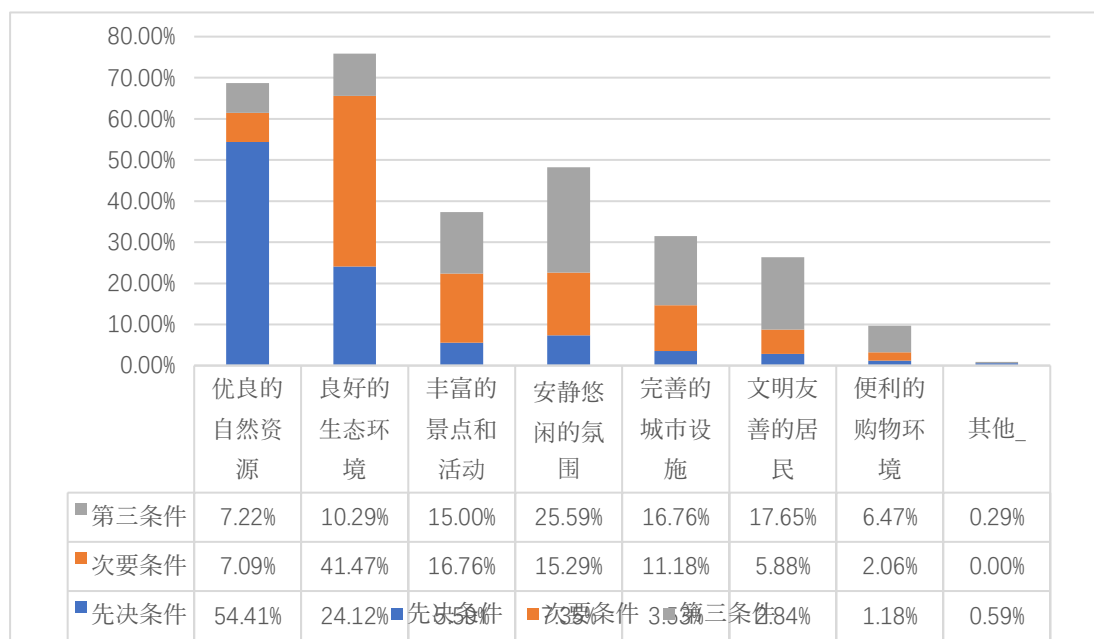


Figure 3- 1 Conditions for Tourism Development in Changshu

Notes: 先决条件 = Most Important 次要条件 = Second Most Important 第三条件 = Third Most Important 优良的自然资源 = Excellent Natural Resources 良好的生态环境 = Good Ecological Environment 丰富的景点和活动 = Multiple Attractions And Activities 安静悠闲的氛围 = Quite And Leisure Atmosphere 完善的城市设施 = Adequate Urban Facilities 文明友善的居民 = Civilised and Friendly Residents 便利的购物环境 = Convenient Shopping Environment

Residents believed that the three most important tourist activities to be developed in Changshu were activities related to “humanities and customs”, “sightseeing and leisure”, and “culture and education”. In 2021, cultural and educational activities ranked third in terms of the most crucial tourist activities to be developed from tourists’ perspective, showing changes in residents’ demands for tourist activities in Changshu. In the future, Changshu should further develop local cultural and educational activities. For example, it can launch reading activities in Changshu Library and set up cultural exhibitions in Changshu Museum to meet the diversified leisure needs of residents.

3.2 Residents recognised the positive impacts of tourism on the economy but were quite concerned about the increase in housing prices and prices of goods due to tourism

The majority of residents were positive about the economic benefits of tourism. Overall, the proportion of residents who agreed or strongly agreed with the positive indicators was the highest. However, residents' positive perception of tourism as a driver for economic growth was slightly lower than in previous years, with slightly lower scores on the two indicators, "Tourism attracts more investment and spending" and "Tourism creates more jobs for local people", than in the surveys from 2015 to 2020. The recognition rate of the indicator, "We can gain economic benefits from tourism", was relatively low. Only 55.50% of residents agreed or strongly agreed with the indicator, while 23.8% of residents were neutral on this issue. Therefore, in the future, institutions in Changshu can further publicise the economic benefits of tourism by releasing detailed data and promoting the economic impacts of tourism in specific situations in residents' life.

Tourism development also had a negative impact on communities, and residents had a negative perception of tourism development. This was mainly reflected in the scores for the two indicators, "Tourism leads to an accelerated rise in housing prices in the community" and "Tourism leads to an accelerated rise in the prices of goods in the community". The scores were slightly lower than in previous years, suggesting that residents had a relatively weak perception of the negative impacts of tourism; however, the issues concerning higher housing prices and prices of goods caused by tourism development had not been fully addressed, and Changshu residents' perception of the negative economic impacts of tourism development was still relatively strong. Therefore, more attention should be paid to residents' attitudes towards tourism

development lest residents would misunderstand and resist tourism development due to the negative impacts.

3.3 Residents had an overall positive attitude towards the social impacts of tourism, but more people believed that tourism led to greater traffic congestion and parking challenges

The overall rating of the positive impacts of tourism development on the society of residents was high. The highest rating was given to the indicator (mean = 4.27), “Tourism is good for local development. 83.7% of residents recognised (choosing “agree” or “strongly agree”) the indicator, “Tourism development improves the municipal infrastructure”. The proportion of residents who recognised the indicator remained largely unchanged compared to the previous year. 63.4% of residents recognised the indicator, “Tourism development improves local medical conditions and services”. The recognition rate decreased slightly compared to the previous year, but the recognition rate remained quite high compared to the recent data.

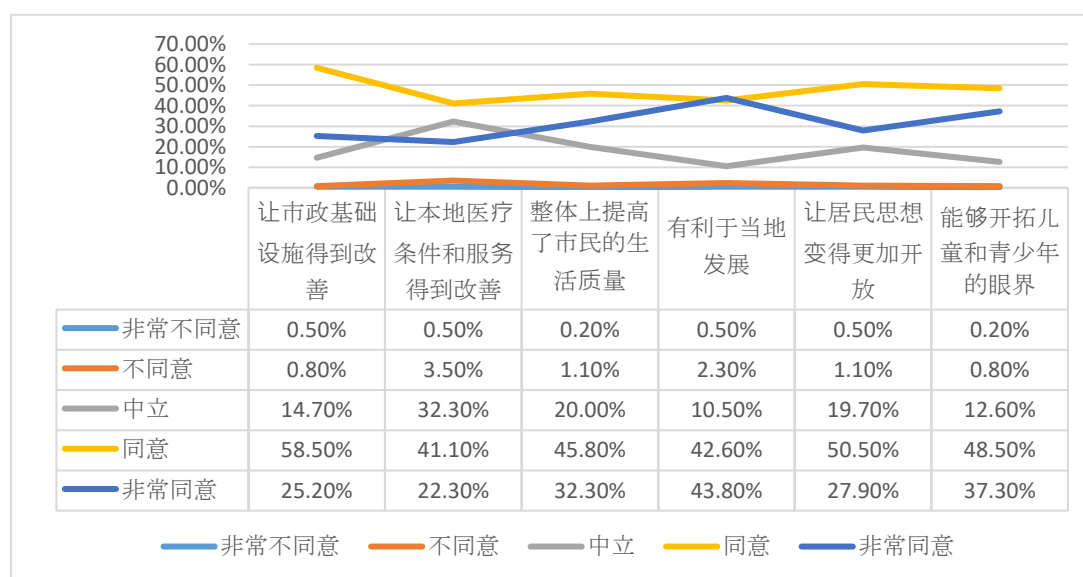


**Figure 3-2 Evaluation of Positive Indicators of the Social Impacts of
Tourism**

Notes: 让市政基础设施得到改善 = Tourism improves municipal infrastructure 让
本地医疗条件和服务得到改善 = Tourism improves local medical conditions and
services 整体上提高了市民的生活质量 = Tourism improves residents' living
conditions in general 有利于当地发展 = Tourism is good for local development 让
居民思想变得更加开放 = Tourism makes residents more open-minded 能够开拓儿
童和青少年的眼界 = Tourism broadens the horizon of children and teenagers 非常
不同意 = Strongly Disagree 不同意 = Disagree 中立 = Neutral 同意 = Agree 非
常同意 = Strongly Agree

Compared to the previous years, residents' perception of the negative social impacts of tourism development decreased, but they had a strong perception of traffic congestion and the disruption to everyday life brought by tourism development. In this sense, there is still room for improvement in the future. More specifically, measures can be taken to improve traffic facilities by adding bus stops and parking areas for shared bikes in key areas with traffic congestion (e.g., downtown, tourist attractions). As most tourists visiting Changshu drove to Changshu by themselves and the monitoring results showed that many residents reported parking challenges due to tourists, it is essential to promote the construction of parking lots in the future.

3.4 A trend towards uncertainty over and indifference to the cultural impacts of tourism development among residents was observed

The proportion of residents with positive attitudes towards the cultural impacts of tourism development was higher than 75%. A small proportion of residents disagreed with each positive cultural impact of tourism development. It should be noted that

compared to 2020, the overall recognition rate of each positive cultural impact decreased. In addition, on average, around 16.65% of residents were neutral about each indicator, an increase of 4.55% compared to the previous year. This change in data implied that residents were uncertain about the positive cultural impacts of tourism development, and a trend towards uncertainty over and indifference to the positive cultural impacts of tourism development among residents was observed. In this sense, the relevant departments responsible for the preservation and promotion of tourism culture should conduct in-depth investigations, adopt development measures to meet the residents' needs to learn about the cultural impacts, encourage residents to pay attention to the preservation and development of Changshu's tourism culture, and improve residents' recognition rate to gain more support for cultural construction activities.

3.5 Residents had a high recognition rate of environmental protection but lacked a comprehensive understanding of the achievements in environmental protection in the context of tourism development in Changshu

Overall, residents had a positive attitude towards the positive impacts of tourism on the environment, but the recognition rate of the indicator, "Tourism development leads to better protection of the landscape", decreased, indicating that further protection of the landscape and promotion will be of importance in the future. Residents believed that Changshu made greater achievements than the previous year in protecting the overall environment while developing tourism. However, the government should strike a balance between the construction of tourism facilities, the protection of the landscape, and the treatment of tourism waste. Additionally, the government should improve the regulatory system to address issues facing residents.

Residents had a high recognition rate of environmental protection but lacked a comprehensive understanding of the achievements in environmental protection in the context of tourism development in Changshu. The mean value of the indicator, “I think it is important to protect the natural environment”, was 4.447. Although Changshu generally made great achievements in terms of environmental protection, the proportion of residents neutral to each indicator was still high, indicating that residents did not have a good understanding of the achievements of the work for environmental protection conducted by the government and other relevant institutions and that there was ambiguity in residents’ perception and evaluation of the environmental impacts of tourism development.

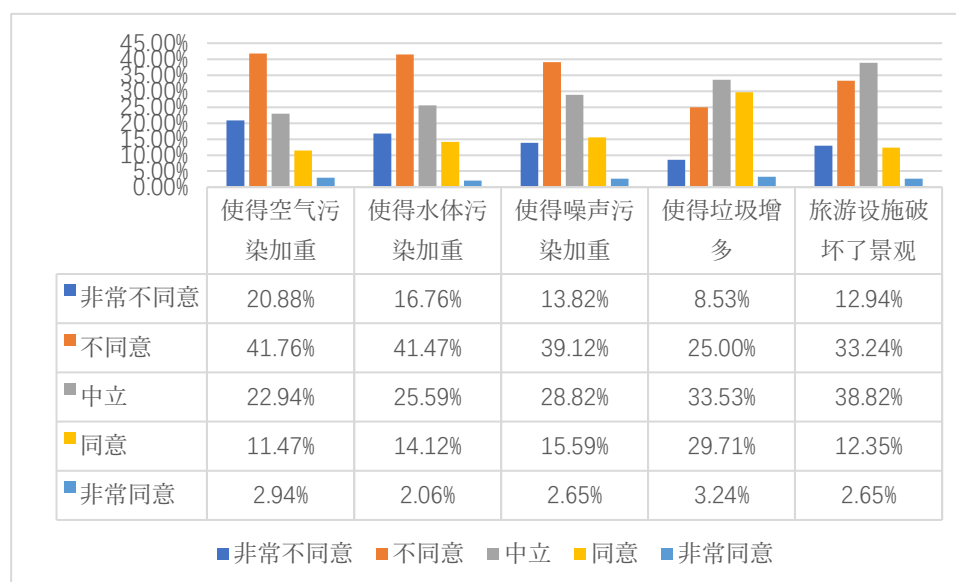


Figure 3-3 Evaluation of Negative Indicators of the Environmental Impacts of Tourism

Notes: 非常不同意 = Strongly Disagree 不同意 = Disagree 中立 = Neutral 同意 = Agree 非常同意 = Strongly Agree 使得空气污染加重 = Tourism makes air pollution worse 使得水体污染加重 = Tourism makes water pollution worse 使得噪声污染加重 = Tourism makes noise pollution worse 使得垃圾增多 = Tourism brings more garbage 旅游设施破坏了景观 = Tourist facilities destroy the landscape

3.6 Level of community participation in tourism declined in the post-pandemic era, with an increase in the awareness of participation and more difficulties in performing actions

As shown in Figure 3-16, the percentage of residents who thought they learned about the government's tourism development plans and measures (choosing "agree" and "strongly disagree") was 52.56%, 17.6% lower than last year. The percentage of residents who chose "disagree" and "strongly disagree" was 15%, 10.16% higher than last year, showing that residents could generally learn about the government's tourism development plans and measures, but the pandemic prevented residents from fully learning about those plans and measures to some extent. 66.47% of residents agreed (choosing "agree" and "strongly agree") with the indicator, "People have easy access to information about tourism and leisure activities in Changshu", 19.02% less than last year, but higher than the recognition rate in 2019 (56.66%). The proportion of those who disagreed (choosing "disagree" and "strongly disagree") with the indicator was 4.41%, 3.6% higher than last year. The result indicated that the recognition rate of the ease of access to information about tourism and leisure activities in Changshu declined compared to the previous year; however, the recognition rate increased significantly compared to 2019.

