

2022

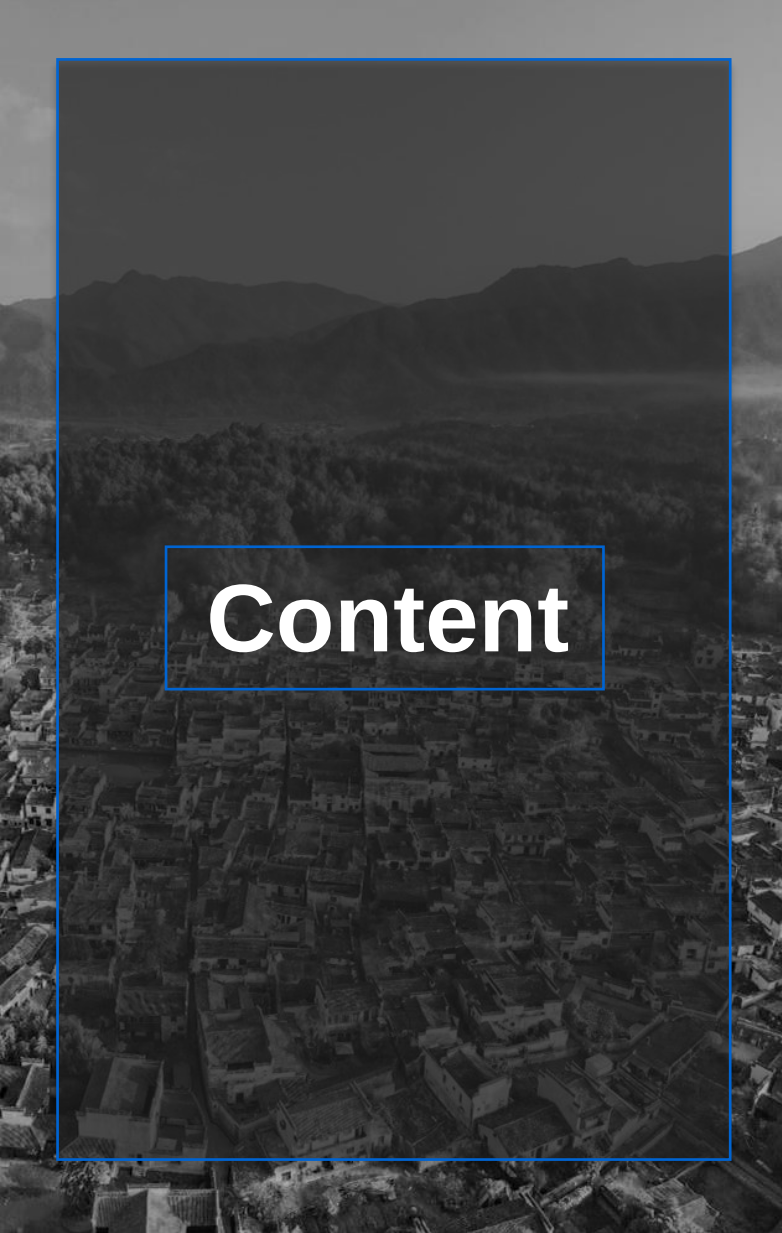
Hongcun

Monitoring Report on the Sustainable Development

Yi County Culture, Tourism and Sports Bureau
Monitoring Centre for UNWTO Sustainable Tourism

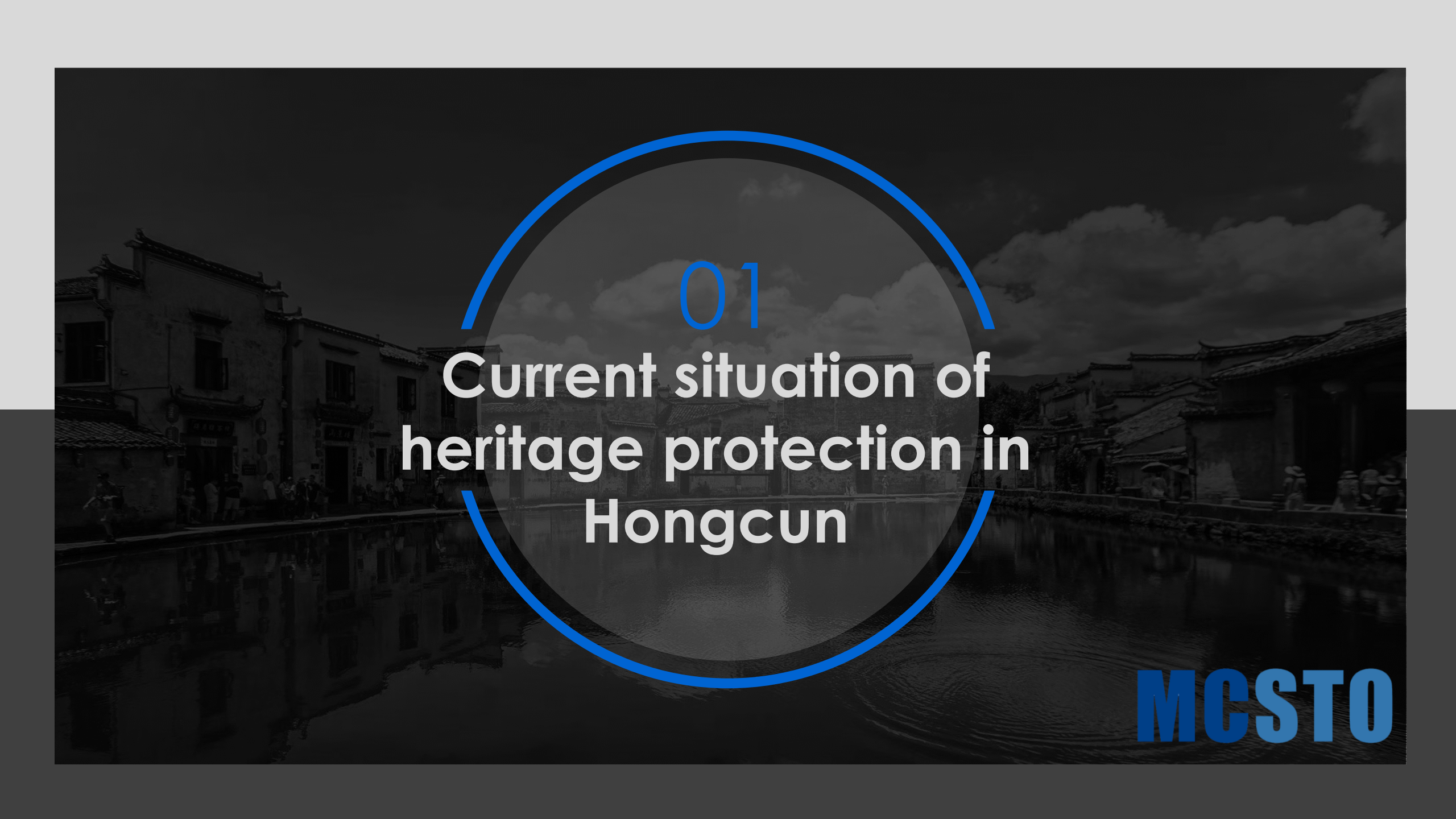
2022.11

MCSTO



Content

- 01 Current situation of heritage protection in Hongcun
 - 02 Tourism and community
 - 03 Tourist satisfaction
-
- 04 Special studies on Tourism Commercialization in Hongcun
 - 05 Special topic on Environmental Governance
 - 06 Special topic of tourism public service facilities
 - 07 Creative industry in Hongcun



01

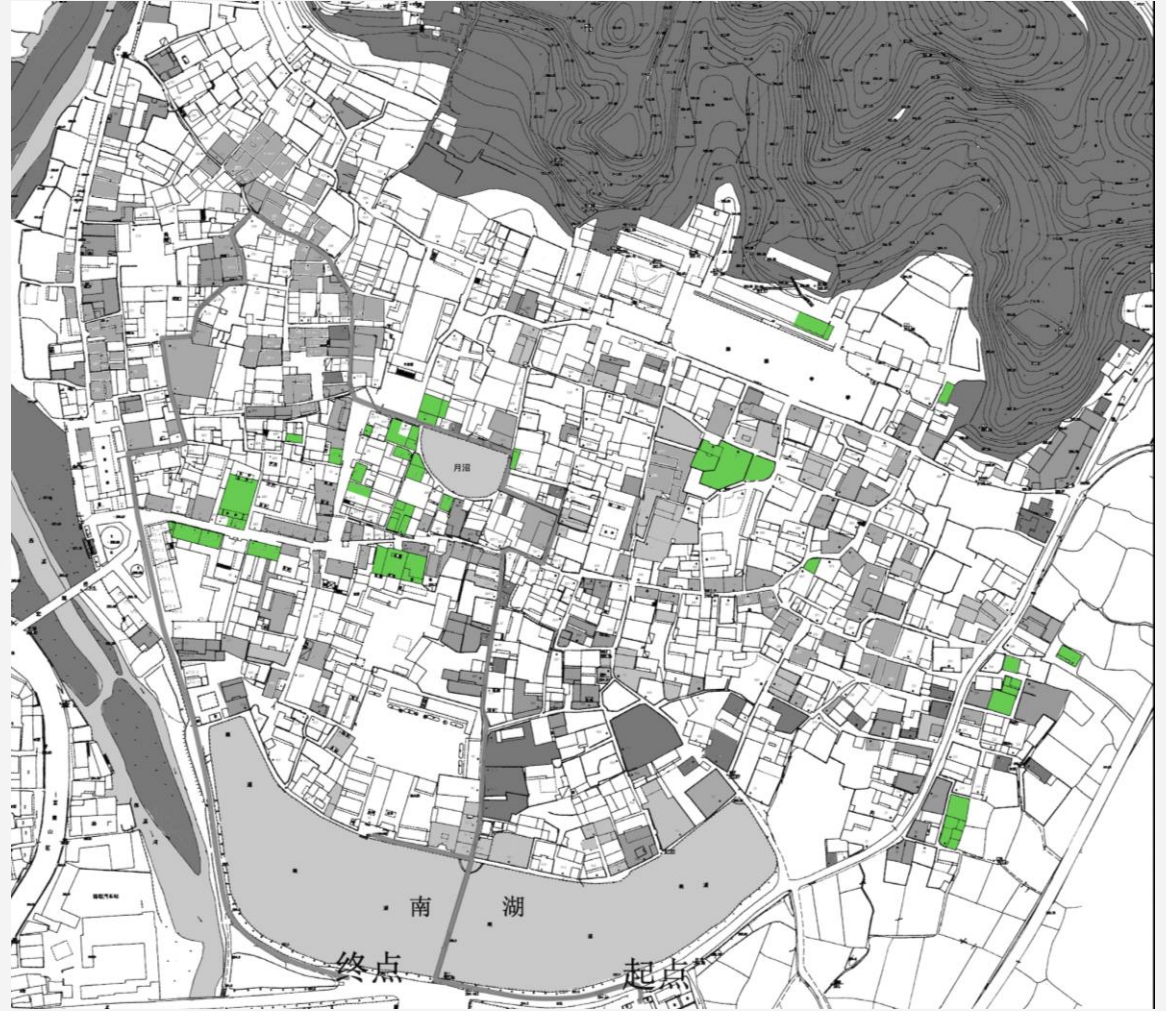
Current situation of heritage protection in Hongcun

