中國西部的旅遊業發展
Tourism development in western China

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來自中國西部的高層旅遊管理人員論述該地區旅遊發展的方方面面。

Senior administrators from western China discussed various aspects of its tourism development.

中國西部旅遊發展研討班

香港培華教育基金會與香港中文大學酒店及旅遊管理學院攜手合作，於二零一二年十二月十一日至十八日在中大舉辦了第五期「中國西部旅遊發展研討班」，這是過去五年內雙方第三度合辦研討班。研討班由酒店及旅遊管理學院的教授與講師負責教學，結合了理論教學、實地參觀考察、專家論壇、業界經驗分享、小組討論、專題研究等形式，涉及行銷、策略、房地產財務、資訊科技、人力資源管理等一系列課程。

第五期研討班的三十餘名學員來自雲南、湖南、廣西、貴州、四川、甘肅、西藏、寧夏、內蒙古及其他西部省份，既有主管當地旅遊開發的政府官員，旅遊相關行業協會的負責人，也有旅行社、酒店等旅遊企業的經理，在旅遊業的平均工作年資為八年(最長二十年)，百分之六十以上擁有大學或碩士學歷。由此可見，這班學員是具有相當從業經驗的管理者。

中國西部旅遊業分析

研討班課程包括一個討論環節，學員要對各自主管的地區做「優勢・劣勢・機遇・挑戰」(SWOT)分析。分析結果可概述如下：

機遇：學員一致認為，以政策環境而論，中國旅遊業目前處於最好的發展時機。從中央到地方政府都對旅遊業非常重視，並給予各項政策優惠。西部地區的交通設施近年來逐漸完善，為旅遊業帶來發展機遇。旅遊產業在中國是方興未艾的產業，旅遊也正在對中國人的生活方式發生重大影響，國民對旅遊產品的需求不斷提高。這些外在環境因素都

Training for western China's administrators

The fifth West China Tourism Development Executive Training Programme, jointly organised by the Hong Kong Pei Hua Education Foundation and the School of Hotel and Tourism Management (SHTM) of The Chinese University of Hong Kong (CUHK), was held during 11-18 December 2012 on CUHK campus. This was the third time in the past five years Pei Hua and the SHTM had cooperated to offer the programme. The SHTM professors and lecturers taught a series of courses related to marketing, strategic planning, real estate finance, information technology and human resource management. The courses were designed to include various activities ranging from lectures, field trips, discussion forums and industry executive presentations, to group sharing and projects.

The 30 or so participants of the latest training programme came from Yunnan, Hunan, Guangxi, Guizhou, Sichuan, Gansu, Tibet, Ningxia, Inner Mongolia and other provinces in western China. On average, the participants had eight years' work experience in the tourism industry (with the longest being 20 years) and over 60% of them had bachelor's or master's degrees. While some participants were senior government officials in charge of local tourism planning and development, others were directors of trade associations and managers of tourism-related enterprises such as travel agencies and hotels. From this profile, it can be said that they were fairly experienced administrators of the tourism industry.

Analysis of tourism in western China

The training programme included a discussion forum, during which the participants conducted a SWOT analysis to evaluate the Strengths, Weaknesses, Opportunities and Threats facing the areas under their supervision. The following is a summary of their analysis:

Opportunities: The participants all agreed that given the overall policy environment, tourism development on the mainland was at its best currently. Much importance was attached to tourism at central and local government levels, with various policy privileges on offer. The tourism industry in western China had benefited from gradual improvement in its infrastructure in recent years. A burgeoning industry in China, tourism was now having significant impacts on the lifestyle of the Chinese, who were demanding better travel products with greater vari-