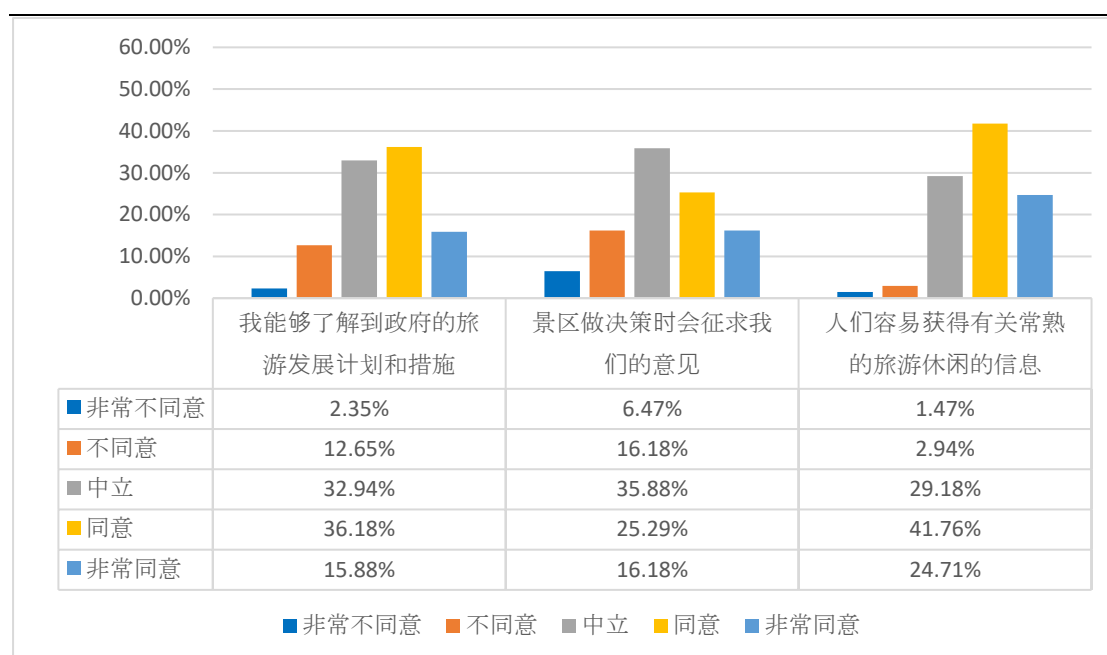


Figure 3-4 Residents' Perception of the Degree of Participation in Tourism

Notes: 非常不同意 = Strongly Disagree 不同意 = Disagree 中立 = Neutral 同意 = Agree 非常同意 = Strongly Agree 我能够了解到政府的旅游发展计划和措施 = I can learn about the government's tourism development plans and measures 景区做决策的时候会征求我们的意见 = Scenic areas will ask for our opinions while making decisions 人们容易获得有关常熟的旅游休闲的信息 = People have easy access to information about tourism and leisure activities in Changshu

As for community participation, residents still possessed a relatively strong conservation awareness and had good expectations for tourism in Changshu, with the recognition rate of all three indicators related to practical actions exceeding 70%, indicating that most residents had a strong sense of ownership and were willing to contribute to the development of tourism in Changshu. However, the recognition rate of four indicators, "I am willing to take the initiative to make suggestions for the development of scenic areas", "I can learn about the government's tourism development plans and measures", "Scenic areas will ask for our opinions while making decisions", and "People have easy access to information about tourism and leisure activities in Changshu", decreased, showing that residents were less aware of tourism-

related information in Changshu than last year and were less involved in the development of tourism in Changshu.

4 Tourist behaviour and satisfaction

4.1 Most tourists visiting Changshu were mainly young and middle-aged people aged 18-45, with the proportion of highly educated visitors increasing

The monitoring collected data by randomly distributing paper questionnaires to tourists visiting the scenic areas, and a total of 383 valid responses were collected. Among them, 209 responses were collected from males, and 174 from females, with a ratio of 1.2:1. The number of responses collected from males was higher than the number of responses from females. As for the age structure, most visitors were 36 to 45 years old (24.41%), followed by visitors aged 26 to 35 (22.05%), showing that most tourists visiting Changshu were mainly young and middle-aged people. Besides, 16.01% and 19.95% of the visitors were under 18 years old and aged 18 to 25 years old, respectively. In 2020, 1.19% of the visitors were under 18 years old, and 11.9% were aged 18 to 25. In this sense, the proportion of visitors who were adolescents and young adults increased significantly.

Regarding the tourist-generating regions, visitors from Eastern China accounted for 78.34% of the sample. The proportion of tourists from other regions was relatively low, with visitors from Northeast China accounting for 0.80% (the lowest proportion). In terms of more specific tourist-generating provinces and cities, tourists from Jiangsu accounted for 54.03% of the sample (the highest proportion), followed by tourists from Shanghai and Henan, accounting for 9.14% and 5.91%, respectively. The proportion of tourists from the rest of the provinces and cities was relatively low. The results reflected **the significant influence of geographical relations on the tourist-generating regions.**

In terms of educational attainment, tourists with a bachelor's degree or higher accounted for 49% of the sample, showing an increase in the number of tourists with a bachelor's degree or higher compared to 2020 (30%). The proportion of highly

educated visitors increased. The monitoring data in 2019 reported that tourists with a bachelor's degree or higher accounted for 50% of the sample. The data in 2019 and 2021 revealed that those with a bachelor's degree or higher had a growing demand for travelling due to the pandemic mitigation. 18% of the tourists received a senior high school education or senior vocational education. 16% of the tourists received a junior college education.

As for the personal income (see Figures 4-6), the proportion of visitors with a monthly income of 5,001-10,000 yuan was the highest (32.53%), followed by the proportion of visitors with a monthly income of 10,000 yuan or more (24.73%). 20.97% of visitors earned less than 1,000 yuan per month, which was related to the proportion of visitors who were adolescents and young adults. With the effective pandemic prevention and control measures, a recovery in the economy was observed. The proportion of high-income tourists increased compared to last year. The proportion of tourists with a monthly income of over 10,000 yuan rose from 9% last year to 24.73%.

4.2 Word-of-mouth communication was the primary approach to promoting Changshu's tourism, and self-guided tours recovered fastest in the post-pandemic era

In 2021, for tourists visiting Changshu, the channels for information were similar to the channels chosen by them in the previous year. More specifically, 50.39% of visitors obtained information from friends and relatives. 45.95% of visitors obtained information through internet-related channels (e.g., Weibo, WeChat, short videos, and APP clients). The proportion of visitors who received information via travel agency brochures was significantly lower than in previous years.

In 2021, most tourists visiting Changshu still chose self-guided tours (49%), showing a slight decrease in the number of tourists choosing self-guided tours

compared to 2020. The proportion of tours offered by tourists' workplaces, tours with friends and relatives, and tours for conferences investigations increased compared to last year, which might be related to the increase in the number of tourists choosing self-guided tours and the fast recovery in the market of self-guided tours in the second and third quarters of 2020. The monitoring data in 2021 might be related to a continuing recovery in the tourism economy, effective pandemic prevention and control measures, the growing popularity of red tourism due to the 100th Anniversary of the Chinese Communist Party, and the development of multiple group tours. Compared to 2019, the popularity of group tours of Changshu did not recover to the pre-pandemic level, especially in the form of tours offered by visitors' workplaces; however, self-guided tours and tours with friends and relatives were more popular than before, highlighting the increased importance of factors such as privacy, safety, individuality, family, and experience from the perspective of tourists.

4.3 The pursuit of leisure and relaxation was still the most important motivation for tourists visiting Changshu, and the opening of the high-speed railway brought great convenience

In 2021, the number of surveyed tourists visiting Changshu who considered "leisure and relaxation" as their most important motivation for travelling remained the highest, accounting for 72.32% of the sample. It indicated that more than 70% of the people who travelled to the city aimed to promote their physical and psychological health. Changshu's recreation, livability, slow living lifestyle, as well as its corresponding ways of production and ways of life, met tourists' needs; however, the number of surveyed tourists visiting Changshu who considered "leisure and relaxation" as their most important motivation for travelling decreased compared to 2020. It was because the whole country gradually resumed normal production and life, and tourists

were more rational about retaliatory and compensatory tourism consumption. The proportion of tourists travelling for other motives rose again. For example, the proportion of tourists travelling for “getting educated and learning” jumped to the second place at 32.90%, showing the huge development potential of study tours and cultural tourism. The proportion of tourists visiting Changshu for “the business” increased from 5.95% to 8.88%. The proportion of visitors travelling for “learning about the culture and enjoying tasty food” and “enjoying a good climate” declined to some extent, but the number of those visitors remained quite large.

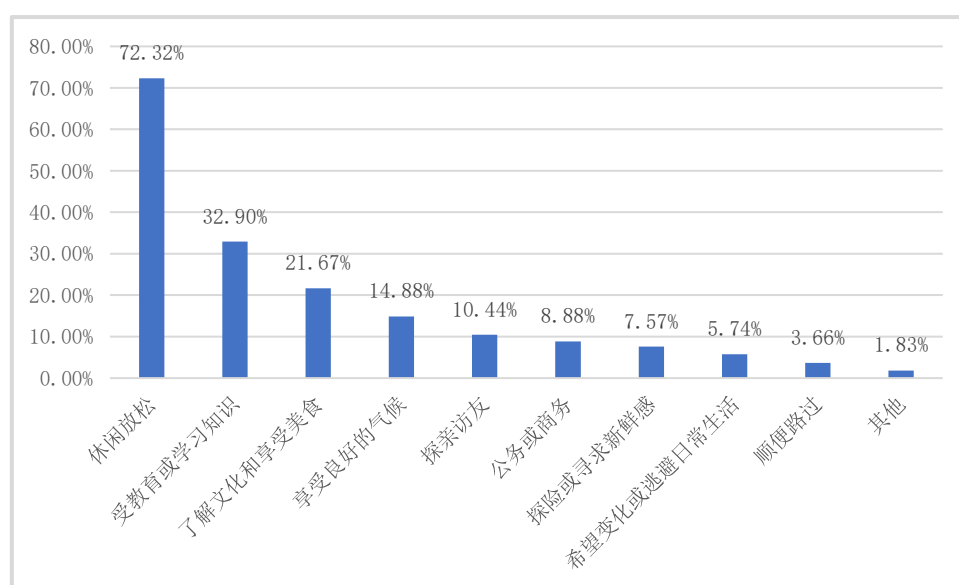


Figure 4-1 Tourists' Motivation for Travelling

Notes: 休闲放松 = recreation and relaxation 受教育或学习知识 = getting educated or learning 了解文化和享受美食 = learning about the culture and enjoying tasty food 享受良好的气候 = enjoying a good climate 探亲访友 = visiting friends or relatives 公务或商务 = business trips 探险或寻求新鲜感 = wanting adventure or seeking novelty 希望变化或逃避日常生活 = wanting changes or escaping from daily life 顺便路过 = passing by 其他 = other

In 2021, 62.92% of the visitors drove to Changshu by themselves. The number of tourists choosing to drive to Changshu by themselves remained the largest, showing

that tourists visiting Changshu were mostly from the neighbouring cities and cities in Jiangsu Province. The finding was consistent with the analysis of Changshu's tourist-generating regions in the previous section. The finding was also closely related to the rapid development of tours of the surrounding cities. 15.14% of tourists chose to go to Changshu by long-distance bus, showing that there were a number of tourists choosing group tours or self-guided tours in the surrounding regions; however, the proportion of those tourists declined compared to 2020. The proportion of tourists travelling by train (including high-speed railway) was 14.36%, and the proportion of tourists travelling by plane was 6.01%. These tourists were long-distance travellers, and the proportion of long-distance travellers was lower than last year.

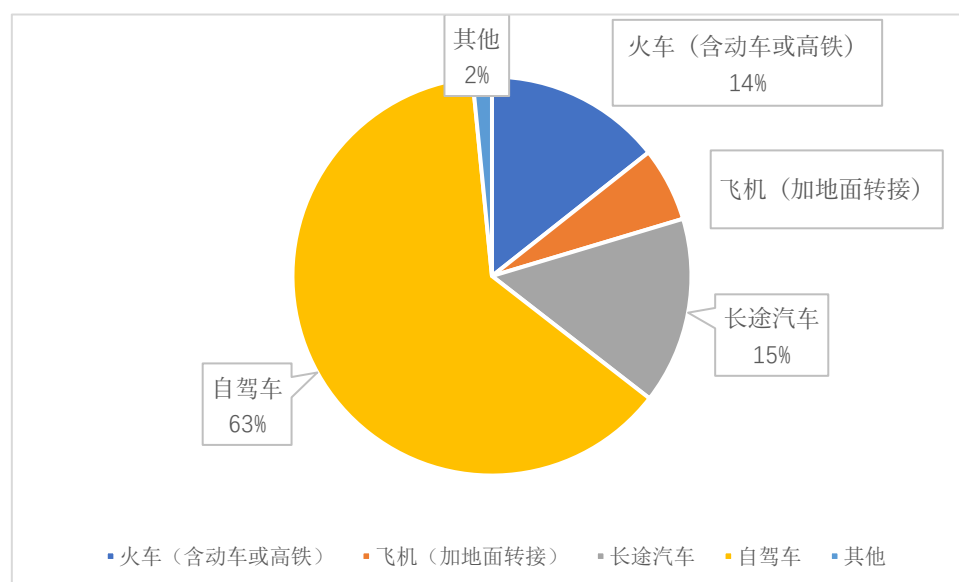


Figure 4-2 Modes of Transportation Chosen by Tourists

Notes: 其他 = Other Choices 火车 (含动车或高铁) = Train (Including High-Speed Railway) 飞机 (加地面转接) = Plane (Plus Ground Transportation) 长途汽车 = Long-Distance Bus 自驾车 = Driving a Car by Myself

4.4 The pandemic led to the shorter length of stay, with overnight visitors mainly choosing to stay with friends and relatives

According to the analysis of the data on the types of tourist accommodation, it can be found that tourists choosing a one-day trip did not live in Changshu (26.37%), whereas the majority of other tourists chose to stay overnight (73.63%), indicating that Changshu delivered a good performance in attracting tourists and extending the length of stay of tourist and that tourists need the enhanced tourism experience in Changshu. Compared to 2020, the length of stay of tourists visiting Changshu was shorter in 2021. The proportion of visitors staying for 2-4 days and those staying for more than 15 days both decreased. Besides, visitors paid more attention to the quality of accommodation, with relatively safe and clean star-rated hotels being more popular.