MCSTO

The reality of residences in Hongcun

In 2022, 29 houses are recorded in files

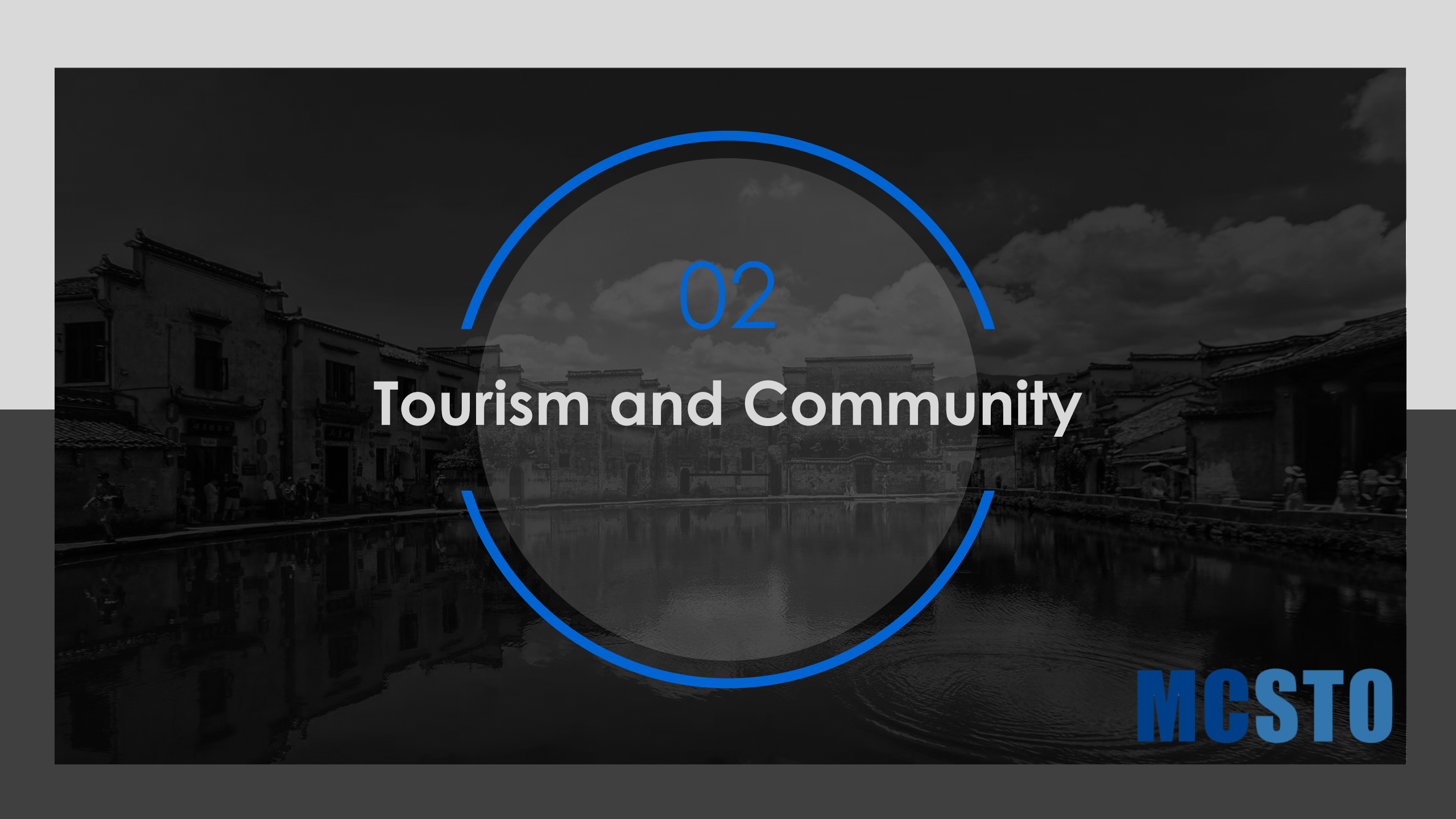
Until 2022, 270 houses have been
recorded in Hongcun



The reality of residences in Hongcun

- The mobility of non-local business operators is high
- There are dilapidated and unrepaired houses, abandoned farmland and vacant interior
- There are obvious spatial and temporal differences of street landscape
- There are significant functional differences between different blocks
- The problem of "four waters returning to the hall" is rectified





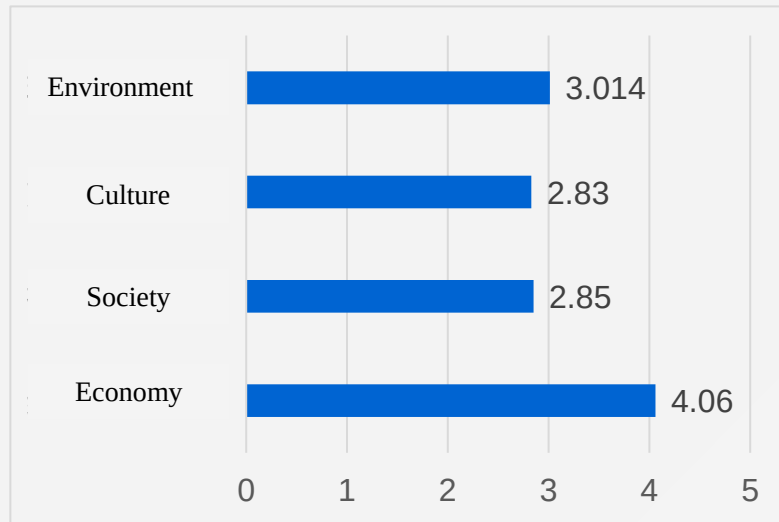
02

Tourism and Community

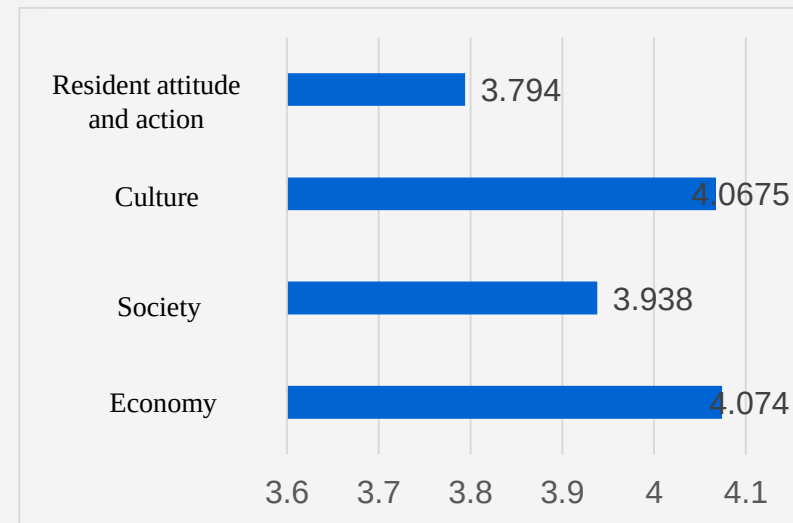
MCSTO

Impact of tourism development

Residents' perception of the impact of tourism is comprehensive and has two sides. They not only feel that tourism has brought good economic and cultural effects, but also believe that tourism has brought some challenges to the local society and environment.