對旅遊業非常有利。

挑戰：最大挑戰在於投入不足。無論是政府投資還是招商引資都不足夠，導致旅遊景區規劃不周，景點開發深度不夠，內容不夠豐富。旅遊產業發展的關聯不足，市場秩序不規範，整體服務水平不高。景點之間的競爭激烈，不僅損害遊客權益，也有礙旅遊企業的生存發展。此外，很多學員還提到交通基礎建設改善後利弊相生的問題。例如，在湖南一些地區，公路鐵路交通改善反而可能使當地變成「過路城市」而已，對當地旅遊發展產生意料之外的負面影響。青藏鐵路雖然令更多遊客可以去西藏旅行，卻也對生態環境與民族文化帶來負面影響。**如何在發展旅遊之餘仍保持可持續發展，這是中國西部面臨的最大挑戰。**

除了討論環節，酒店及旅遊管理學院也對學員進行了一項問卷調查。表一總結了學員對影響內地旅遊業經營環境的不同因素的看法，以李克特六點量表衡量，可視為對上述討論結果的進一步補充。例如，技術革新被視為影響旅遊業的最大因素，而需求增長與產品設計革新則緊隨其後。結果也顯示資金短缺仍然是一個很大的限制因素。

優勢：學員普遍認為，西部最大的優勢在於旅遊資源，不僅有得天獨厚的景觀與歷史文化遺產，

eties. All these external factors contributed favourably to tourism.

Threats: **The greatest threat was insufficient investment, regardless of whether it came from government or private sources. As a result, scenic areas were poorly planned, and tourist attractions were neither fully developed nor rich in content.** Developments in tourism-related industries were fragmented. Market rules were lacking and service standards were generally low. Competition between tourist attractions was so fierce that not only were the interests of tourists harmed, the survival of tourism businesses was also at stake. Many participants also mentioned that improvement in the transport infrastructure was a double-edged sword. For instance, better highway and railway connections in some areas in Hunan province might have turned these areas into mere "en-route towns", and hence generating unexpected negative effects on local tourism development. Whereas the Qinghai-Tibet railway had brought more travellers to Tibet, the ecology and ethnic culture of the area were negatively impacted. **The most challenging task confronting western China was to strike a balance between tourism development and environmental sustainability.**

In addition to the discussion forum, a questionnaire survey was also conducted by the SHTM. As a supplement to the above descriptions, Table 1 summarises the participants' responses (measured on a six-point Likert-type scale) to the questions regarding the factors influencing China's tourism industry. For example, the factor deemed to have the greatest impact on tourism was technological innovations, followed by increases in demand and innovative product design. The results also showed that capital shortages continued to be a substantial constraint.

Strengths: The participants generally believed that the major strength of western China lay in its natural and cultural tourism resources – not only did it abound in magnificent scenery and historical and cultural relics, it also boasted a unique ambience full of ethnic features.

表一：學員對旅遊業經營環境的看法
Table 1: Participants' views on the business environment of tourism

	平均值 Average	標準差 Standard deviation
通訊、電腦、資訊科技對旅遊業的影響很大 Communication, computer and information technologies have great impact on the tourism industry	5.52	0.71
對本地區旅遊產品和服務的需求正在持續增長 The demand for local tourism products and services is on the rise	5.16	0.90
必須不斷改變旅遊產品設計，以跟上競爭對手的步伐 There is a constant need to change tourism product design in order not to be outpaced by rivals	4.76	1.56
預計本地區旅遊企業收益會持續增長 Revenues from local tourism businesses are expected to grow continuously	4.71	1.12
我所在地區的旅遊市場投資盈利機會很多 The tourism market of my region offers plenty of profitable investment opportunities	4.48	1.08
本地區旅遊業生存發展較少受到外來威脅的影響 The survival of local tourism is relatively free from outside threats	3.40	1.53
發展擴張本地旅遊業所需資源很容易取得 The resources for development and expansion of local tourism are easily accessible	3.32	1.31
旅遊產品和服務很快就會過時被淘汰 Tourism products and services become obsolete and out of fashion quickly	3.24	1.56
競爭對手的策略行動很難預測 Strategic actions of rivals are difficult to predict	3.20	1.47
本地區可獲得充裕資金支持發展旅遊業 My region can obtain plenty of capital to develop tourism	3.20	1.44