In terms of tourists' choices of accommodation, the proportion of tourists choosing other types of accommodation was the highest (27.15%). During the monitoring, the team learned that some tourists decided to stay at the homes of their friends and relatives to save money on accommodation costs. The length of stay of these tourists was relatively short. Star-rated hotels were the second most popular type of accommodation (21.93%). The star-rated hotels hosted approximately double the number of visitors than in the same period last year. The third most popular type of accommodation was budget hotels hosting about half the number of visitors in 2020 (15.67%), followed by family hotels and youth hostels accounting for a relatively small proportion.

4.5 Inadequate tourist destination attractiveness and tourism facilities reduced visitor satisfaction

Visitors were most satisfied with Changshu's natural ecological value (88.25%). The second most satisfying aspect was Changshu's historical and cultural heritage (85.38%), and the third most satisfying aspect was the overall leisure atmosphere embodied in Changshu's tourism (79.12%). Among the unsatisfying aspects, the most unsatisfying aspect was the climate suitability (4.7%), which was inextricably related to the hot weather in Changshu during the monitoring; however, from a year-round perspective, Changshu has always enjoyed a mild and humid climate, making Changshu a more suitable area for tourism and residence nationwide. In this sense, the mean score of the indicator might be biased due to time constraints. The second most dissatisfying aspect was Changshu's tourist destination attractiveness (2.35%), showing that although Changshu boasted tourism resources with high natural ecological value and historical and cultural connotations, Changshu did not stand out in terms of tourist destination attractiveness and it had not fully revitalised and utilised its own resources.

The average score of each indicator related to the urban infrastructure construction was basically above 4, and the feedback was favourable, indicating that tourists were relatively satisfied with the urban infrastructure construction in Changshu. According to the analysis of tourists' satisfaction with infrastructure, tourists were satisfied with the urban greening space, general condition of urban environmental sanitation, and clarity of road signs of Changshu; however, tourists were relatively unsatisfied with the general condition of urban public transportation of Changshu, and the average score of the indicator was relatively low, indicating that tourists visiting Changshu were not satisfied with the planning and implementation of Changshu's urban public transportation. Therefore, Changshu should offer intensified policy support to public transportation to improve public transport infrastructure and make scientific plans

simultaneously. The rebuilding of some areas and road upgrading projects might influence the score of the indicator.

4.6 Changshu should focus on optimising the ticket prices for attractions, the transport links between the attractions, the room facilities, and the fun and uniqueness of the recreational facilities and programs

In terms of services offered by scenic areas, the indicator with the highest average score was the infrastructure of scenic areas, followed by the toilet hygiene of scenic areas and the clarity of the signage system of scenic areas. The results showed that the scenic areas in Changshu delivered a good performance in terms of facility construction and service levels. Besides, some well-established scenic areas (e.g., Shajiabang Scenic Area, Yushan Cultural Tourism Resort) actively sought new edges. However, the rating of the reasonableness of ticket prices of scenic areas was not high, demonstrating that there was still room for improvement in the ticket prices for attractions.

As for transportation, the most unsatisfying aspect (according to the tourists choosing “dissatisfied” and “very dissatisfied”) was the degree of comfort of transportation, showing that there was room for improvement in the degree of comfort of transportation in the city and the scenic areas in Changshu. At the same time, the average score of the indicator related to the accessibility of transportation was low. Therefore, relevant departments should further enhance the transport links between scenic areas to establish closer connections between scenic areas and guide tourists to visit multiple scenic areas.

In terms of accommodation, visitors were most satisfied with the attitude of the staff. Visitors provided positive feedback about the accommodation in Changshu, reflecting that Changshu made great achievements in improving the quality of the

accommodation services. The most unsatisfying aspect (according to the tourists choosing “dissatisfied” and “very dissatisfied”) was the degree of comfort of the room facilities, which was related to the increased psychological demand for high-quality accommodation in the post-pandemic era. Therefore, the operators of hotels should consider whether to improve room service facilities in order to meet visitors’ expectations.

When it comes to shopping, tourists were most satisfied with the shopping environment and market order, whereas the most unsatisfying aspect (according to the tourists choosing “dissatisfied” and “very dissatisfied”) was the price-performance ratio of goods. Based on the monitoring, Changshu delivered a good performance in creating a good shopping environment and maintaining the market order, and there was no compulsory consumption; however, due to the impact of the pandemic and the slowdown in economic growth in recent years, tourists had a higher demand for the prices of tourist goods. They gave priority to cheap and cheerful tourist products. In this sense, Changshu should pay more attention to regulating the prices of tourist goods.

Tourists were basically satisfied with Changshu’s recreation. The most satisfying aspects included the safety, the reasonableness of the prices of the entertainment programs, and the fun of recreational facilities and programs. As for the most unsatisfying aspect, the number of tourists unsatisfied with the uniqueness of recreational facilities and programs was the largest. Changshu was committed to the deep integration of resources and was always striving to develop new products. However, according to the monitoring, in terms of the development of recreational programs, Changshu did not establish an influential industry, and some of its products were in very early stages. The products did not fully reflect the local cultural characteristics, which was why visitors were not satisfied with the uniqueness of the products.

4.7 There was a high degree of uncertainty about tourists' willingness to revisit and recommend Changshu, and Changshu should further promote its tourism via multimedia

According to the monitoring in 2021, 65% of tourists clearly expressed their willingness to revisit Changshu, while 30% of the tourists were uncertain. 4% of tourists were not willing to revisit Changshu. The number of visitors willing to revisit Changshu was 27% lower than in 2020. The number of visitors who were uncertain increased significantly compared to last year, and visitors' expectations and confidence in the future development of Changshu were lower than in previous years. When it comes to the time to revisit Changshu, the comparison between the data in 2019 and the data in 2020 showed a higher proportion of visitors choosing "within one year" and "within two years"; however, the proportion of tourists choosing "within one year" (59%) decreased dramatically compared to the previous years. The proportion of tourists choosing "within two years" and "after two years" increased. The results were partly related to the fact that the primary motivation for tourists was the pursuit of leisure and relaxation. Since the pursuit of leisure and relaxation drove most tourists, they could make choices among multiple tourist destinations, leading to a high degree of uncertainty about tourists' willingness to revisit Changshu.

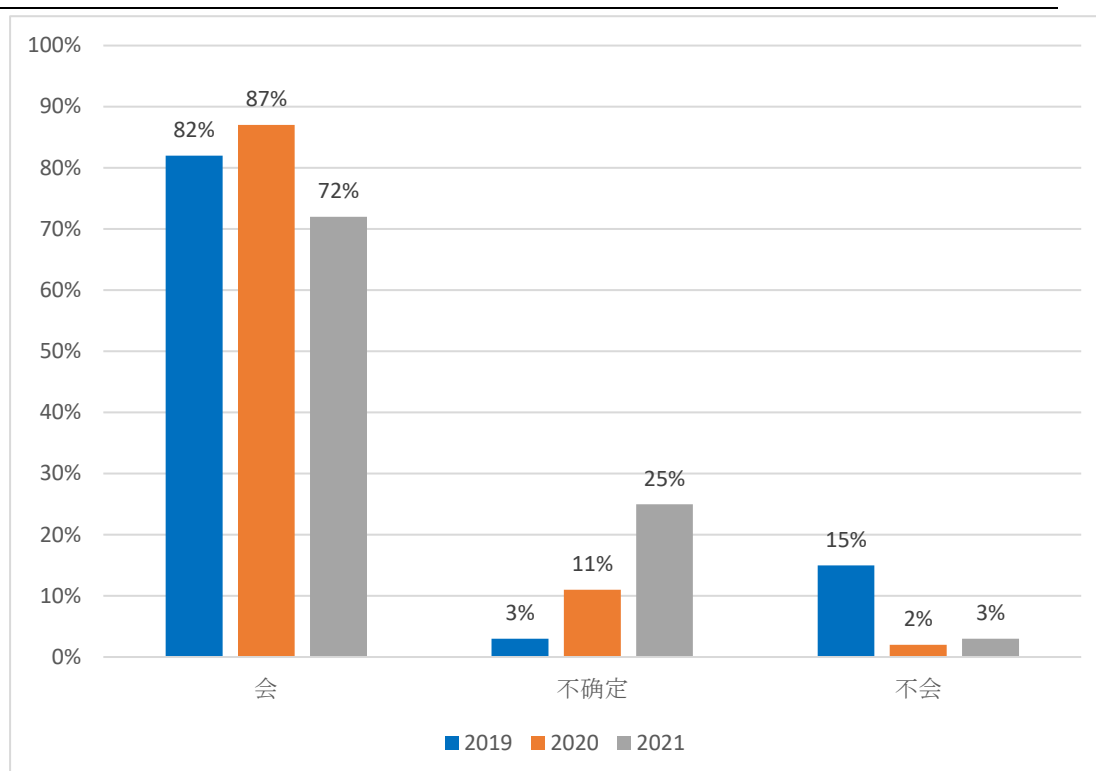


Figure 4-3 Changes in Tourists' Willingness to Recommend Changshu in the Past Three Years

Notes: 会 = Will Do 不确定 = Uncertain 不会 = Will Not Do

4.8 Overall tourist satisfaction was high, and there were growing expectations for the sustainable tourism development of Changshu

In 2021, tourists visiting Changshu had a relatively positive attitude towards Changshu's tourism, with more than 85% of tourists feeling satisfied (including "satisfied" and "very satisfied"). The average rating reached 4.14. Tourists were more tolerant of Changshu's tourism development as a whole than they were of any particular part or aspect (as shown in the previous sections showing tourists' ratings of specific indicators of Changshu's tourism resources and services). Some aspects that should be optimised did not have a severe negative impact on their satisfaction. However, in the

future, Changshu should take precautions in terms of tourism development and focus on continuously optimising its tourism image, continuing to improve its tourism image based on the needs of tourists. It should also try to avoid tourism crises caused by insufficient resources and services. The low ratings of some of the indicators in the previous sections did not mean that tourists were completely disappointed with Changshu's tourism. According to the interviews, tourists had growing expectations for the sustainable tourism development of Changshu. They hoped that their ratings and suggestions would convey their own ideas and help Changshu reach a higher level of tourism.

Overall, Changshu achieved a relatively high rating in terms of the tourism experience. Changshu's tourism experience basically meets tourists' expectations. However, there were still some shortcomings in the use of resources, project development, market segmentation, facilities and equipment, and marketing and publicity. Changshu should take precautions to avoid tourism crises caused by insufficient resources and services. Moreover, in terms of the tourism development of Changshu, there was still room for improvement. Changshu should further consider exploring its tourism resources, prioritise stability while pursuing progress, and tell Changshu's stories well to enable tourists to find more highlights of Changshu.

5 Economic influence of tourism

5.1 The tourism market in Changshu was significantly influenced in 2020 due to the pandemic, but the tourism market recovered steadily in the first half of 2021

The tourism market in Changshu was significantly influenced in 2020 due to the pandemic. The number of domestic tourists received in Changshu was 14,033,300, down 32.4% compared with the previous year. The tourism revenue was 28.987 billion yuan, down 27.2%, and Changshu recorded its first negative growth since 2016 in tourism revenue (shown in Figure 5-1). In the context of the normalised COVID-19 prevention and control, according to the data from the first half of 2021, Changshu's tourism market recovered steadily, with a significant increase in the number of tourists choosing to travel and go on holiday. There were 196,000 visitors during the Spring Festival in 2021, an increase of 54.33% compared with the Spring Festival in 2019. During the three-day Qingming Festival holiday, the A-class tourist attractions of Changshu received a total of 92,100 visitors, witnessing an increase of 119.3% year on year. The ticket sales revenue reached 1.520 million yuan, seeing an increase of 149.5% year on year. During the Dragon Boat Festival in 2021, Changshu received a total of 305,200 visitors, an increase of 11.8% over last year. The total tourism revenue reached 240 million yuan, an increase of 14% over last year.

