

会展节事与城市旅游

国际旅游学会第二届双年会论文集

MEGA EVENTS & URBAN TOURISM

Proceedings of the 2nd ITSA Bi-annual Conference

吴必虎 党 宁 等主编

中国旅游出版社

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前 言

2008年北京奥运会和2010年上海世博会，两大世界级节事活动将全世界的目光锁定在中国。为了充分探讨全球化背景下大型会展节事活动对旅游业以及经济、社会、文化等方面的影响，特别是对都市旅游发展的动态影响，促进节事旅游、都市旅游在中国乃至全世界的发展，国际旅游学会（ITSA）第二届双年会“会展节事与都市旅游国际研讨会”于2008年11月在上海召开。会议选择在“奥运后、世博前”这一特殊时期和世博会举办城市上海举办，本身，具有深远的意义。

这次会议是继2006年“新亚洲改变世界旅游”国际研讨会之后的ITSA第二次国际会议。作为由学界、政界、业界等各种旅游利益主体代表共同参与研讨的全球旅游盛会，此次“会展节事与都市旅游”会议，不仅对世界及中国会展节事活动实践经验的提炼和理论研究水平的提高产生积极影响，而且也有利于促进都市旅游的健康持续发展。同时，通过国内外旅游及会展专业教学科研单位及个人的交流，将极大促进我国旅游与会展学科的国际化进程。

会议由国际旅游学会（ITSA）、华东师范大学、上海师范大学、美国南卡莱罗纳大学（University of South Carolina）、英国谢菲尔德哈勒姆大学（Sheffield Hallam University）及美国乔治华盛顿大学（George Washington University）国内外6所大学、学会共同主办，由北京大学旅游研究与规划中心、香港理工大学（The Hong Kong Polytechnic University）、同济大学、中南林业科技大学、亚太旅游协会（PATA）、旅游学刊、凤凰古城、旅研网、大地风景旅游咨询集团等9家单位共同协办。来自中国大陆、港澳台地区、美国、加拿大、英国、葡萄牙、比利时、意大利、波兰、匈牙利、芬兰、新西兰、南非、韩国、泰国、马来西亚等近20个国家和地区的约150多名代表参加了此次会议。

采用英文和主办地当地官方语言是国际旅游学会年会的特色。本届会议以中文和英文为工作语言，大会议题涉及领域广泛，包括会展策划与管理、北京2008奥运会和旅游、上海世界博览会与都市旅游、会展与旅游教育、旅游可持续发展等14个分议题，与会代表以小组研讨的形式进行了广泛的交流与讨论，提供了一系列创新观点，形成了一批具有实践意义的对策方案。会议组委会经过精心筛选，将其中的58篇论文（其中23篇英文论文、35篇中文论文）按照主题重新编辑集结成册，以飨读者。限于时间关系，文集中可能还存在一些缺憾之处，另外论文署名以作者提交的论文为准，未能一一核对及翻译。

北京大学旅游研究与规划中心主任、国际旅游学会秘书长
吴必虎

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第一部分 奥运会与世博会

Part 1 Olympic and World Expo

SPORT, TOURISM and the OLYMPIC GAMES: LEVERAGING OLYMPIC TOURISM

Mike Weed
Director, Centre for Sport, Physical Education & Activity Research (SPEAR)
Canterbury Christ Church University, UK.

INTRODUCTION

The aim of this paper is to examine the ways in which tourism associated with the Olympic Games might be most effectively leveraged. Such strategies for effective leveraging fall into two groups: those aimed at directly leveraging opportunities to stimulate Olympic tourism trips, and those aimed at leveraging Olympic-related media coverage to raise awareness of the host city as a tourism destination. These groups of strategies are summarised in the table below:

Strategies for Leveraging Olympic Tourism	
Leveraging Opportunities to Stimulate Olympic Tourism Trips	Leveraging Olympic-related Media Coverage to Raise Awareness of the Host City as a Tourism Destination
<i>Entice Olympic Tourism Spending</i> <i>Retain Local Resident Spending</i> <i>Lengthen Olympic-Related Visits</i> <i>Maximise Olympic-Related Visits</i>	<i>Benefit from Olympic-Related Reporting and Event Coverage</i> <i>Use of Olympics in Host Destination Advertising and Promotion</i>

The paper is therefore divided into two main sections, the first of which examines the leveraging of Olympic tourism trips, and the second of which examines the leveraging of Olympic-media.

LEVERAGING OPPORTUNITIES TO STIMULATE OLYMPIC TOURISM TRIPS

The strategic objective for leveraging Olympic tourism opportunities is, simply, to optimise Olympic-related tourism benefits. While this obviously includes strategies to maximise the numbers, lengths of stays and spending of Olympic-related visitors, it also comprises strategies to minimise the potential negative impacts of those wishing to ‘escape’ Olympic-related activities (aversion markets).

Leveraging strategies may be macro strategies employed by destination wide agencies, such as marketing consortia, tourist boards or the public sector or, indeed, partnerships of such agencies. However, at the micro level, individual businesses or small groups of businesses can consider leveraging strategies that might maximise the benefits of the Olympics for such businesses. An example of the former might be a decision to host an Olympic festival of arts and entertainment in the pre-Games period, whereas an example of the latter might be a decision made by an individual restaurant to have an “Olympic Menu” or by a group of businesses in the same street to get together to develop a coherent Olympic-related theme for their business precinct (cf, Chalip & Leyns, 2002)

Strategies for Leveraging Olympic Tourism in the Pre-Games Period

In the pre-Games period strategies should focus on enticing Olympic tourism spending and on maximising Olympic-related visits. In the Olympic host city, strategies for maximising

Olympic-related visits in the pre-Games period should focus on sports-related themes linked to the Olympic Games. Specifically, Olympic host cities need to consider the types of sports-themed provision they might make to attract Olympic tourists in the pre-Games period and what their particular target markets might be. Key products are likely to be both sporting events and sports participation activities. While it might be expected that an important part of provision for an Olympic host city might be tourism linked to sports training camps, previous experience has shown that Olympic-related training camps in the years running up to the Games are more likely to take place in regions adjacent to the host city than they are in the host city itself.

The key attractions of an Olympic host city in the pre-Games period are the places in which the Games themselves will take place, as Olympic tourists may wish to take part in activities in future Olympic facilities. Here the importance of vicarious participation becomes important, as participants can make an imagined journey to the Games themselves and put themselves in the places of their favourite athletes competing in the Olympic arena. As such, it is not just the opportunity to use Olympic facilities that is important in making provision in this area, but the opportunity to see places that will become Olympic sites. As such, key parts of provision can be festivals of sport in and around the Olympic arenas, with opportunities to use those facilities that have been constructed, and opportunities to see the way that those facilities yet to be constructed will look. Easily accessible plans, and computer generated imagery of such facilities are an important part of this type of provision, as are such things as ‘Countdown to the Games’ boards and lists and sets of images of sports people who have visited the site. Status and prestige motivators (Weed & Bull, 2009) should not be overlooked in this respect, as those who have visited Games facilities and sites in the pre-Games period will enjoy telling their friends and associates as they watch the Games (either live at the events, or mediated back home) about the construction miracles that have taken place, or that “I’ve been there!”.

Many of the opportunities for pre-Games participation at Olympic sites and facilities may be through fairly low level or informal events. However, other opportunities may be more formal, with pre-Games Olympic tourists wishing to run the Olympic marathon course, for example, and such behaviours are likely to be motivated by similar status and prestige factors as discussed above. At the more elite end of the spectrum, events at Olympic facilities in the years approaching an Olympic Games are likely to attract a significant number of very high level international athletes, who will want to be familiar with the Olympic facilities. A key factor for Olympic athletes is to feel ‘at home’ during an Olympic Games, and such a feeling is more likely to be engendered if they have competed at Olympic facilities before they compete in the Games themselves. In addition, the opportunity to spectate at what will essentially be Olympic warm-up events in the few years before the Games will be a particularly attractive one for sports enthusiasts, especially as they will know that the competitors at such events will often include the top athletes in the world. As such, a key strategy in maximising Olympic-related visits for the host city will be to consider what opportunities exist to host events. This is likely to include close partnerships between public sector bodies, commercial sector providers or facility managers, and national governing bodies of sport (Weed, 2008) to ensure that maximum benefit is achieved and that the full range of opportunities for event hosting are fully exploited.

In maximising Olympic-related visits in the pre-Games period, a host city should ensure that there is an ongoing series of events and attractions that will appeal to potential Olympic tourists that might encourage them to take a break in the host city in the pre-Games period, rather than a tourist trip to another destination. As such, the forthcoming Olympics should be seen as an opportunity to add value to a host city’s tourist offer. Therefore, along with the types of provision discussed above, efforts should also be made to ensure that the Olympic theme is carried into other aspects of the city’s tourist product. Examples might include special exhibitions on Olympic history in the city’s museums or displays of Olympic-related art in local galleries. Of course, such provision is only part of the leveraging process, leveraging Olympic media to fully market and promote Olympic tourism in the pre-Games period is a further key activity, and this is discussed later in the paper.

In order to entice Olympic tourism spending, leveraging strategies should be aimed at affecting both pre-trip planning and the post arrival behaviours. Much of the leveraging effort aimed at affecting post-arrival behaviour will attempt to entice tourists to the region who have not considered the Olympics in their trip decision making or pre-trip planning, to spend additional money in the area by providing opportunities relating to the Olympic Games. Of course, such efforts also need to consider ‘aversion’ markets, and to ensure that pre-Games Olympic related themes and provision does not overwhelm aspects of the tourism product that has attracted those who are not interested in the Olympic Games. Chalip (2004) suggests a range of questions that should be considered in attempting to entice visitor spending, with those that are relevant to the pre-Games period of Olympic tourism leveraging being:

- Who should co-ordinate leveraging efforts?
- What promotions will appeal to pre-Games visitors?
- Which areas would benefit from Olympic theming?
- How should Olympic theming be designed?
- How can accompanying and aversion markets be catered for?

The key aim of leveraging Olympic tourism spending by affecting post-arrival behaviour in the pre-Games period is to encourage visitors to spend money they would not have otherwise spent by visiting attractions or areas they would not have otherwise visited. This can be somewhat difficult, as much Olympic-related spending is likely to be replacement spending. This means that in taking part in Olympic-related activities, such tourists are simply replacing non-Olympic-related tourist behaviour, in which they would have also have spent money. Consequently, such leveraging strategies need to focus largely on creating an Olympic “buzz” or feel in the host city that makes it feel like an exciting place to be. However, such a “buzz” needs to be carefully managed, as if it could potentially have a negative effect on tourism if positively motivated Olympic tourists spend only on replacement activities, and aversion markets spend less or take their money out of the host city.

Of course, an Olympic “buzz” is something that a country containing a future Olympic host city can expect to experience in the years following the decision to award the Games, and this will have an effect on the country’s broader tourism product, with Olympic theming being a key part of national tourism strategy in the years before and after an Olympic Games. However, there are specific opportunities for regions outside of the host city in the years before the Games.

In the country outside the Olympic host city, it is likely to be tourism associated with training camps and events that provide the greatest opportunity to maximise Olympic related visits in the pre-Games period. While these product types will attract people who have specifically travelled to train, compete or spectate, sports events may also provide additional trip activities for more general tourists. In each of these cases, as the aim is to maximise Olympic-related visits, leveraging strategies are targeted at the trip decision stage.

As noted above, previous experience indicates that Olympic-related training camps in the years running up to the Games are more likely to take place outside the host city than within it. Such training camps, therefore, present a real but limited opportunity for regions outside the host city. There is often a misconception that Olympic-related training camps are only likely to take place in the year or so before the Games; however, opportunities to host such camps exist in the four years preceding a Games as once the previous Olympic Games has finished, athletes and national sports organisations are starting to prepare for the next Games, even though it may be four years away. This preparation includes physical acclimatisation to climate and conditions, but also cultural acclimatisation to local customs, language and social infrastructure. As such, places seeking to host such Olympic-related training camps need to ensure not only that top class sports facilities and support are provided, but also that opportunities for cultural acclimatisation are provided in an atmosphere that is relaxing and away from the glare of the Olympic media. It may often be these

latter opportunities, as much as the availability of sports facilities, that means that Olympic tourism through such training camps takes place away from the host city.

Sports events outside the host city region in the pre-Games period can also provide many of the physical and cultural acclimatisation opportunities for elite athletes that training camps provide. However, they add the further dimension of competition in conditions likely to be very similar to those of the forthcoming Games. The need to compete in local conditions akin to those expected in the Games themselves is likely to mean that existing small and minor sports events around the host country will become much more significant in the four years preceding the Games and present opportunities for regions around the host country to leverage Olympic tourism. Such events will attract a much more high profile line-up which, in turn, will attract more spectators, either those travelling specifically for the event, or those taking in the event as part of a wider trip. While a forthcoming Olympics may mean that a country may stage more than its usual share of World and European championships or events, it is likely that few additional events will need to be hosted, rather the strategy should be to expand current events in the years before the Games. This is a more sustainable long-term strategy for sports event tourism after the Olympic Games have come and gone.

A strategy of capitalising and building upon existing events is something that should also be part of provision of the Cultural Olympiad, which commences four years before the start of the Games, as soon as the preceding Games has ended. Such Olympic-related cultural events are likely to entice Olympic tourism spending among tourists who are in the area in any case, but who may wish to attend such Olympic-related events and festivals. However, the provision of festivals and other events in the Cultural Olympiad should both capitalise on current cultural provision, and carry a flavour of local interpretation of Olympic-related ideas. In this way, the work put into developing such festivals is likely to result in a continuing event after the Olympic spotlight has turned elsewhere.

A final issue for regions outside of the host city to consider is the potential tourist trade they may be able to attract among those people who are put-off visiting the host city because they feel it will be “a building site” in the pre-Games period. While the potential to attract those tourists who wish to avoid the Games may be greater during the Games period itself, there are still opportunities to market other areas of the country to ensure that potential inbound tourists still visit, albeit a different part of the country. Such opportunities, of course, will depend on the motivations of such tourists, and the extent to which the host city has a unique product that is differentiated from that of the rest of the country.

Strategies for Leveraging Olympic Tourism during the period of the Games

The most obvious category of Olympic tourist during the Games period are those tourists who are visiting the host city because of the Olympic Games, and would not have made the trip if the Games were not taking place there. It would be expected that the attraction of these tourists would derive from strategies aimed at *maximising Olympic-related visits*. However, many of these tourists will travel regardless of leveraging strategies and they will often exhibit the “sports junkie” profile described by Gibson (1998). The general media coverage of the Games will often be enough to attract such visitors and, as such, further leveraging strategies aimed at *maximising Olympic-related visits* have less potential to “add-value” to tourism benefits than efforts in other areas. Consequently, while this means of leveraging is relevant, during the Games period it is less so than the other leveraging strategies (Weed, 2008).

Of course, while many Olympic tourists will make a specific trip to see the Games, many others will have considered the Games in their trip decision. Consequently, strategies aimed at *lengthening Olympic-related visits* are important. Chalip (2004: 235) highlights four questions that should be considered in lengthening visitor stays, each of which may be relevant to Olympic tourism:

- What new event components can we add to increase the number of days over which the event takes place? How will the market respond to these components?

- What entertainments might be added in the lead up to the event in order to create a lengthened festival atmosphere around the event? How will the market respond to those entertainments?
- What post-event social spaces and activities can we create through which event visitors can revel in their shared subcultural identities? What is required to make those spaces and activities particularly appealing to event visitors?
- What activities or tours can we offer as part of event package bundles? Which activities and tours will be particularly attractive to the event's market segments?

Of course, some of these questions have very different implications for Olympic tourism than for a general consideration of sports event tourism (Weed & Bull, 2009). For example, the second question relating to how a lengthened festival atmosphere can be created may seem a little superfluous, on a macro-level at least, because the Olympic "festival" can last for years rather than just the period of the event itself. However, on a micro-level of extending trip visits, the question remains relevant as a festival atmosphere around the event itself may contribute to the decision to take an extended visit.

As strategies aimed at lengthening visits are targeting trip-decision making, it will be the perception that there will be an ongoing festival around the event that will cause tourists to plan a lengthened stay. In this respect, tangible markers of a lengthened event need to be promoted. As Chalip (2004) notes, this may be pre-event parties or post-event festivals. In respect of the Olympics, a multi-sport event that lasts 16 days, the challenge of lengthening stays may be related to enticing visitors to stay longer than the period for which they have specific event tickets, rather than the 16-day period of the entire event. As such, the provision of big screens in public places, showing the action and continuing the party may be a way in which stays may be lengthened.

The provision of big screens may be a consideration for regions outside of the host city, and may link the second and fourth of Chalip's (2004) questions in an Olympic context. Chalip asks what activities or tours might be offered or bundled with the event. It may be that Olympic tourists who have seen the specific events for which they have tickets may wish to both continue the party, but also spread their wings and visit other parts of the host country. As such big screen festival areas, akin to the Fan Fests that were so popular in Germany during the 2006 World Cup, in locations and regions around the country can allow tourists to both visit a broader range of areas and continue to feel part of the Olympic party. A further consideration for regions outside of the host city is the extent to which Olympic tourists can be encouraged to take non-Olympic-related trips around the rest of the country after the Games have finished. Chalip's consideration of post-event tours largely relates to the host city. However, with an event as large as the Olympic Games there may be an anti-climatic element of "post-event hangover" in the host city itself. As such, there may be opportunities for other regions to offer explicitly non-Olympic activities to extend Olympic tourists' stays.

In addition to lengthening visitor stays, leveraging strategies for Olympic tourists in relation to enticing Olympic tourism spending are very similar to those in the pre-Games period. As such, the questions posed earlier in the paper in relation to the co-ordination of Olympic promotions and themes remain relevant in the Games period. Such questions are posed to affect post-arrival behaviour in encouraging visitors to engage with tourist activities that are related but peripheral to the Games themselves. Many of these strategies revolve around the creation of a festival atmosphere in which tourists feel they are enjoying a unique, once-in-a-lifetime experience on which it is worth spending money.

Of course, there are also aversion markets during the period of the Games. Of these markets, some are temporal flows (i.e. the timing of the trip is changed rather than the trip itself) which have a neutral tourism impact. However, others are negative flows for which strategies should be considered to minimise impacts. Such negative flows may, in fact, be exacerbated by strategies to maximise or lengthen visits, and this should be borne in mind when developing such strategies.