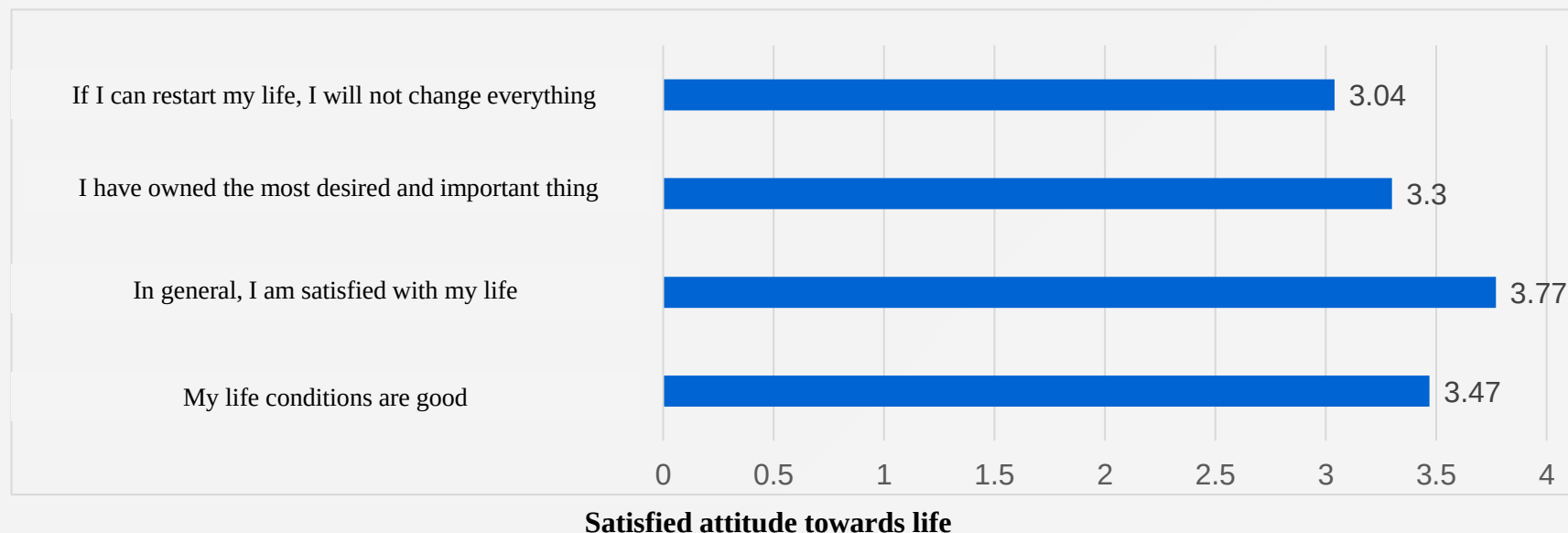


Negative impact of tourism development



Positive impact of tourism development

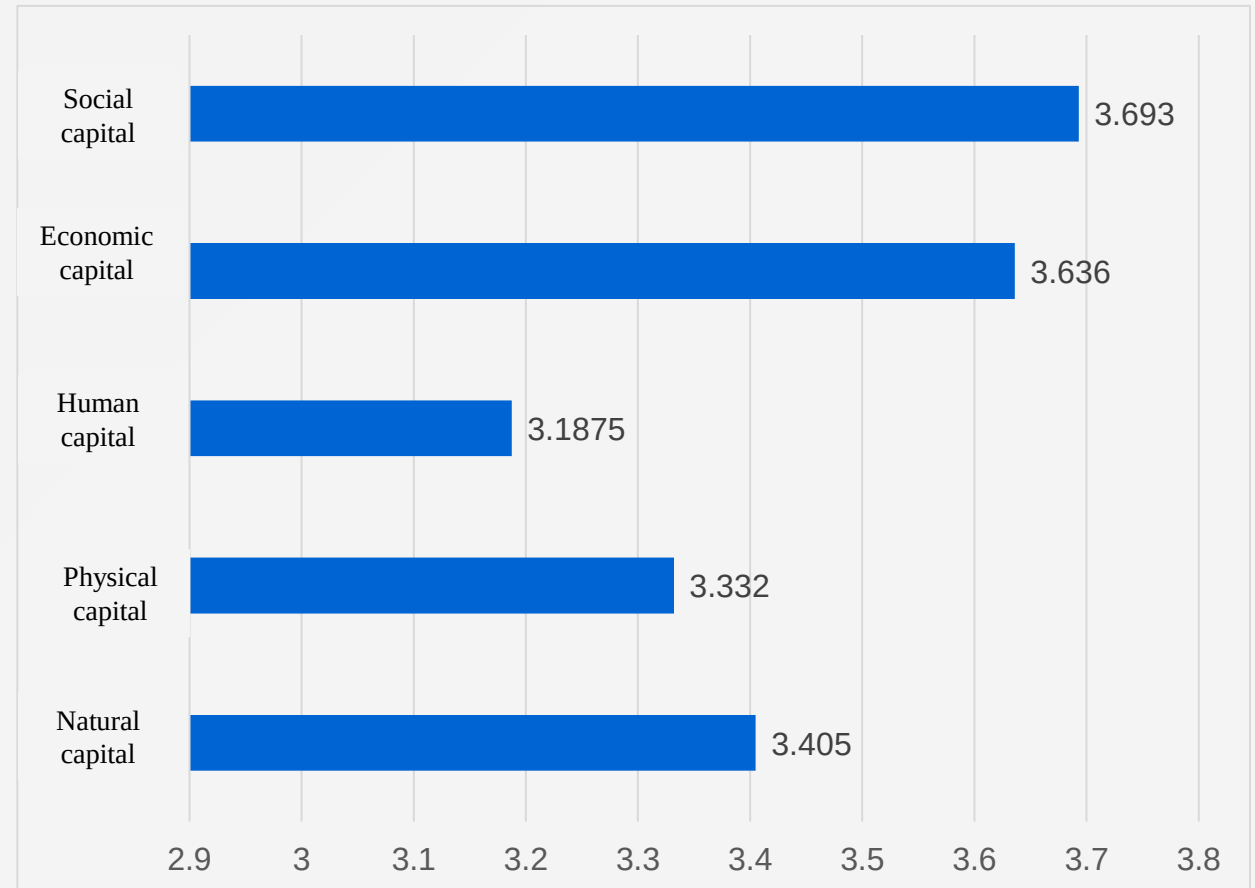
Satisfied life attitude



Most residents are satisfied with their own life. Compared with 2021, the average value of the four questions of Hongcun residents' satisfaction with life has increased, which is due to the weakening impact of COVID-19, the gradual recovery of tourism, and the increase of tourists in the peak season. Therefore, the residents' happiness has been improved.

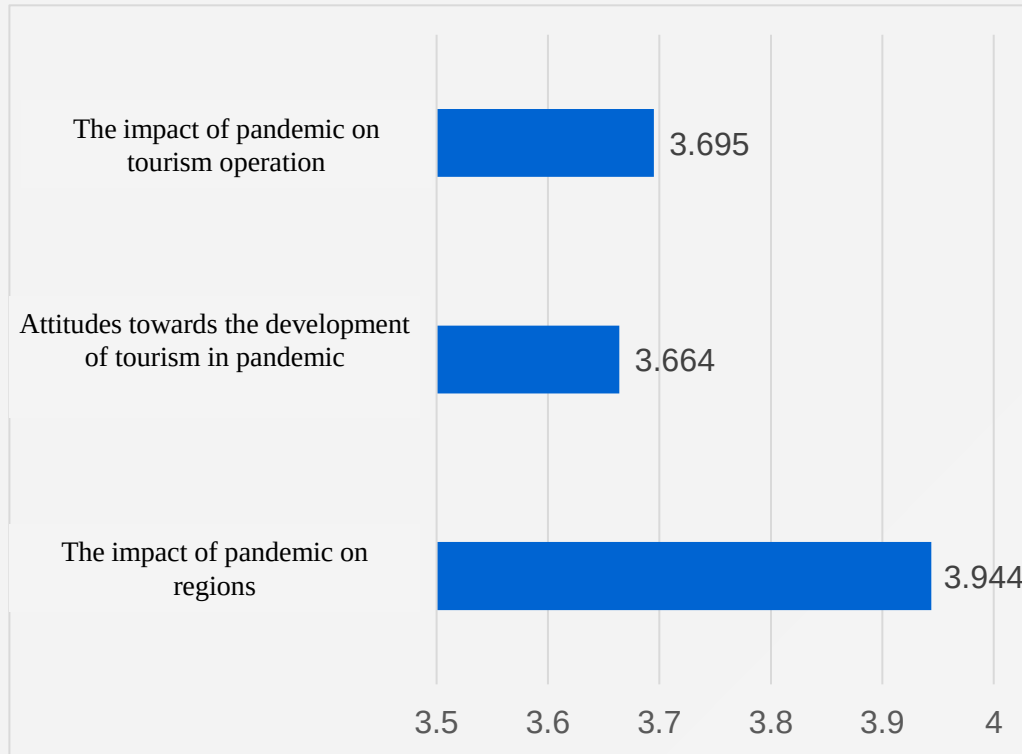
Livelihood capital of residents

- The livelihood capital of residents is generally good.
- In terms of economic capital and social capital, Hongcun residents enjoy the most prominent advantages. This shows that the development of tourism in Hongcun has brought great positive impetus to the economic development and the improvement of social relations.
- The advantages of human capital are relatively small. At present, Hongcun needs to pay more attention to the quality improvement of local residents, especially tourism practitioners.



Statement of residents' livelihood capital

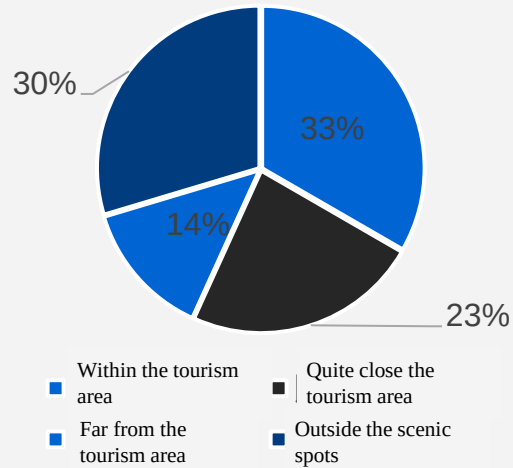
Residents' perception of the impact of COVID-19



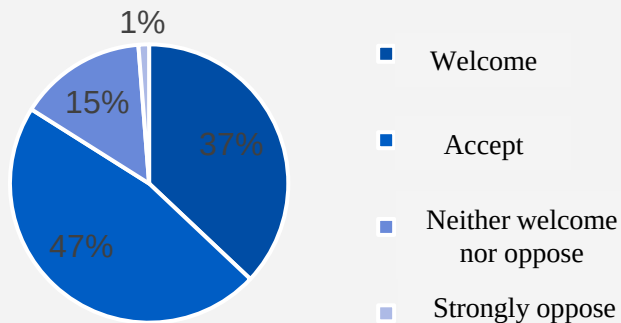
Residents' perception of the impact of COVID-19

- The vast majority of residents believe that the pandemic has greatly affected their lives, resulting in certain losses and even regional economic stagnation and tourism decline.
- However, with the improvement of the situation, most residents still support the development of tourism and are full of confidence in its future.
- Some residents also have a certain pessimistic attitude, thinking that the future of tourism is gloomy so economic development needs to change its focus to other industries.

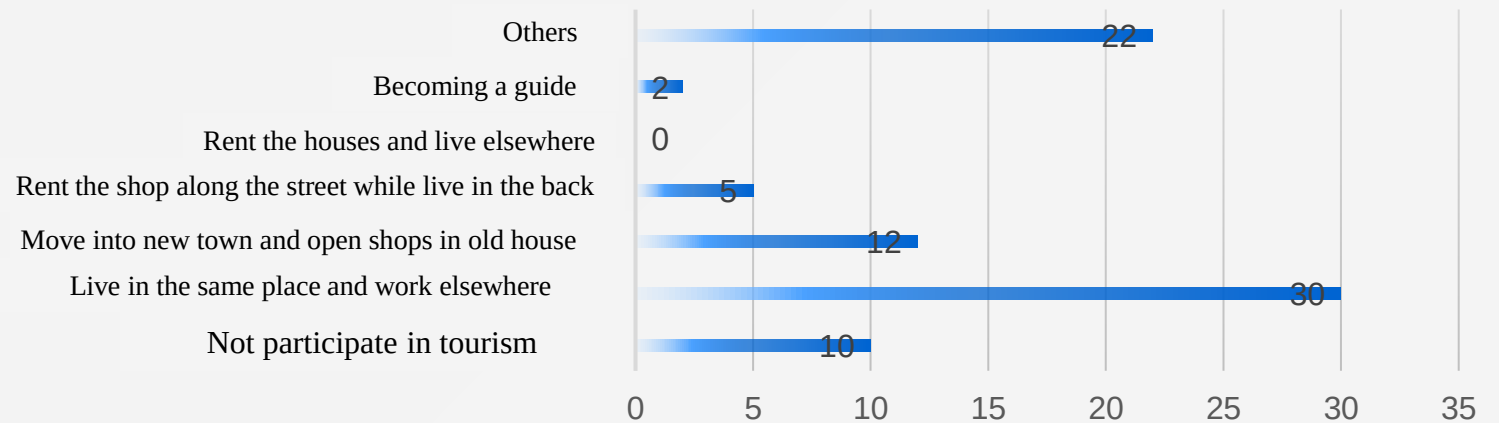
Residents' perception and suggestions on Tourism Development



Distance between residence and sightseeing routes



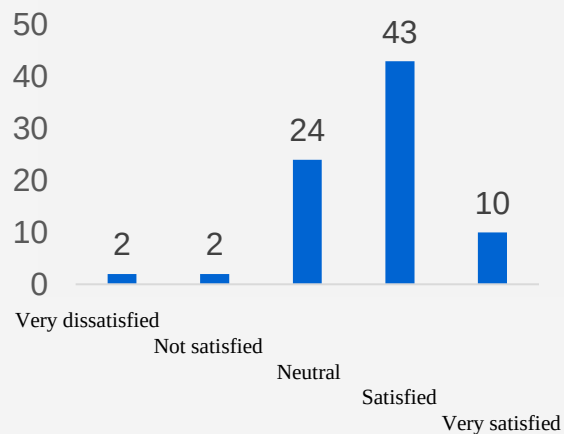
Residents' Attitude towards that tourists visit their home



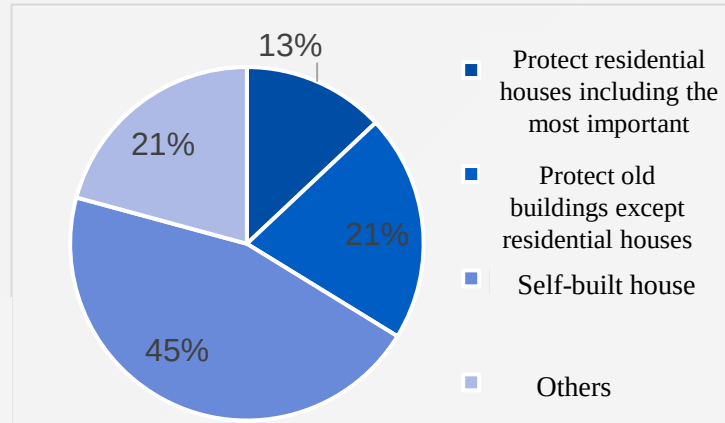
Ways of participating in tourism development

Residents have a high degree of participation in tourism, hold a relatively open and welcoming attitude towards tourists' visits, and widely participate in the development of tourism. The most unsatisfactory aspects of tourism development are the working methods and efficiency of the government, environmental pollution and the ways of tourism development.