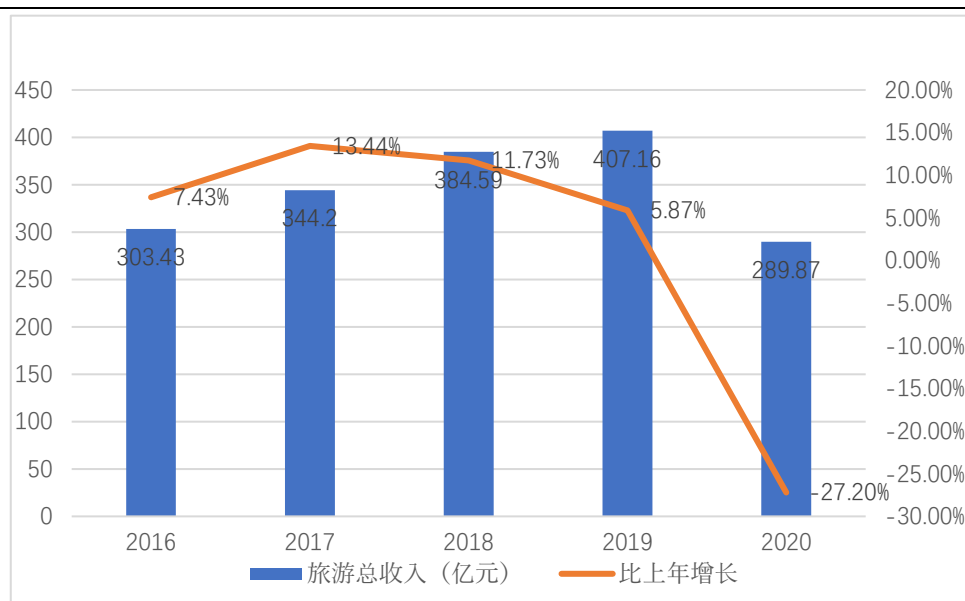


Figure 5-1 Total Tourism Revenue of Changshu and its Growth Rate, 2016-2020

Data Source: “Bulletin of National Economy and Social Development of Changshu City, 2016-2020”

Notes: 旅游总收入（亿元） = Total Tourism Revenue (100 Million Yuan) 比
上年增长 = Increment Compared with the Previous Year

5.2 The share of total tourism revenue in the value-added of the tertiary industry increased

In 2020, the value-added of the primary industry in Changshu was 4.034 billion yuan, an increase of 1.9% over the previous year. The value-added of the secondary industry reached 114.607 billion yuan, an increase of 4.1%, and the value-added of the tertiary industry reached 117.903 billion yuan, an increase of 3.1%. The ratio of the three industries was 1.71:48.45:49.84. In 2020, due to the impact of the pandemic, the total tourism revenue accounted for 35.89% of the value-added of the tertiary industry, which was 0.13% less than the previous year, but still remained above 35% (shown in Figure 5-3). Since 2012, the share of total tourism revenue in the value-added of the tertiary industry had been increasing and maintaining the momentum for growth, showing that Changshu’s tourism industry played an increasingly prominent role in its

tertiary industry.

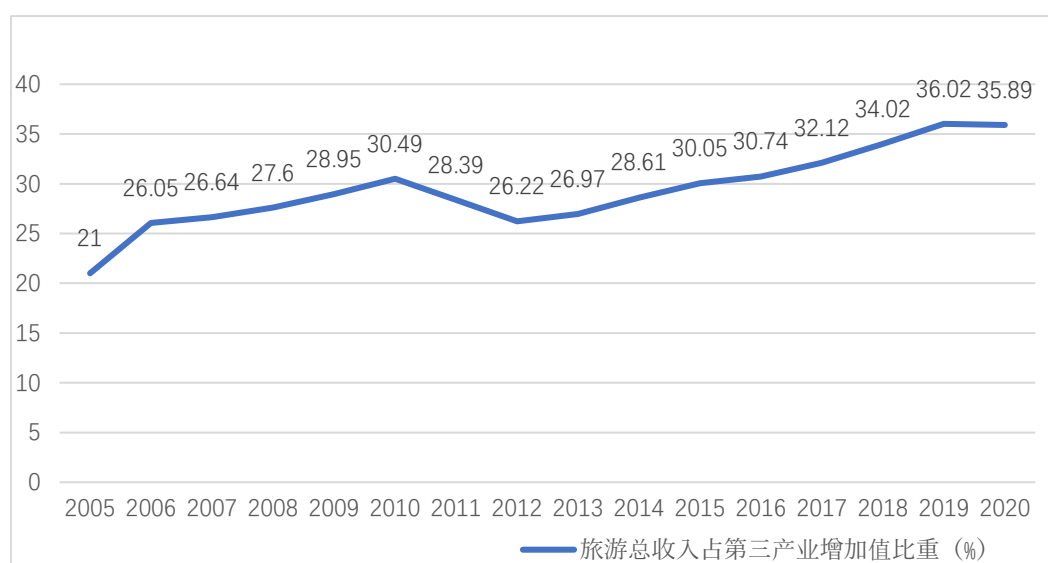


Figure 5-2 Share of Total Tourism Revenue in the Value-added of the Tertiary Industry, 2005-2020

Data Source: “Bulletin of National Economy and Social Development of Changshu City, 2016-2020”

5.3 Gradual improvement of external transport and steady expansion of sharing and rental businesses could be observed

The official opening of the Changshu Station of the Shanghai-Suzhou-Nantong Railway in July 2020 greatly enhanced the accessibility of Changshu and brought huge development opportunities for Changshu’s tourism. However, although the opening of the Changshu Station might bring more diversified tourist-generating regions, residents of Changshu might choose to visit the surrounding areas rather than spend leisure time in Changshu due to the accessibility of transportation. Therefore, based on the changes in the market, Changshu should innovate and develop tourism brands with local characteristics, enhance its tourism attractiveness, and further promote its tourism to retain residents while capturing a broader non-local tourism market.

Regarding internal transport, Changshu did not have a subway system, and the main modes of transportation were buses and taxis. Besides, many people would choose

to drive by themselves. Changshu had a well-established bus system, including shuttles and special buses related to tourist routes. However, there was a relative lack of services enabling tourists to drive in Changshu by themselves. The scale of the extant car sharing (car rental) industry was small, mainly providing industrial and trade enterprises with business car services. A small number of enterprises, such as Changshu Zhida Zhixing Automobile Passenger Transport Service Co., Ltd., Liandongyun Car Lease Co., Ltd., and Shenzhou Car Rental, offered tourist-oriented car rental services. In addition, steady progress was achieved in the construction of the city's transportation infrastructure.

5.3 Tourists had a growing demand for accommodation, and the diversification and quality of the homestays received more attention

Overall, the hotel industry of Changshu had the momentum for growth. According to the monitoring, Changshu had 268 hotels. Those hotels were mainly located in the city centre, Wanda Commercial Plaza, Yushan Shanghu Tourist Resort, and Shajiabang Scenic Area. The number of hotels in Changshu held steady, and the quality of hotels kept improving. The number of hotels in Changshu in 2021 was lower than the number of hotels in Changshu in the pre-pandemic era (2019), but there was no significant difference between the number of hotels in Changshu in 2021 and the number of hotels in Changshu in 2020. Changshu mainly provided a supply of middle and low-end hotels, but Changshu continued to enhance the quality of hotels and would gradually provide more high-end hotels.

To promote the revitalisation of the cultural, sports and tourism industry in the post-pandemic era, Changshu Municipal Government actively promoted the development of the homestay industry, focusing on restoring traditional-style buildings

(e.g., the Tang Residence, the Ma Residence). It attempted to recreate the characteristic residences in the areas south of the Yangtze River, develop a new business form related to homestays, and strengthen industrial agglomeration of the high-quality tourist tourism accommodation in the old city. With the support from the government, the homestay industry in Changshu showed the momentum for growth. By the end of 2020, seven homestays had gained joint acceptance on the spot. Moreover, five homestays were under construction, and four homestays had gone through the archival filing and registration. During the May Day holiday in 2021, the occupancy rate of 16 homestays in Changshu reached 100%. The occupancy rate of homestays was significantly higher than that of star-rated hotels. In the future, Changshu should take multiple elements (e.g., the renovation of old buildings, administrative procedures, and fire safety) into consideration while promoting and developing homestays in Changshu.

5.4 Gastronomy helped to enhance the tourism experience, and characteristic catering brands should be further supported

Changshu offered a wide variety of catering services to meet the individual dining needs of tourists. In response to the diverse catering needs of tourists, Changshu gradually formed a relatively catering system in the tourism industry. The system included formal meals (such as Chinese food and dinner provided by star-rated restaurants), fast food, beverages offered by different types of stores (such as teahouses, bars, and coffee shops), and snacks (such as snacks offered in food streets, snacks provided by farmhouse restaurants, and characteristic snacks). Local specialities were closely related to tourist activities. According to the monitoring, Changshu was actively promoting the local speciality food culture (e.g., Changshu steamed food, mushroom oil noodles, wine cakes, and osmanthus wine) and using it as one of the key elements

in promoting its tourism. Tourists had easy access to these types of tasty food without having to take long-distance trips. Some restaurants, such as the noodle restaurants at the foot of Yushan Mount, leveraged its geographical advantages and combined food with beautiful scenery and local ecological resources to provide visitors with a unique dining experience. However, since many types of speciality food were widely offered in different restaurants (from small restaurants to five-star hotels), Changshu might encounter issues related to the limited influence and low brand awareness of the food. For example, Changshu steamed food could be produced by small restaurants or five-star hotels, making uniform management and quality control difficult.

5.5 The number of cultural venues and museums was large, and their quality was high; however, the tourism experience should be further improved

Changshu is rich in tourism resources. In recent years, it has focused on developing nighttime tourism and study tours. According to the monitoring, Changshu had four scenic areas rated 4A or 5A tourist spots, two provincial-level tourism resorts, six national industrial and agricultural tourism demonstration sites, one national wetland park, two national urban wetland parks, and one national forest park. As for cultural venues and museums, Changshu had one museum, two art performance venues, two art museums, and other exhibition venues (e.g., Changshu International Exhibition Centre, Shajiabang International Conference Centre, and Guobang Conference Centre). With the development of intelligent tourism services, tourists and citizens could admire the scenery via the Internet and attend exhibitions via VR technology without leaving home, which could partially meet people's travel needs; however, the scenery was mainly demonstrated via live streams or short-form videos, and the VR exhibition failed to provide tourists with high-quality tourism experiences. In this sense, they should be

further updated. Besides, Changshu should explore its cultural connotations, highlight its features to remain distinct from other cities south of the Yangtze River, and develop more diversified tourism projects according to the characteristics of different specific markets. The signage system and parking system should also be gradually upgraded to suit the tourism development of Changshu.

5.6 Changshu boasted diversified tourism products, but it should further publicise its IP and extend its influence

Changshu enjoyed diversified tourism products; however, it should further explore the content of tourism products and help those products gain growing popularity. Changshu had some commercial areas, such as Wanda Plaza, Aeon Mall, and World Trade Centre, which could meet the demands of tourists for general tourism products and daily necessities. Changshu's tourism products included Yushan green tea, osmanthus wine, and Shajiabang fried chicken. Visitors could buy these products at some scenic areas, stores selling tourism products, and general supermarkets. Besides, tourists could also buy those products via mini-programs (e.g., "Changshu Supply and Marketing" and "Entrance to Changshu's Tourism"). In addition, Changshu boasted three kinds of agricultural products with national geographical indications (i.e., Dongbang golden corn, Dongbang towel gourd, and Wangzhuang watermelon). Nevertheless, Changshu had not leveraged the strengths of those products. The packaging of those products was simple, and those products were mainly sold through traditional channels. Besides, Changshu did not widely publicise those products. In recent years, the government has encouraged cultural venues and museums to develop souvenirs, attracted designers through the development of the cultural and creative industries, and promoted tourism product design activities. Several cultural and creative products endowed with local historical and cultural elements (e.g., postcards, paper

tapes, and canvas bags) came on the market. However, overall, the cultural connotations and experiential value of Changshu's cultural and creative products should be further explored. Moreover, there is much room for developing new marketing channels.

Changshu focused on promoting brands and IP. It should further explore relevant content and help relevant content gain growing popularity. In terms of city branding, Changshu was making efforts to build the brand of "Jiangnan Culture" (the culture of the regions south of the Yangtze River) and explore Changshu's comparative advantages in Jiangnan culture, gradually highlighting Changshu's "Yushan Culture" and "Guqin Culture". Additionally, some tourist attractions explored some approaches to promoting IP. Changshu made some achievements in promoting brands and IP; however, it should further explore the relevant content and increase the recognition of the brands and IP among tourists. The monitoring results showed that the experiential value of Changshu's cultural and creative products had not yet met tourists' needs. More specifically, first, the sensory experience of those products was not multiple (mainly visual experience). Second, the emotional experience in products was not intensified. The emotional experience was embodied primarily in the product appearance and functional design. Third, consumers did not frequently share their experiences related to cultural and creative products, and those products were not widely known. Fourth, consumers did not acquire memorable tourism experiences while using those products.

Launching activities related to tourism products also facilitated the development of tourism products of Changshu because those activities promoted the school-enterprise cooperation, integrated diversified resources from the society, and facilitated the development and publicity of cultural and creative products. Well-known activities related to tourism products in recent years included the Yushan Cultural and Creative Design Competition and the Huang Gongwang-Themed Cross-Strait Cultural and Creative Design Competition.

5.7 The nighttime economy and cultural and creative industry were valued, and the leisure districts were well-developed

According to the monitoring, Changshu had multiple tourism and recreational resources, which could basically meet the needs of various groups of people for leisure and recreation. However, compared to the surrounding cities (e.g., Suzhou, Wuxi), Changshu did not stand out in the number and scale of tourism and recreational resources as well as the tourism experience. Therefore, Changshu should further promote market segmentation and provide differentiated products for different age groups. Changshu's nighttime tourism programs kept up the momentum for growth. To speed up the development of the nighttime economy, the government made efforts to build the nighttime economy brand, "Yu Ge Chang Wan"; however, the nighttime economy of Changshu was at a very early stage. The overall influence of the nighttime economy of Changshu was not high, and Changshu was not very competitive compared to its neighbouring cities. The established nighttime agglomeration areas were sparsely distributed. Besides, since the nighttime activities were mainly launched in the open air, those activities were vulnerable to the weather and the pandemic. Those activities were launched at different times (unfixed). The issues mentioned above led to the low influence of the nighttime activities of Changshu. As for the form and content, there was a great deal of room for improvement in terms of the quantity and quality of the goods and services available for consumption in each agglomeration area. The nighttime activities in Changshu were mainly developed for local citizens. Moreover, those activities mostly included night tours of parks, food streets, and small theatres. The market had low barriers to entry, and those activities were homogeneous.

The new cultural and creative business forms were flourishing. Shanqianfang Cultural and Creative Industrial Park took shape after nearly a year of renovation, and more than 40 businesses (e.g., characteristic restaurants, photography shops, and

homestays) came to the industrial park. During the “May Day” holiday, the industrial park hosted a soft opening, receiving a total of 38,000 visitors during its five-day operation on a trial basis and hitting 1.05 million yuan in revenue. The cultural and creative industrial park was a representative of industrial integration and an important carrier for the development of cultural tourism and cultural and creative industries in Changshu. In addition to Shanqianfang, cultural and creative parks (e.g., the cultural tourism area located in Guli Town and the cultural and creative park showing the culture of Jiangnan embroidery) were established and opened. The parks demonstrated people’s emotions and memories. They were generally small and beautiful, providing high-quality leisure activities. There was room for further improvement to the parks, such as enriching business forms, improving the quantity and quality of products, and integrating online and offline resources to launch activities.