Strategies to minimise the effect of negative Olympic tourism flows during the Games need to be considered within the “stratified geography” of such flows (Weed, 2007). If an Olympic host city is considered within the context of a host country, three geographical levels may be identified: the host city, the rest of the country, and the country as a whole. This stratified geography results in a different impact of tourism flows at different geographical levels. For example, if there is a flow of residents out of the host city during the Games period, then that is a negative flow for the host city, but if this flow is to another region in the country, then that is a positive flow for that region. However, the net flow for the country as a whole is neutral. Consequently, those residents of the host city seeking to escape the city during the Games represent a negative effect for the host city, a potential opportunity for other regions throughout the country, and a challenge to ensure that the effect is neutral for the country as a whole. This, of course, implies that there may need to be very different Olympic tourism strategies at national level, at non-host regional level and in the host city (see London 2012 case study in Weed, 2008). In this respect, the host city will need to examine strategies aimed at retaining local resident spending to persuade those seeking to escape to stay, which may mean toning down some of the other suggested leveraging strategies. Other regions might wish to consider opportunities that this aversion market provides. Chalip (2004: 231), for example, notes that during the Olympic Games in 2000 some rural regions outside the host city of Sydney enjoyed a booming tourist business by promoting themselves as Olympics-free zones. It falls, of course, to national tourism organisations to examine the best way to ensure that the national impact of aversion markets is as close to neutral as possible. This may involve persuading the host city to advertise other regions in the country that provide an escape from the Games, otherwise those seeking to escape the Games may go out of the country.

A similar set of considerations applies to those who would have visited the host city if the Games had not been taking place. One strategy is to attempt to change these negative flows to temporal (and therefore neutral) flows by persuading such tourists to switch their trip to the pre- or post-Games period. Other strategies would be to persuade such tourists to still make the trip, or to travel to another region in the country. In considering this type of tourist it is useful to extend the analysis of the “Games period” to the months around the Games, and to illustrate this with a particular example, that of the conference/exhibition sector of business tourism. Experiences from previous Games indicate that there is often a feeling that Olympic host cities are “closed for business” during Olympic year, and consequently much conference/exhibition business may go elsewhere. The challenge here for host cities is to persuade potential cancellers that they can still be accommodated within the city in the months around the Games, while the opportunity for other regions is to suggest that such conferences/exhibitions would be better served by taking their business to other areas of the country because the host city will be too busy and too focussed on the forthcoming Games. Again, the role of national tourism organisations is to ensure that the country as a whole retains the business by attempting to strike a balance between these two strategies.

Strategies for Leveraging Olympic Tourism in the Post-Games Period

Both potential incoming Olympic tourists and aversion markets need to be considered in leveraging post-Games tourism. As in the pre-Games period, the most significant means of leveraging Olympic tourism are those aimed at enticing Olympic tourism spending and at maximising Olympic tourism visits, with the former aiming to influence pre-trip planning and post-arrival behaviour and the latter aiming to influence the trip decision.

Both in the host city and in other regions around the country, strategies aimed at maximising post-Games Olympic tourism (as opposed to generating tourism through Olympic media which is discussed later in the paper) will largely revolve around tourism with an Olympic-related sporting theme. Key products in the host city will be sporting events and sports participation activities. As such, much provision is analogous to that for the pre-Games period discussed earlier in the paper. Post-Games Olympic tourists will wish to take part in activities in venues that have hosted Olympic events, either as a core part of the trip or as a supplementary activity. As in the pre-Games period,

vicarious participation is important, as are status and prestige motivators relating to having visited or competed in Olympic venues or along Olympic courses.

Vicarious participation may also be important in developing visitor attractions relating to the Games. The exact nature of these may depend on the events that take place during the Games themselves, but “iconic” performances or stories may play a central part in any such attractions. However, such attractions, particularly with the passage of time, are more likely to be part of the destination package (see later discussions relating to Olympic media) than to comprise the prime trip purpose, and should be planned with the purpose of attracting more general tourists who, while having some interest in the Olympics, are not necessarily committed sports enthusiasts.

An obvious strategy, for both the host city and other regions throughout the country, is to build on both the Olympic Games themselves and the range of sports and Cultural Olympiad events that have been developed in the pre-Games period to develop a continuing portfolio of events. Such strategies will largely be dependent on having carefully constructed a sustainable planning approach to events in the pre-Games period. The rewards of such an approach should be a range of sports and cultural events in the host city that can continue to trade on the Olympic association. Furthermore, sports and cultural events that took place outside the host city in the pre-Games period will have had around a four year period to become established as significant events in their own right as a result of the pre-Games Olympic spotlight. If such events were organised well and ran smoothly in this pre-Games period, there is good reason to expect that they will be able to survive in their own right once Olympic attention has turned elsewhere.

While on the surface it would seem unlikely that there would be any Olympic-related tourism opportunities in relation to sports training camps in the post-Games period, it may be that regions and facilities that hosted Olympic-related training camps for major teams or gold medal winning athletes can continue to benefit from this association. Ongoing provision for such camps might continue at the elite level, but provision may also be made for non-elite athletes and clubs to take part in more recreational sports training tourism, or for “learn-to-play” courses to take place. The draw of a venue that has hosted gold medal winning individuals and teams will be significant for those sports tourists driven by status and prestige motivators. As such, former venues of Olympic-related training camps (and, indeed, regions in which such venues are situated) should ensure that the Olympic association is capitalised upon in any post-Games marketing (see Olympic media discussions later in the paper).

Of course, in each of the cases described above, there is the potential for a more up-market Olympic tourism offer. Hosts of sports such as sailing and tennis might consider how opportunities to take part in or watch sport at these Olympic venues might be packaged with top-class luxurious accommodation and services to attract the premium that many of those seeking a more luxurious product are prepared to spend. A further element of post-Games Olympic tourism, a significant proportion of which might be at the luxury level, is that of conference and exhibition tourism. The added value that former Olympic event or Olympic training venues can add to this market is significant.

A final note of caution for the host city must be sounded in relation to potential aversion markets. Many tourists are likely to have been negatively motivated by the Olympic Games to take their trip to the host city at a later date to avoid the Games. Host cities must ensure that the core tourism product that existed prior to the Olympic Games is not displaced by efforts to attract Olympic tourists, otherwise those who had planned to visit the host city after the Games to avoid the Olympics may change their plans and cancel altogether. Attention, therefore, must be paid by destination marketers and managers, to ensuring that Olympic tourism products are carefully integrated into the more longstanding tourism products that the host city offers.

LEVERAGING OLYMPIC-RELATED MEDIA COVERAGE TO RAISE AWARENESS OF THE HOST CITY

The purpose in leveraging Olympic media is to identify means to maximise the positive effects that the Games can have on the image of the host city and country projected into both domestic and international markets. Brown et al (2002) note that media leveraging strategies are derived from the association of the host city with the Games, and the meanings that are attached to that association. In this respect, one of the goals in leveraging Olympic media is to increase the extent to which the Olympic host is thought of as a potential tourist destination region. Furthermore, as strategies aimed at leveraging Olympic media focus on increasing general travel inclinations, rather than promoting specific Olympic tourism products (as discussed in the first part of this paper), it tends to be tourists to the host city and country in the pre- and post-Games periods that are targeted, regardless of their interest in sport.

There are two clearly differentiated means by which Olympic media might be leveraged, namely: *Olympic-related reporting and event coverage* and the *use of the Olympics in host destination advertising and promotion*. The former is outside of the control of destination managers and marketers and, as such, strategies aimed at leveraging reporting and event coverage are less straightforward than those that utilise the Olympics within destination marketing strategies. As these respective means of leveraging Olympic media are very different, the following discussion takes each of them in turn.

Strategies for Leveraging Olympic-related Reporting and Event Coverage

As has been noted in a number of previous places in this text, the spotlight of Olympic-related media coverage is turned onto an Olympic host as early as the bid period, before the Games have even been awarded. From this point on the coverage intensifies through the pre-Games period and during the Games themselves. However, such coverage largely ceases with the closing ceremony as coverage then intensifies on the next host. As such, strategies aimed at leveraging *Olympic-related reporting and event coverage* are most important in the pre-Games period and during the Games. That is not to say that *Olympic-related reporting and event coverage* does not have an implication in the post-Games period. In fact, it is likely that the majority of trips generated by the leveraging of *Olympic-related reporting and event coverage* will take place in the post-Games period.

The goals of leveraging *Olympic-related reporting and event coverage* are to enhance images and perceptions of the Olympic host city and country through coverage provided by others. Chalip (2000) notes that this requires active media management strategies, and cites the Sydney Games as providing an example of how such strategies can have a significant impact on the way in which the image and perception of the host is portrayed in both domestic and international markets. Of course, as Weed (2008) notes, it is possible for tourists to be put-off by Olympic-related coverage. Some tourists may have considered visiting an Olympic host city in the pre-Games period, but develop negative perceptions as a result of Olympic-related coverage, and decide not to visit, thus creating a negative flow as a result of Olympic media.

There is a range of Olympic-related reporting and event-coverage that might be envisaged. In the pre-Games period there are likely to be general Olympic stories across a range of issues. These might range from negative stories about corruption (e.g. Salt Lake City, 2002) or escalating budgets (e.g. Athens, 2004; London 2012) to more positive stories about the positive economic and social impacts of the Games or the completion of Games venues. Other stories might be those “planted” by Games hosts. In early 2007, for example, the organisers of the London Olympic Games released a number of features to celebrate “2012 days until London 2012”. There is also the potential for coverage of Games-related events in the pre-Games period. This might include sports events that are seen as warm up events for the Games, visits for training camps of high-profile teams or athletes, and events taking place as part of the Cultural Olympiad. Linking pre-Games and Games coverage are likely to be stories relating to particular athletes and teams and their preparations and participation in the Games. Such coverage may overlap with coverage of pre-Games events and,

obviously, with coverage of the Games themselves, but may also include a more long-term human interest coverage of the athletes “road to the Games”. During the Games, there will obviously be coverage of the competitions (rowing, swimming, athletics and so on) but, again, there are also likely to be background or human interest stories that may cover athletes, officials, volunteers or spectators. All of these types of *Olympic-related reporting and event coverage* can be capitalised upon by leveraging strategies.

Chalip (2004: 240), in discussing his general model of sport event leverage, suggests five sets of questions that should be considered in building strategies to showcase the host destination in event-related media, and these have been adapted here for the Olympic context:

- What aspects of the host city and country are likely to appeal to those interested in the Olympic Games and the Olympic movement? How can these be built into *Olympic-related reporting and event coverage*?
- How can journalists be assisted to locate and research background stories or anecdotes about the Olympic host city and country. What stories and anecdotes are likely to be appealing? What supporting materials can be provided?
- How can Olympic-related events be constructed to showcase the destination? How should photographers and/or television cameras be placed to provide the most favourable destination backdrop shots of such events?
- What elements representing the host destination can be designed into various Olympic and event logos
- How can sponsors be prompted and assisted to use host destination mentions and imagery in their advertising and promotions?

A number of authors have noted that there will be a link between an event and the city, region or country that hosts it. In particular, that the host’s destination image will become linked with the image of the event (Chalip, 2004; Gwinner & Eaton, 1999; Simonin & Ruth, 1998). In the case of the Olympic Games the significance of this link is magnified considerably. Weed’s (2008) discussion of tourism related to the Winter Games, for example, notes how the Swiss ski resort of St Moritz still benefits from the association with the Winter Olympic Games, even though it has been almost 60 years since the Games was last staged there. Furthermore, as an Olympic host has an association that spans a number of years before and after the main event, there is a macro link between the Olympics and the host, but also a number of micro-links between Olympic-related events and a number of cities and regions within the host country. So, the first question listed above will be of concern to host cities, but also to other regions in host countries that may be hosting Olympic warm-up events, training camps and aspects of the Cultural Olympiad. Of course, the audience for much Olympic-related reporting will be those that are already interested in the Olympics. As such, it may be more likely that messages in such coverage may focus on promoting the sporting credentials of destinations. However, this may not always be the case. Aspects of the Cultural Olympiad and some more general Olympic stories may appeal to a wider audience and coverage of such events and issues may have a role to play in attracting pre- and post-Games Olympic tourists, or in creating aversions in some tourists. These potential aversion markets are important to consider and should not be overlooked in media management strategies. In particular, while the first question in the list above highlights the importance of identifying which aspects of the host will appeal to potential Olympic tourists, it is also important to identify those stories that will not appeal to potential visitors, such as those mentioned earlier relating to corruption and the Salt Lake City Winter Games of 2002.

The second question listed can be important for both the host city and other regions in both the pre-Games and Games periods. Stories relating to visits for training camps for high profile teams and athletes can showcase destinations outside the host city in the pre-Games period, but can also provide a background story to the performances of individuals and teams during the Games themselves. If a particular region can establish a link with a successful team and/or athlete, this can provide useful avenues to promote the area, particularly if archive footage of the team’s/athlete’s visit

to the area is made available. Chalip (2004: 241) notes that the strategies related to this question are derived from standard public relations techniques and cites the Sydney example:

“In the years leading up to the Sydney Olympics, for example, the Australian Tourist Commission (ATC)...worked with journalists by helping them to find stories about Australia, by facilitating familiarisation visits and by providing the necessary introductions to enable stories that showcased the country. During the Olympic Games, they provided press conferences to journalists to help them write interesting stories about Sydney and Australia. Before, during and after the Games, the ATC provided event broadcasters with video postcards (short visuals of Australian icons) that could be inserted into telecasts.”

Following Sydney’s lead, the Athens organisers developed ten short films promoting Greece and the Olympic Games, covering a range of traditional cultural and historical subjects, from Greek music to classical Greece, to the treasures of Athens and the islands, which were distributed to broadcasters for use in their coverage (Weed, 2008).

Linked to the second question listed is the third relating to how Olympic-related events might be structured to showcase destinations. As above, such events may be the Games themselves or events in the pre-Games period. Perhaps the most well-known images of any Olympic Games in this respect are those from the diving competition at the Barcelona Games in 1992, where the only feature in the forefront of images to which the Barcelona cityscape provided the backdrop was a lone-athlete taking off from the high-diving platform. Similarly, routes for the Torch Relay and the Marathon can be constructed to allow the best coverage of iconic place images. Chalip (1990) notes that post-event evaluation showed that international audiences perceptions of Seoul and South Korea were enhanced as a result of the coverage of the Marathon at the 1988 Olympics, the route for which was designed to showcase the city, its parks and the Han River. Whilst these examples relate to the Games themselves, the same principle applies to pre-Games sports events, training camps, and the Cultural Olympiad.

The fourth question concerns the more specific issue of the Games and associated events logo. Research has shown that event logos, as a result of the length of time they are on-screen during the event, are a useful way of promoting iconic destination features (Green, Costa & Fitzgerald, 2002). The logo for the Sydney Olympics, for example, featured the peaks of the Sydney Opera House. However, logos for a high profile event such as the Olympics can often be the subject of close scrutiny and intense criticism. The London 2012 logo, launched in June 2007, has been criticised for failing to incorporate anything distinctive to London or the UK, apart from the word London in fairly small lettering.

The fifth and final question relating to leveraging *Olympic-related reporting and event coverage* relates to the way in which hosts might benefit from sponsors’ promotion of their sponsorship of the event. Specifically, how a host’s relationship with a sponsor might lead to the utilisation of host destination images in sponsors advertising campaigns. Such a relationship is beneficial to sponsors as it can help to combat the problem of “ambush marketing” as noted by Chalip (2004: 243) in relation to Visa’s longstanding sponsorship of the Olympics:

“For many years American Express ambushed Visa by airing television commercials featuring Olympic host cities, thus giving the impression that American Express, rather than Visa, was an Olympic sponsor (Card watch, 1992; Sutton, 1993). By the time of the Sydney Olympics, the lesson had been learned: It is not sufficient for a sponsor to advertise its association with an event; the sponsor must also link itself to the event’s host destination.” (Chalip, 2000)

As noted earlier, strategies for leveraging Olympic-related reporting and coverage can be complex because Olympic hosts are attempting to encourage positive coverage of the city and country as a destination in the coverage of others rather than generating their own advertising. Furthermore,

with an event of the size and interest of the Olympic Games, the potential to experience negative coverage is significant. However, an effective Olympic media leveraging strategy can play a central role in attempting to maximise the positive aspects of the coverage. Of course, such a strategy also includes the use of the Olympic Games in the destination's own advertising material where, as discussed in the next section, the destination is in control of the messages.

Strategies for Leveraging the Olympics in Host Destination Advertising & Promotion

As noted above, strategies for leveraging *Olympic-related reporting and event coverage* may have success in targeting pre- and post-Games Olympic tourists as a consequence of the fact that sport-oriented individuals are likely to form a significant proportion of the audience for Olympic-related reporting and coverage. In contrast, and notwithstanding the potential to target sports tourism market segments, the audience for *host destination advertising and promotion* is likely to be a more general one and, as such, attempts to use the Olympics in such promotions need to be carefully balanced. On one hand, the *use of the Olympics in host destination advertising and promotion* may attract pre- and post-Games tourists but, on the other hand, the use of the Olympics in such advertising may increase the size of potential aversion markets. However, attempting to leverage the Olympics in this way differs from leveraging Olympic reporting and event coverage in two ways: firstly, such advertising and promotion is wholly controlled by destinations and, secondly, the Olympics can be used in host advertising and promotion long after the Games have taken place. In fact, as time progresses after the hosting of an Olympic Games, the leveraging of Olympic tourism products (as discussed in the earlier part of this paper) becomes less significant, and the use of the Olympics evolves into a becoming a part of the general destination profile. Consequently, over time there should be a change in emphasis from advertising the range of Olympic tourism products in the pre-Games period to using the hosting of the Olympics to say something about the attributes of the destination in the post-Games period. If this is done effectively, post-Games tourism can be maximised and the size of potential aversion markets can be minimised. The key to strategies attempting to leverage the Olympics in this way is an understanding of the relationship between destination and Olympic association sets. Again, Chalip (2004: 244) has provided some useful questions for destinations to consider, and they are reproduced here in an Olympic context:

- How do the host city's and country's target markets view the destination? What are their association sets for the host city and country?
- How do the host city's and country's target markets view the Olympics? What are their association sets for the Olympics?
- What elements from the Olympics association set does the host city and country want to use strengthen or change its image?
- How can Olympic associations be best used to emphasise the desired aspects of the host city's and country's image?