1 = 極不贊成 strongly disagree；6 = 非常贊成 strongly agree

還有獨特的民族風情，自然、人文資源都很豐富。

劣勢：相較於對資源優勢的共同認知，學員對本地區、部門的劣勢分析呈現出更多層面。總括而言，弱點包括幾個方面。一、缺「人」：專業管理人才不夠，服務水平相對不高，與遊客日益提高的要求之間差距很大。二、缺「錢」：資金不足，在建設景點、改善基礎設施及配套設施等方面都心有餘而力不足。三、缺「理念」：**在景區開發方面缺少策略規劃與跨部門、跨行業合作，導致重複開發，惡性競爭。此外，本地旅遊企業普遍欠缺整體營銷觀念和品牌意識，導致產品同質而欠特色，未能充份利用各種宣傳管道。**

與上述討論結果一致，表二概括了學員對挑戰和劣勢因素的評估。人才缺乏被視為最大的挑戰，設施缺乏與資金缺乏則緊隨其後。

Weaknesses: Contrary to the consensus on the strength of tourism resources, diverse views were revealed in the participants' analysis of the weaknesses of their districts or areas. The weaknesses, in sum, involved several aspects. First, a lack of "people": With professional managers in short supply and relatively low service quality, there was a wide gap between the services delivered and the ever-rising demands. Second, a lack of "money": The shortfall in capital made it difficult to implement plans for developing tourist attractions and improving tourism infrastructure and supporting facilities. Third, a lack of "acumen": **Insufficient planning and poor cooperation across government departments and industries led to redundant development projects and ruthless competition. Besides, local tourism businesses generally suffered from a lack of expertise in integrated marketing and branding, which resulted in homogeneous, lacklustre products and ineffectiveness in using diverse marketing channels.**

In line with the conclusions of the discussion, Table 2 summarises the participants' assessments of the threats and weaknesses. A lack of talent topped the list, with a lack of facilities and a lack of capital ranked second and third.

表二：學員對挑戰和劣勢因素的認知
Table 2: Participants' perception of threats and weaknesses

	平均值 Average	標準差 Standard deviation
人才缺乏 A lack of talent	4.83	1.37
基礎及配套設施缺乏 A lack of infrastructure and supporting facilities	4.67	1.34
資金缺乏 A lack of capital	4.60	1.39
產品品質和創意方面的競爭激烈 Intense competition concerning the quality and creativity of products	4.38	1.10
旅遊產品和服務的價格競爭激烈 Intense competition concerning the price of tourism products and services	4.08	1.44
政府干預過大 Excessive government intervention	4.04	1.57
旅遊市場萎縮，客源缺乏 A dwindling market and declining tourist numbers	3.50	1.56
政府支持不足 Insufficient government support	1.37	1.47

1 = 該要素不構成威脅 the factor does not constitute a threat；6 = 很大威脅 the factor constitutes a serious threat

對香港的印象與建議

學員在香港學習一週，對香港旅遊業創造環環相扣的消費鏈的能力最是讚嘆。例如香港賽馬會集合不同行業商家，為顧客提供美食、娛樂等一系列服務。大嶼山、山頂、海洋公園都是消費鏈效應的成功案例。相比之下，內地的文化旅遊項目往往以過於簡單的模式經營，只靠門票收益，而缺少增值產品。**內地旅遊企業似乎更重資源導向，而香港則更加重視市場和顧客導向，因而在產品開發、顧客心理與行為研究、服務品質方面具有更大的優勢。**

研討班學員與香港旅遊發展局的管理團隊會面

Impressions of Hong Kong and recommendations

After a week in Hong Kong, the participants were most impressed with the ability of Hong Kong's tourism industry to create a closely linked "consumption chain". For example, the Hong Kong Jockey Club provided a venue for business people of different industries to mingle with one another, with a whole range of services on offer such as fine dining and entertainment. Lantau Island, the Peak and Ocean Park were also successful examples of such chain effects. In comparison, cultural tourism attractions in mainland China were often operated under an oversimplified business model, generating revenues only through ticket sales and offering customers few value-added products. **It appeared that tourism businesses in mainland China focused more on tourism resources whereas**