5. 8 Changshu faced issues related to the weak city image and ineffective branding

After years of efforts, Changshu’s image, “A Blessed Land in Jiangnan, Come to Changshu Often”, achieved widespread popularity. There were four problems with the publicity of Changshu’s city image under the theme of “A Blessed Land in Jiangnan, Come to Changshu Often”. Specifically, due to the pandemic, the frequency of activities promoting the city image in the past two years was lower than the average level in previous years, and the duration was shorter as well. Second, the activities promoting the city image did not effectively highlight the core tourism resources or the unique tourism attractions of Changshu. The results of the questionnaire survey showed that more than half of the tourists thought that the promotion of the city image (i.e., “A Blessed Land in Jiangnan, Come to Changshu Often”) was not attractive. Some residents also held the same view. Third, the image was not closely linked to tourists’

motivations to travel (i.e., the pursuit of health and cultural motivations) and the degree of tourism development. Therefore, Changshu should further consider tourists' needs. Besides, there was still much room for improvement in terms of language use and creative marketing. Fourth, communication was weak, and most activities promoting the city image were not effective. Most of the time, the activities could be only found via the official websites of the organisers; however, the activities were not effectively promoted via new media platforms enjoying massive popularity. The questionnaire survey results showed that most tourists had only heard about most of the activities promoting Changshu's city image. They did not think about and further explore the connotations of the activities.

The pandemic influenced Changshu's festivals and events to some extent. More specifically, many festivals and events were delayed or cancelled to prevent and control the pandemic. Besides, most tourism products offered by Changshu were associated with sightseeing activities, unable to provide memorable tourism experiences and widely publicise Changshu's culture. Additionally, there was a lack of high-quality tourism products, making it challenging to meet tourists' diversified needs. Furthermore, there was a lack of a master plan related to product development and market expansion. The resources inside and outside scenic areas were not effectively integrated. Under such circumstances, Changshu's events and festivals were not widely known. In the future, challenges (e.g., COVID-19) will persist. Changshu should try to develop new tourist activities such as the International Fireworks Festival to promote its city image further and attract tourists while carrying forward some extant high-quality tourist activities. Besides, it should take the initiative to facilitate the integrated development of the Yangtze River Delta and build an influential leisure and tourism city in China.

6 Urban leisure and residents' well-being

6.1 Leisure venues in Changshu were more suitable for senior citizens, and those venues were not diversified

Residents aged under 15 and aged between 15 and 25 had a demand for “modernisation”, “youthfulness”, and “recreation”. Residents aged 26 and 45 conveyed a demand for “diversification” and hoped those leisure venues could be more suitable for their children. Residents’ demands reflected that the leisure venues in Changshu were more suitable for senior citizens and were more likely to meet the needs of residents aged above 45. Changshu did not give the needs of children and adolescents adequate consideration.

The analysis of the characteristics of residents’ leisure activities revealed that the leisure venues in Changshu were more suitable for senior citizens and that there were fewer leisure venues suitable for young people. Some residents commented, “*There are no leisure venues for young people in Changshu*” (F-11). The reason for this was related to the cultural background of Changshu (preference for drinking tea and eating noodles) and the characteristics of Changshu’s tourism resources (resources suitable for developing sightseeing activities). If this issue is not addressed, more residents of Changshu will turn to the neighbouring cities to satisfy their leisure needs and spend their money.

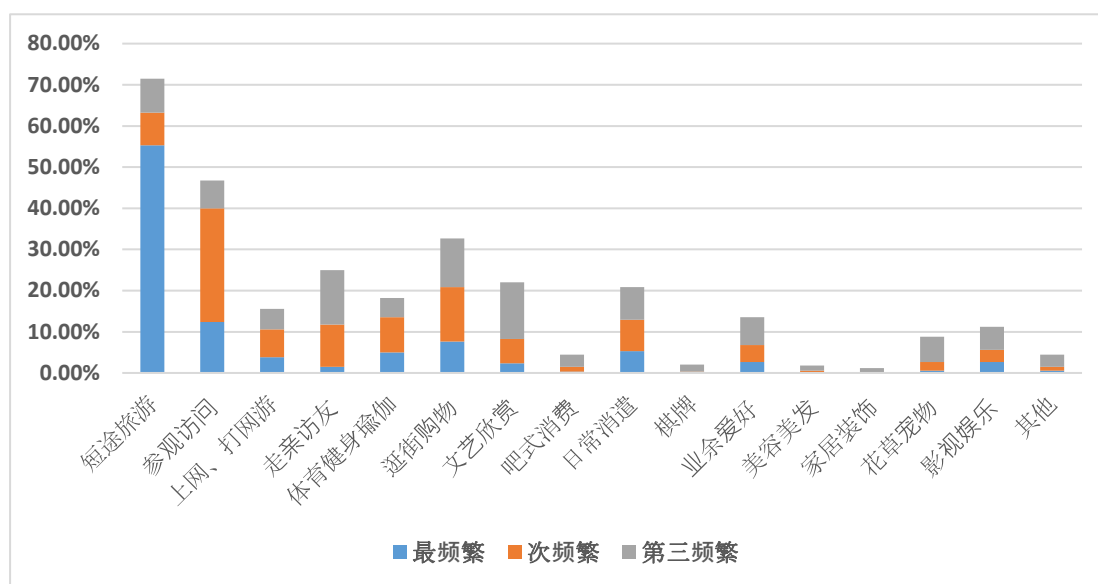


Figure 6-1 Participation in Leisure Activities of Changshu's Residents

Notes: 最频繁 = Most Frequent 次频繁 = Second Most Frequent 第三频繁 = Third Most Frequent 短途旅游 = Short Trips 参观访问 = Visiting 上网、打网游 = Surfing on the Internet 走亲访友 = Visiting Friends and Relatives 体育健身瑜伽 = Physical Fitness and Yoga 逛街购物 = Shopping 文艺欣赏 = Appreciating Cultural Works 吧式消费 = Going to Pubs 日常消遣 = Everyday Pastimes 棋牌 = Playing Chess or Playing the Cards 业余爱好 = Amateur Hobbies 美容美发 = Beauty and Hairdressing 家居装饰 = Home Decoration 花草宠物 = Growing Flowers and Keeping Pets 影视娱乐 = Film and Television 其他 = Other

6.2 The rate of revisiting leisure destinations was low, and there was a lack of innovation

Generally, the leisure consumption of residents under 45 plays an important role in developing a leisure city and improving the revisiting rate. The rate of revisiting leisure destinations of residents aged under 45 was low, whereas the rate of revisiting leisure destinations of residents aged above 46 was relatively high; however, the leisure consumption ability of residents aged under 45 (especially residents having children)

was generally stronger than that of residents aged above 60. Therefore, in the future, Changshu should give adequate consideration to residents aged under 45 to increase the rate of revisiting leisure destinations and facilitate the development of Changshu as a leisure city. Taking residents under 45 into consideration will contribute to tourism development in Changshu and address residents' leisure needs. In this sense, residents will be more likely to spend their money to satisfy their leisure needs in Changshu instead of turning to the surrounding cities.

Residents of Changshu lived in Changshu for a long time. They were quite familiar with Changshu's leisure destinations. The rate of revisiting Changshu's leisure destinations of residents was low, but residents still had expectations for local leisure destinations. The reasons for the low rate of revisiting leisure destinations are listed below. Firstly, residents were familiar with those attractions (e.g., *"I will drive to Suzhou and Wuxi when I have time because I am too familiar with Changshu and want to find something new"*). Secondly, those leisure attractions did not have many new elements to attract residents (e.g., *"I have been to all local attractions such as Yushan and Shajiabang. I don't go there often anymore because there is nothing new"*). Thirdly, the tourism products and leisure activities offered by those attractions were not interesting and attractive enough (e.g., *"I think the Changshu Museum is rather average and not big enough. The collection is not rich enough, so I would not take my children there once again"* & *"I can only walk around inside, and there are not many interesting activities"*).

6.3 In terms of leisure consumption, Changshu was not attractive enough, and the surrounding cities distracted tourists to some extent.

Changshu was near Suzhou. Additionally, Changshu's leisure attractions were

relatively scattered. Besides, the leisure activities offered by those attractions were not interesting enough. Consequently, the surrounding cities distracted tourists to some extent. Many respondents mentioned that the distance to some leisure destinations in Changshu was roughly equal to the distance to Suzhou. They would choose Suzhou because Suzhou had more diversified leisure activities and venues (e.g., *“It takes an hour to get to Shajiabang and it also takes an hour to get to Suzhou, so I would choose to go to Suzhou Old Street for a rest”*). Some residents aged 16-25 contended that Changshu should emphasise “modernisation” and “recreation” in terms of developing its leisure activities. Some residents felt that the leisure destinations in Changshu were not multiple. They hoped Changshu would develop more new activities and modern leisure facilities such as water parks and amusement parks. Besides, from their perspective, there was a lack of attractive activities for young people, and they longed for new elements. Changshu’s residents also had a greater demand for various leisure facilities and innovative urban leisure activities.

In addition to this, the lack of parking spaces forced Changshu’s residents to choose not to go out for leisure consumption in Changshu; instead, they decided to go to the surrounding cities for leisure consumption. In terms of transportation, Changshu’s extant facilities did not meet the leisure needs of residents. For example, some residents pointed out that Changshu should *“improve transportation”* and *“address parking issues”*. During the interviews, respondents aged 26-45 repeatedly provided suggestions for improving transportation.

6.4 Residents faced leisure time pressure, and the spending power was limited

According to the findings of the “Survey on Good Life in China”, Changshu’s residents’ well-being was affected by insufficient leisure time. The frequency of

participating in leisure activities of Changshu's residents significantly increased compared to 2020. Most of them would participate in leisure activities three times per month or more. In the context of the normalised COVID-19 prevention and control, the frequency of leisure participation of Changshu's residents increased gradually; however, in daily life, residents preferred to participate in leisure activities in a short time. Most of them preferred to spend less than eight hours on each leisure activity. The number of residents who spent enough time on leisure participation was not satisfying enough, with 53.08% of residents failing to spend 30 hours on leisure activities. The main reasons for residents' leisure time pressure included the workload and the need to take care of children. In the future, Changshu should develop corresponding leisure activities based on residents' leisure needs. Meanwhile, it can try to guide residents to engage in immersive leisure activities lasting for a longer time to enable residents to gain high-quality leisure experiences.

According to the "Leisure Green Paper: China's Leisure Development Report from 2019 to 2020", the average annual per capita leisure consumption on weekdays in China was 5,647 yuan¹, while the proportion of Changshu's residents whose average annual per capita leisure consumption was less than 5,647 yuan was larger than 14.24%. The proportion of Changshu's residents whose average annual per capita leisure consumption was greater than 5,647 yuan was nearly 32.46%. Therefore, there was still some room for stimulating the leisure consumption of Changshu's residents. Changshu should take measures to boost the demand for leisure consumption of Changshu residents. The reasons why the leisure consumption of Changshu's residents did not reach the desired level were also related to the leisure habits of Changshu residents. The expenditure on traditional leisure activities (e.g., drinking teas, eating noodles) was

¹ Released by the "Leisure Green Paper: China's Leisure Development Report from 2019 to 2020". Retrieved from <https://baijiahao.baidu.com/s?id=1685587317101297447&wfr=spider&for=pc>

relatively low. In the future, Changshu should change residents' leisure habits and stimulate diversified consumption to improve the level of consumption.

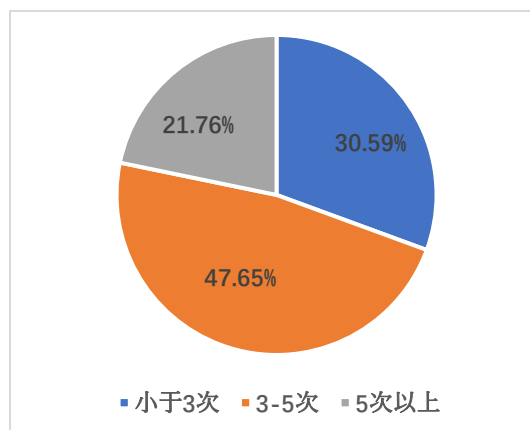


Figure 6-2 Frequency of Participating in Leisure Activities Per Month

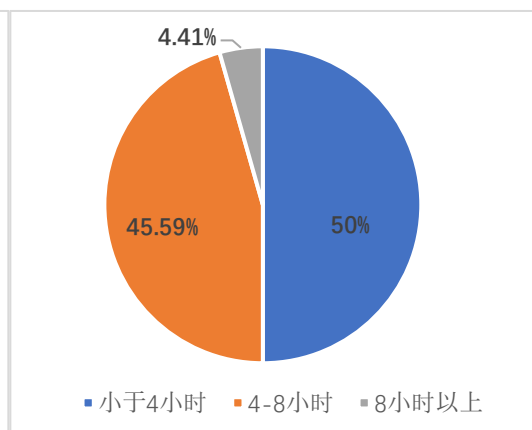


Figure 6-3 Length of Time of Each Leisure Activity

Notes: 次 = Times 小于 = Less Than 以上 = More Than 小时 = Hours

6.5 Suggestion I: Leisure venues can be more youthful to heighten the experience for people

First, leisure facilities should be more youthful to promote the sense of participation of the young. In the future, Changshu can consider introducing leisure facilities and launching leisure activities related to e-sports, anime, garage models, and Chinese fads to satisfy people's diversified needs. With the help of the Internet, Generation Z developed more diversified and characterised interests and hobbies. Generation Z had a strong sense of belonging and a high degree of participation in their cultural circles. In this sense, the consumption potential brought by cultural circles was considerable. In April 2021, Changshu also announced a free entry policy to some tourist sites for people wearing Hanfu, which was a good attempt. In the future, Changshu can continue exploring multiple aspects (e.g., e-sports, anime, garage models,

and Chinese fads) and facilitate the integration between the traditional culture and new cultural trends, exploring Changshu's local culture and attracting more young people.