Brown et al (2002) are cited by Chalip (2004) as providing two key insights into the relationship between event images and destination images from their work on the Sydney 2000 Olympics. Firstly, it is noted that images and associations are multi-faceted. An Olympic host city and/or country is likely to be associated with a range of characteristics (e.g. weather, attractions, etc.) and with emotional responses (e.g. stimulation, relaxation, etc.), whilst the Olympics itself has similar associations with features (e.g. elite competition, fair play) and emotions (e.g. pride). Secondly, the key to effective leveraging is to identify the Olympic associations that the host city and country wishes to develop as part of its image, and develop strategies to transfer those associations from the Games to the host city and country (Chalip, 2004).

In the pre-Games and Games periods, a key aspect of this strategy of association is for Olympic hosts to decide on the way in which they are going to interpret aspects of the Olympic Movement, history and ideology to match their characteristics. The Athens Games of 2004, for example, focussed on the link between ancient and modern. A key part of the Olympic Games is its

link to its ancient history, but it is also a global phenomenon that represents the pinnacle of modern sport. Athens wished to draw on this association to promote the value of its ancient culture and history to tourists, but to also show that it was a modern country with a high-quality tourism infrastructure. Similarly, the forthcoming Games in London in 2012 have linked the international nature of the Olympic Games (each of the Olympic rings represents one of the World's continents) with the multicultural nature of London, its population and its tourism product. Such local interpretations of Olympic themes by host cities and countries should be a clear and consistent part of marketing strategies in the pre-Games and Games periods. The important aspect of such strategies is to use the Olympics to portray messages and associations that are relevant to more general tourists, rather than associations specific to those interested in the Olympic Games. In focussing on more generic associations, hosts are less likely to alienate "aversion markets" who are put-off by the Games themselves.

Similar principles apply in attempting to leverage the Olympics in post-Games destination advertising and promotion. Over time there should be a gradual move away from advertising Olympic tourism products (such as sports events and attractions) towards using Olympic themes to reinforce destination images. One such theme might be to focus on quality. A number of previous Olympic hosts have successfully used the association of the Olympics with top-quality sport to promote the high-quality of tourism services and products. Similarly, the size of the Olympics, and the infrastructure needed to host an Olympic Games, can be harnessed to promote a modern and efficient tourism and transport infrastructure, which an event of the size of the Games demands. Weed (2008) describes Beijing's efforts to promote itself as a modern and progressive global city, and its hosting of the Olympic Games is a key part of its strategy to show itself in this light to a global audience. Beijing sees the Games as a route to developing tourism and trade links with key Western markets. Other hosts have used the Games to develop the lucrative business and conference tourism market. Brown (2008) notes that the Sydney Convention Centre generated Aus\$530 million worth of business in the four years following the Sydney Olympic Games in 2000.

A key consideration in leveraging Olympic media is the extent to which messages which may have positive impacts on Olympic tourism may also increase the size of Olympic aversion markets. However, unlike strategies aimed at leveraging *Olympic-related reporting and event coverage*, the leveraging of the *Olympics in host destination advertising and promotion* is under the control of destination managers and marketers. Therefore, whilst balancing promotional strategies to cater for the complex range of Olympic tourism markets is not simple, the strategic planning to successfully achieve such a balance is within the capacity of such managers and marketers.

CONCLUSION

The discussions in this paper have been concerned to outline some of the opportunities and strategies to leverage tourism opportunities associated with the Olympic Games. It has been sought to extend the scope of analysis beyond the Games themselves, both temporally (i.e. across the pre-, during and post-Games periods) and geographically (i.e. across the host city, other regions in the host country, and the host country as a whole). While such an extended scope has led to the discussions, by necessity, being illustrative rather than comprehensive, the paper has shown, contrary to both the popular view of policy makers, and to much else that has been written, that opportunities to develop Olympic tourism extend for considerable periods of time, both before and after the Games.

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Professor Mike Weed is Director of the Centre for Sport, Physical Education & Activity Research (SPEAR) and Faculty Research Director for the Faculty of Social & Applied Sciences at Canterbury Christ Church University, UK. He is Editor of the *Journal of Sport & Tourism* and author of *Olympic Tourism* (Elsevier) and *Sport & Tourism: A Reader* (Routledge) and *Sports Tourism: Participants, Policy and Providers* (Elsevier).

A MEMETIC FRAMEWORK FOR THE CONCEPTUALISATION AND EVALUATION OF THE CULTURAL OLYMPIAD OF THE 2012 OLYMPIC AND PARALYMPIC GAMES

James Kennell, & Nikki MacLeod
Business School
University of Greenwich

ABSTRACT

This paper proposes the development of a memetic framework for analysing and evaluating the Cultural Olympiad of the 2012 Olympic and Paralympic Games. A review of grey literature has revealed five recurring themes or *memes* (units of cultural transmission) associated with the Cultural Olympiad and the authors predict that they will be transmitted spatially, through planning and delivery processes and between the formal sectors of the Cultural Olympiad. The paper proposes a methodology which includes a longitudinal study of three UK case studies in the four year run-up to the 2012 Olympics. These case studies (London Borough of Greenwich, Canterbury and Durham) will be the subject of quantitative and qualitative analysis which the authors hope will reveal valuable insights into the frequency, transmission and longevity of the identified memes. The memetic framework proposed may provide future guidance for the planning and evaluation of public projects both within and outside the Olympic realm.

Keywords: 2012, Olympics; Cultural Olympiad; memetics; evaluation

INTRODUCTION

The field of memetics has its roots in the coining by Richard Dawkins (2006 [1979]) of the term meme as the unit of cultural transmission. The meme is analogous to the gene in evolutionary biology in its properties of replication and heredity and, for these reasons, subject to the principles of 'universal Darwinism' (Blackmore 1999). This insight, although contentious, has nevertheless led to a flourishing of dedicated journals, books, websites and scholarly articles on the subject of a new perspective on the evolution and transmission of culture, the field of memetics.

Memetics has often been mis-understood as presenting a biological imperative for culture, or as part of the field of socio-biology. It is, in fact, a distinct approach to the understanding of culture as composed of memetic units which, in a weak analogy to the 'selfish gene' theory of evolutionary selection, can explain the propagation and evolution of ideas, behaviours, theories and cultural products. Seen from a memetic perspective, culture is transmitted through the imitation of cultural forms such as gestures, languages, methods of production and fashions. For evolutionary selection to take place it requires a replicator, a unit of information that can make copies of itself and which has the qualities of longevity, fecundity and copying fidelity. In the context of biological evolution, this replicator unit is the gene which is copied on DNA molecules every time a cell divides or in the process of sexual reproduction. It is the degree of inter-generational permanence of a gene, its copy-ability and the faithfulness with which it is copied that explain its relative presence within the gene-pool. The central argument of memetics is that these same qualities, when identified in units of cultural transmission – memes – can explain the relative prominence of cultural forms and products within the meme-pool, human culture.

In a world where there are more memes than there is time and space to express them, and where some memes prosper whereas others disappear, the 'algorithm' (Dennett 1995) of natural selection first proposed by Charles Darwin of selection provides a powerful tool for analysing the transmission and apparent 'success' of cultural forms and concepts. This evolutionary algorithm requires three conditions to be met in order to be run: variation, selection and heredity (Blackmore 1999: 10). Where these conditions are met, evolutionary pressure will always operate to drive a process of increasing complexity of form and function. The study of memetics is the study of this combination of meme properties and evolutionary pressure on memes.

The cultural phenomenon of Olympism provides a unique laboratory within which a memetic framework can be tested and explored in three contexts. The Olympic games are cyclical and have established mechanisms for evaluation and replication between games in terms of delivery frameworks, promotional strategies, sporting and cultural content and policy innovations and rhetoric. This provides a 'generational' framework corresponding to each games period, across which it should be possible to plot the transmission of memes. Secondly, the combination of the universal aims and values of Olympism and the specifics of each host nation and city also provide a changing, but conceptually coherent, environment in which evolutionary pressure can operate. Thirdly, the four year 'host-city' period provides a short Olympic cycle within which it should be possible to map the transmission of Olympic memes, whether those attached to the Olympic movement generally, or those generated during the bidding for and promotion of the individual games. Each of these three contexts suggest specific programmes of memetic research, but can also be integrated to develop a more thorough and historical memetic framework for the Olympic Games.

This study has the aim of developing a memetic framework for conceptualising the Cultural Olympiad program of the 2012 Olympic and Paralympic games as an example of the third context outlined above, the four year host-city period. What follows is a discussion of the initial findings of this research, an outline of our proposed methodology for a four year research project to continue this research and ideas about future directions for this conceptual and methodological perspective on the Olympic Games.

THE CULTURAL OLYMPIAD OF THE 2012 OLYMPIC AND PARALYMPIC GAMES

The Cultural Olympiad is the four year cultural festival that attends the Olympic Games, beginning when the host city assumes the title of Olympic City. In London's case, the title of Olympic City passed from Beijing in August 2008 and this marked the start of the Cultural Olympiad of the 2012 Olympic and Paralympic Games, which was publicly launched on 26-28 September 2008 with events in London, the four nations of the United Kingdom and the regions.

The Olympic Games have incorporated a cultural element from their classical beginnings and the nineteenth century Olympic revival of Pierre de Coubertin included arts competitions where winning architects, musicians, artists and writers received medals for their efforts along with their sporting colleagues (Gold & Revill, 2007). However, it has only been in very recent years that the role of culture has been formalised into the Cultural Olympiad, with the first of these festivals taking place in Barcelona in 1992, with the concept then extending to the Winter Games in Turin in 2006. The International Olympic Committee (IOC) Charter states that the host city 'shall organise a programme of cultural events' (IOC, 2007:80) and the Cultural Olympiad of the 2012 games is the first to have a national rather than a solely city-based remit. Along with the promise of tangible legacies, the strength of the plans for the 2012 Cultural Olympiad is among the key factors that impressed the IOC when surveying the Olympic bids for the 2012 games.

The three key values of the Cultural Olympiad have been articulated by the London Organising Committee of the Olympic Games (LOCOG) and are as follows: to celebrate the cultural diversity of London and the UK, inspire and involve young people and generate a positive legacy. These values provide the inspiration for the objectives of the Cultural Olympiad which are to:

- inspire and involve the widest range of London and UK-wide communities;
- generate sustainable long-term benefits to our cultural life;
- create outstanding moments of creative excellence across the full range of performing arts and creative industries;
- connect future generations with the UK's artistic communities and with their peers around the world;
- promote contemporary London as a major world cultural capital;
- drive tourism and inward investment and use the creative industries to boost economic regeneration; and embrace the Olympic movement values of 'excellence, respect and friendship' and

the Paralympic movement vision to ‘empower, achieve, inspire’. (LOCOG, 2007, p. 4).

Although the spectacles of the opening and closing ceremonies are well known and mediated across the globe, the Cultural Olympiad is much less familiar and well-understood not only by the general public but also by those organisations that may find themselves involved. Responsibility for planning and delivery is split across a range of organisations including government departments, non-departmental public bodies and a range of cultural agencies and organisations and cultural provision will take place across three tiers. These tiers incorporate the mandatory ceremonies, major bid projects and a UK cultural festival (LOCOG, 2007). There is, therefore, scope for much confusion, lack of awareness and inevitable problems in evaluating the cultural offering and its legacy. The potential of the cultural offering to effectively be merged with the sporting aspects of the games and to deliver tangible benefits has been limited in previous Games (Garcia, 2003; Garcia, 2004).

One of the strengths of the London bid was its emphasis on the national impacts of hosting the games and the cultural programme of London 2012 is the first attempt to deliver a national cultural programme to accompany the Olympic games, rather than basing the cultural events solely in the host city. Apart from the staging of some Olympic events outside of London, such as the sailing events that will be held in the south-west of England, the regional programme of the Cultural Olympiad provides an important mechanism for dispersing the benefits of hosting the games to the rest of the UK (Shipway & Brown, 2007). For the majority of the UK, and especially for those who do not participate in sport, the Cultural Olympiad will be the main local manifestation of the games.

The delivery structure of the Cultural Olympiad continues to emerge, but some of its details are becoming clearer as we move past the start of the cultural festival in September 2008. Within LOCOG there is a senior management structure and officers who support the core cultural programme and provide a strategic lead for the UK-wide festival. LOCOG has responsibility for producing the mandatory celebratory ceremonies and key flagship projects and is providing an unspecified amount from its core funding for this.

The programme of nation-wide major cultural projects is being delivered by the national cultural agencies, supported by central funding from LOCOG and the legacy trust (Legacy Trust, 2008). There are also thirteen ‘creative programmers’, one for each devolved nation and a further nine for each region of England, based in regional cultural agencies or consortia. These programmers will be carrying out mainly coordinating and enabling roles – as yet there has been no project funding announced for local projects. This difference in funding has emerged as a recurrent theme in the grey literature reviewed for these policy review notes, with many regional documents stressing the need for financial sustainability, efficiency and leverage in cultural projects associated with 2012 in the regions (e.g. Coventry and Warwickshire 2012 Opportunities Group, 2006; Croydon Borough Council, 2007; North West Regional Development Agency, 2007; Team South West, 2007). Working alongside the creative programmers and other coordinating agencies will be individual cultural practitioners and organisations, some of whom will be able to access grant programmes connected to 2012, but many of whom will be seeking to ‘re-badge’ their existing or planned activities to benefit from potential increased exposure associated with the games.

GREY LITERATURE REVIEW – CONCEPTUALISING THE MEMEPLEX

Blackmore (1999) describes the collections of memes within particular contexts as *memeplexes*. These are co-adapted groups of memes who gain benefits (i.e. are replicated more successfully) by being present in combinations of multiple memes. An example of this might be the meme for studying in higher education and the meme for gaining employment. In our current neoliberal environment, the meme for entering higher education is more likely to be successful (to be passed on within families, workplaces and peer groups) if it is linked to the meme for gaining employment, rather than to, say, a meme for personal improvement. Working in this manner we would expect to find a memeplex, or memeplexes, within the discourse of the Cultural Olympiad, made up of cultural units of transmission that will be replicated as the Cultural Olympiad is developed

and delivered across the UK. In order to identify the memes involved in this memplex, we began our research in early 2008 by reviewing the grey literature associated with the emerging Cultural Olympiad of the 2012 games.

Grey literature refers to documents that are not commercially published and usually incorporate reports, policy documents, local and national government documents, conference proceedings and other publications. (Mathews, 2004). The review involved the study of more than 50 documents relating to the Cultural Olympiad. These included guidance issued by central and local government, plans from national and regional cultural agencies and consortia and information from the London Organising Committee of the Olympic Games (for more information on this process and a more detailed review of this literature see Kennell & MacLeod, forthcoming).

A process of content analysis and frequency measurement led to the identification of five core memes that appear to be the backbone of the Cultural Olympiad memplex, providing a toolkit for analyzing the emerging cultural programme as it evolves from a polycentric network of organisations spread across the UK. The majority of themes within the literature searched could be reduced to these memes, whilst others are strongly related to them and gain support from being so. These memes are:

- Cultural development
- Developing institutional frameworks
- Social benefit
- Educational benefit
- Tourism benefit

The meme of Cultural development, which was very common within the documentation, has two aspects: social and institutional. The first was expressed in terms of the Cultural Olympiad's potential to promote a sense of entitlement to culture, to engage young people in culture, to link sport and art, to celebrate cultural diversity and to increase cultural participation. An illustrative quotation from the London Cultural Consortium posits that:

'an important ambition... is to leave a legacy of larger and more diverse cultural audiences, including younger generations' (London Cultural Consortium, 2008, p.8).

The second aspect is the much hope expressed in the ability of the Cultural Olympiad to further develop institutional frameworks by forging and strengthening partnerships, by promoting a sense of ownership of the Cultural Olympiad by cultural organisations, by using the Olympics as catalyst for accelerating or enhancing the delivery of existing projects, by developing international links, by promoting financially sustainable projects and finally by coordinating tourism and culture. The Museums, Libraries and Archives partnership (MLA), who have been very proactive in their planning for the Olympiad have stated that developing institutional frameworks is a key factor in their plans:

'the Cultural Olympiad...offers the chance to strengthen further the partnership between our three domains, and between them and the rest of the cultural, voluntary and community sectors' (MLA, 2007, p.4)

The authors found that the meme of social benefit was, inevitably, the most nebulous concept and yet was enthusiastically embraced within the literature. The potential social benefits of the Cultural Olympiad were thought to include increased social capital, promoting social inclusion, improvements to quality of life, improvements to well-being, increased community cohesion and the animation / enlivening of public space. With the possible exception of the latter, these are all notoriously difficult to define, differentiate and evaluate. However, DCMS have promised that:

'The Cultural Olympiad...will generate a positive legacy through cultural and sports participation, cultural skills, urban regeneration ... social cohesion and international links' DCMS, 2008, p.15).

The link between the Olympic Games and education (both formal and informal) is clearly emerging from the grey literature. Volunteering is a key theme both in terms of community involvement but also for the skills development potential of this activity. It is hoped that the Cultural Olympiad will also increase creative industries training opportunities and provide educational programmes for schools. Sharing the values of the Olympic movement was also a key theme. The Culture and Creativity Advisory Forum announce that:

'the legacy had to be...about people... inspiring young people, improving skills and leadership in the cultural and creative sectors..' (Culture and Creativity Advisory Forum, 2006).

The final meme emerging from the literature review concentrates on the tourism benefits afforded by the Cultural Olympiad, mainly concerned with increased tourism flows before, during and after the games. One of LOCOG's expressed values is to:

'promote contemporary London as a major world cultural capital; drive tourism and inward investment...' (LOCOG, 2007, p.4).