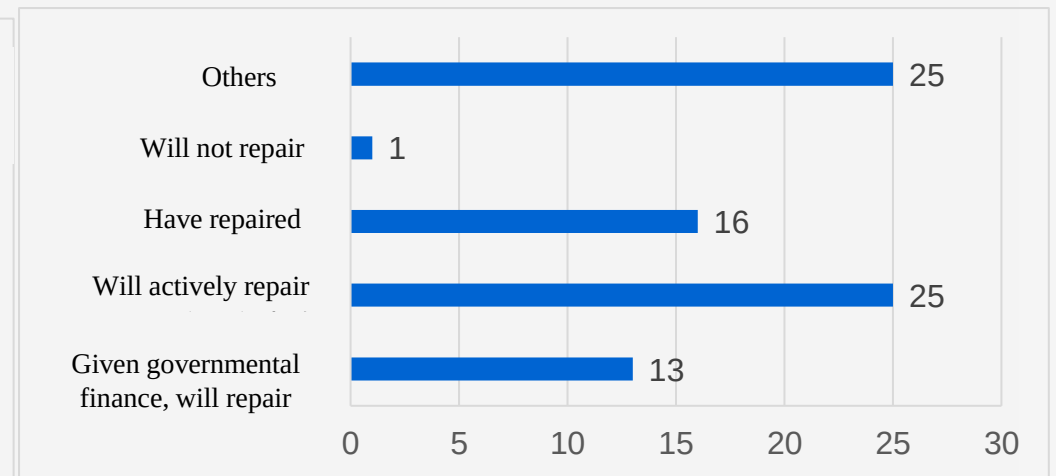
- Residents are highly satisfied with the current situation of heritage protection in Hongcun.
- The phenomenon that residents working in Hongcun live outside Hongcun village is prominent.
- Residents have a strong willingness to maintain ancient houses.
- The main problems in the process of heritage protection are: the maintenance job needs official approval; the cycle is too long; motor vehicles can not easily access; there are too many other restrictions...



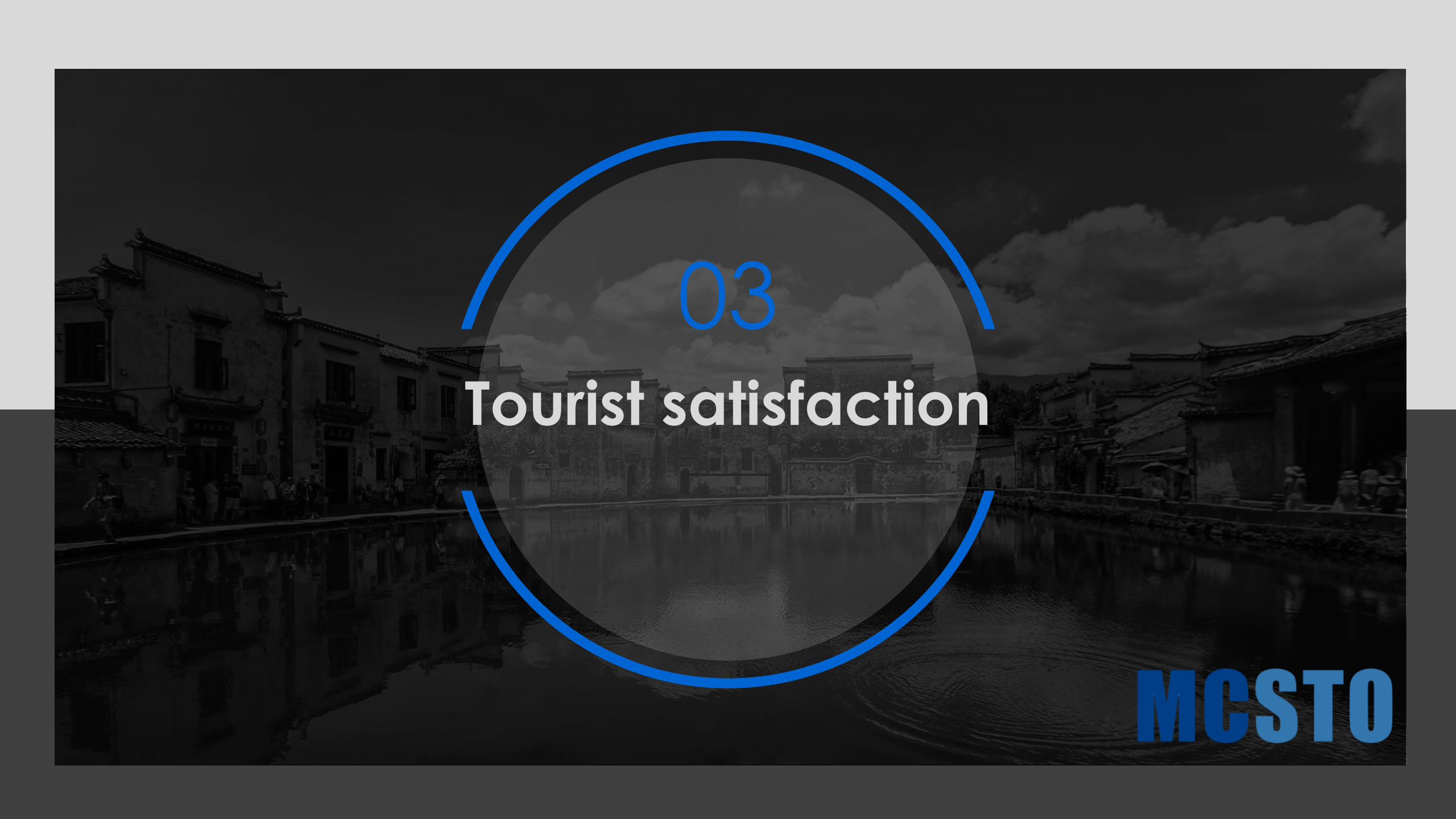
Satisfaction with the current situation of heritage protection in Hongcun



Types of Residential houses



Residents attitude towards the repairment of old houses



03

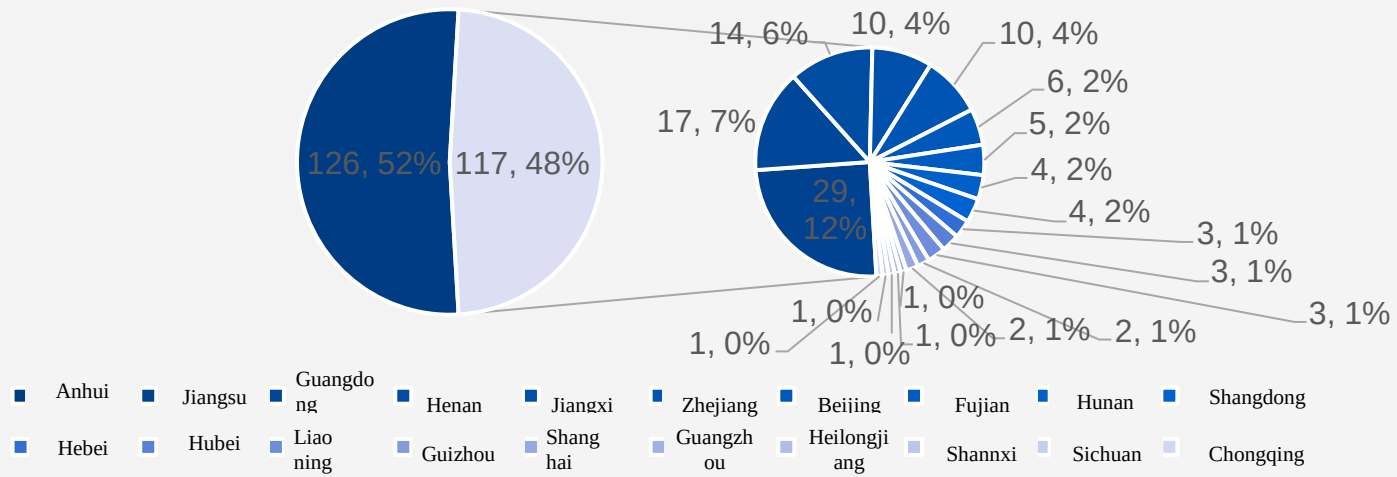
Tourist satisfaction

MCSTO

Basic information of tourists

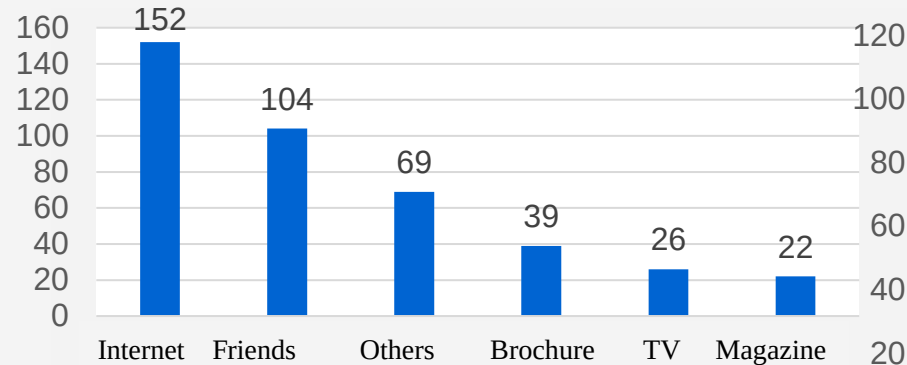
- 59% of tourists in Hongcun come from Anhui Province, Jiangsu Province, Guangdong Province. After the outbreak of pandemic, tourists from distant provinces decreased.
- The tourists in Hongcun are mainly young and middle-aged; their education level is mainly undergraduate or junior college; the income of tourists is mainly at low and medium-level; students and enterprise employees are the main types of tourists.