時，提出了很多問題，主要集中在幾個方面：(一)香港政府在推動旅遊業中的作用，政府相關部門的角色分工及權責關係；(二)香港旅遊發展局的任務、組織構架、資金來源，與民間企業的關係；(三)香港「優質旅遊服務」計劃認證制度如何建立和運作；(四)香港如何處理遊客投訴，各部門如何協調跟進；(五)危機處理策略，尤其是如何處理與媒體的關係。

學員對香港旅遊業的服務品質與專業管理留下了深刻印象。與此同時，他們也認為香港與內地在某些方面的差異正在縮小。有學員認為，香港自豪的美麗夜景與都會特色，現在一些內地大城市也可以找到。此外，香港購物天堂的形象似乎也需要重新定位。在如何增強旅遊業創新能力的討論中，有學員提出，隨著內地商業的發展和繁榮，香港的傳統購物優勢將逐步減弱，失去競爭力。新的旅遊產品(如金融旅遊)同樣符合香港的資源實力，而且切實可行，應該是值得探討的旅遊創新課題。

香港未來的作用

學員不僅熱心學習香港經驗，更對香港充滿期待，希望香港能夠對中國西部旅遊發展起到更大的推動作用。具體而言，學員認為香港正由商貿金融中心轉型為亞太地區的旅遊樞紐，希望香港旅遊業界能夠多瞭解中國西部，增加對西部的投資。**學員也希望香港與西部加強聯繫，將種種旅遊產品推薦給香港遊客和經由香港前往內地旅行的外國遊客。**學員還期待能有更多內地二線城市與香港之間的旅遊合作，設計更靈活的多點旅遊路線，使西部旅遊產品多彩多姿。

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their Hong Kong counterparts were more market- and customer-oriented. Therefore, Hong Kong enjoyed greater advantages in new product development, customer psychology and behaviour research, and service quality.

When meeting the management team of the Hong Kong Tourism Board (HKTB), the participants of the training programme raised many questions, especially in these aspects: (1) the functions of the Hong Kong Government in promoting tourism, and the roles and responsibilities of the relevant government departments; (2) the duties, structure and sources of funding of the HKTB, and its relations with businesses in the private sector; (3) how the Quality Tourism Services Scheme was set up and run; (4) how tourist complaints were handled in Hong Kong, and how different government departments were coordinated; and (5) strategies of crisis management, in particular the way of dealing with the media.

While the participants were impressed by the service quality and professional management of Hong Kong's tourism industry, they pointed out that the gap between Hong Kong and the mainland was narrowing. Some participants remarked that the spectacular night scenes and cosmopolitan aura, which Hong Kong was so proud of, could also be found in some big cities in mainland China. Besides, there appeared to be a need for a repositioning of Hong Kong's image as a shoppers' paradise. When discussing ways to foster innovation in tourism, some participants warned that as the mainland continued to grow and prosper, Hong Kong would gradually lose its long-held competitive advantage as a premium place for shopping. New tourism products (such as financial tourism), which could tap into Hong Kong's strengths and were also viable, should be a topic of tourism innovation worth exploring.

Future role of Hong Kong

Apart from being enthused about learning from Hong Kong, the participants also expressed an ardent wish that Hong Kong could provide tourism development in western China with greater momentum by, specifically, having a better understanding of the region and channelling more investment to it as Hong Kong was undergoing the transition from a commercial and financial centre to a tourism hub of the Asia-Pacific region. **The participants also hoped that Hong Kong would establish close ties with the western region, and recommend diverse tourism products to different types of travellers from Hong Kong and tourists from overseas heading for China via Hong Kong.** They also expected that more second-tier mainland cities would cooperate with Hong Kong to design flexible multi-destination itineraries aimed at raising tourism product diversity in the western region.

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