Most regional documentation on the Cultural Olympiad supports the view that the increased international media profile of the UK during the games period will help each region to market itself as a cultural and tourist destination (Yorkshire Committee for the 2012 Games, 2007). By producing memorable moments through celebratory performances / events (both through the mandatory ceremonies and as part of the wider festival) it is hoped that there will be increased opportunity for attracting tourists and maximizing the tourism opportunity for the regions presented by the increased profile of London and the UK. Despite these aspirations, evidence suggests that Olympic Games do not necessarily deliver expected tourism numbers (Weed, 2007).

A memetic conceptualization of the Cultural Olympiad can help us to understand why some themes and terms have prominence within the literature.. All of the memes identified in this analysis share the necessary qualities for successful memes. Frequency analysis shows them all to be fecund, appearing many times and in many guises in (for example) policy documents, consultancy reports and promotional literature. Their longevity cannot yet be asserted, but certainly the memes identified as central to the memplex at this stage can be identified in the London 2012 candidate file and in early materials from LOCOG and government. As this research progresses, consideration will be made of the longevity of these memes, but it is still possible for memes of low longevity but of high fecundity and / or copying fidelity to be successful, especially in combination with other memes. The final criteria of 'successful' memes is their copying-fidelity. We have identified the core memes as being copied with high fidelity as they move between the national, regional and local levels of planning for the Cultural Olympiad, with the highest level of fidelity being shown in the transmission of memes from the national to the local and regional levels, facilitated by an enabling framework of funding and policy. An additional spatial category is that of the host-borough, those five London boroughs within which the games themselves will be hosted. These boroughs will host many of the core events from the cultural Olympiad as well as promoting, jointly and also independently, their own cultural programme of events as part of the Olympiad. Transmission of memes from the host boroughs should be successful due to their prominence within media coverage of the 2012 games and the Cultural Olympiad, even though the effects of this may be felt more keenly in future games. This is due to the specific funding and organisational contexts of the host boroughs which will reduce the fecundity and copying-fidelity of these memes within the UK. It is possible however, that the fecundity of memes generated or popularized by the host boroughs will be seen in future host cities.

In addition to this spatial dimension of the Cultural Olympiad, we have also identified a formal structure that contributes to our memetic conceptualisation and which allows us to make predictions about the spread of memes between formal sectors of the Olympiad programming that we

could expect to see as the programming develops and is delivered. It is possible to split the programming of the Cultural Olympiad into formal, informal and independent categories. The formal category relates to those projects that are part of the core, national Cultural Olympiad programme. The core programme of celebratory cultural events directly attached to the sporting programme such as the opening and closing ceremonies, as well as the large national projects, funded by the ODA and the Legacy trust respectively, are time constrained and supported by specific delivery teams with their own evaluative remit. Informal projects within the programme are those that are associated with the official programme, but not part of it – these include the ‘inspired by’ projects which can associate themselves with the cultural Olympiad and benefit from becoming part of the 2012 ‘brand family’ (LOCOG, 2007) and are expected to number in the hundreds. Each of these projects will have to show how they meet the broad aims of the cultural Olympiad, but will not benefit from the same organisational frameworks and support as the core programme. The final categorization that can be made of the cultural Olympiad programme is that of independent projects. These are projects that are taking place within the context of the 2012 games, but that have no organisational connection to the formal or informal programme. Some of these projects take an oppositional position as regards the staging of the games and seek to highlight community tensions or displacement effects, for example, whilst others are more supportive but are being staged independently for ideological or pragmatic reasons. The tables below summarize our spatial and formal categorization and how this relates to the transmission and replications of memes within the Cultural Olympiad process.

Table 1
The Spatial and Formal Categorization of the Cultural Olympiad

Spatial	Formality	Project example
National	Formal	Opening and closing ceremonies
	Informal	The People’s record – Museums Libraries and Archives Council national ‘inspired by’ project
Regional	Formal	Open weekends to launch the cultural Olympiad
	Informal	The inauguration of the Stoke Mandeville Archive – a museum that documents the history of the Paralympic movement
Local	Independent	
	Formal	Handover event in Herne Bay, Kent that showcased local childrens’ activities alongside a temporary ‘live-site’
Host borough	Informal	Lyme Regis Artsfest – a recurrent arts festival prompting itself along with the Cultural Olympiad
	Independent	
	Formal	Create08 – the five boroughs cultural Olympiad annual festival
	Informal	Pudding Mill Lane - foraging on and around the Olympic site with funding from local authorities
	Independent	Hackney-Olympics – artists-led parody of Olympic events on Hackney marshes

Table 2
Spatial transmission of memes within the Cultural Olympiad planning and delivery process

Meme origin	Meme destination	Level of meme replication	Memetic mechanisms
National	Regional	High	Policy and funding frameworks
	Local	High	Policy and funding frameworks
Regional	Host Borough	High	Policy and funding frameworks
	National	High	Regional programmers networks
	Local	High	Policy and funding frameworks
Local	Host Borough	Low	Informal networks
	National	Low	No obvious mechanism other than through regional fora
Host Borough	Regional	High	Regional and sub-regional networks and joint programming strategies
	Host Borough	Low	Informal networks
	National	High	Projects will be part of the national festival
	Regional	Medium	Projects will have an impact on regional programming decisions
	Local	Low	Disparities of scale suggest only extremely low copying fidelity would be possible

Table 3
Predicted transmission of memes between formal sectors of the Cultural Olympiad

Meme origin	Meme destination	Level of meme replication	Memetic mechanisms
Formal sector	Informal sector	High	'Inspired by' programme ensures replication of core memes
	Independent sector	High	Formal sector defines the territory upon which the independent sector operates, even oppositionally
Informal sector	Formal sector	Low	Disparities in funding and organisation make this unlikely
	Independent sector	High	The independent sector will be responding to memes from the formal and informal sectors
Independent sector	Formal sector	Low	No obvious mechanisms at present, although it is possible that independent projects can be co-opted by the formal and informal sectors, e.g. the gradual acceptance of an 'independent media centre' for the games
	Informal sector	Low	The often oppositional nature of the informal sector makes this unlikely

MAPPING THE MEMEPLEX – PROPOSED METHODOLOGY

Previous research into the evaluation of cultural programmes suggests that evaluation should include: concepts and frameworks to guide the evaluation that are agreed early in the programme; longitudinal research; consideration of national / strategic, local and user group priorities and experiences; and that the evaluation should be congruous with the specific aims and cultural content of the programme (Guetzkow, 2002; Matarasso, 1997; Reeves, 2002). However, the complex delivery structure of the Cultural Olympiad outlined above means that following such

guidelines is problematic without establishing from an early stage an evaluative framework that accurately reflects the evolving system of projects and priorities that characterizes this national scheme. The national scale of the programme means that there is no ‘one’ Cultural Olympiad programme whose impacts can be planned for and understood. Instead, there is a diverse network of projects, for which a huge range of claims are being made in terms of their intended effects, and which should be assessed against these claims, which we have conceptualized as being structured around 5 core memes.

We are proposing a 4 year study of the Cultural Olympiad of the 2012 games, using a multiple-embedded, longitudinal case study approach (Yin 2003). A case study methodology is appropriate at this stage as a way of testing our memetic framework against the complex cultural policy and funding mechanisms involved in the planning and delivery of the Olympiad. In this sense, we are seeking analytical generalization (i.e. evidence of memetic pressure and selection) rather than statistical generalization which would not be appropriate at this stage of the research with the potential population of such study being extraordinarily large. Another reason for the choice of using a case study approach is that the early stage of this research has identified spatial and formal divisions within the research field and these can be directly interrogated and contrasted best through the use of research parameters that replicate these analytical categories – an approach facilitated by including the categories in the case study criteria. Although the case studies have been constructed mainly in the interests of theoretical replication, elements of literal replication have also been included in the design to increase the internal validity of the methods and findings.

We have chosen three cases for our study, the characteristics of which are outlined in the table below:

Table 4
Case study characteristics

Case	Population	Cultural characteristics	Claimed impacts of Cultural Olympiad	Integration with 2012 games
London Borough of Greenwich	226,200	World Heritage Site Integrated into London’s cultural offer	Improvements to local cultural infrastructure Tourism benefits Social benefits Increased inward investment	Host borough
Canterbury – a city in the south east of England	135,287	World Heritage Site DCMS Cultural Pathfinder Regional cultural centre	Tourism benefits Social benefits Increased inward investment Improvements to local cultural infrastructure Increase in sports participation	97km from London Olympic training venue Live site
Durham – a city in the north east of England	87,709	World Heritage Site Cultural offer integrated into regional cultural strategies	Improvements to local cultural infrastructure Tourism benefits Social benefits Increased inward investment	433km from London Olympic training venue?

Within each study, the same set of methods will be applied to ensure internal validity within the research design. The research is following a mixed methods approach (Creswell 2009) where both qualitative and quantitative data will be gathered within each study to triangulate between diverse data sources so as to provide a stronger evidence base for the memetic perspective being taken in this research. Four concurrent methods will be used for each case:

- Quantitative analysis of meme frequency within the case studies and the relationships between memes and their original sources and contemporary presentation.
- Qualitative mapping of Cultural Olympiad planning and delivery networks and their development over time to analyse the mechanisms of memetic replication
- Qualitative interviews with key informants to triangulate steps 1 & 2 and add richness to the data
- Meta-evaluation of evaluative frameworks implemented within each case study

CONCLUSIONS

This paper has outlined a conceptual framework for understanding the Cultural Olympiad of the 2012 Olympic and Paralympic games. This memetic framework has received early evidential support from a review of the literature in this area, but in order to interrogate its value as mode of enquiry, a four year research project has been proposed that will test the value of memetics for carrying out research in this field.

Any new theory should make testable predictions. At this early stage we do not have sufficient data to formulate thorough hypotheses, but our research so far indicates that the meme of tourism benefit in particular is already being replicated with high fidelity and fecundity throughout the Cultural Olympiad planning structures, at all levels. This appears to be the case in spite of research that suggests that tourism impacts from the Olympics are contentious and not even always positive. We suggest that this can be explained best through seeing this meme as part of a memplex that provides competitive advantage to memes that appear to confer economic benefit and that can be best understood within the contemporary neoliberal political context that emphasises inter-regional competitiveness and a core role for business within public policy frameworks. If this continues to be the case then we would expect to see this meme featured prominently in the post-games evaluation structures at all levels, leading to the possibility of some Cultural Olympiad projects being judged as failing because of the memetic pressure operating on their design. A memetic framework of the kind we are proposing (if supported by research data) may provide insights into the planning and evaluation of projects, especially in the public arena, with more general implications outside of the field of Olympism.

Should the findings of the research prove inconclusive or contradict the memetic hypothesis, the research will add to our knowledge of Olympic planning and delivery by collecting and analysing longitudinal data on the Cultural Olympiad period, and will be the first study of its kind to do so.

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奥运赛事与城市旅游的发展探讨——以北京奥运会为例

王婉飞 任奕阳
浙江大学管理学院旅游管理系

摘要

奥运对旅游城市规划具有极其显著的推动作用，本文将总结北京奥运在城市商业服务业、环境保护、城社会公共服务、区域发展、统筹城乡经济、精神文明建设等诸方面的具体措施和整体规划，讨论其对旅游城市建设鲜明的借鉴作用。

关键词：北京奥运； 旅游城市

OLYMPIC GAMES SPORTS EVENT AND URBAN TRAVELING DEVELOPMENT DISCUSSION: TAKE BEIJING OLYMPIC GAMES AS THE EXAMPLE

Wanfei WANG Yinyang REN
Tourism Management Department, Zhejiang University

ABSTRACT

Olympic Games have the extremely remarkable promotion effect on the tourist city plan, This article will summarize the specific measures and the corporate planning of Beijing Olympic Games in the urban commercial service industry, the environmental protection, the city society collective services, the area development, the economy of city and countryside, the promotion of cultural and ethical progress. Then, distinctively discusses such events' function to the tourist city construction.

Keywords: Beijing Olympic Games; tourist city

奥运会作为节事旅游活动的典型范例对国家社会的经济建设与发展，社会人文的推动与促进，国家国际影响力的塑造与提升等多方面均会产生较为深刻的影响。为期七年的准备工作更使奥运举办城市在基础设施建设、环境质量改善、公众服务完善等多方面得到全面和长足的发展。旅游，作为奥运中重要的一部分，在奥运举办的赛前、赛中、赛后都呈现出较大的市场价值，体现了节事活动对旅游发展的促进作用，从整体塑造了城市旅游的发展模式，规范了旅游业的经营运作，提升了邻近区域的旅游目的地影响力，具有明显且长期的宣传效力。本文将北京奥运为例，总结在奥运对北京旅游城市建设的推动作用和影响力，分析北京奥运会对其他奥运举办城市的借鉴价值和国内其它旅游城市开发及规范的示范作用。

1 对旅游城市规范商业服务业的借鉴

旅游活动中的吃、住、行、游、购、娱涉及到旅游城市的餐饮、饭店、娱乐等多种商业服务性部门，所提供的商品具有典型的服务性商品性质，包括明显的不可储存性、生产与消费同步性、无形性等特征，使消费者在消费过程中具有较高的风险性和较大的需求弹性，相关部门的行业规范和品牌提升对于城市旅游形象的塑造具有显著的作用。在以奥运赛事为契机的城市总体规划中，北京于2005年正式发布《北京市商业服务业迎奥运三年行动计划》，商业服务业的标准化措施对城市旅游规划发展具有较高的借鉴意义：

1.1 提高重点行业，重点领域及不同业态的规范化经营管理水平。提升商业服务业规范发展水平，实现标准化、个性化服务体制，制定具体行动标准，实现有标准可依，按标准操作。对服务业商业所涉及的大型商场、超市、小商品市场、餐饮企业、美容美发业、摄影业、旅馆业、洗染业的硬件设施设备及服务设定具体项目标准，优化消费环境，提升管理水平，分类调整，综合治理，实现相关部门的达标升级，推动行业部门的健康发展，提高整体服务水平。2005年，北京市商业局组织制

定、修订《商业服务业标准化工作资料选编》以及《零售业促销管理办法实施细则》，照此对行业整体进行升级改造、规范整顿，使同类性质服务部门在统一标准的基础上彰显其个性特点。

1.2 注重提升细节规范，提高消费便利程度，充分完善消费环境。包括对服务人员进行行为规范、服务态度、服务技能等方面的培训及督导，研究制定员工行为礼仪规范，明确员工仪容仪表、服务礼仪等基本服务行为要求，通过评奖评优的方式对在各个方面表现优秀的员工进行奖励和表彰。对服务硬件设施的设置采用标准化要求，如研究制定大型商场超市购物环境规范，提出卫生间、试衣间、橱窗设计、灯光照明、室内温度、背景音乐的具体要求，着重解决购物环境中的细节问题。同时，加快推进商业服务业无障碍建设，在主要商业场所增加设立无障碍设施，加强服务人员语言交流沟通能力，大力发展银行卡特约商户，利用多种渠道充分提供消费服务信息。如北京市“北京商业服务网”、“导吃导购网”的开通，《北京西餐指南》、《北京特色商业》、《北京商业购物线路图》等资料的编制发放，改善社区商业服务环境，为居民创建便利快捷的消费条件。

1.3 开展特色主题活动，创新改造具有文化内涵的品牌产品，促进商业繁荣。商业联合会及行业协会通过具体活动的宣传作用扩大相关部门的社会影响力，拉动客源消费市场，面向社会开展行业特色评比活动，如举办具有较大范围影响力的特色购物节、美食节、西餐文化节，“百家特色店”评选活动等；打造具有中国特色、北京特色的旅游商品、旅游纪念品等；依据国际 CBD、RBD 的建设标准，促进重点商业街区的升级改造，如王府井、西单、前门和大栅栏等；对具有特殊文化内涵的北京古巷、胡同在保留原有文化特色的基础上，规范商业运作，打造极具特色的城市游憩商业区，实现差异化经营，突出经营特色，如什刹海、烟袋斜街、南锣鼓巷、观音堂画街廊等；积极引导老字号的发展，构建舆论、中介、政策支持体系，重点推进传统老字号改革、调整，深化老字号企业股份制改革，支持老字号非物质文化遗产保护和品牌建设。

1.4 树立行业典型，完善监督监管体系，利用各种宣传资源形成社会影响效力。充分利用媒体的舆论导向宣传作用，对符合标准的具有全国影响力的零售、餐饮业进行宣传，建立有效激励与大众监督机制，通过对“达标百货商店”、“无冒充专利示范店”、“品牌连锁洗衣店”，一、二级餐饮服务店等具有标识性服务企业的评选及宣传。根据各行业的服务及生产标准设定具体的监督体系，如：编印《安全生产规定》、《北京市商业零售经营单位安全生产规定解读》、《北京市餐饮经营单位安全生产规定解读》、《北京市商业零售和餐饮经营单位安全生产规定宣传手册》等宣传资料，实现安全标准到细节，牵头监管到部门，配合群众调查监督办法，切实落实各项安全标准，消除安全隐患。建立包括食品卫生、产品质量、消防设施、服务设备卫生，价格安全等多方面，全方位的监督管理体系。按照工作展开的程度合理设定具体计划，分三个阶段分步完成对商业服务业各个部门的规范调整，实现短中长期目标相结合的有效行动方案。

2 对旅游城市环境保护建设的借鉴

奥运城市绿色环境的营造对城市旅游产业的发展将起到较为长远的影响作用，北京“绿色奥运”口号的提出，使其在城市规划、居民、行业建设、工程管理等多方面进行了详细具体的规划和宣传。“绿色”理念的提出对旅游可持续发展有较为现实的指导意义，对旅游城市环境的开发塑造具有较强的示范作用，其具体措施包括：

2.1 合理规划生态环境，改善空气质量，对固体废物实行科学管理，防治交通污染，优化水环境。扩大北京城区绿化面积，开展万米大绿地、500米见公园绿地、街道道路绿化、阳台屋顶绿化、墙体垂直绿化、见缝插绿等重点绿化工程，合理利用有限及闲置空间进行绿化覆盖，彻底改善北京整体绿化环境。旅游城市的空气指数为衡量其城市环境的重要标准之一，打造国际化的旅游城市品牌，北京从工业污染防治着手，如：停产重污染工厂，对高能耗、高污染的工厂企业实行搬迁调整。同时注重新无污染技术的广泛应用，从根本上解除污染源问题。运用水资源保护新模式，建设清洁小流域，对村庄污水、垃圾实行集中处理，针对河道进行生态整治，对水资源实现循环利用。实行固体废物合理管理，对其进行无害处理，实行市区垃圾分类收集。防治交通污染，优先考虑扩展公共交通系统，通过票价优惠的措施鼓励市民积极乘坐公交出行，扩大地铁网络化建设，加强地铁的使用，减少机动车辆的尾气排放；实现公交和出租车的更新换代，采用无污染的天然气、欧 III 标准