销售额

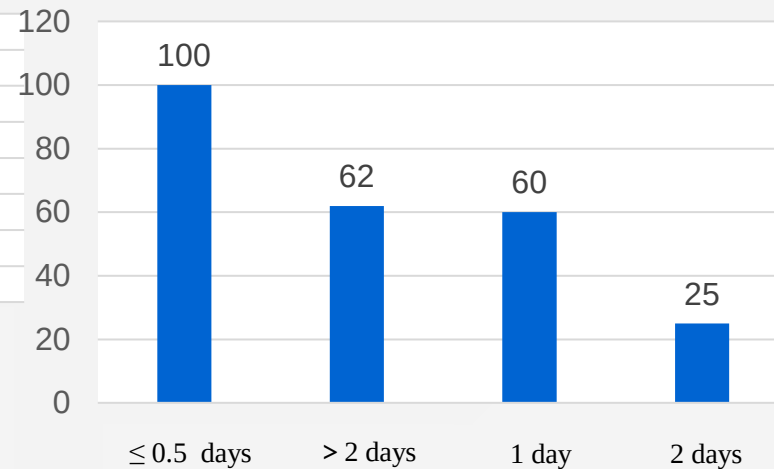


Distribution of Tourism markets

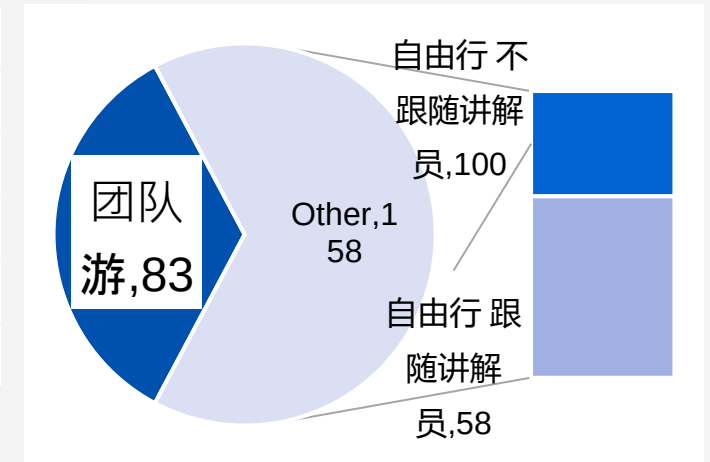
Characteristics of tourists' travel behavior



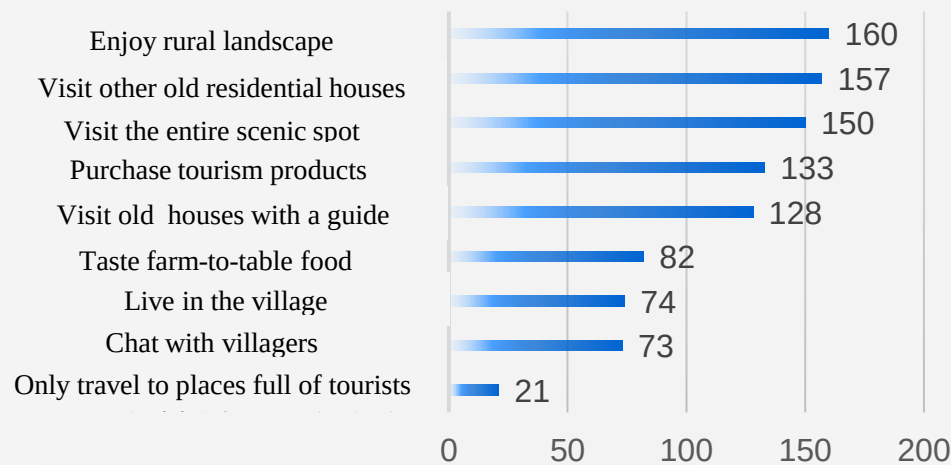
Tourists' information channel



Tourists' staying time



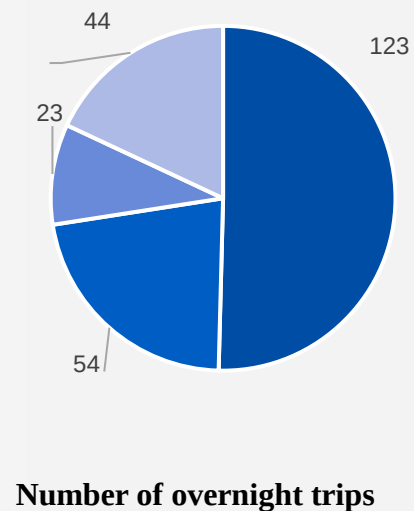
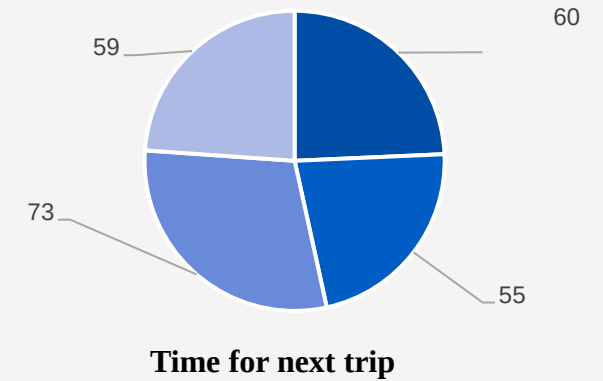
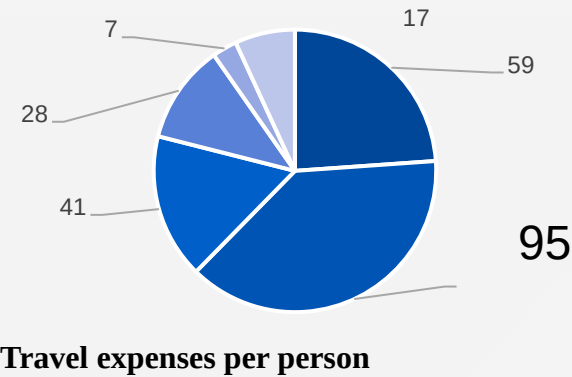
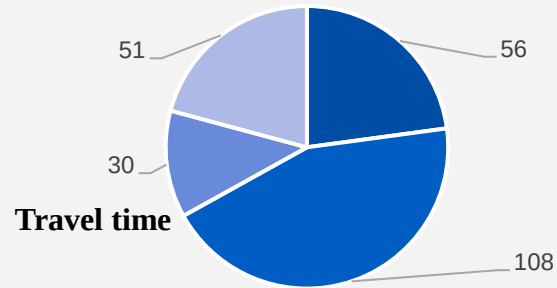
Tourists' travel style



Tourists' activities

Tourists' knowledge about Hongcun mainly comes from the Internet and other channels, which is newer and broader than before. More tourists travel by themselves rather than in groups. Most tourists stay in Hongcun for one day or half. Sightseeing is the dominant activity, indicating that the trip is not in-depth enough.

Characteristics of tourists' travel behavior



- In terms of travel time, 77% of tourists travel for 3 days or more, indicating that Hongcun is not the only destination for most tourists.
- In terms of travel expenses, most people spend 1,001-2,000 yuan, and more than half of them spend no more than 2,000 yuan, indicating that most tourists in Hongcun are still low-consumption groups.
- In terms of the time for next trip, most people prefer the choices of 6 months or one year later, and other options are evenly selected. More than half of the people travel once or less in a year, indicating that tourists have not kept traveling as their habits.
- In terms of the number of overnight trips, most tourists say this is their first time to travel overnight. The first half of 2022 has passed, so the overall frequency of overnight trips is not high.

Tourists' satisfaction

- Tourists' satisfaction with destination landscape and sightseeing is the highest, followed by the diversity of travel experience. However, tourists are not so satisfied with the diverse sightseeing activities.
- The lowest satisfaction is given to the tourist centers, trash cans, restrooms, etc., followed by the equipment of public toilet facilities in infrastructure. These results are consistent with the research finding. In the future, attractions spots need to improve their conditions and promote sustainable development of tourism.

Dimension	Item	Average value	General average value
Sightseeing at destination	Rural landscape	4.28	4.2
	Hui-style traditional houses	4.41	
	Attractiveness of scenic spots	4.10	
	Comfortability of environment	4.03	
	Hospitality of local residents	4.16	
Destination environment	Commercial atmosphere	3.70	4.0
	Crowdedness of scenic spots	3.78	
	Noise condition of scenic spots	3.88	
	Water quality of scenic spots	3.92	
	Air quality of scenic spots	4.44	
	Overall hygiene of scenic spots	4.17	
	Environmental protection of scenic spots	4.12	
Infrastructure	Convenience of public transportation	3.90	3.77
	Comfortability of public transportation	3.86	
	Price of public transportation	3.78	
	Number of Public toilets	3.65	
	Hygiene of public toilets	3.76	
	Facilities for rest in scenic spots	3.79	
	Number of garbage collection facilities	3.85	
	Guidance at tourist center, garbage can and toilet	3.57	
Service at attraction spots	Reasonable ticket price	3.80	3.79
	Tour guide service	3.99	
	Variety of information material (magazine, brochure)	3.64	
	Availability of travel information 旅游信息 (post, brochure...)	3.69	
	Visibility of signage system	3.83	
Safety and health	Local safety facility (warning sign, fire extinguisher)	3.88	3.86
	Local medical facility (medical centre, staff and ambulance)	3.67	
	Local security	4.04	
Variety of tourism activities	I can feel the charm of traditional houses	4.27	4.14
	I can feel the rich culture of Hongcun	4.35	
	I can experience local lifestyle	4.19	
	I can feel the local folk custom	4.15	
	I can enjoy local handicrafts and souvenirs	4.06	
	I can taste local delicacy	4.11	
	I can experience various tourism activities	3.86	

Tourists' satisfaction

Tourist perceptions and attitudes

Tourists generally have a clear perception of Hongcun as a world heritage site and a positive attitude toward local people. They highly agree that Hongcun should be protected. The overall satisfaction of tourists is high, but the willingness to revisit is very low, which will have a certain negative impact on the sustainable development of Hongcun tourism.

Dimension	Item	Average Value	Average Value
Perception of heritage	I know Hongcun is world heritage	4.31	4.33
	Ancient houses in Hongcun should be protected	4.56	
	I am satisfied with current protection	4.12	
Attitudes towards local people	I think local service providers are hospitable	4.13	4.17
	I would like to communicate with the local	4.19	
	I think local people are hospitable	4.20	
General satisfaction	I am satisfied with this tour	4.10	3.97
	I will recommend Hongcun to others	4.11	
	I will revisit Hongcun	3.69	

Tourist perceptions and attitudes

Mobile phone use during travel

In terms of mobile phone use during travel, tourists' use of content platforms is not very common in the preparation stage; during the trip, only the functions of taking photos and inquiring information are frequently used; after the trip, tourists' willingness to share their travel experiences on social platforms is high, but their willingness to share on content sharing platforms is much lower. The development of tourism in Hongcun can better utilize social media and platform in the future.