Second, the parent-child programmes should be more diversified to inspire families to travel. The leisure activities of residents aged 26-35 and above 60 were mainly related to their children. Those residents hoped that leisure activities could satisfy their own leisure needs as well as those of their children. Many residents hoped that Changshu could provide more concentrated recreational facilities for their children and develop more diversified modern leisure facilities (e.g., water parks, amusement parks) to increase the richness of parent-child programmes. In the future, scenic areas in Changshu can promote parent-child tickets and emphasise parent-child interactions. Besides, they can add some new elements and games popular with children (e.g., camping, handicraft, and games embodying elements of the scenic areas).

In terms of parent-child leisure activities, in addition to introducing more modern leisure facilities such as water parks, Changshu should emphasise introducing parent-child experiential leisure products that can make learning more enjoyable. Changshu can learn from other destinations. For example, at the Ginger Farm in Chiang Mai, parents and children can slide in muddy water, visit the henhouses, grow rice, harvest vegetables, make sculptures, and participate in many other activities. By getting closer to nature, children can stay innocent and happy and make children feel closer to their parents. In the future, Changshu can also develop study tours and develop some programmes suitable for parents and children to provide families in Changshu with more choices for leisure activities.

6.5 Suggestion II: Changshu should address leisure-related issues to enhance the attractiveness

First, Changshu should update tourist attractions to improve the rate of revisiting of tourists. Changshu can introduce updated and diversified leisure products in tourist attractions, developing a diversified, artistic, and personalised leisure product

system to meet diversified leisure needs, providing an urban ecological leisure space, and offering residents multiple channels for leisure consumption. Residents contended that there was a lack of innovation in leisure activities in Changshu and that they could not gain diversified experiences. In the long run, they felt bored. Therefore, the government should actively introduce or cultivate diversified leisure products and offer policy support and financial subsidies to encourage the development of new leisure business forms and encourage residents to participate in new leisure business forms actively. The above practices can lead to a virtuous cycle of growth in leisure products in Changshu. In addition, in the future, Changshu's scenic area can try constantly updating activities and introducing immersive products that are related to the scenic areas and require repeated experiences to increase the rate of revisiting.

Second, Changshu should plan parking areas reasonably to enhance people's satisfaction. The government needs to learn about the situation of various leisure venues and make reasonable use of resources to facilitate the construction of car parks, fitness facilities, and other leisure facilities. For example, Fengwo Town in Pingyang County, Wenzhou City, Zhejiang Province, built a "car park + leisure park". The facility served as a car park during the day and a leisure park at night (introducing some supporting facilities). Changshu can learn more from similar tourist destinations to make full use of resources to build car parks, fitness facilities, and other public facilities, and build ecological car parks. The ecological parks should be reasonably distributed and scientifically managed. Besides, they should be compatible with the carrying capacity of residents and tourists. Changshu should form a complete support system to facilitate the development of the ecological parks.

6.5 Suggestion III: Changshu should safeguard people's rights to enjoy leisure activities to enhance participation

First, Changshu should introduce diversified business forms to safeguard people's rights. Changshu needs to actively introduce diversified business forms such

as the digital economy to develop new industries, build up a new engine for economic development, provide more jobs, increase the disposable income of residents, and enhance the leisure time and consumption of residents. For example, on 6 July 2019, Xiaoshan hosted the first digital economy and esports industry summit forum. In the future, the government should actively introduce new business forms that are suitable for Changshu, perform more analyses of the development of new industries, and leverage the strengths of the government in integrating policy resources, factor resources, and industrial resources to promote the rapid and healthy development of emerging industries and address the issues related to the lack of jobs and people's pessimistic perception of the prospects of emerging industries.

Second, Changshu should carry out activities related to consumption seasons to stimulate people's spending power. Changshu can carry out consumption season activities relevant to games and amusement, sports and fitness, and festivals and exhibitions. Besides, it should implement the paid leave system to guarantee the leisure time of Changshu's residents and stimulate their spending power. The Ministry of Culture and Tourism of the People's Republic of China launched the 2021 National Culture and Tourism Consumption Season from 1 October to 31 December. The promotion of culture and tourism consumption has become a major trend nationwide. Under such circumstances, Changshu can further explore its local culture and carry out consumption season activities. It should attach importance to enriching the activities, adopting measures to benefit the people, innovating the form of consumption activities, strengthening regional cooperation, and promoting high-quality industrial development.

7 Evaluation of media communication of Changshu's city image as a tourist destination

7.1 The communication via the government was the most important approach, and the unofficial body as the communication subject was not distinctive enough

The communication subjects of Changshu's tourism image were diversified. The government and public institutions played a predominant role in facilitating the integration of culture, sports, and tourism, and building tourism brands. The unofficial body publicised Changshu's tourism image in the form of sharing real-life experiences and making a summary of experiences on social media platforms. They shared the content related to destination images and tourism experiences with the communication objects.

According to the survey, the communication via the government and interpersonal communication were the most reliable approaches; however, the credibility of tourism enterprises and units, related social organisations, and media institutions was relatively low. Tourists seldom took the initiative to follow the information posted by these subjects. The official accounts generally posted introductory information and summaries, performing the function of releasing information and recording work. The audience engagement was low. There was a lack of interaction between the official accounts and followers. The quality of posts was not high, and the post frequency was low. The official accounts failed to publicise certain content for a long time. To sum up, the communication was not effective. Therefore, the communication objects were likely to be not interested in the relevant content, making it difficult for them to recognise Changshu's image and be inspired to pay a visit to Changshu. Although the unofficial body as the communication subject was relatively active; however, it was not distinctive

in terms of content production and content representation. In this sense, the communication via the unofficial body was ineffective.

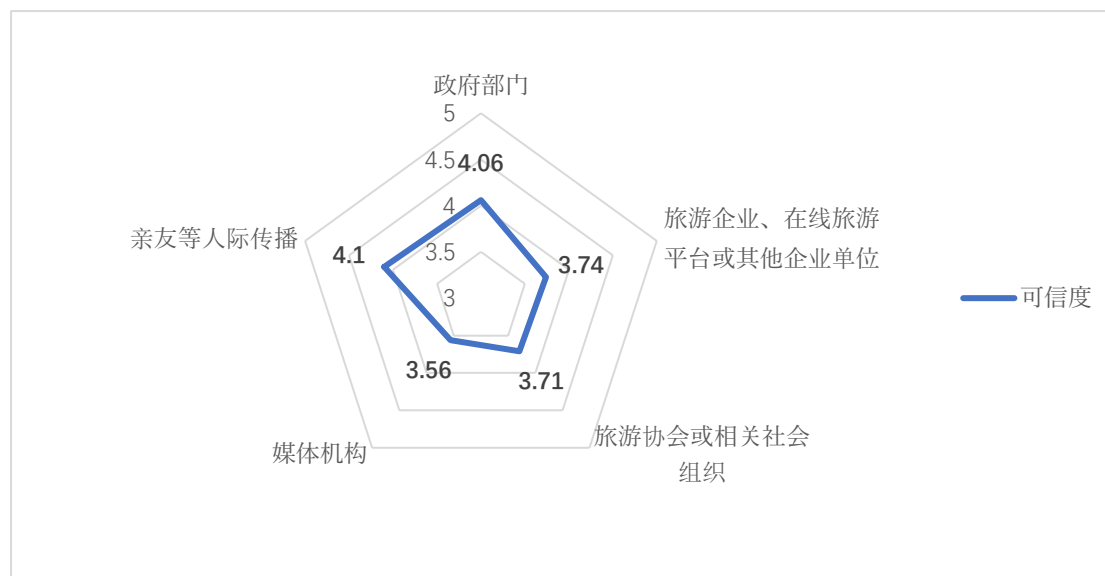


Figure 7-1 Average Credibility of Tourism Image Communication Subjects

可信度 = Credibility 亲友等人际传播 = Interpersonal Communication via Friends And Relatives 媒体机构 = Media Institutions 旅游协会或相关社会组织 = Tourism Associations or Relevant Social Organizations 旅游企业、在线旅游平台或其他企业单位 = Tourism Enterprises, Online Tourism Platforms, or Other Units 政府部门 = the Government

The practitioners of tourist destinations, residents, and tourists themselves could also be considered the main interpersonal communication subjects promoting the city's tourism image. They played an indispensable role in sharing tourism information with tourists and potential tourists and showcasing a good tourism image of the city. However, the survey found that relevant tourism enterprises, social organisations, and media institutions in Changshu did not attach enough importance to communicating the city's tourism image. They did not lay emphasis on publicising the tourism image, relevant tourism policies, and tourist information, unable to publicise certain content for a long time. Besides, they just posted information instead of seeking interactions with the audience and collecting feedback from the audience. Moreover, tourism operators providing the supporting services did not contribute significantly to the

communication of Changshu's tourism. Residents also had a vague perception and evaluation of the tourism image of their city, showing a lack of awareness of tourism promotion and a sense of ownership.

7.2 Changshu should integrate the resources of different communication subjects and strengthen their cooperation to enhance the credibility of communication subjects

In order to leverage the strengths of the unofficial body as the communication subject, the government (especially the culture and tourism departments) should offer detailed guidance as to the communication of the tourism image to enable other communication subjects to learn about their role and status. While clarifying the development direction and communication objectives, the government should leverage the strengths of relevant tourism enterprises, social organisations, and media institutions, providing them with policy support and publicity resources and encouraging them to publicise further Changshu's tourism information based on their features to enhance the credibility of communication subjects and maximise the effect of information aggregation. For example, Changshu can cooperate with art teams to design symbols conducive to promoting the tourism image of Changshu. Changshu can cooperate with cultural and creative enterprises to integrate city characteristics, the tourism image, and the tourism slogan into cultural and creative products. Moreover, it can cooperate with media centres to produce documentaries or short-form videos showing Changshu's tourism image. Besides, Changshu should focus on the role of tourism practitioners (especially tour guides) in promoting Changshu's tourism image, providing tourism practitioners with more training in professional ethics and professional skills to improve the quality of their services and raise their awareness of promoting Changshu's tourism image as a destination. These communication subjects will be in direct contact with tourists and will directly influence their perception of the

tourism image of the destinations.

In addition, for interpersonal communication, Changshu can invite celebrities with high credibility and positive images or celebrities from Changshu to be tourism ambassadors. By doing so, Changshu can promote its tourism image with the help of the social influence of those celebrities. For example, Gansu invited the famous actor from Gansu, Huang Xuan, to be its tourism ambassador. The promotional materials and posters were demonstrated on TV channels, advertising platforms, and other online platforms, enabling Gansu's tourism to gain widespread popularity and a high reputation. Besides, the tourism image of Gansu, "Silk Road in Symphony, Gansu in Harmony", became more popular and well-known.

7.3 Tourism-related services provided by Changshu were not adequate

The communication of the tourism image involves six elements of tourism, namely, food, accommodation, transportation, travel, shopping, and entertainment. Tourists' experiences of each aspect will influence their perception of the image of the specific destination.

According to the monitoring, visitors were most impressed and satisfied with their tours of Changshu; however, they were not that satisfied with the food, accommodation, transportation, shopping, entertainment, and consultation services of Changshu. Tourists' ratings of tourism-related services were not high. Some tourists were unsatisfied with the perception of the tourism image. The urban transportation network should be further improved. Public transport was inadequate, and there was a lack of parking spaces. Although the distance between tourist attractions was not large, tourists choosing self-guided tours and family tours would get bored by the inability to find parking spaces and the inadequate transport, which was not conducive to the communication of the city's tourism image. Besides, there was a lack of a good shopping environment. There were many homogeneous commercial shopping centres

and traditional economic business forms; however, thematic shops with local characteristics and innovative products remained rare, making it difficult to stimulate tourists' purchase intent and tourism consumption. Moreover, there was a lack of innovative recreational programmes. The number of leisure and recreational venues and facilities was small. Furthermore, recreational programmes and facilities in scenic areas were not distinctive and attractive enough, not considering the recreational needs of adults and children. Therefore, tourists did not have memorable tourism experiences, making it challenging to inspire tourists to revisit and recommend Changshu.