柴油以及双燃料车，动员市民减少私家车的使用。以上措施使北京环境各项指标得到明显提升，城市污水处理率提前一年达到奥运指标：

表 1 北京市环境指标（2002-2007）

指标	2002	2003	2004	2005	2006	2007
绿化覆盖率	40.2%	41%	49.5%	42.5%	42.5%	43%
空气质量好于二级的天数	203	224	229	234	241	246
污水处理率	45%	56%	58%	70%	90%	92%
生活垃圾无害化处理率	86%	91.3%	93.8%	95.2%	96.5%	99.87%

引自：北京市环境状况公报

2.2 运用现代科技手段，采用环保工程技术，推动旅游城市环保基础设施建设。北京奥运筹备过程中众多具有明确环保思想的工程技术运用对旅游城市的基础建设具有明显的导向作用，包括：节能工程，如：太阳能光伏发电系统、太阳能光热系统、热泵技术、节能照明控制系统、先进节能门窗和外围护结构保温等技术的应用；水环境保护工程，如：中水利用、雨洪利用、节水设施（安装红外控制、节水洁具、延时开关、无滴漏龙头，洗手盆、小便器、蹲便器采用感应式冲洗阀等）。通过各项科技工程的应运直接保障了旅游城市环境长期的优质化，对旅游城市在城市设施改造、城市建设等方面具有较高的参考意义。

2.3 积极开展奥运环保活动，树立旅游城市居民环保意识，提高环境保护的持续影响效力。城市环境保护的维持在很大程度上需要市民的配合和保持，从宣传舆论角度、社会媒体方面对其进行环保意识的提升，通过活动帮助学生从小树立环保理念，以上举措对促进旅游城市优质环境的建设和维护有着直接重要的意义；北京开展对旅游各项产业的环保规范以及评创活动，如：2006年北京市旅游局组织全市星级饭店开展争创“绿色旅游”饭店活动等，为旅游业树立了环保的思维理念；同时，各种大型企业宣传旅游思想，通过硬性指标和奖励鼓励办法促使其开展环保活动，履行旅游环保措施，如：在奥运筹备过程中，一些赞助企业在各自的领域承诺做好保护臭氧层的工作，包括大众中国、可口可乐、麦当劳、海尔等。

2.4 根据城市环保的实际情况制定具体政策条例及宣传材料，保障环保计划有“法”可依，保障各项环保措施的履行。旅游城市环保的具体开展需要明确合理的计划及具体的保障章程，根据各个城市自身的环保现状，从具体实际出发，制定合理的环保政策及措施。北京从绿色奥运宣传资料和相关政策办法出台两方面促进环境保护的顺利开展。制作的绿色奥运宣传材料包括：《国际奥委会体育、环境与可持续发展指导手册》、《北京奥运会火炬接力环保指南》、《福娃环保宣传招贴画》等；相关政策办法包括：《北京市节能监察办法》、《加快发展循环经济，建设资源节约型城市 2006 年行动计划》、《北京市“十一五”时期建筑节能发展规划》、《北京市“十一五”时期环境保护和生态建设规划》、《北京市“十一五”循环经济发展规划》、《北京市“十一五”能源发展与节能规划》、《北京市清洁生产暂行办法实施细则》等。

3 对旅游城市完善社会公共服务的借鉴

旅游城市社会公共服务设施的完善程度是其城市化的重要衡量标准之一，也是旅游顺利开展的基础条件之一，健全的社会保障体制对提升旅游城市居民的生活品质有着重要的作用，幸福感的营造对旅游城市的整体氛围有着明显的影响，因此完善社会公共服务设施，加大社会保障力度，推进旅游城市休闲产业建设，营造城市休闲生活氛围，对于旅游城市品牌的塑造至关重要。北京在奥运筹办过程中贯穿了“人文奥运”的指导思想，对城市及周边地区基础设施的改善及居民生活品质的提高有较多的可借鉴之处：

3.1 加大旅游城市基础设施建设，改善基本生活设施条件，充分利用奥运资源，为城市居民提供良好的休闲环境，丰富休闲活动内容。奥运会的筹办为北京居民提供了多种多样的生活休闲娱乐设施，涉及到城市以及周边居民的业余生活的方方面面，奥运场馆赛后可作为百姓健身、游乐场所，奥运场馆在修建过程中就考虑到了赛后的再利用问题，因此多将其修建在居民生活区附近以及各大高校内，在比赛后满足社区及高校的体育及休闲活动需要；新建全民健身工程，推行郊野公园、环城游

憩带以及文化广场建设,利用公园等空间资源,新建一批面向低收入群体的露天剧场;增添大屏幕等一批装点城市环境的文化景观,满足游人休闲游憩、文化娱乐等需求,同时,公园面向社会免费开放、服务于民。开展众多活动丰富城乡居民生活。具体城市基础设施建设投资情况如下表:

表 2 北京市城市基础设施建设相关数据(2001-2006)

指标	2001年	2002年	2003年	2004年	2005年	2006年
城市基础设施投资(亿元)	356.4	411.9	417.8	463.2	610.7	935.3
其中:能源	40.8	49.5	36.1	73.0	102.3	113.4
公共服务业	95.2	101.6	152.8	139.3	160.3	265.3
交通运输业	104.4	159.7	129.2	148.8	224.1	439.6
公路长度(公里)		14359	14453	14630	14696	14926
城市桥梁(座)	891	1051	1332	1299	1207	1279
公路路网密度(公里/百平方公里)		87.5	88.1	89.2	89.6	91.0

来自:奥运官方网站

3.2 完善社会保障结构,针对特殊群体实行具体保障政策,平衡旅游城市居民生活水平。主要表现在:一、城镇社会保险制度全面实施。截至2006年底,全市基本养老、基本医疗、失业、工伤保险人数分别达到604.1万人、679.5万人、482.2万人、465.3万人。二、实施“一老一小”医疗保险制度,对社区医院常用药品实行集中采购、统一配送、零差率销售的管理办法。三、在全国率先建立最低生活保障制度。四、实施义务教育“两免一补”政策,困难家庭子女受教育权得到保证。五、实施“名校办分校、名校办分院”,让更多市民分享优质的教育和卫生资源。通过以上各种制度保障措施全面城市及周边地区居民生活质量,从而为旅游城市的“友好居民”形象打下了良好基础,成为旅游城市热情好客,积极相应城市旅游开发关键要素之一。自2001年至2006年,相关指标提升具体情况为:

表 3 北京社会福利保障项目相关数据(2001-2007)

指标	2001年	2002年	2003年	2004年	2005年	2006年
城市居民最低生活保障标准(元/月)	285	290	290	290	300	310
失业保险金最低标准(元/月)	305	326	326	347	382	392
企业退休人员基本养老金最低标准(元/月)	441	466	466	510	563	620
参加基本医疗保险人数(万人)	216.6	383.5	436.1	484.0	574.8	679.5
高等教育毛入学率(%)	45	46	52	53	53	56

来自:奥运官方网站

3.3 促进旅游城市无障碍建设,提高城市国际化接待水平。在城市建设方面推行无障碍建设,设计适合各种人群使用的规范城市基础设施,如地铁站升降电梯的设计,残疾人通道的设置等。打造具有国际知名度的旅游城市需要在各个细节方面进行充分的设计和完善,围绕奥运建设,北京在科技研发、体育运动、标准化建设等多方面与国际社会开展广泛合作,北京作为奥运承办城市,承担着接待国内外众多官员、游客和体育运动员的责任,因此,在细节化规范方面有着独到的经验。健全城市的信息化体系,运用多种语言综合服务,满足不同国家旅游者的各种咨询需求,提供可靠有效信息;引入国际标准,按照国际旅游城市标准化指标具体规范城市建设细节问题,如对住宿、商业服务、图形符号和导向标识等实行国际标准化规范,与英国标准协会开展交流合作,建立完善的国际旅游城市规范标识体系。

4 对旅游城市区域互动发展,统筹城乡经济的借鉴

4.1 旅游城市的建设需要利用周边整体环境的拉动,区域旅游的互动发展对城市旅游业的发展具有显著的促进作用。北京奥运筹办以来,充分发挥其独特的地理优势,京津冀三地在交通体系建设、产业结构调整、资源开发利用、生态环境保护等方面积极展开合作:通过对区域路网体系的建设促进了城际之间的交流,方便了旅游者的出行,客源之间的互动效应明显;调整产业布局,因地制宜,建立商业信息共享,规划互补、监管互认、应急互助等体系,保证多方工作的全面顺利进行;以区域为单位开展生态环境保护工作,通过对核心地区的环境维护和周边地域的环境改善,有效阻

止了城区间相互污染现象，使区域大环境的环境质量得到明显提升。

4.2 贯彻国家统筹城乡经济发展的思想，实现通过节事旅游的举办和旅游城市的建设解决农村剩余劳动力、城镇失业人口、困难群体的就业问题。北京在奥运筹办期间，围绕奥运筹办和首都经济发展开发岗位，不断扩大就业规模，完善促进就业政策，促使城镇失业人员就业，鼓励单位招用城乡劳动者，鼓励城乡劳动者自主创业；实施就业援助制度，促进困难全体就业，不断完善困难群体就业帮扶制度；城乡协作，促进农业富余劳动力就业，出台鼓励用人单位招用本市农村就业困难人员的岗位补贴和职业培训补贴办法等政策；加强公共就业服务体系建设，包括建立和完善市、区（县）、街道（乡镇）三级服务体系，开展社区和村的就业服务工作。

5 对推进旅游城市精神建设的借鉴

根据中国的具体国情，精神文明建设对打造具有国际知名度的旅游城市品牌具有巨大的现实意义。通过展现旅游城市的精神面貌可以为旅游者树立了良好旅游目的地形象，城市居民作为旅游城市的重要元素之一，直接反映了城市的发展状况和居民素质，友好亲切的目的地居民形象对推动旅游目的地的宣传以及扩大旅游城市的影响均有显著影响。北京在塑造旅游城市形象上推进“五大文明行动”，开展“迎讲树”活动，通过各种途径的宣传教育、居民礼仪教育实践、文明模范人物评选等提升城市文明礼仪度；加强监督考察，制定有关标准和考评细则，如市城管执法局建立了由城市奥运者和城管队员组成的“纠正不文明行为联合宣传检查队”，采取以教育劝阻为主、执法罚款为辅的联合执法模式，使乱吐乱扔等不文明行为得到有效遏制；对不同岗位的人员进行道德培训，树立榜样标杆，展现服务文明新风貌，促进了旅游城市良好形象的树立。

综上所述，奥运从多方面、全方位促进了旅游城市的开发建设，“一个事件改变一座城市”，北京在奥运筹办和举办过程中积累了大量的经验，通过分析奥运举办城市对旅游城市建设的指导作用，可以为今后的奥运举办国以及旅游城市建设提供诸多的实际案例和规范标准。北京奥运会是一个典范，在商业、环境保护、社会公共服务、区域发展、精神文明建设等诸方面的经验结合历届奥运会对旅游城市规划的实际案例，将成为旅游城市建设极好的参考样本，为我国旅游城市的国际化、人文化、现代化发展提供典范。

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作者简介

王婉飞 浙江大学管理学院旅游管理系教授 www@zju.edu.cn
任奕阳 浙江大学管理学院旅游管理系硕士研究生 ren_yiyang60@yahoo.com.cn
通讯地址：浙江大学紫金港校区管理学院旅游管理系 310058

2008北京奥运文化效应与都市旅游可持续发展

张胜男 白艳萍 雷蕾
首都师范大学

摘要

本文以 2008 北京奥运为切入点,从“文化”、“生态”、“人本”等层面,探讨奥运后都市旅游特别是首都文化旅游的持续发展道路。通过开展社会经济信息分析及体现在以文化功能、文化传播与交流为特征的旅游文化空间变化研究,探索经济型旅游业向文化型旅游业的转化模式,及区域旅游文化管理与旅游经营开发的良性互动运行机制,在一定区域初步实现城市旅游规划与文化生态平衡的“旅游优化环境”目标,为规范旅游市场,实现可持续旅游进行前瞻性的理论探索和技术保护。这将成为提升未来旅游业国际竞争力的关键所在。

关键词: 北京奥运; 文化效应; 可持续发展

2008 OLYMPIC GAMES' CULTURE EFFECTS ON BEIJING AND SUSTAINABLE DEVELOPMENT IN URBAN TOURISM

Shengnan ZHANG Yanping BAI Lei LEI
Capital Normal University

ABSTRACT

This thesis is oriented from 2008 Beijing Olympic games. The writer discussed how to keep capital's tourism in a good condition after Olympic games from three aspects----'culture', 'ecology', 'humanism'. Through analyzing social economic information and doing researches on spatial changes which is featured as cultural function and spreading (exchanging) culture, writer tries to find out a proper pattern for transforming between economic tourism industry and cultural tourism industry and a mechanism which can be put into the interaction between tourism cultural management and tourism operation. The goal for those researches is to improve city's tourism project based on ecological balance. At the same time, another urgent task is to regulate tourism market. To accomplish this task, some perspective study and technology protection is necessary. Those mentioned above is critical for China tourism industry to become more competitive in global market.

Keywords: Beijing Olympic games; culture effect; sustainable development

国际学术界旅游文化研究已从学术外层走向学术中心,尤其是大型节事活动区域旅游文化管理研究更成为关注的热点和难点。从文化与生态的层面探讨北京奥运大型节事活动后旅游文化资源的持续效益,进而探索中国经济型旅游业向文化型旅游业的转换模式。

一、国内外学术界相关研究回顾

我国旅游文化研究起步于 20 世纪 80 年代,随后便引起广泛的关注和探讨,从对“旅游文化”的界定,对旅游文化传统的初步探讨。90 年代开始关注中国传统文化内涵的宏观研究、区域旅游文化的微观研究及旅游文化的应用研究;如钟敬文强调民俗文化在民族文化中的最基本、最重要的地位,与自然环境的共生与共赢(陶立潘,1996)。进入 21 世纪,学界更加关注旅游文化资源的可持续发展、旅游开发与环境保护良性循环机制等更深层次的问题。但研究论题还主要集中在旅游文化与文化管理的分离状态研究,缺乏整合旅游文化管理的相关探索及提升旅游文化产业层次的研究。

国内学术界近年来对于奥运与文化的研究主要体现在:其一,关于奥运人文理念的研究。如田麦久(2006)在《人文奥运理念与奥运会赛事》中以新的视角提出奥运会不是文化节,应增加奥运会赛事中的人文思考与人文关怀。雷厉、温宇红(2005)等《北京奥运会人文关怀理念及雅典考察

的启示》一文也表达了类似观点，针对参与者和关注者等不同群体的人文需求展开人文关怀。李建平（2004）在《奥运与北京的“和”文化》中倡导要展示北京“和”文化的理念，用“和”的文化吸引世界各国游客。其二，关于旅游文化产业内涵及运行方式的研究。金元浦（2004）在《奥运：创意文化产业》中指出，面对全球化的文化消费与文化营销，奥运是以数字方式全面提升北京整体文化产业水平的大好机遇，应及时发展奥运文化产业，开发内容丰富的文化产品。其三，关于奥运旅游的研究。李小波、袁霜凌（2004）在《奥运行动计划与北京古城旅游景观》中指出奥运行动计划不仅是对北京城市总体规划的全面实施，而且还应从局部诠释整体。刘少和（2007）在《奥运旅游与文化展示》中认为北京 2008 奥运所展示的中华文化不能仅局限于物质文化，而且应深入到行为和思想层面。国外学者关于旅游文化及奥运会与文化结合的研究较为广泛。部分学者专注于奥运与城市发展的研究并有充足的论证。如 MATTHEW J.BURBANK（2002）发表了《大型运动会，城市发展和国家政策》，文章强调将奥运会纳入城市发展的进程。高墩·维特（1999）在《与悉尼博弈：2000 年悉尼奥运会营销》一文中强调文化消费品不仅满足了个体娱乐、文化与教育的需求，更为重要的是完成了城市从生产中心向共同消费中心的转变。

上述国内外学术成果为深入细致拓展研究领域奠定了基础。但是，外国学者对于细化文化的各组成部分与奥运之间的相互作用与影响的研究相对稀缺；中国学者针对北京奥运文化方面的观点大多局限于与国外奥运城市的横向比较而讨论奥运会给举办城市带来的普遍性的文化影响，而忽略了中国这个特殊的东方国家的文化地域特殊性所决定的中国会产生特殊奥运文化效应，尤其缺乏针对奥运后区域旅游文化及生态环境效益的分析研究，缺乏整合旅游文化管理的相关探索及提升旅游文化产业层次的研究。本文在吸取当前学术成果的基础上，阐述北京奥运对相关文化层面的影响及效应分析。

二、奥运后首都城市旅游文化资源管理及持续旅游效应分析

西方学界对城市旅游的研究始于 20 世纪 70 年代，目前已向多领域逐步拓展。学界普遍认为城市不仅作为旅游消费地，同时城市的公园、博物馆、节庆活动、民族艺术等更能带给旅游者休闲娱乐与审美空间；尤其是文化遗产、历史街区、古建筑更能体现城市文化内涵；奥运会等大型节事活动能有效增添城市的吸引力、生机活力、发展的催化剂及其可持续发展的动力。整合首都奥运旅游文化资源，提升古都北京文化旅游产品的国际竞争力，产生后续发展的持久效应。