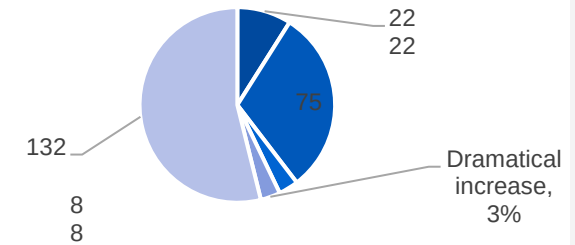
Dimension	Item	Average value	Average value
Preparation	I will consult relevant information on social media (Tiktok, Xiaohongshu)	3.85	3.68
	I will make travel plans based on information on social media (Tiktok, Xiaohongshu)	3.71	
During travel	I will travel (photo pose, destinations) according to information on social media (Tiktok, Xiaohongshu)	3.47	3.84
	I will select shops to visit with reference to comment platform (Dianping)	3.62	
	I will use mobile phones to search information about attraction spots	4.08	
	I will frequently use mobile phones to take photos and make videos	4.04	
	I will frequently use mobile phones for communication (phone call, text message, sharing on social media)	3.60	
	I think mobile phone improves my travel experience	3.88	
After travel	I will share my experience on social media (Wechat, QQ)	4.03	3.8
	I will share my experience on content platform (Tiktok, Xiaohongshu)	3.56	

Mobile phone use during travel

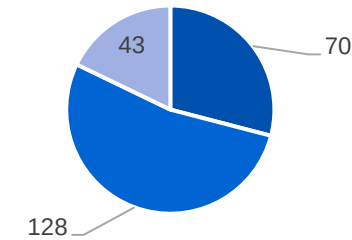
The impact of the pandemic

In terms of the impact of the pandemic, most tourists have not changed much in terms of annual income, travel time and travel spending compared with the pre-COVID period. But the overall impact is slightly negative, with only a small percentage of people experiencing significant changes. This shows that the impact of the pandemic on those with the ability to travel is within their acceptable range.

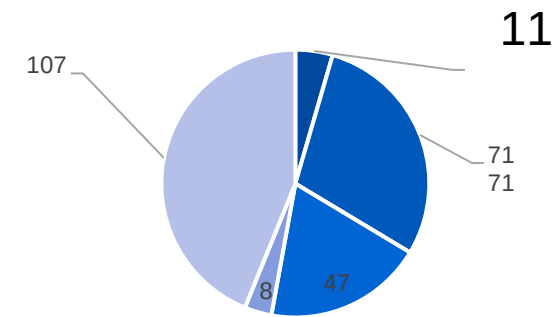
Annual income before and after the pandemic outbreak



Changes of travel time



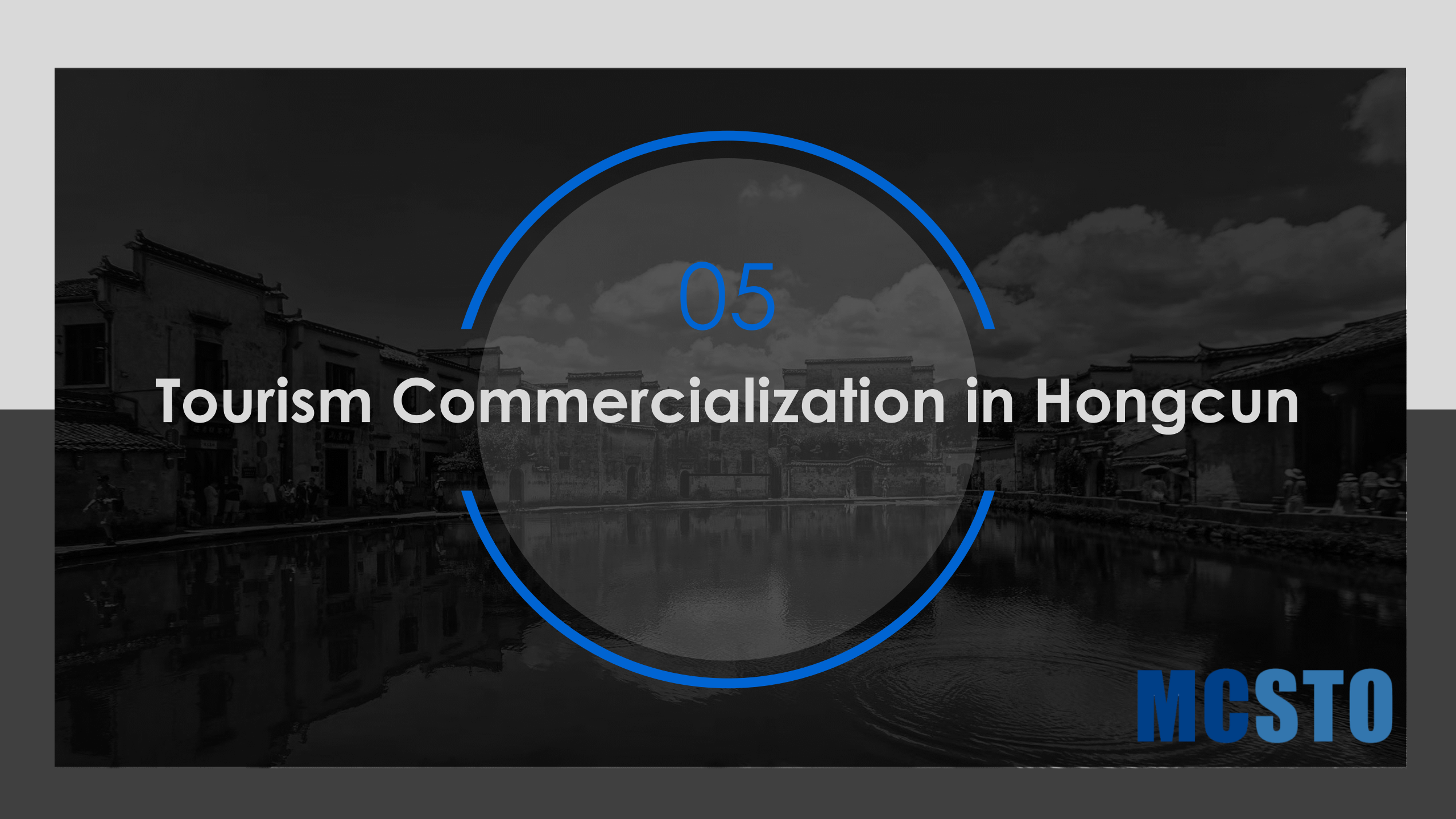
Changes of expense



Tourist impressions and suggestions

The suggestions of tourists mainly derive from their impression about scenic spots. Most tourists felt satisfied, because the Anhui-style architecture and beautiful natural scenery gave them good impression. But they feel less impressed by folk customs and folkways and local cuisine. Many other factors such as hot weather, inaccessible toilets and poor planning of roads can not be ignored, which will inspire future management in scenic spots..

The four most prominent suggestions are to reduce the degree of commercialization, increase the public toilet facilities in the scenic spot, add trash cans and improve the indication signs. Especially, the increase of public toilet facilities in the scenic spot is worthy of the attention of the scenic spots.



05

Tourism Commercialization in Hongcun

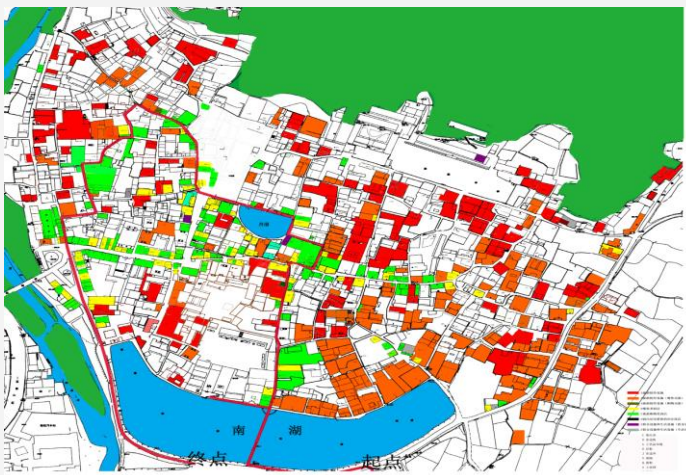
MCSTO

5.1 The type, distribution and commercialization degree of Hongcun tourism business

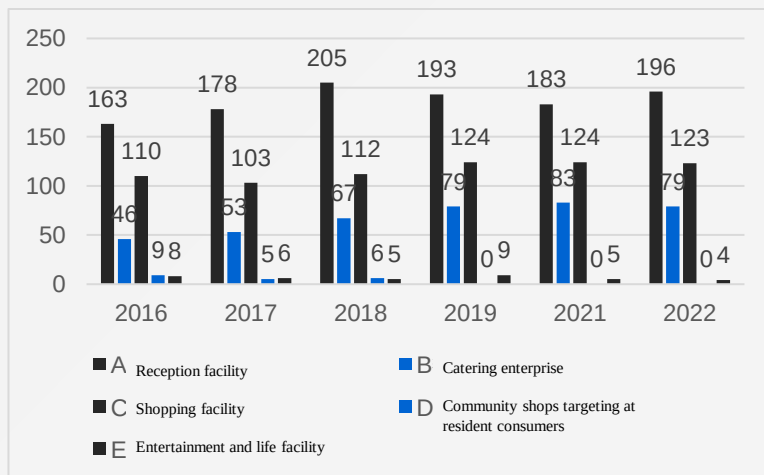
The total number of stores in Hongcun scenic area increased by 7 in 2022, among which the number of tourist reception facilities (Class A) rose significantly and the proportion increased, among which relatively speaking, high-end B&Bs were more sought after by tourists, reflecting the trend of polarization of the accommodation market in Hongcun.

Compared with 2021, the overall change of stores in each area is not significant; Shangshuizhen, Dongbian Street and Qianjie Street are still the most concentrated commercialized places in Hongcun Scenic Area, but the total number of stores has decreased, and the number accounts for 52.99% of the total number of nine areas.

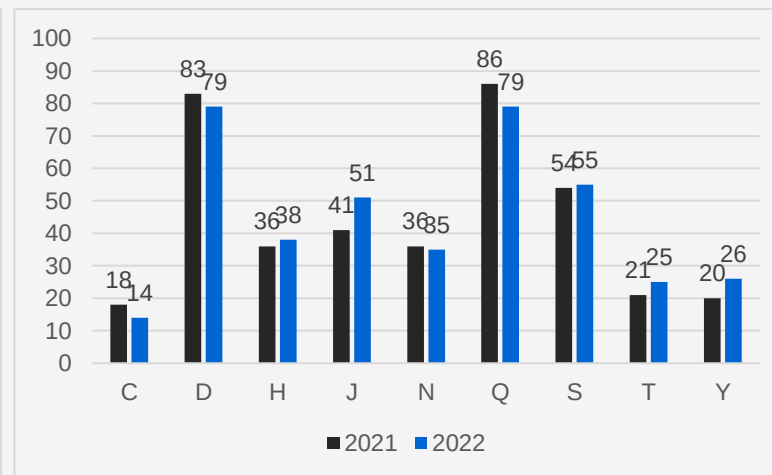
The commercial penetration rate of Hongcun scenic area reached 64.52%, slightly higher than 2021 and slightly lower than 2019, with South Lake, Qianjie and Tingqian having relatively higher commercialization.