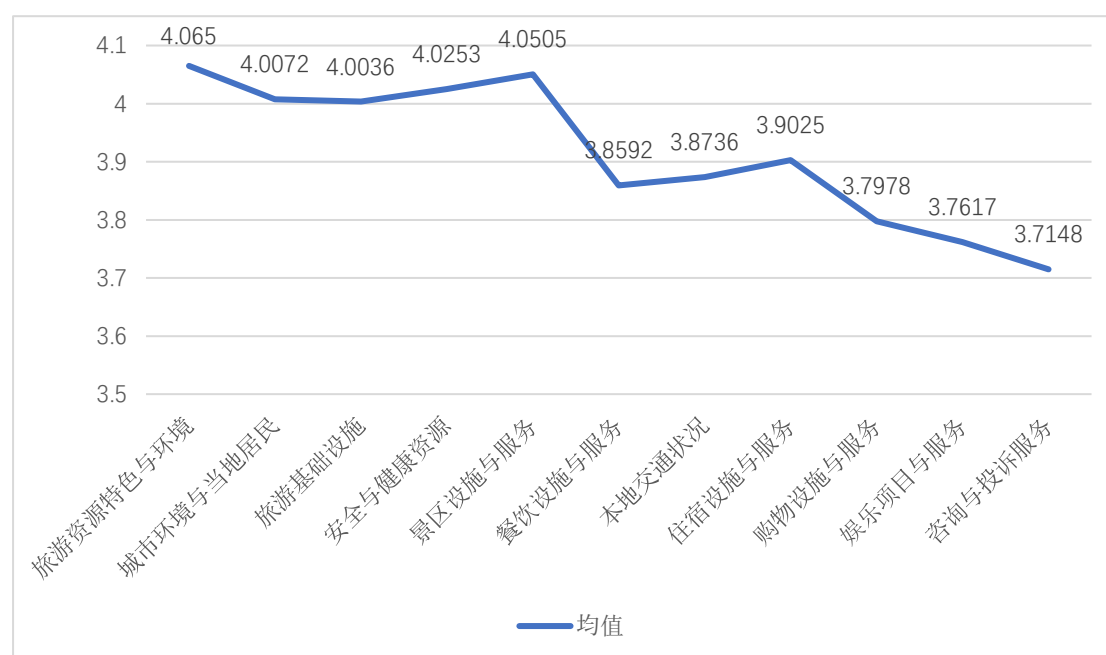


Figure 7-2 Communication Objects' Perception of Changshu's Tourism Image

Notes: 旅游资源特色与环境 = Tourism Resource Characteristics and Environment
城市环境与当地居民 = Urban Environment and Local Residents 旅游基础设施
= Tourism Infrastructure 安全与健康资源 = Safety and Health Resources 景区设
施与服务 = Facilities and Services of Scenic Areas 餐饮设施与服务 = Dining
Facilities and Services 本地交通状况 = Local Transportation Conditions 住宿设
施与服务 = Accommodation Facilities and Services 购物设施与服务 = Shopping
Facilities and Services 娱乐项目与服务 = Recreation Programmes and Services
咨询与投诉服务 = Consultation and Complaint Services

Monitoring Report on the Sustainable Tourism Development – 2021, Changshu

7.4 The delivered content did not fully embody local characteristics, lacking integration and not being able to get feedback from the audience

Quality content will attract public attention, which is the core competitiveness of the creators. According to the monitoring, the audience remained comparatively unaware of the tourism image and symbol promoted by Changshu. Although the majority of residents and tourists recognised the tourism image of Changshu, “A Blessed Land in Jiangnan, Come to Changshu Often”, they considered that the image of Changshu as a blessed land in Jiangnan was vague and that the image did not highlight the characteristics and innovation of Changshu. The tourism image failed to distinguish Changshu from other leisure cities as tourist destinations. Besides, tourists’ perception of the concept of “blessed” was quite vague. Tourists’ perception of Changshu’s tourism image was almost all related to Changshu’s tourism resources. The official body developed specific themes and sections of communication. More specifically, from the marketing perspective, it took “Jiangnan Culture” as a tourism branding strategy and took the thematic tourism characterised by colourful scenery as a specific branding strategy; however, Changshu did not integrate relevant resources, and each scenic area promoted its image and brand independently. Therefore, there was a lack of internal integration, making the tourism image of Changshu not diversified and specific enough.

The communication subjects could seldom get feedback from the audience, and there was a lack of interaction between the communication subjects and the audience. The government played a predominant role in promoting Changshu’s tourism; however, the communication via the government did not address the tourists’ tourism needs. The interviews revealed that the content related to Changshu’s tourism resources and service information, high-quality tourist routes, and characteristic festivals and events were

relatively popular, highlighting Changshu's natural and humanistic tourist attractions. Nevertheless, from the perspective of tourists, the content was not diversified, and the language used was characterised by a rigid style and frequent use of clichés. In this sense, Changshu did not pass on information that tourists really liked and needed (e.g., practical tourism information, information related to the city's landscape, folk customs, leisure and entertainment, and local specialities), making tourists unable to form a complete and clear perception of Changshu's image and leading to ineffective publicity.

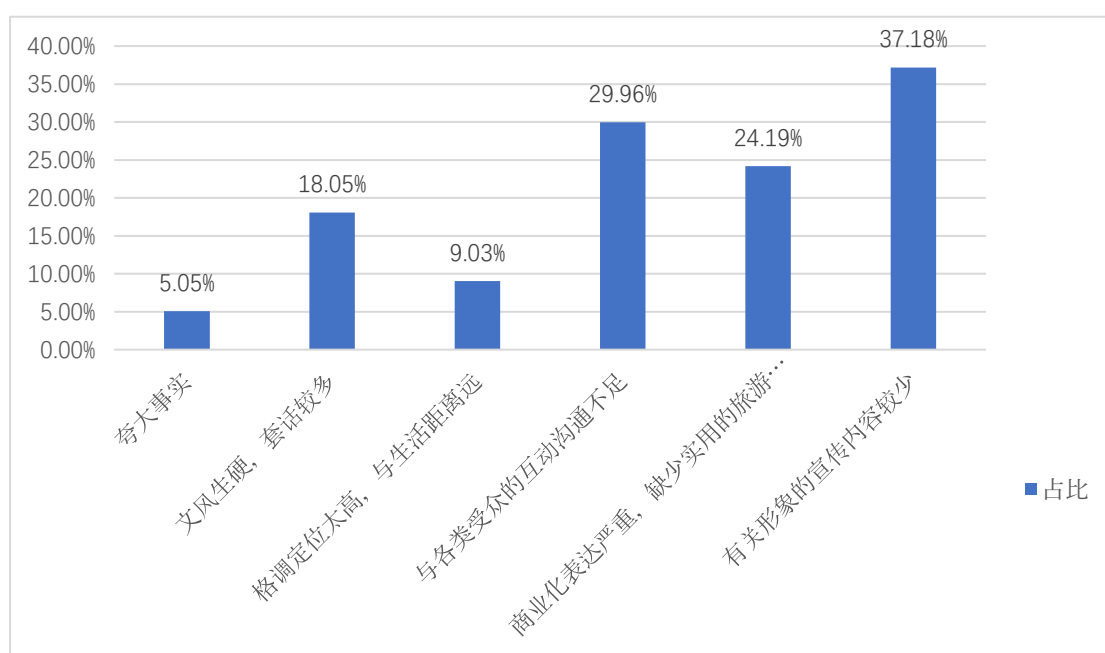


Figure 7-3 Issues Facing Changshu in Conveying Tourism Image

Notes: 夸大事实 = Exaggeration 文风生硬, 套话较多 = Rigid Style And Frequent Use of Clichés 格调定位太高, 与生活距离远 = Far from Life 与各类受众的互动沟通不足 = Insufficient Interaction with Various Audiences 商业化表达严重 = Too Many Commercial Expressions 有关形象的宣传内容较少 = Insufficient Content Related to the Promotion of the Image

7.5 Changshu should focus on conveying content with local characteristics, highlight its brand identity, and improve the mechanism for promoting its image

The quality of the content of image communication can be improved by focusing on brand identity and content with local characteristics. Changshu should highlight the meaning of the “blessed land” to enhance the mechanism for promoting its image. On the one hand, it is essential to improve the living environment and create a favourable place for people to live. It should emphasise integrating Changshu’s urban construction and tertiary industry development, improving the quality of tourism support facilities and services, upgrading the urban living environment through construction projects, and building various facilities in the urban system, such as improving the transportation system by adding cycling paths, shared bicycles, trams, and electric cars for tourists between close attractions. Besides, Changshu should facilitate the development of special towns with cultural heritage and promote leisure and recreational programmes, such as the Shajiabang Hengjing Old Street Film and Television Park and intangible cultural heritage experience bases. Moreover, Changshu should provide a good shopping environment and experience and facilitate intelligent living services to enable residents and tourists to gain more leisure and tourism experiences and form a clear perception of Changshu. Meanwhile, Changshu can create an emotional resonance between residents and tourists and Changshu’s tourism.

On the other hand, Changshu should highlight the tourism branding strategy related to the “blessed land in Jiangnan”, specify the positioning of its image based on city construction, and enrich the image content to develop Changshu into a famous city featuring Jiangnan culture and landscape and a blessed land suitable for travelling and taking a holiday. Changshu should highlight the characteristics of its tourism resources and the leisure atmosphere of the city. For example, Changshu can make itself a place where people can enjoy living and eating, appreciate the culture and landscape of the

Jiangnan region, and live a good life at ease. Besides, Changshu should further take the thematic tourism characterised by colourful scenery as a specific branding strategy, utilising new technologies, new media platforms, and new modes to facilitate its development. Moreover, Changshu can try developing diversified tours (e.g., “red tours”, second classroom education, “green tours” referring to ecological tours that facilitate rural eco-tourism and rural towns, “blue tours” referring to healthy tours integrating large-scale sports events and outward bound activities, “colourful tours” related to the scenery of the Jiangnan region and ecological shared space). Changshu should develop more tourist routes and tourism products in the whole region to establish closer connections between different types of tours and facilitate marketing effectiveness.

7.6 The use of media platforms was not sufficient, and Changshu should further integrate communication approaches

There have been more diversified communication approaches in the context of the integrated development of traditional and new media. However, Changshu did not leverage the strengths of different media platforms. The communication subjects of Changshu mainly adopted one-way communication approaches, presenting tourism information on the Internet in a fast and convenient way. Nevertheless, Changshu ignored the interactive and social nature of the Internet, unable to ensure that followers would continue to pay attention to information and make followers remain active. Besides, Changshu laid a greater emphasis on WeChat official accounts and video platforms than on Weibo, leading to the low influence of related Weibo accounts. Nevertheless, the communication subjects did not use the new media frequently and lay enough emphasis on promoting Changshu’s tourism information. The content was slightly outdated. Although users had been exposed to relevant information, the content

could not meet the needs of users, leading to users' vague perception of Changshu, the poor communication of Changshu's tourism, and the ineffective use of communication resources.

In addition, Changshu did not attach enough importance to traditional media and did not use traditional media frequently. For example, it seldom promoted its image via television channels, travel newspapers, and magazines with high market recognition. Besides, Changshu seldom posted tourism information via channels tied to public transportation systems and outdoor media, often ignoring the fact that the people flow was large in public areas. Changshu just offered brief introductions to tourist attractions and recommendations on tourism products at the entrance to scenic areas, rarely involving the communication of its tourism image. To sum up, Changshu faced the issue related to inadequate publicity.

Generally, interpersonal communication is the most common and direct communication approach in life. Compared with other communication approaches, interpersonal communication is more persuasive and more likely to influence the audience. Individuals play a prominent role in word-of-mouth marketing in the We media age. Each individual can offer and circulate information. Key opinion leaders can use their influence to disseminate information rapidly. However, when it comes to promoting tourism, the official body might not consider other communication subjects (i.e., tourists and residents), failing to make full use of the word-of-mouth effect of interpersonal communication to expand the influence and effectively circulate information.

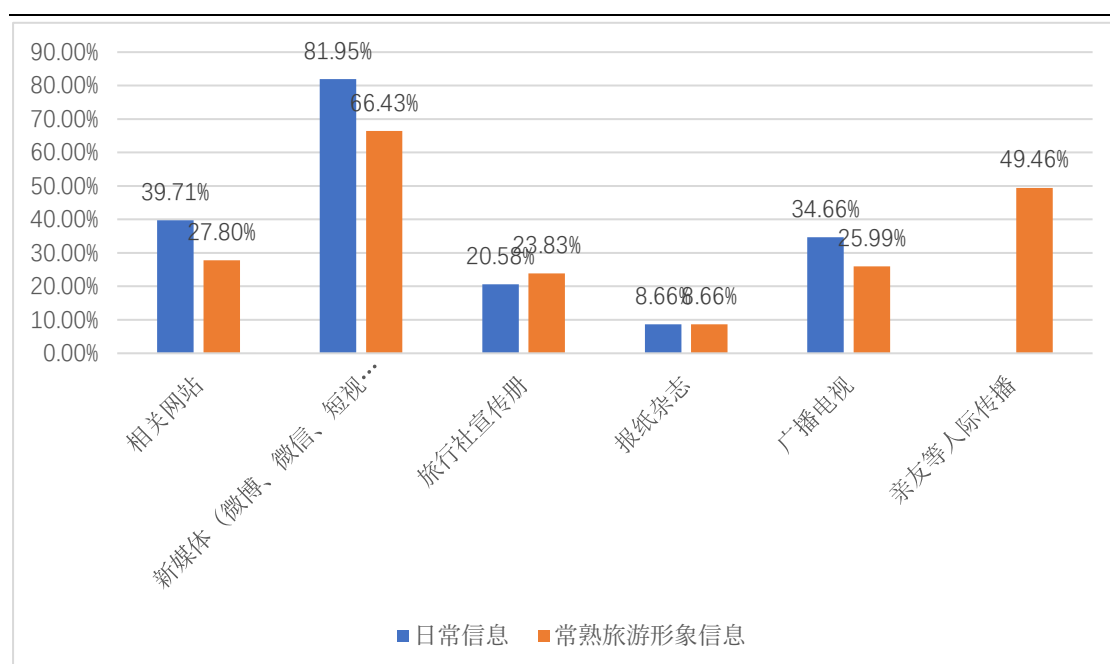


Figure 7-4 Tourists' Use of Media Platforms Showing Tourism Image

Notes: 相关网站 = Related Websites 新媒体 (微博、微信、短视频、客户端) = New Media Platforms (i.e., Weibo, WeChat, Short Videos, and APP Clients) 旅行社宣传册 = Travel Agency Brochures 报纸杂志 = Newspapers and Magazines 广播电视 = Radio and Television 亲友等人际传播 = Interpersonal Communication via Relatives and Friends 日常信息 = Daily Information 常熟旅游形象信息 = Information about Changshu's Tourism Image

7.7 Suggestion I: Changshu should promote the integrated development of traditional and new media, trying to get more feedback and interact more with the audience to use multiple communication channels effectively

According to the monitoring, the communication of Changshu's tourism via the traditional mainstream media and new media platforms was ineffective. Therefore, Changshu should be innovative in terms of content, approaches, channels, and expression and tightly integrate different media platforms to leverage the strengths of

different platforms. Moreover, Changshu should also leverage the strengths of the Internet (e.g., rapid information dissemination, various information, diversified channels, strong interactions with the audience, and considerable sensory impact. WeChat prioritises official accounts with a high engagement rate, certification, and content best match specific keywords. Therefore, Changshu should track its data and pay attention to the engagement rate of its official accounts from different aspects (e.g., retweets generated by articles, collects, comments, and likes). Besides, it should interact with its followers more often, encourage tourists and residents to share their views and attitudes towards the tourism image of Changshu, and take the initiative to receive feedback from followers to form a two-way communication between the communication subjects and the communication objects. Moreover, it should certify its official accounts to raise their value. Furthermore, it should pay attention to the originality of the articles and optimise article titles for more traffic. It should better understand user search habits and name valuable columns with Changshu's tourism image, relevant symbols, brands, and routes. In addition, for each tourist attraction, the link to the website of a tourist attraction can be provided on the official websites of other tourist attractions and the government. Meanwhile, the link can be provided in articles posted by official accounts. In this sense, when tourists are searching for information about a tourist attraction, they can learn about other tourist attractions via different links. In this sense, the connections between different scenic areas can be closer, which will be conducive to the communication of Changshu's tourism image.