2008 北京奥运会一个特别的意义在于促进文化的扩散与融合。正是文化的差异性，形成了旅游的必要性和可能性，北京作为著名古都和历史文化名城，有 3000 多年建城史和 800 多年建都史，北京具有巨大的资源优势和文化产业成长的基础，文化早已成为其支柱性发展的内容。以文化为本不仅仅体现在奥林匹克发展过程的方方面面，体现在奥运会的任何一个细节中，更体现在奥运后文化的深入与整合，如奥林匹克运动的五环标志、格言、历届奥运会吉祥物等，都有着丰富的文化内涵。在奥运会中，人们运用各种艺术手段，不仅展现着人体的健、力、美，而且更加集中地表现了其他多种多样的文化艺术形式，这样才使这项活动达到了更高的审美意境。对于举办城市而言，文化因素对于奥林匹克运动会的全过程更不可或缺，正是丰富的城市文化内容及其相关的跨文化的碰撞与交流，使奥运会充满生机活力，也正是在这样的过程中，不断提升奥林匹克运动的历史底蕴和时代精神。因为“文化决定人们的思维方式、感觉方式、交流方式以及生产具体物品的方式。”（弗郎克·戈泰、多米尼克·克萨代尔，2005）奥运会其实就是一次奥林匹克文化和举办国家、城市文化的撞击。具有五千年历史文化传统的东方文明古国，在某种程度上，“中国”对于世界中国就是东方的代名词。作为东方古国首都的北京，是文化底蕴深厚的城市，不同于大多数的举办奥运会的西方现代城市不同。因此，北京奥运文化效应既具有普遍性的，也有特殊意义。

北京奥运会因注重了文化内涵而更具生命力。北京奥林匹克公园具有典型意义，奥林匹克公园建筑位于贯穿南北的老北京城市中轴线上，承载着文化，适应着环境，突显传统城市建筑南北垂直、左右对称、“倚山向阳、山水环绕”的精神理念与文化特征。南起永定门约 8 公里的旧城中轴线，再从钟鼓楼向北延伸约 10 华里至北四环中路北辰桥，国家体育场“鸟巢”与国家游泳馆“水立方”正是北延长中轴线两侧的对称性现代建筑。椭圆形的“鸟巢”与方形的“水立方”相呼应，鸟巢代表“木”属“阳”；水立方代表“水”属“阴”，体现了中国传统的天圆地方和乾坤阴阳说；建筑结构复杂的“鸟巢”

与简约的“水立方”形成对比；刚性的钢结构建筑材料与柔性的膜结构形成反差；红色的“鸟巢”与蓝色的“水立方”在色彩上交相辉映；“温暖”的鸟巢与“冰洁”的水立方更是寓意不凡，这两个标志性的建筑充分体现了中国的文化精神和建筑风格。而奥运村中的廊桥栈道、大漠风情、江南水乡、黑山白水等设计风格，体现了传统的造园挖湖堆山思想，尽显中国风情。沿着中轴线向北俯瞰北京城，在中轴线上形成了近、中、远层层环抱的局面：近景景山、中景奥林匹克山、远景燕山依次衔接。这一切将与天坛、颐和园、长城一起，因同属于中国的历史和文化而源远流长。正如北京大学教授侯仁之先生所指出，北京城市建设经历了三个里程碑式的发展阶段：第一个里程碑是 600 年前明朝定都北京，开始了举世闻名的紫禁城的修建；第二个里程碑是上世纪 50 年代天安门广场的改造和东西长安街的贯通，打破了原有的封建城市封闭的格局，改变了封建帝王至高无上的地位。第三个里程碑是中轴线向北延伸和奥林匹克公园的建设，充分展示了北京步入 21 世纪后进行城市现代化建设的新水平。

文化资源在事件旅游和节庆旅游中占有重要地位，众多国内外游客到来，其关注焦点不仅仅是北京举办奥运会的具体过程，更加关注的应该是北京这座历史名城举办高水平有特色的奥运会的深远影响。奥林匹克运动会带动了首都北京城市的发展，并形成文化产业链。城市自身就是一种旅游资源，娱乐和休闲的审美空间，文化遗产消费以再现历史活动为核心，而文化正是城市旅游的核心要素，文化要素是城市旅游产品中最为重要。经济发展推动文化产业的而被广泛利用，因为它代表了一个城市的文明、文化及其进步，以及这个城市资源的水平。(M.Selby,2004)大型节事活动对作为城市发展的一种形式，对城市的发展具有长期的效果。在休闲得到普遍认同和发展的当代中国，奥林匹克公园尤其具有特殊的意义。正如 Hall 所指出：“像奥林匹克运动会或世界博览会这样的大型节事，一向与大规模的公众消费、相关设施和基础设施建设、城市地区的再发展和再繁荣等问题像联系，这些都会对当地社会造成相当大的影响”(Hall,C.M.Hallmark,1992)。确实，在奥运之后的第一个“十一”黄金周，全国各地的游客纷纷来到北京，到奥林匹克公园游览，体会和回味百年奥运的精神和中国文化传播的生命力。其人次超过故宫、长城等经典景点。“关于旅游的社会文化效应的思考的基本线索，即由于其创新性和恰定性而最具成功希望的思考线索，而无论这些效应是表现在出发旅游者的地区和集体，还是表现在接待旅游者的地区和国家。”(罗贝尔·朗卡尔卡 1997)因而，旅游所带来的，往往是未来的社会变革方向，旅游使得旅游者的国家本身的精神面貌发生演变，表现在生活质量观的出现等，而最突出的后果是一种“旅游文化”的出现，尤其是在中产阶级中。这种新的文化的特点是寻求生活环境的安全的改变，提高个人的价值，把接待地区的某些价值融合起来(罗贝尔·朗卡尔，1997)。正是奥运会的成功召开及奥运后的北京城市发展，将设计出越来越完美的旅游设施，因为旅游休闲已经成为全天候的和主动的活动；必须设计出专门的产品和服务来，因为旅游者“对那些条件舒适和异国情调的平庸和低劣的标记越来越快地感到厌恶”。这些新形式的行动是同当地民众一起，按照地区的和纯粹民族的方式来进行的(罗贝尔·朗卡尔，1997)。奥运后“十一”黄金周的若干变化，已经明显体现了奥运对北京城市发展、市民生活及旅游业发展的影响。

三、在文化与生态层面提升首都经济型旅游业向文化型旅游业的转型

中西方传统文化不约而同地孕育了文化生态和谐思想。正是中国古代“天地有大美而不言”(《庄子·知北游》)的生存环境中迸发出的“生生”和谐，和西方文化中追求生态系统和谐过程中的“创进不已”，成就了人类社会辉煌的文明；因而某种程度上，环境对文明具有重要的影响。现代旅游经济的发展与旅游文化的转换，以及旅游文化要素之间能量的交换和转换，必然存在一定的矛盾，而这样的矛盾需要借助生态的力量加以协调；进而积极关注和研究跨文化旅游中的生态和谐观。古代文明与时代精神相结合，传统文化与西方文化乃至世界各民族文化的交流与互补，增强旅游活动的文化底蕴和视野。

生态环境是由各种生态系统所构成的整体，持久地、潜移默化地对人类的生存与发展产生影响。生态系统的平衡有赖于其内部要素的丰富性，即生物多样性，生物多样性作为生态系统稳定性的重要条件，其意义不仅在于环境保护的理论价值，更在于生态重建的历史实践。作为系统性存在的文化，其自身的演进也是如此。但具体到旅游生态环境容量的检测尚显薄弱，目前在我国已开发的旅游保护区中，定期进行环境检测的保护区仅有 16%；依据科学检测对游客数量进行控制的保护区仅

占 20%；尤其是现代高新技术参与生态旅游管理的领域几乎为空白。通过对旅游生态环境容量进行检测与分析，增强环境质量的测量与监控，由追求经济目标的增长模式向可持续发展模式的转变，经济效益与环境效益良性循环和谐发展。旅游业的增长以旅游资源的可持续利用和良好的生态环境为基础，与资源和环境的承载力相协调。

现代科技革命带来严重的生态后果，诞生了可持续发展的理论，在经历了从无奈到自觉的必然选择之后，人与自然的和谐相处关系并非是向古人“天人合一”原始境界的简单复归，而是人类可持续发展的理性选择。使人类在与自然经历了一系列的对抗和冲突之后，从开始的无奈到自觉升华到与自然和谐共处的境界。1972 年 6 月，联合国在斯德哥尔摩召开了第一次“人类与环境会议”，通过了《人类环境宣言》，继而，1987 年，在世界环境与发展委员会《我们的共同未来》报告中，提出了“可持续发展”的战略思想。20 世纪 80 年代首次提出生态旅游的概念，社会发展的目标是满足人类需求，发展不仅要满足当代人的需要，还要考虑后代人的需要。追求对生态环境的保护，不同于传统旅游，注重对旅游资源和环境的开发和利用，在注重经济效益的同时，强调了资源和环境的生态效益和社会效益。考虑旅游环境的承载力，自然调节控制旅游景点的人数，减少旅游活动对当地生态环境的不良影响，科学测量生态旅游容量，实现综合效益最大化，达到旅游目的地和旅游业的可持续发展。

奥林匹克公园建设突出了“生态城市”的主题。体育场馆地处北京城市的上风上水的西北地段，国家奥林匹克公园正是依托北京城市的文化特征与传统。建筑注意节能、环保，山形水系突出了自然生态保护和生态环境建设，把许多 2008 年奥运会赛馆分散建于北京的大学校园之中，这将保证这些体育设施在奥运会之后仍得到充分的使用。“鸟巢”与“水立方”恰恰表达了对美好环境的追求，中国最早的建筑来源之一为“从地上长出来的”（北方的穴居），来源之二为“从天上落下来的”（南方的巢居），而鸟巢的设计包含着巢居的最初形态，禽鸟是自然界与人类最亲近和最温和的朋友，用鸟巢的形象建造标志性的奥运场馆，来自于五湖四海的奥运健儿及中外游客，汇聚于温馨的鸟巢，寄托着人类对温馨而美好自然界的向往，因而包含着更深意义上的人与自然和谐相处，共同拥有一个地球。正如八十年前爱国实业家“中国船王”卢作孚先生所期待的“愿人人皆为园艺家，将世界造成花园一样。”

奥运后都市旅游可持续发展，需要运用信息技术手段，整合首都文化资源，实现生态文明和谐。从三个方面互相促进，协调发展：其一，以奥运为契机，规划首都城市文化旅游。运用空间遥感技术、地面激光扫描及航空摄影数据等技术手段，为首都旅游文化名城规划、北京文化街镇规划、奥运场馆的利用与旅游文化资源的整合提供具有科学性的新型遥感技术服务。探索首都文化景观的区域特征及内涵，人与自然的和谐互动以及千变万化中的整体性风格。其二，开展首都乡村民俗旅游，开展村镇文化产业空间布局与对比分析及民俗特色产品虚拟展示研究，建立乡村旅游服务信息系统，实现旅游产品供需信息的及时有效对接，以最大程度共享信息资源。“人们似乎更喜欢一年中的各种小休闲或是延长周末。周末或短期休假确实能中断日常工作和交通强加与人的节奏，能逃离城市，拥有进行各种娱乐活动的相应的时间”（罗歇·苏，1996）。其三，从城市向乡村扩散和融合的过程中，实现奥运后首都旅游文化产业一体化。以北京自然环境与历史文化资源为前提，协调奥运场馆与首都旅游文化资源；横向层面与相关产业融合，实现文化向体育健身、餐饮业、服装业等相关产业的扩散；纵向层面，依靠高新科技和新型媒介实现文化向休闲消费等更高层次发展。

以奥运为契机，带动中国休闲产业的发展，成为提升中国旅游业竞争力的重要途径之一。依托首都城市与农村区位特征与优势，将首都城市与乡村文化旅游资源及奥运旅游资源相融合，通过首都农村自然环境及民俗资源、城市文化资源、奥运建筑景观资源的融合与互补，以北京所特有的乡土与城市文化资源和特有的奥运资源吸引国内外游客，通过集观赏、娱乐、体验、知识、教育于一体的新兴产业与首都城市休闲旅游需求对接，促进城乡统筹旅游产业结构协调发展。进而提升首都休闲旅游的规范化和规模化，以文化旅游引领中国旅游业从经济型旅游业走向文化型旅游业的发展道路。

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作者简介

张胜男, 女, 1965年10月出生, 副教授, 博士学位, 毕业于中国人民大学; 白艳萍, 女, 1976年出生, 博士学位, 讲师, 毕业于对外经贸大学; 雷蕾, 女, 1981年出生, 首都师范大学资源环境与旅游学院研究生。

2008奥运景观雕塑世界巡展与北京奥运景观的创建与传播

王馨欣

北京第二外国语学院会展系

摘要

真正无国界的、具有全球性号召力的奥运会，以及在此基础上所进行的各类文化庆典活动，它们彼此间相互推动和发展形成历届奥运会举办城市最具特色的文化景观。奥运会不仅为举办城市带来巨大地经济、政治、文化等诸多方面的效益，也留下许多重要的文化景观与城市吸引物，而以奥运为主题的景观雕塑更成为诸多奥运文化遗产之中最具艺术性和观赏性的文化载体，持久永恒的承载并传播着奥运精神与文化理念，以2008北京奥运景观雕塑世界巡展等为代表的各类展会活动，成为了历届举办城市奥运文化遗产和城市景观的创建和传播的重要载体。

关键词：景观雕塑；城市景观；奥运文化遗产；艺术传播

2008 OLYMPIC LANDSCAPE SCULPTURE OF WORLD EXHIBITING TOUR WITH THE FOUNDATION AND TRANSMISSION OF AND BEIJING OLYMPIC LANDSCAPE

Xinxin WANG

Beijing International Studies University

ABSTRACT

Every session of Olympic Games leaves Olympic cultural heritage to posterity. To tourism, as the main economic increasing point of Post-Olympic period, the Olympic cultural heritage represented by Olympic sight sculpture is the key part among so many Olympic tourist attractions, and it plays an important role in attracting and promoting the tourism development of hosting cities.

Keywords: landscape sculpture; city landscape; Olympic cultural heritage; art transmission

城市景观作为一种依附于城市文化背景而存在的艺术形式，带有鲜明的地域特色和时代特征，其自身所体现出唯一性与专属性，是城市特色、地域风貌、文化内涵的艺术体现，既能成为城市的标志性景观，又具有文化地标的属性，形成视觉传达的“瞬间效应”和吸引眼球的“驻足效应”。而在城市景观设计中雕塑作品历来是画龙点睛之笔，优秀的雕塑作品不仅可成为该地区的标志性景观，还可为其带来广泛的社会声誉及影响。挪威奥斯陆风景胜地最著名的当属维吉兰这座世界闻名的雕塑公园，它是以弗洛格纳公园的绿地、湖泊为自然背景，由挪威久负盛名的雕塑家古斯塔夫·维吉兰用了40年时间精心设计而成。人们称这座公园为“人生旅途公园”，整个公园以人生为主题，用铸铁、铜和花岗岩雕刻成，192组共650尊雕像呈现出人类由生到死亡的各个时期，成为世界久负盛名的雕塑公园。

在国际上衡量一个城市发展水平标准有很多，包括人均GDP生产值、人均消费额、绿色植物的人均占有量等；而现在雕塑在城市中的人均占有率和空间占有率的高低也已成为衡量城市经济发展状况、文化审美水平的重要参照系。在希腊雅典，当地人会非常自豪的向游客介绍：雅典共有80万人口，其中40万是居民，40万是雕塑，这也为雅典成为世界性著名的文化艺术中心起到重要的助推和宣传作用，1896年第一届现代奥运会在这方沃土诞生也就极容易被人所认同，正是雅典自身文化艺术以及其在城市景观中所呈现出的独特城市文化魅力，使得它通过奥林匹克这样一个真正成为了无国界的、具有全球性号召力的大型活动组织形式，得到最为广泛的传播和推广；在此基础上所进行的各类文化庆典活动，使其更像是一次全球联欢与文化盛典，所以依凭奥林匹克运动和城市景观发展的相互推动和发展成为历届奥运会举办城市最具特色的文化现象。奥运会本身所具备的巨大的全球化传播影响，不仅为举办城市带来巨大地经济、政治、文化等诸多方面的效益，又使得奥运举办后为后世留下名垂史册的奥运文化遗产，成为奥运举办地重要的文化景观与城市吸引物，

而以奥运为主题的景观雕塑更成为诸多奥运文化遗产之中最具艺术性、观赏性和传播性的文化载体，持久永恒的承载并传播着奥运精神与文化理念，以2008北京奥运景观雕塑世界巡展等为代表的各类展会活动，成为了历届举办城市奥运文化遗产和城市景观的创建和传播的重要载体。

一、奥林匹克盛典与文化理念传播

奥林匹克运动会发展历程已逾百年，经历了时间岁月的洗礼，由早期单纯化的区域性体育赛事，发展为全人类的国际性文化盛典，每届奥运会的成功举办都是全人类集体智慧共同努力下的成果，作为活动成果的重要结晶便是那些名垂史册的奥运文化遗产。

1.1 奥运申办与竞选——奥运举办城市的文化资格审视

每一届奥林匹克运动会申办城市的竞选，实际就是一次城市之间综合实力的竞争，而那些具有特殊文化底蕴的申办城市，总会因其独特的文化魅力而增加其在竞争中的砝码，举办城市所具备的文化资质在所有奥运举办城市的竞选条件中，始终拥有着至高无上的地位与荣誉。

1.2 奥运承办与建设——人类文化遗产的伟大建设工程。

奥林匹克精神理念的宣传与表达，除了直接性的通过其自身举办的各项体育赛事以外，其他方式的呈现几乎都寻求来自于文化艺术的服务。奥运历经百年锤炼而成的各种精神理念和口号文本均需要寻求物质化的形式展现，奥运会会徽、吉祥物、体育场馆建筑等承载着传播奥运精神理念的功用；而在诸多的文化艺术门类之中，景观雕塑又因其与生俱来的诸多优势特征而获得人们的认同与青睐。

1.3 奥运举行与展演——当代文化艺术的集中规模呈现

每一届奥运会都是对其所处时期全世界文化成就的检阅和总结。一届奥运会举办的成功与否，不仅体现在其基础场馆设施、建筑景观环境、服务保障体系，更突出的是奥运比赛以外最受人们关注的奥运会的开幕式和闭幕式，从主题风格的选用确定，到文艺演出的整体编排，从服装道具的设计制作，到场景音乐的创意构思，都展现出浓厚的地域文化和民俗特征，成为每四年一次全球最盛大的文化艺术展演活动。