Distribution of Hongcun business in 2022



Hongcun business type and characteristics



Number of shops in Hongcun in 2021 and 2022

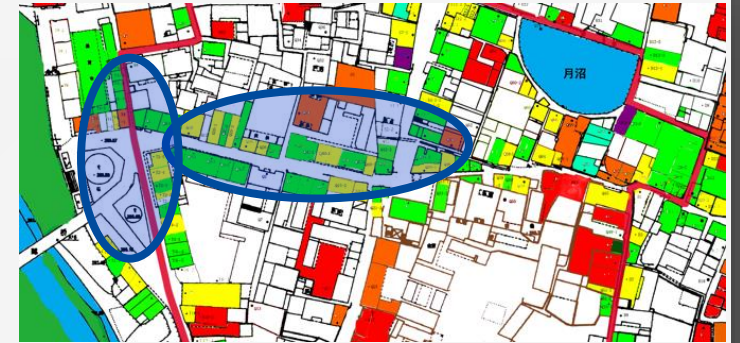
5.2 Venders in Hongcun

During the daytime, about 20 mobile vendors in Hongcun appear in front of the pavilion, the front street, the moon swamp, the south lake and the vicinity of the upper canal, and the rest of the streets are also sporadically distributed by them; while at night, about 80 mobile vendors concentrate in front of the pavilion and the front street since 5:30 pm.

The overall characteristics of mobile vendors: concentrated operating hours and locations, stall owners are mainly local people in Hongcun and neighboring residents; long operating hours, and unpromising operating conditions.

According to the level of mobility, vendors can be classified as fully mobile, semi-mobile and fixed. The three types of mobile vendors have their own characteristics in terms of business contents, operation methods, operation pressure and operation focus.

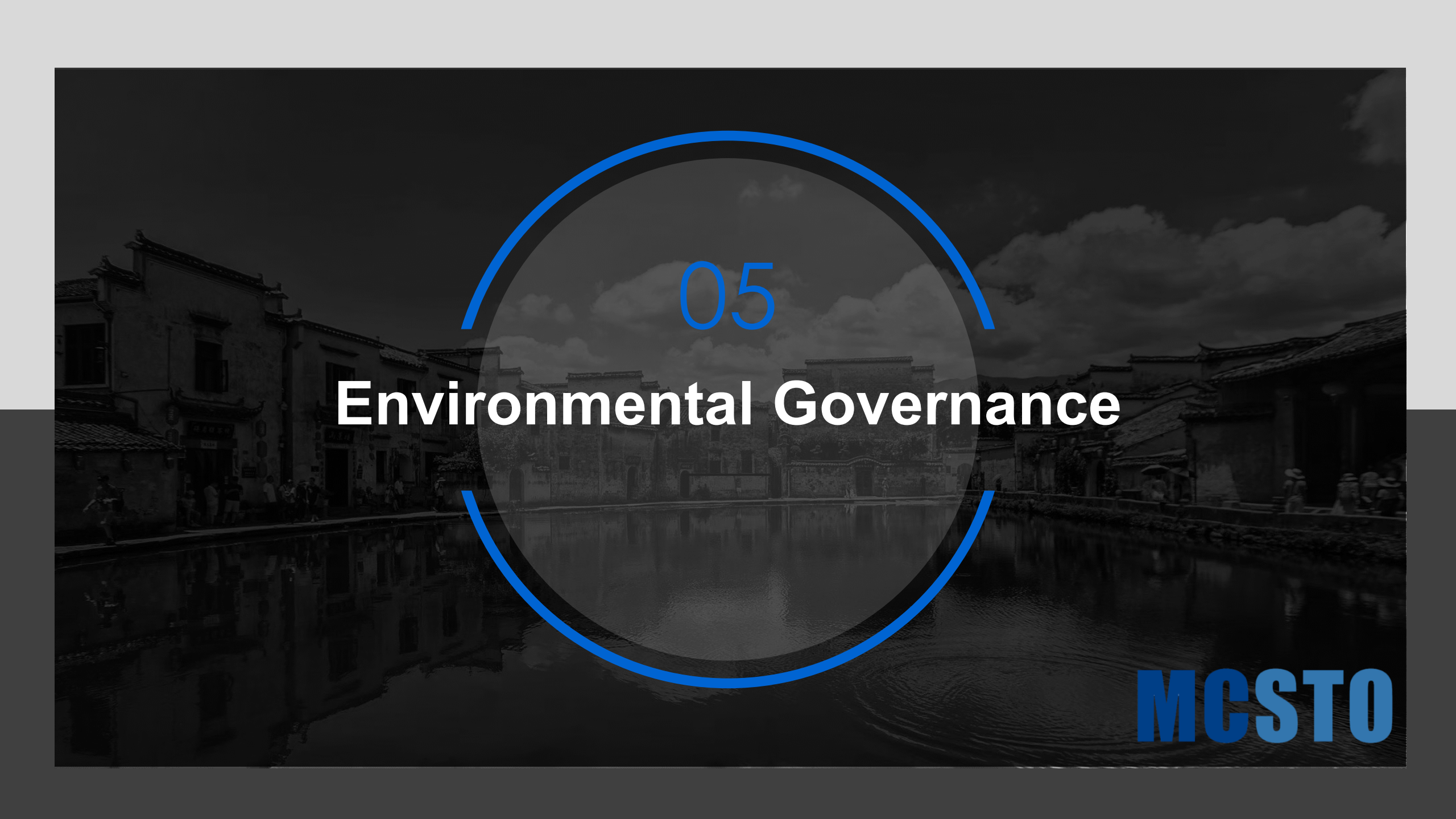
The impact of commercialization of mobile vendors: enrich the consumption scene at night; show the characteristics of Hongcun; the balance between normal order and the livelihood of operators; add new content to the management of Hongcun.



Areas of concentrated vendors

Type	Specific meaning
Fully mobile	Fully mobile vendors do not have shops so they have to move within and around Hongcun
Semi-mobile	Semi mobile vendors either have shops or live in Hongcun; their stalls are not always fixed
Fixed	Vendors have their shops or work outside their house, with no change in business location

Information Profile of Vendors



05

Environmental Governance

MCSTO

Environmental Governance

Sewage Treatment

The dry areas are reduced, and the collection of pigment water is effective, but the water pollution still exists.



Air Quality

The air pollution control is effective. From November 4, 2021 to July 17, 2022, the air quality rate reached 99.6%.

时间	SO2(μg/m3)	NO2(μg/m3)	CO(mg/m3)	O3_8H(μg/m3)	PM10(μg/m3)	PM2.5(μg/m3)	AQI	类别	首要污染物
2022-07-13	9	6	0.5	108	25	15	57	良	O3_8H
2022-07-14	9	6	0.6	106	28	18	55	良	O3_8H
2022-07-15	10	7	0.6	114	34	20	62	良	O3_8H
2022-07-16	10	7	0.6	114	34	22	62	良	O3_8H
2022-07-17	10	8	0.6	73	26	15	37	优	-

Report on daily average value of air quality monitoring in Yi county from July 13 to July 17, 2022

Environmental Governance

Sound Environment

Noise pollution exists and is prominent at night.



traffic noise



Social life noise



Construction noise

Distribution Pattern

Time:

the highest decibel level is produced at day time.

Space:

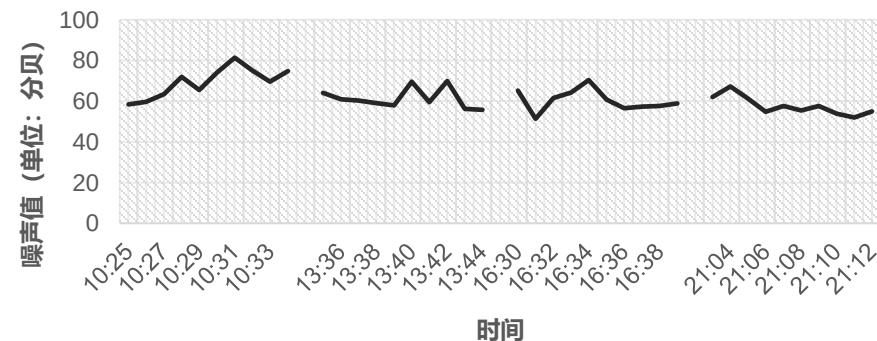
Due to different zone functions, the noise pollution at places where tourists concentrate is the most serious.

Solid Waste

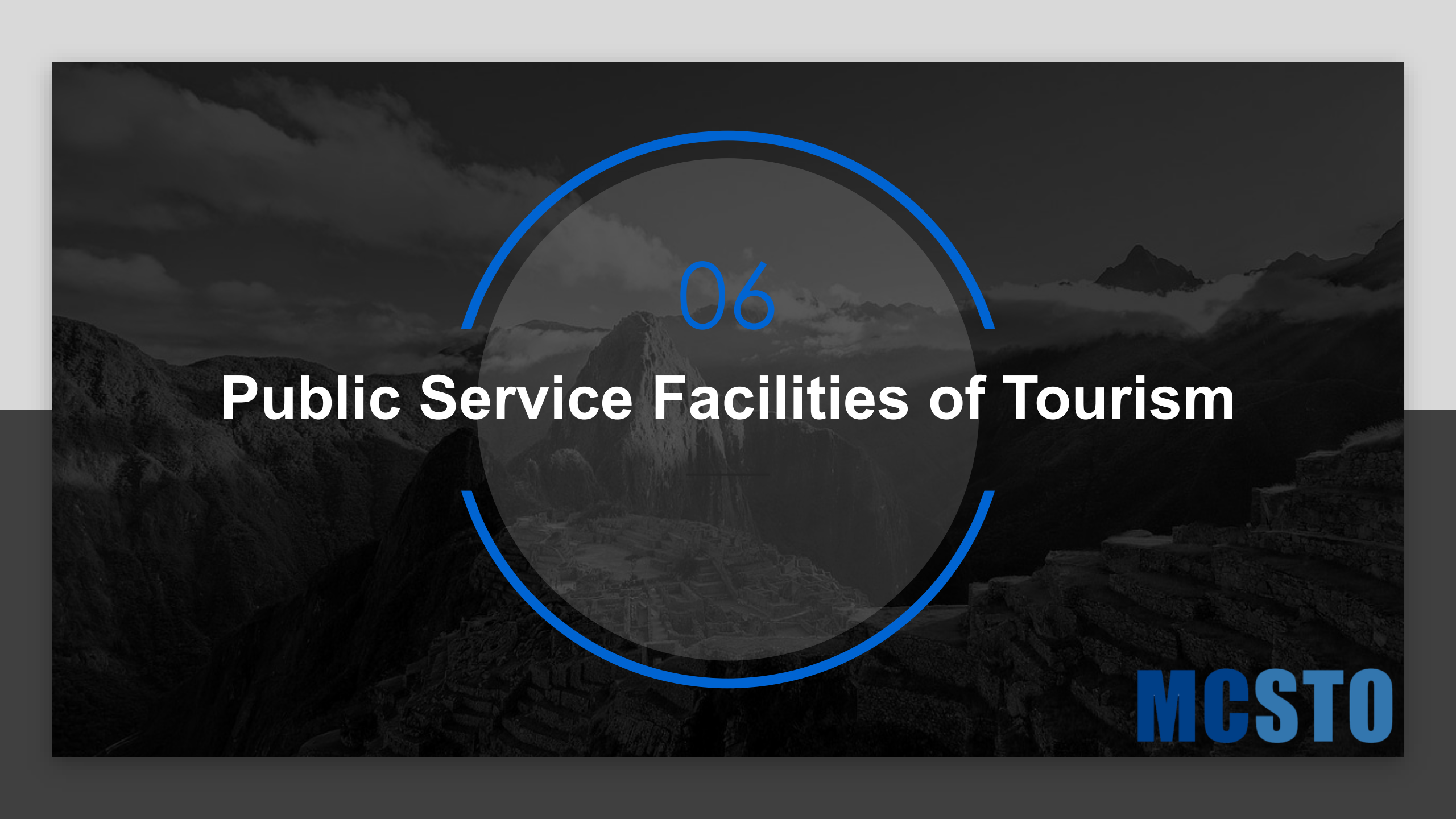
The amount of garbage discarded on the street increases, causing secondary pollution.