7.8 Suggestion II: Changshu should attach importance to interpersonal communication to increase emotional resonance and magnify the effect of word of mouth

Typically, the interpersonal communication of tourism image is manifested in the interactions between tourists and between tourists and residents. Changshu should pay

attention to the predominant role of tourists and residents as the communication subjects and emphasise the characteristics of interpersonal communication. On the one hand, it should enable residents to engage in shaping and disseminating Changshu's tourism image, help residents establish a good sense of ownership and communication awareness, and improve the quality of life and well-being of residents by promoting everyday leisure activities, slow lifestyle, and beautiful city landscape. On the other hand, since tourists long for a sense of familiarity with the surroundings while travelling, Changshu can consider developing tourism programmes and activities based on residents' happy life, encouraging tourists to try drinking tea, eating noodles, and making a sightseeing tour in Changshu and enabling tourists to experience the everyday life of local residents. By doing so, Changshu can further shape its tourism image and attract more non-local tourists to increase emotional resonance and enable residents and tourists to promote Changshu's tourism brands and image as well as to tell Changshu's stories well.

While facilitating interpersonal communication, Changshu should adopt some new strategies to magnify the effect of word of mouth. The official departments can try to establish connections and cooperation with grassroots organisations, culture and tourism enterprises, and scenic areas. Moreover, it can try to cooperate with key opinion consumers (e.g., the influential official account sharing local information "Changshu Zero Distance", famous travel bloggers) to showcase the progress of Changshu's tourism development and the highlights of Changshu. By cooperating with key opinion leaders, Changshu can rapidly circulate its tourism information with the help of the influence of key opinion leaders, enabling followers to form a clear perception of Changshu and pay closer attention to Changshu to gain growing popularity and stimulate tourism consumption. By doing so, Changshu can integrate information, media platforms, and the audience to facilitate communication.

8 Analysis of the potential of Changshu's study tours

8.1 Changshu had multiple places for developing study tours; however, it should follow an internal logic while developing study tours

According to the monitoring, Changshu offered a variety of study tours to tourists. Changshu had rich resources with local characteristics for developing thematic study tours; however, the quality of the study tours was not high. Changshu should strike a balance between the learning part and the travelling part. Changshu promoted several tourism routes with five major themes. The five major themes characterised by diversity and distinctive features matched the characteristics of Changshu's resources for developing study tours. Nevertheless, Changshu simply linked spots with similar characteristics to promote tourism routes, not following an internal logic. Besides, the spots for developing study tours were unevenly distributed. It was probably because there was a lack of interaction between different sites for developing study tours, and there was a lack of professional institutions integrating and promoting relevant resources.



Figure 8-1 Distribution of Places for Developing Study Tours in Changshu

8.2 Changshu had built an online platform, but it should pay more attention to the content and interaction

The online study tourism platform built by Changshu was mainly used for circulating information, not being able to connect multiple channels. The quality of the content was not high, and the efficiency of the customer service was not high. The online platform lacked interaction with the public. Consumers could not communicate directly with suppliers on the platform. The online platform did not establish close connections between different subjects involved in study tours. In the context of the pandemic, various culture and tourism units launched online culture and tourist activities; however, in the context of the normalised COVID-19 prevention and control, relevant units did not pay enough attention to developing online tourism products, seldom connecting online activities with offline activities. There was a great deal of room for improvement.

8.3 Changshu's resources were not distinctive, and its overall competitiveness should be improved

As a county-level city, Changshu boasted culture and tourism strengths nationwide; however, as a county-level city administered by Suzhou City in Jiangsu, Changshu was not distinctive among all cities belonging to the Yangtze River Delta City group even though it enjoyed rich red tourism resources, ecological resources, industrial prosperity, culture and tourism resources highlighting the culture of the Jiangnan region, and rich historical and cultural heritage. Besides, there was a lack of talent in terms of the development of resources in Changshu. Changshu did not have professional teams to develop characteristic courses with high quality. According to the field research and interviews, Changshu did not effectively promote its cultural attractions (e.g., the Wen Temple, Yanzi Former Residence, Zengyuan Garden, and Zhaoyuan Garden) and explore the characteristic culture of Changshu (e.g., Yushan culture, Guqin culture). The existing study tour products only basically met the needs of local primary and secondary schools.

8.4 The study tours of Changshu did not offer tourists memorable and deep experiences, and Changshu should attach more importance to the design of the travelling part and the learning part

Changshu was passing through the early stage of product development. The overall quality and influence of its products should be further developed. Changshu did not strike a balance between the travelling part and the learning part of study tours, failing to fully leverage the strengths of its tourism resources. With the support from the government, relevant departments and institutions began to explore the use of resources to develop study camps (bases) and carry out related activities; however, there

was a lack of interaction between related subjects, and related subjects were not highly motivated. Under such circumstances, the curriculum system was not adequate, not being able to highlight Changshu's advantages. The courses offered by Changshu mainly involved experiencing the traditional culture and participating in outward bound activities, which was in line with the mode of "tourism elements + extracurricular private school"; however, there was room for improvement in terms of continuity and systematisation. Moreover, Changshu should further integrate the travelling part and the learning part.

8.5 The official body continuously promoted study tours, but it should further energise the market

During the five years of the development of study tours, the government of Changshu continued to promote the development of the industry, and relevant cultural and tourism units gradually built study camps (bases) and carried out study activities based on the resources of their units under the guidance of the government. The bases had their unique research resources and activities, but the study tour products were passing through the early stage of development. The bases faced issues related to inadequate facilities (e.g., infrastructure, signage, instructors, accommodation, safety services) and the low quality of products for primary and secondary school students. In addition, existing institutions providing study tours were not highly professional in the design and marketing of relevant courses. No research institutions or travel agencies were qualified enough to integrate tourist routes and provide schools, parents, and students with personalised and diversified study tour products.

The Ministry of Culture and Tourism of the People's Republic of China adopted the "Service Norms for Study Tours" in 2016, which stated that study tour service providers should include organisers, contractors, and suppliers. Nevertheless, there was a lack of interaction between subjects involved in the industry, and the study tours were not systematic. The interaction among subjects involved in the industry was mainly

reflected in the design and organisation of activities. Due to the lack of travel agencies or institutions that integrated study tour resources, study tours were independently carried out at various bases, making it difficult to provide students with high-quality thematic study tours that integrated research resources. Museums and art galleries, as non-profit institutions providing public services, had the responsibility and obligation to provide services related to study and research; however, due to the nature of study tour activities and the lack of funds and talent, it was difficult to enhance the quality of relevant services continuously. Some entities (including but not limited to social institutions) were cautious about the development of study tours, leading to the slow development of the industry.

8.6 Changshu boasted a solid local customer base for developing study tours, and humanistic education activities were popular

Changshu boasted a solid local customer base for developing study tours. As schools paid more attention to studying and researching, Changshu's primary and secondary school students and their families became the main consumers of study tours in Changshu. Meanwhile, residents of Changshu focused on both work and leisure life, with a strong sense of leisure and demand for leisure. They had a growing demand for leisure activities. Besides, they showed a strong interest in Changshu's folk customs as well as cultural education. In the future, the development of culture-focused study tours will meet residents' diversified leisure needs in various forms. The increasing disposable income of the residents will further stimulate tourism consumption, unlocking the huge consumption potential of the study tour market.

8.7 Changshu boasted a solid non-local customer base for developing study tours, with study tours becoming popular

In the post-epidemic era, it would be difficult for outbound travel to recover in the short term due to the need for pandemic prevention and control as well as people's concern for safety and other factors. Visitors from the Yangtze River Delta region would prefer to look for destinations with rich resources suitable for revisiting than look for new destinations. Meanwhile, they would choose to travel to fewer destinations and extend their length of stay instead of travelling to many different destinations. There were five major cities within a two-hour drive from Changshu. The five cities had 3,951 primary and secondary schools (2,208 primary schools and 1,743 secondary schools) and a total of 4,448,700 students (2,738,100 primary school students and 1,710,600 secondary school students), indicating the considerable potential of the study tour market. Under the guidance of the Jiangsu Provincial Department of Culture and Tourism, a good atmosphere for the development of study tours was formed. In the future, with its ideal location, Changshu has been expected to become one of the popular destinations for short-distance trips in the Yangtze River Delta if it can develop high-quality study tour products.

.8.8 Suggestion I: Safety is the basis for further development, and it is necessary for Changshu to improve the quality of study tours

The Ministry of Education and other ten ministries and commissions jointly issued the “Opinions on Promoting Study Tours for Primary and Secondary School Students”, clearly identifying the principle of safety as one of the four basic principles for developing study tours. In addition, influenced by the pandemic, the state and consumers put forward new safety requirements for study tours. Therefore, safety is the basis for the development of study tours. The government should put safety first in the

development process, trying to improve security and reduce risks. Study tour bases should emphasise safety and regulation, stick to safety guidelines, establish mechanisms for ensuring safety, clarify safety responsibilities, and adopt measures to ensure students' safety. Safety and innovation are not contradictory, and the ability to innovate in safety should be reflected in various measures used to prevent hidden hazards. Those measures include improving facilities (e.g., equipment, devices, and medicines), educating and training relevant staff, and providing safety tips.

For a long time, the market players had misunderstandings of the essence and connotations of study tours, leading to many issues related to the development of study tours. One of the major problems was the lack of integrated planning for product design, causing homogenisation. Nevertheless, after years of development, a trend in the upgrading of study tours has been observed. More and more parents have begun to examine the details of study programmes in depth. Schools have started to pay attention to strengthening the personalisation and planning of study programmes. Society and the media have emphasised monitoring and disclosing low-quality study programmes. Consumers have become more rational when buying study tour products and have a higher demand for the quality of study tour products. Therefore, in the future, the government should encourage the market to develop more interesting and participatory study programmes, consider participants' physical and mental characteristics and learning needs, and abide by the education rules. Relevant products should meet the psychological needs of tourists, such as the longing for fun, novelty, beauty, and pleasure.

8.10 Suggestion II: Changshu should pay attention to the brand building of study products and regulate the market to create more opportunities

With everyone longing to learn, new changes in the market demand for study tours have been observed. Some enterprises have started to organise some team-building activities similar to study programmes. Moreover, more and more adults and senior people have been engaged in study programmes. Besides, with the “double reduction” policy, students have been allowed to have more spare time. In this sense, parents will begin to look for alternatives to cramming schools, making families play a more predominant role in the study tour market. The demand for educational and interesting study programmes will rise greatly. Under such circumstances, the competition in the study market will increase along with the opportunities. Besides, since it is not difficult to transform the training curriculum into study programmes, there will be more education and training institutions with adequate investment, teachers and professional curriculum systems, intensifying competition in the industry. In order to seize the opportunity, Changshu should focus on guiding and supporting the development of local study brands, building a product system with its own characteristics, enhancing product standardisation, improving customer trust, and developing a positive reputation. Besides, it should attach importance to cooperating with high-quality suppliers and deepening exchanges with the education sector. Moreover, it should lay an emphasis on the diversification of products, meeting the personalised needs of the consumers, improving product quality, lowering costs, increasing efficiency, and capturing market share.

In recent years, the Ministry of Culture and Tourism, the Ministry of Education and other relevant ministries have formulated and issued a number of policy documents to promote the development and standardisation of the study tourism market, creating new opportunities for the study tour market in a well-regulated way. At the same time,

the regulation of enterprise qualifications, teacher qualifications, and the course content may be tightened.

In the face of the lack of market supervision and the uneven quality of study tour products, Changshu should strengthen the supervision of enterprise qualifications, teacher qualifications, and the course content. It is essential to strengthen the training of study tour instructors and improve the quality of study institutions; it is also important to incorporate moral education in study programmes, integrate core socialist values into all aspects of study programmes, and focus on the critical role of moral education and good behaviour. According to the monitoring, there was a shortage of talent in the development of study tours. Changshu needs to focus on openness, cooperation, and talent development to promote the standardisation of study tours. More specifically, first, it should strive for more social resources, encouraging university students and retired scholars to engage in the development of study tours, cooperating with the group and individual volunteers, boosting cooperation between similar enterprises, and cooperating with relevant universities and higher education institutions to cultivate compound talents. Second, it should offer school teachers more policy support and training programmes to enable them to participate in study tours and help improve the quality of study tours. School teachers have already been familiar with the field they work in. Therefore, it is relatively easy for them to learn more about another related field with specific training, which can quickly mitigate the talent shortage.

Acknowledgements

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Departments and Units: Changshu Municipal Government, Changshu Municipal Bureau of Culture, Radio, Television and Tourism, Changshu Museum, Changshu Art Museum, Changshu Library, Changshu Wenlv, Shajiabang Red Tourism Scenic Area, Yushan Shanghu Scenic Area, Zengyuan Garden, Zhaoyuan Garden, Changshu Wen Temple, Fangta Garden Scenic Area, Guli District, Jiangxiang Village, Weng Tonghe Memorial Hall, Yanzi Former Residence, Yanyuan Garden, Tiehuangsha Ecological Island, Tongguan Mountain Rural Scenic Area, Changshu Creative Design Association, Cross-Strait School, Fengxi Culture and Art Centre, Shanqianfang, Yu Jian Tang Residence, Shiye Tea House

We would like to convey our gratitude to all those who helped with the monitoring work!