二、奥运景观雕塑与奥运文化遗产

众所周知，文化艺术作为人类劳动成果的重要组成部分，同时也是人类精神文明的重要分支，是人类按照美的规律和法则，通过某种物质媒介所进行的各种创造性活动，并将人们的感性知觉与理性思维诉诸其中，成为人们传播文化理念、交流思想观念的重要手段。随着大众意识的觉醒和民主化进程的加快，使得人们具有要使包括艺术品在内的一切事物在空间与人性上更接近自我的强烈愿望，而置于开放公共空间中的以奥运景观雕塑为代表的奥运文化遗产，正好为人们提供了与艺术品亲密接触的契机。

2.1 精神载体——奥运理念的持久传播者

奥运景观雕塑承载着传播奥运精神理念的重要使命，它以开放式的敞开姿态迎接着来自世界各地的八方宾朋，将奥运崇高至上的精神理念通过自身的审美表达传递给每一个人。处处是景、样样独特、件件精品、个个永恒，既让人们感受到自然环境的优美动人，又为人们营造了艺术殿堂般的浓郁氛围，同时也让人们亲身经历了奥林匹克精神的洗礼。2004年第28届雅典奥运会开幕式上，50英尺高的古希腊巨型头像、真人活体雕塑的历史年轮表演，对雕塑本体进行了解构与重建的视觉化演示，以一种新的视觉形式完美再现了雅典奥林匹克运动的源流发展与历史演进，体现出了雕塑艺术作为一种具有永久性传播的物质载体所具备的天然的优势特征。

尤其值得一提的是1988年第24届韩国汉城奥运会闭幕后，为后世创造了一座经典的艺术宝藏

——奥林匹克雕塑公园，里面不仅陈列着来自世界 30 多个国家的杰出雕塑家专门创作的近 200 件作品，还有来自 66 个国家、155 名雕塑家捐赠的作品，代表着当今世界雕塑的最新趋势和最高水平，通过不同的样式和风格共同体现着奥林匹克的精髓所在，并被认定为世界 5 大著名雕塑公园之一。另外，美国西雅图的奥林匹克博物馆和雕塑公园，日本箱根的“雕刻之森”雕塑公园、墨西哥的“友谊与艺术之路”等都是利用雕塑全天候、持久性的独特属性向世人传播奥林匹克的精神与理念。

2.2 景观创建物——城市精致建设的装饰手段

奥运景观雕塑的艺术魅力还在于其自成一体的独立式景观样式，作为依附于人文背景而存在的艺术形式，景观雕塑带有鲜明的地域特色和时代特征，强调唯一性与专属性，是城市特色、地域风貌、文化内涵的艺术体现，既能成为城市的标志性景观，又具有文化地标的属性，也成为彩妆城市的工具，具有视觉传达的“瞬间效应”和吸引眼球的“驻足效应”。优秀的雕塑作品不仅可成为该地区的标志性景观，也成为城市精致化建设的重要装饰手段，为其带来广泛的社会声誉及影响。很多国家正是看重了景观雕塑的特质，于是纷纷在奥运举办地兴建了以奥运为主题的奥林匹克雕塑公园，或者将以奥运为主题的景观雕塑永久性地陈列于城市各个空间角落。纵观从雅典、罗马、巴黎、莫斯科，到汉城、巴塞罗那、亚特兰大、悉尼，都曾经将景观雕塑作为其重要的奥运文化遗产进行创建与维护，极大地帮助和推动奥运发展。通过雕塑文化的宣传与引领，借助奥运活动的契机与优势，带动了城市建设的精致发展，使得整个国家和城市的文化建设因为奥运而丰富、因为雕塑而精彩。

2.3 旅游吸引物——奥运经济的重要推动力

历届奥运会举办之前，被大众和舆论最为关心的就是在付出天文数字般的用于整个奥运建设、举办和运作的费用之后，能否获得高额的利润收益，以及奥运举办以后相关景观设施的持续利用和地区经济的后续拉动作用。事实证明，作为后奥运时期经济推动增长的重要因素之一的奥运文化遗产，能够产生持久性地旅游吸引效应，成为旅游文化的新型“城市名片”，受到世界各地游客追捧的以奥运和体育为主题的雕塑公园便是很好的例证。位于捷克的斯丹涅克·聂麦契克体育雕塑公园是一个规模不大但很有特色的主题公园，园中竖立着雕塑家 20 多件作品，大部分是以体育运动为内容的，有表现自行车运动、有表现冰球运动、表现艺术体操的等等，吸引了许多游人专门前去观赏，成为美丽布拉格一道独特风景线。多种独具特色的雕塑公园不仅促进了地区经济的迅猛发展，成为城市文明的象征性景观，而且对于促进整个社会的精神文明建设的发展也起到不可估量的推动作用。

2.4 北京欢迎你——北京奥运景观雕塑的创建

作为目前被世界上最为看好的北京 2008 年第 29 届奥林匹克运动会，同样选择了奥运景观雕塑作为宣传奥运精神、传播中华文明的重要载体和工具。早在 20 世纪 90 年代我国很多著名雕塑家就已创作出很多世界闻名的体育雕塑作品，例如在瑞士洛桑奥林匹克总部设立的永久性雕塑花园中，陈列着许多近百年来由各国雕塑家创造的反映奥林匹克精神的雕塑作品，其中包括我国著名雕塑家朱成的作品《千钧一箭》，优美矫健的射击运动员抽象幻化为满弓之箭，体现出体育与人的完美统一；田金铎先生的作品《走向世界》，表现一位飒爽英姿的中国女运动员，迈着矫健的步伐，走上世界体育的大舞台，走向代表永恒的胜利终点。

此外，自 1995 年开始至今已举办六届的全国体育美展，以及在 2001 年专门为北京申奥而举行的《新北京、新奥运——体育雕塑展览》已经传达了人们利用雕塑艺术来期盼奥运的心声，创作出了一大批反映体育精神和奥运理念的经典雕塑作品。2002 年秦皇岛北戴河奥林匹克雕塑大道建成，更是成为国内首个专门为奥运而创建的艺术宝藏之地，她已经成为该地最为重要的群体性景观和旅游吸引物，成为了中国奥运景观的重要集藏地。值得一提的还有，2005 年至今筹备举办的“北京奥运公共艺术·环境设施暨城市雕塑方案展”，是由全国城市雕塑建设指导委员会、中国雕塑学会、北京市规划委员会、北京市文化局、第 29 届奥林匹克运动会组织委员会文化活动部等单位共同主办，共征集了来自 128 个设计单位的 400 余件立体方案和 1500 余件平面方案，旨在营造奥运城市文化景观，提升北京城市文化品位，为北京奥林匹克公园、奥运场馆及其他环境公共艺术建设储备雄厚的文化资源。

现如今，由北京奥组委主办，中国美术家协会等单位承办，作为第 29 届奥林匹克运动会文化节重要文化活动的“2008 奥运景观雕塑世界巡展”也是凭此契机举行地，此次活动共有来自 91 个国家和地区的 1000 多名雕塑家报名应征，总共送来 2433 件/组作品方案，很多在国际享誉盛名的雕塑大家也积极投稿。展览筹备和举办期间，全国政协、国务院、全国侨联、统战部、中宣部、外交部、北京市委市政府以及奥组委等有关领导都亲临听取工作汇报，尤其是全国政协主席贾庆林和前任国际奥委会主席萨马兰奇、现任国际奥委会主席罗格等前来指导参观，更是令全球雕塑界备受鼓舞。入选的 400 余件/组优秀方案已在包括北京、上海、香港、澳门等在内的全国十多城市，以及包括瑞士洛桑的国际奥委会总部和美国联合国总部在内的五大洲 30 个海外城市进行公开展示。最终经过来自十多个国家的专业评委细致缜密的评审，共评选出 29 件金银铜奖、50 件五环奖和若干件优秀奖。从此次展览的巡展城市数、参观总人数、媒体关注度、巡展总里程等因子便可窥见其世界级影响力，它在传播奥运理念、传扬北京奥运、传承中国文化方面已经起到了重要推动作用。这些作品最终将作为永久性景观放置于北京奥林匹克公园和城市街景之中，成为北京奥运会后流传下来的珍贵文化遗产而接受世界各国人士的观光留念。

三、传播形态魅力与文化精神属性

3.1 奥运文化遗产的普及共享

纵观现代艺术的发展，随着工业革命之后人权意识的不断高涨，艺术创作也逐步走向极端，成为艺术家宣泄个人情感与展现个人观念的工具，与观众的距离越拉越大；博物馆、画廊也成为一些社会精英标榜身份与品味的地方，一般观众却很少有机会专门前去参观。到了 20 世纪末，这种情况改变了，人民大众开始关注起艺术来，“参观博物馆的人越来越多，画廊不堪重负，电梯常常人满为患，礼品商店供不应求……”高额的门票费用、脱世的创作风格、自高的创作理念，再加上拥挤的参观人群、糟糕的环境氛围和不便的交通设施，使得人们又一次得面对艺术殿堂时开始望而却步，人们开始渴望一种更为舒适、开阔的艺术展览模式的出现。而置于公共展示空间的城市景观雕塑正好满足这种要求，它以开放式的敞开姿态进行着审美信息的传达，社会大众作为社会公民既享有视觉共享权，同时也享有公共所有权，使得雕塑艺术真正与人们紧密结合起来，呈现在人们生活的各个角落。在北京奥运建设过程中，伫立于交通节点、社区街道、花园园林等各处，以及奥林匹克公园集中的奥运景观雕塑群落，使得人们能够在宽阔的公共空间、优美的自然环境中与雕塑艺术零距离接触，既让人们感受到自然环境的优美景观，又让人们在优雅的环境中体味到了艺术的无限魅力，也真正实现了奥运普及共享的精神理念。

3.2 大众传播媒介的传播推广

以奥运和雕塑为母题，借助影视、报刊、杂志、电子媒体等现代传播媒介进行传播过程中，信息含量经历了复制、运输、传递、迁移和再创造。在这里，报纸杂志、电视台、电子网络的编导充当了“把关人”的角色，他们通常根据传播主题的设置、不同类型受众对雕塑艺术品进行了信息的筛选、解读与再创造，通过纸质文本、电子媒介进行传播，这都会形成雕塑艺术信息含量的迁移、传送与增减变量，也正是如此形成了不同人对于奥运景观雕塑不同的理念阐释。同时受众在欣赏阅读的过程中也会出现信息含量的不均等现象，他们一方面会受到自身知识结构和审美文化水平等因素的制约而产生不同认知，对于那些了解作品历史背景、创作动机基本的受众可以实现信息的等量传递，而对于一般性的观众或不了解相关背景信息的欣赏者在对作品解读时，则会有信息的增减与变量，于是形成了一万个人就有对奥运景观雕塑的一万种理解与解读；另一方面，传播媒介自身传播过程中对作品的介绍也对观众的接受也有着至关重要的影响。各类有关奥运景观雕塑的专题书籍、杂志、报刊，甚至很多电子媒介都分别通过照片、文字、影响、声音等传播形式，其延展方式的不同调动了受众不同的知觉器官，使得奥运精神理念通过各种大众传播媒介的传播推广更加深入人心，形成的是更深层次的审美期待与社会影响。

3.3 可持续性和谐发展观

人类的不断发展前进，目的的就是追求宜人的生活环境。奥运景观雕塑的材料多直接取材于

大自然，符合中国“天人合一”的理念，同时在雕塑的制作和保存过程中，不会对人类生存环境造成二度污染，具有可持续性发展的意蕴在内。雕塑自古以来就与自然景观有着密不可分的关系，园林石峰、形态万千、刚柔相济、密透相间，自身就如独具一格的巨大抽象雕塑群；而至于其中的雕塑作品被称为是自然环境的点睛之笔，不可或缺，两者相辅相成，互为影响。自然景观中因为加入了雕塑，起到了增添景致、美化环境的作用；雕塑也因环境的映衬而更具艺术感染力。要通过雕塑自身的造型语言与周围的环境进行交流，共同创造一种协调的关系，使之增添一种自由、活泼的氛围和优雅、清新的空间环境。由雕塑去适应环境，让环境来映衬雕塑，显现出两者的融合性，会令它们和谐共存、相得益彰。

借助奥运的契机，通过景观雕塑的宣传与引领，带动整个国家、城市的文化建设，使得北京奥运和中国的城市化建设因为雕塑而更人性化、更富魅力，也使得中国雕塑因为奥运的助力而走向世界、名扬海外。有着悠久的历史，深厚的文化传统的中国，在迎来迎接 2008 年第 29 届北京奥运会期间，景观雕塑的功能在这里被无限地发扬与光大。历经 8 年的奥运建设和筹备期，包括奥运场馆建设，周边环境改善，城市形象的美化，细节景观的营建等在内的北京城市景观的营造，这一切通过景观雕塑的形态将奥运精神完美体现出来，作为一种文化遗产的永久保存；同时，各类奥运纪念品、工艺品、标示牌等雕塑的衍生物也体现出雕塑自身的文化魅力和社会影响力。2008 年奥运景观雕塑作为北京奥运文化遗产的重要组成部分，必将成为传播奥运精神理念的持久传播工具，成为整个城市精致化建设的重要装饰手段，同时也成为体现中国传统雕塑资源及现代雕塑实力的集藏地，为北京城增添更丰富、更生动、更具人文价值的艺术元素。

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作者简介

毕业于清华大学，获得学士、硕士；中国国际贸易学会会展专业委员会会员。现北京第二外国语学院会展系教师，主要从事展览策划与设计传播研究，著有《北京会展经济发展报告》、《公园景观艺术设计》等著作和论文。本人曾作为“2008 奥运景观雕塑世界巡展”组委会工作人员参与该展览全程策划和组织管理。

TOURISTS' MULTI-SENSORY EXPERIENCES AT WORLD EXPOS

Claudia Bell
Dept of Sociology
University of Auckland

ABSTRACT

International mega events often determine the choice of destinations for travelers. This paper explores the visitors' experience of visiting World Expo 2005 at Nagoya Japan, and Expo 2000 Hannover, Germany. As a component of this, the author addresses a significant but largely overlooked issue in the planning and staging of mega events. The tourists' experiences are not just as spectators of the visual. Other bodily senses are also engaged at Expo displays eg touch, taste, smell. These bodily experiences ('sense-scapes') have not been explored in the literature on global mega events. I refer to the 'sensual economy', noting that the positive corporal experiences of individuals plays a significant role in economic and social life.

Keywords: World Expo; nations; senses; sensual economy; experience

My observations expressed in this presentation have implications for any nation hosting a mega event, including China and its forthcoming Expo in Shanghai, 2010. The website for the Shanghai World Expo describes such events as 'galleries of human inspirations and thoughts', and 'grand events for economic, scientific, technological and cultural exchanges' important for their displays of 'historical experience' and exchanges of 'innovative ideas'. For an exciting, memorable touristic experience – and successful public relations exercise - the displays and demonstrations at Expo should appeal to the individual visitor as a pleasurable multi-sensory experience. There is scope in the development stages for exhibition designers to expand their consideration of these issues. The outcomes: an enhanced experience for the tourist; and capital gain from that sector we can now label the 'sensual economy'.

'The limits of my language are not the limits of my world.'
David Howes, *Empire of the Senses*, 2003;1.

AN INVITATION TO SENSUAL EXPERIENCE

World Expos are sites in which diverse nations compete for attention. In the peculiar geography of immediate neighbourhood – pavilions from various nations crammed against one another – distinctive spaces have to be created to appeal to international guests. Those visitors come from a wide range of countries, often without sharing a spoken or written language in common with the host nation. These people therefore need to be reached via the appeal to their bodily senses. It is up to Expo designers to provide what Kracauer refers to as 'an organised bombardment of the senses' (in Rojek and Urry, 1997; 6).

PART ONE: THE SENSUAL REVOLUTION

There has been something of a sensual revolution, Canadian anthropologist

Howes tells us. A segment of academia has moved into the realm of the bodily and the senses. He writes in response to philosopher Michel Serres' observation about the sensual poverty of contemporary theory. As academics, we learned to shove personal sensory experiences away from intellectual analysis - these were believed to inhabit separate realms. Howes describes the language-bound body as a 'desensualised robot, unable to taste or smell, and side-lining those pleasures to another sphere of their being' (Howes, 2005; 2).

Constance Classan points out that senses are cultural; they are imbued with social values.

‘Taste and sounds and touches are imbued with meaning and carefully heirarchized and regulated so as to express and enforce the social and cosmic order. This system of sensory values is never entirely articulated through language, but it is practiced and experienced by humans as culture bearers... it is something one lives.’ (in Claassen, 2005; 3). The senses are not just ‘energy transducers’ or ‘information gatherers’ or ‘perceptual systems’ - terms Howes has collected from various analyses – but also cultural systems. The senses are shared social phenomena (Howes, 2005; 5). The senses are the media through which we grow to understand and make sense of the world. To manage without any particular sense – sight, hearing, taste – is indeed to be sentenced.

Seeing the world

Western subjectivity is premised on the centrality of sight, Hetherington reminds us, and on understandings of what we do when we see. That centrality equates the body ‘with the cultural in ways that essentialise the cultural significance and specificities of seeing as knowing...’ (Hetherington, 2003;1934). The privileging of the visual, or hegemony of vision, has been denigrated in the twentieth century by various writers, including Rojek and Urry, who explain that ‘Flanerie was an act not only of intelligent wandering, but also of peeling away the blasé indifference of everyday life and opening up the senses.’ Obrador-Pons explains that ‘the penetrating gaze that imbues the social science seeks the order of things... their extrinsic foundations and underlying meanings and structures’. He laments the lack of attention to other senses (Obrador-Pons 2007; 124).

Offering visitors enchanting novel visual experiences has been an essential prerequisite of World Expos. The agenda, after all, is to have people come and see. Like any tourist attractions, mega-events must appeal primarily and fundamentally to the visual.

The very first Exposition of all Nations in London, 1851 was notable for its extraordinary purpose-built architecture. The Crystal Palace at Hyde Park was a marvellous edifice constructed of ten hectares of glass, covering a display area of 96,000 square meters. The canopy of light contrasted with the dour solidity of the surrounding Victorian stone buildings of London. This was indeed a splendid sight!