The garbage bins and garbage collection timing are not located and set properly.

The treatment of pigment waste is effective.



Noise monitoring beside big trees at the village entrance



06

Public Service Facilities of Tourism

MCSTO

Sewer Pipeline Construction

By the time of monitoring this year, the main pipeline laying had covered more than 80% of the area around Hongcun including the core scenic area.

Later, when the construction encountered the problem of ancient tree protection, it was impossible to continue the original plan. The project had to be adjusted.

When the flooding period occurred, the project could not be carried out, so it is currently in a stagnant state.



Newly built sewage pipe manhole cover

Signage System

Advantages

- The type and quantity of the signage system are complete and the spatial distribution is reasonable.
- The design of the signage system harmonizes with the ancient village landscape of Hongcun.
- More than 90% of the signs are printed in Chinese and English or even in Japanese and Korean, with good translation quality errors and semantic correctness.



Signage System

Disadvantages:

- Some signs have moldy outer frames and blached layout due to their long service life, which affects the overall appearance and needs to be updated and replaced.
- The text pattern of the panoramic signs in the scenic area is too small, while some of the panoramic signs have a large area of scratches, resulting in missing content.
- The current signage system has a low degree of digitization and cannot meet the comprehensive needs of visitors who inquire and manage information



Garbage Collection Facilities

Measure

- The number of large garbage cans in residential areas has decreased, and that in tourist areas also decreased; paint collection tanks increase
- Garbage recycling turns to PPP mode; implement marketization of cleaning
- Garbage transfer follows the recycling path of "household collection, village transfer and county treatment", and garbage is collected twice a day at door.

Problems

- Garbage sorting is not strictly implemented
- The distribution of garbage bins is unreasonable: bins are densely located at the areas that are not crowded with people



Different kinds of garbage bins in Hongcun

Public Service Facilities of Tourism

Public Toilets



- Public toilets in Hongcun scenic spot are relatively scarce. Besides the three public toilets located in the parking lot and the ticket gate, there are only two public toilets inside the Hongcun scenic area. One is far from the main route and located on the second floor of the building, while the other is inside Chengzhi Hall.
- The main problem is about guidance of the two public toilets. The guidance and service signs pointing to the public toilets in Hongcun are problematic: the color and location are not eye-catching enough and the pattern signs are missing; no sign indicates that there is a public toilet built inside Chengzhi Hall except for the panoramic sign.



Two public toilets inside Hongcun

Public Service Facilities of Tourism

Medical Facilities



- 1 primary medical clinic with backward facilities and remote location
- 1 town-level health center, which also serves as the Hongcun Red Cross Relief Center, located in Jicun, outside the scenic area
- 1 emergency medical point, located at the South Gate ticket gate
- 3 medicine boxes, located at the visitor center at the west gate and south gate, and the tourist service point of South Lake School.



Medical stations in Hongcun

Firefighting Facilities

- Hongcun divides the scenic area into several fire prevention areas, and each area is equipped with a firefighting water intake to facilitate the firefighting problem to be solved by taking water nearby.
- Hongcun has established an intelligent fire protection system, which integrates the fire alarm system, electrical fire system and other systems, and is able to detect the fire protection condition of each household and make timely response.
- The fire module box in the village is one of the whole fire protection system component equipment, which integrates the fire module, and also has the function of wire connection between each equipment.



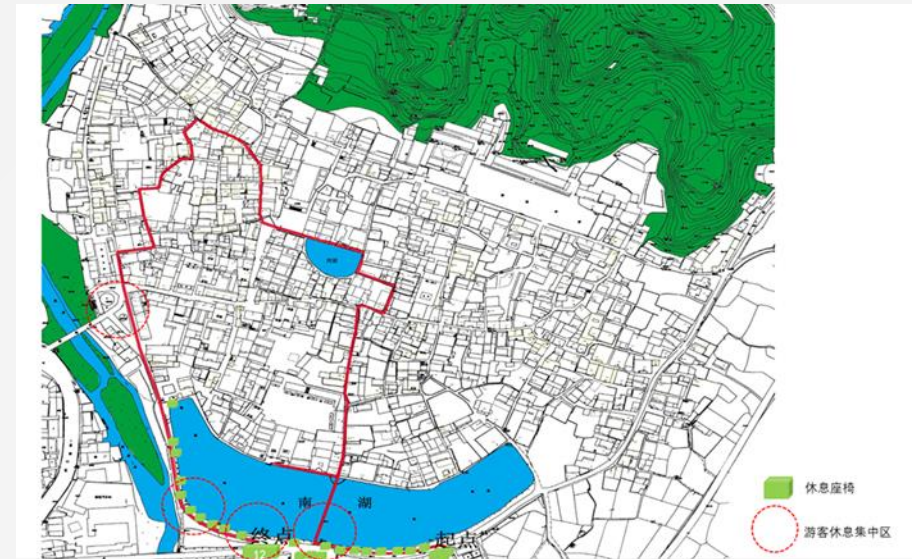
Fire-fighting water intake



Fire-fighting module box

Public Seat

- There is an obvious concentration effect in the distribution of public seats. Tourists rest under the big trees at the entrance of the village and on the south bank of the South Lake, at the two ends of the tourist route.
- There are almost no rest facilities in the middle section of the tourist route. Only a small number of seats in the hall of Chengzhi Hall are there for tourists to rest.
- The stone chairs in the village committee square are far from the main tourist routes, so few tourists rest here.
- The number of stone chairs on the south bank of South Lake has grown significantly.



Distribution of rest facilities in Hongcun

Tourist Center

- Hongcun has two tourist centers at the ticket office of the west gate and the south gate respectively, equipped with special service staff to provide services such as information and consultation, drinking water, rest, charging and medicine box. The scale and facilities of the South Gate Visitor Center are not as good as the West Gate Visitor Center which is also a waiting room.
- The tourist center actually plays a limited role. Few tourists go there and many don't even know where it is.



South Gate Tourist Center



07

New Business Forms of Tourism

MCSTO

The concept and general situation of new tourism business in Hongcun

The Concept of New Business Form of Tourism

Compared with traditional tourism industry, it has new breakthrough, and even transcends the previous mode. It can achieve sustainable growth and reach a certain scale, becoming a relatively stable development trend of the business model.

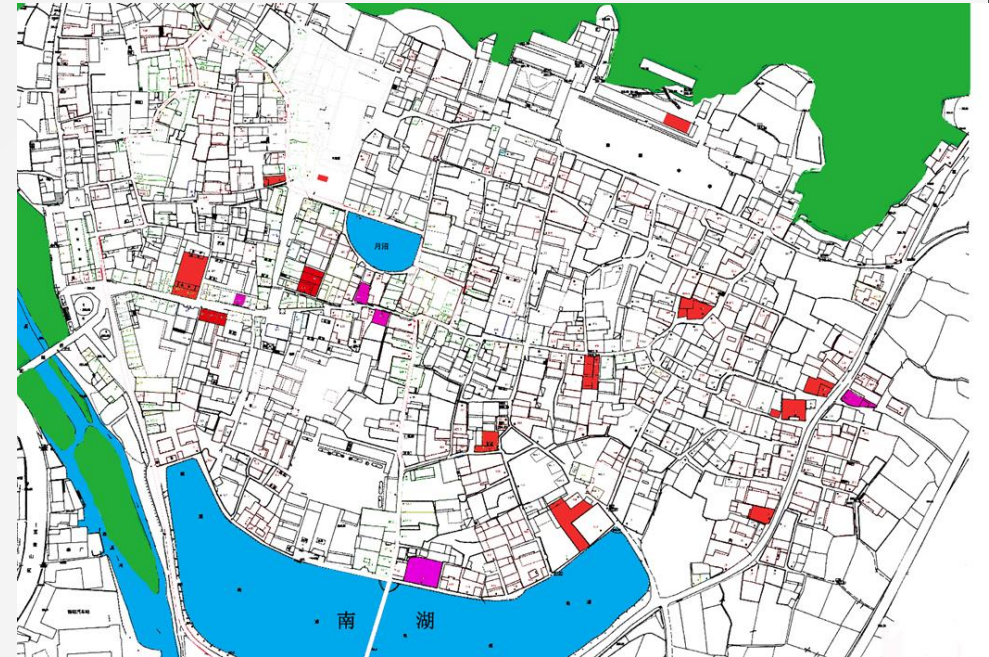
New Tourism Business in Hongcun

Transformation of the traditional B&B industry into a "B&B+" model; the ability to make a profit or have other sustainable business models; the formation of new tourism products, business methods and organizational forms.

The general situation of new tourism businesses in Hongcun

Spatial distribution: concentrate in the hot zone and scatter in the cold zone;

Type characteristics (quantitatively): tourism product > business method > organizational form.



New business forms of tourism products

B&B as side business

Enrich the travel experience
Of tourists



Unique products

Out of the hobbies and
Interest of business
runners



Diversification of local specialties

Based on exhibition and display



Characteristics of new business trend and Discussion

Characteristics of new business trend

Business runners

Enhance the attribute of products as experience,
Emphasize online marketing,
Diversification and personalization

Companies in scenic spots

Multi-channel online promotion,
Enhance the production function of tourism,
product Rejuvenation and vitality

Discussion

The possibility of popularizing new business

It is difficult to replicate new and distinctive,
The operation methods will be widely imitated,
The cooperation between scenic companies and individual,
merchants of handicrafts are strengthened

Actions that can be taken

Scenic companies should strengthen cooperation with high-quality merchants and improve festival management,
Responsible departments should strengthen skill training of merchants

2022

Thanks for your attention!

Yi County Culture, Tourism and Sports Bureau
Monitoring Centre for UNWTO Sustainable Tourism

2022.11.

MCSTO