That architecture set both standard and style: Expos were not just about the displays inside the buildings, but also about the buildings themselves. The most famous example is the Eiffel Tower, built for the Exposition Universelle de Paris, 1889. Until 1930 it was the world’s tallest building. At the Barcelona International Exhibition 1929 the modernist German National Pavilion (referred to as the Barcelona Pavilion) became a key point of reference in twentieth century architecture and furniture design. At the World Expo in Seattle 1962, the then futuristic Space Needle became an enduring symbol for that city – and subsequently a much-imitated structure.

The Expo tradition has been for distinctive buildings, identified with particular nations, both for the main buildings built by the host, and for contributing nations.

Feeling with one’s skin

Obrador-Pons explains that ‘touch assumes a proximal and performative form of knowledge that exceeds representation this breaking the distance between subject and object (Obrador-Pons 2007; 124). Certainly tactile qualities in the architecture of pavilions were apparent at the 2000 Expo, Hanover, Germany. There was extremely diverse expression of nationhood in the very construction materials utilized in many of the stand-alone buildings.

Individual structures included deliberately textured, tactile qualities in their design; visitors happily satisfied their urge to touch. The Finnish, Swiss, Hungarian, Latvian and Lithuanian pavilions all used rough sawn and natural wooden surfaces, inviting stroking and handling. Elsewhere varied floor surfaces offered a range of textures to walk on. A mock ‘museum of the future’ impelled

the fingering of mysterious objects. Iceland's simple bright blue rectangular block skinned with water articulated the blue glacial landscape. Denmark's display was across boardwalks over water. Both let the qualities of water entice the visitors. One could run one's hands through the refreshing surfaces; one could hear the tumbling and splashing of cool water.

Thermoception – the sense of heat or its absence – cold! – was addressed delightfully at Japan Expo 2005. To cool the crowds on those hot August days, fine mist sprays had been erected alongside board walks. These were enormously popular with the sweltering visitors: people laughed as they darted in out of the mists.

What's that I hear?

While some theorists (eg Hilmes, 2005; Jensen, 2006) locate the literature on sound studies at the margins of academia, sound itself and the experiences of hearing or audition are key elements to the human response to atmosphere and ambience.

Sound is created by both nature and culture. The twentieth century might well be described as 'sound culture': the period in which recorded sound became a significant global commodity. Jensen (2006) points out that technologies have increasingly separated 'sound from its origins, thus potentially polluting both social and natural contexts, and desensitising audiences to the potential richness of sound in work as well as leisure' (Jensen, 2006; 15). He explains how soundscapes have been re-engineered over time, to the mood music to encourage lingering in a shopping mall, to the omnipresent 'muzak' some call 'elevator music'. He points out that this is very under-researched 'as a form of communication, as a modality of experience, and as a resource for cultural expression and social action' (Jensen, 2006: 7).

In this new century, with ever more sophisticated sound-collecting and sound-transmitting technologies, we anticipate cutting edge technologies to deliver various kinds of sound at World Expos. We expect this to range from that which provides the most subtle ambience, to pleasurable noises that happily distract and dominate our senses. Along with this are those ambient sounds that happen without human design, control or direction.

Hilmes reminds us that sound culture practices, from music to spoken word to conceptions of noise and silence, differ greatly from culture to culture (Hilmes, 2005; 258). For this reason, we expect Expos to showcase the sounds of nations via world music. At Pacific pavilions continuous singing and dancing are the main attractions. Outside the large African pavilion at Japan Expo African musicians performed idiosyncratic sounds. But I have found few pavilions with the constant aural ambience of an assemblage of sounds – other than music- collected from that nation. This could be an interesting experiment or solution, especially in those pavilions where the designer has offered only silence.

Smells great!

Olfaction receptor neurons in the body – those which give us our sense of smell - can be easily excited or satisfied at any event that offers food! At Hanover Expo the Bavarian pavilion, effectively a huge beer hall, wafted with the hot fragrance of juicy roasted meats and beer. With the vigorous music of the oomph band, visitors experienced a convincing and joyful version of (perhaps) authentic of German folk culture. At Hanover Expo more subtle fragrances were also enjoyed: the rough sawn timber of the Baltic pavilions smelled gently of amber, resin and pine.

The Venezuelan pavilion, a huge stylised flower, the petals opening and closing by hydraulics, presented a soft damp jungle smell of bromeliads and other tropical flora.

As we walk around any site, we experience smell in ephemeral fragments. Dann tells us about 'smelltizers': machines designed to waft particular aromas across a site eg at Disney World.

Often, he says, the inclusion of smells to provide atmosphere tends to act ‘as an agent of time-transcendent nostalgia, evoking scenarios that are portrayed as better than current reality’ (Dann, 2002; 22). The pleasure in the experience of smell is not about new experiences, but the pleasure of nostalgia and reminiscence.

Taste or gustation

Food is not just about flavour and taste. The location in which food is eaten greatly enhances not just the sense of taste, but the food as an experience that represents another culture. As various writers explain, food experiences are an intrinsic, essential component of the tourist experience (eg Quan and Wang, 2004; Cohen and Avieli, 2004; Kivela and Crotts, 2006).

At Japan Expo one could delight in new food and drink tastes at a restaurant set up in a space to characterize a specific country: eg Sri Lanka, France, Italy, and Tunisia. In the best exemplars, the physical surroundings were contrived to create ambience (Stroebele and De Casto, 2004). Representation of nation was more than mere backdrop to the food; the colours, smells, elegance of presentation, warmth and charm of the wait staff, the very décor and background sounds, provides theatricity, stimulation, ‘authenticity’, and appeal to memory. When one remembers taste, often that taste is thus contextualised.

Hence at Expo there is the opportunity for food to represent nation. This only really works if nationals from that country sell and serve the food. At Japan Expo we were very surprised at how many foreign food vending outlets were staffed by Japanese. This robbed the experience of novelty and authenticity, severely diluting the sense of this being a truly novel foreign food experience.

The sensual economy

For tourist attractions to appeal, visitors want the joy of anticipation, and confidence that their expectations will be at minimum fulfilled. British geographers Crouch and Desforges points out that an impetus for tourism –paying money to go somewhere - is to immerse the body in new contexts – eating, drinking, sunbathing, sight-seeing, walking, dancing! The plurality of the senses gives access to the world (Crouch and Desforges, 2003;7). This obviously drives tourism economies.

Quan and Wang (2004) write of the ‘experience economy’. They explain that the experiences of individuals play a significant role in fiscal and social life. They add, ‘tourism is surely one of the pioneer examples of the experience economy’ (Quan and Wang, 2004; 297). In this paper, I have refined that notion to concentrate on the sensuous elements of even casual, momentary experience.

The wonderful thing about satisfying the senses at any Expo – or other – mega-event is that these can be arranged, manufactured, deliberately created by the designers of the individual pavilions, and of the overall site itself.

The impact on visitors might be subtle. They may say they thought it was a fantastic event, without overtly referring to the varied sensual pleasures. But in any experience we engage with, the appeal to our various senses is what provides pleasure and enchantment. Event organisers need to be highly conscious that the sensescape is a crucial dimension in their planning, in delivering an enchanting- not prosaic - experience.

PART TWO: CASE STUDY

A touching experience

My case study explores the encouraging of awareness of a nation – New Zealand - through

the simple act of touching a natural object from that country. My example is the effective use of tactile actions at the New Zealand pavilion at Expo 2005 in Aichi, Japan.

In the New Zealand pavilion an artificial long white cloud (representing Aotearoa – the Maori name for New Zealand, which translates to ‘land of the long white cloud’) was suspended over a 1.8 tonne greenstone boulder (pounama). This had been collected from the West Coast of the South Island of New Zealand. Recorded birdsong played. A huge screen showed multiple projection images of a bird's flight across gorgeous New Zealand landscapes. The boulder was arranged in front of this.

Visitors were invited to touch the stone. In touching the stone, they were symbolically touching the ‘heart’ of New Zealand. While the cloud was obviously a representation; the rock was real, a greenstone boulder from New Zealand: a solid chunk of terrain, signifying the spirit and the very essence of New Zealand as a whole.

In this pavilion the visitors were engaging with something authentic. Simultaneously they knew it was just a particle, a miniscule component, of something hundreds of thousands time larger: an entire country.

Visitors queued to touch the boulder. What would compel them to do this? What academic analysis could explain it? Could a sense of nation be conveyed, far from home, through the presentation of a transportable item, that is also a fragment of actual landscape? Can visitors’ imaginings of another place be enlightened as they physically wait, watch, then place their hands onto a solid surface? As Claassen reminds us, touch is the sense least likely to deceive. We unthinkingly trust that which can rest our hands on.

Touch is ‘the hungriest sense of post-modernity’, Claassen tells us. She explains that an ideological barrier to writing about touch in culture is that touch, like the body in general, has been positioned in opposition to the intellect, and assumed to be merely the subject of mindless pleasure and pain.’ This distinction, she suggests, is entrenched in the class hierarchy which gives precedent to those who work with their heads, over those who engage in manual labour (Claassen 2005; 4-5).

My own observations suggest that the urge to touch is frequently thwarted, but also often satisfied, at tourist attractions (Bell and Lyall, 2005). People often wonder if they are allowed to touch; their usual obedience to rules may supersede spontaneous instinct. One does not often come across an explicitly stated invitation to touch. And this was an experience where the item to be touched had been placed there to stand for an entire nation.

Sight is supplemented by touch as a means to discover the traits of the objects on display. Yi-Fu Tuan observes that ‘touch is exploratory, and hence can open up a world. Our hands present us with the reality of discrete objects, (to be) examined for their form, size, weight, texture. Hands are restless; indeed, it is tempting to speak of them as curious...’ (in Claassen, 2005; 75). Children are constantly impelled to touch; for them, touch is their first dominant sense, and a primary method of learning.

To touch is to form a tactile relationship with the environment; to verify its actuality, its authenticity; to elicit confirmation; to destroy the gap between that which is seen and the subjective human body; to surmount distance. Feeling the object extends what one feels about the object; the physical and emotional connect. Through manual investigation, objects confirm and enrich our knowledge via their materiality; our awareness of the physical world (through our hands) cannot be separated from the body. Exhibited artefacts do not just engage the viewer mentally, but also address the senses. Athinodoros explains that understanding is mediated by the body; ‘not mental, but corporeal’. To touch an object is to bring it physically closer; to have it engage with one’s very body: ‘In their tangibility, objects are perceived through the body in a multi-sensory way... objects are sensed in their present actuality’ (Athinodoros, 2006: 25). As Hetherington writes ‘its

non-representational quality is context specific, and often mundane.’ That object surface or texture which we may have the urge to touch might be exceedingly trivial.

The canny designers of this display had placed the greenstone boulder beneath an artificial rain cloud, so that water dripped onto it, the wet surfaces revealing its stunning colours. Visitors needed no invitation to reach out and touch the boulder. Cleverly, this was a language-free opportunity; anyone could feel the rock. This seemingly prosaic act was surprisingly engaging for most of the visitors to this space. Indeed, people even queued to touch. As one commentator noted

‘The main attraction is a two-tonne chunk of West Coast greenstone, beautifully displayed with an artificial cloud raining on it. By good luck or good planning, it has captured the public imagination: visitors touch the greenstone with the reverence of Muslim pilgrims touching the Kabala stone in Mecca’ (Hunt, 2005; 22.)

For many of these visitors, the greenstone attraction in the New Zealand display was perhaps imbued with resonances of the ancient tradition of sacredness in stone(s). For a display located in Japan this was a particularly apt inclusion; sacred stones are a familiar part of Shinto culture. The emotional attachment to natural stones, originally religion-inspired, has persisted in Japan and is manifest today in the creation of richly symbolic and spiritual stone gardens, and the tradition of viewing stones (suiseki).

I wondered whether, for visitors, it was assumed that some sacred myth pervaded this actual stone. Was this lump of greenstone respectfully receiving recognition because it was believed to be a very special repository of a significant heritage event? There was no accompanying documentation to suggest such a story; or to explain the traditions of Maori relationships with, and understandings, of pounamu, a traditional treasure or tohunga.

There was also nothing to suggest to aficionados or believers of quantum touch or various other new-age touch healing therapies that through interacting with this very rock they would inevitably gain spiritual energy or other healthful benefits. The experience of observing this phenomena brought home the issue of being a participant observer in a situation that crosses cultural boundaries: with no knowledge at all of Japanese attitudes to touch, there was a recognition that the ways senses are valued within a culture affects the ways that they come to be experienced.

This response to the stone must be read as a way of participating with the display. After passively looking at most displays, here was a moment to engage another sense: to feel with one’s hands the firmness of an ancient rock solid beneath the trickling water. To deliberately touch the surface of it to interrogate it: is it cold or warm, hard or crumbly, rough or smooth? Only a small part of the body impacts on the rock, but the whole body is aware. Through reaching out to touch, a minor curiosity is resolved. Gratification is immediate. Most of the time in our everyday lives our body simply disappears from our awareness. Here, for a moment, putting one’s hands on a wet rock, one’s body’s senses are alerted to the tactile qualities of that stone. For that moment, touch is privileged.

In a post industrial, post modern world, where material objects are to be possessed, a moment’s touching is a form of (albeit temporary) possession: to ‘have one’s hands on it’.

Touching is an embodied connection not possible through mere looking. To touch this rock was to perform perhaps a memorable act; to feel one was actually had one’s hands on a bit of New Zealand. At a venue where most displays depended on ‘faith in fakes,’ here was something very real to engage with. This case study helps us understand how all of our senses help us navigate the world – the actual world; or ‘the world’ as represented at World Expos.

IMPLICATIONS

My observations expressed in this presentation have implications for any nation hosting a mega event, including China and its forthcoming Expo in Shanghai, 2010. While the website for the Shanghai World Expo describes such events as ‘galleries of human inspirations and thoughts’, and ‘grand events for economic, scientific, technological and cultural exchanges’ important for their , displays of ‘historical experience’ and exchanges of ‘innovative ideas’, these events must also appeal to the individual visitor as a pleasurable multi-sensory experience. There is scope in the development stages for exhibition designers to expand their consideration of these issues; to live, for instance, mundane static displays to something simply but truly captivating. The result for the organizers: ever greater enchantment or ‘customer delight’ for tourists; and capital gain from that sector we now label the ‘sensual economy.’

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PROMOTING DARK TOURISM BY TAKING THE OPPORTUNITY OF THE EXPO

Can HUANG, & Junxia ZHANG

School of Economics and Management, China University of Geosciences

ABSTRACT

Dark Tourism is defined as an experience activity of tourism, in which tourists gain their satisfaction on education, curiosity and stimulation by traveling to the tourist attractions where dark incident occurs or simulated scene of it exists. In recent years, dark tourism has become a new hot topic in the field of tourism in foreign countries, especially in North America. However, its research is few in china. With the changes in consumer demand as well as the particularity of dark tourism sites, dark tourism is expected to become a new bright spot of 21st century. This paper firstly introduces the conception, type, status and significance of dark tourism as well as the characteristics of the Expo, then discusses the feasibility of developing dark tourism by taking the opportunity of the Expo. That is, taking advantage of the great influence, a huge number of tourists and the high-tech to open the dark tourism market. Furthermore, this paper also gives some specific measures on the development of dark tourism.

Key words: Dark Tourism; the Expo; feasibility; measures

1. INTRODUCTION

After the incident "9 • 11", ruins of the U.S. World Trade Center become a tourist attraction, which has been a significant part of tourist routes. In 2005, four months after hurricanes attacking New Orleans, a local travel agency launched the "Katrina disaster tour" and immediately attracted many tourists traveling to the disaster areas. There a huge steel barge that stood in the cars, twisted concrete buildings, fallen trees and rusting appliances have become a unique landscape to tourists (Xiao, 2006). Less than a month after the earthquake 5 • 12 occurred in Sichuan, 22 volunteers from around moved to 22 scenic spots with a slogan "watch their homes", such as Dujiangyan, Qingcheng Mountain, Xiling Snow Mountain and so on, shooting the status of these scenic areas. The battle of Waterloo in 1999, whose entire process was documented, was witnessed by a large number of tourists. Even today it is still Belgium's second most important tourism site, marked by 135 separate monuments and memorials (Seaton, 1999). Many sites associated with disasters have become hot spots abroad especially in North America in recent years - dark tourism: An experience activity of tourism, by which tourists gain their satisfaction on education, curiosity and stimulation by traveling to the tourist attractions where dark incident occurs or simulated scene of it exists (Hu, & Luo, 2007).

2. CURRENT STATUS OF DARK TOURISM DEVELOPMENT

2.1 Development of dark tourism aboard

Dark tourism is not new, for example, Christians went to the martyrs of Jesus as the pilgrims long ago. Gladiator has also existed in the ancient Roman. The nobility were watching the battle of Waterloo in a safe distance in 1815. The earliest battlefield of U.S. Civil War (now located in the town of Manassas, Virginia.) was on sale as a spot on the second day after the war beginning. After "9 • 11", the ruins of the U.S. World Trade Center have become an essential part of tourist routes. In 2005, hurricanes attacked New Orleans, thus it suffered a lot. While four months later, a local travel agency launched the "Katrina disaster tour", which immediately became the focus of media attention and attracted many American tourists as well. As a memory to victims, three of 35 U.S. dollars paid by each tourist were used directly to aid the disaster site (Hu, Luo, & Qi, 2007).

2.2 Domestic development of dark tourism

In China, because of the limits on development stage and sensitivity as well as the

traditional reserved character appears on Chinese people, the development of dark tourism has been severely restricted. Before 5 • 12 earthquake, its product has not been introduced in the domestic, theoretical researches just stay at the initial state of "what" (Li, & Zheng, 2006). However, after the earthquake, Dujiangyan city launched special tourist routes "Care for world heritage and appreciate the whole society" on the World's Cultural Heritage Day on June 14. The number of visitors per day was controlled and three months were allowed. At last, a total of 4,000 tourists around went there, including the delegates for rescuing and guests at home and abroad. They became the first visitors experiencing Dujiangyan post-earthquake tour (ShowChina, 2008).

In theoretical research, Chuandong Hu, Shiwei Luo, Jinglong Li and Shujing Zheng discussed the exploration of dark tourism, besides, Shuliang Cai, Shenggui Zou and Xu Lin, Zutong Sun discussed disastrous and earthquake resources of tourism respectively. This shows that as the origin of tourism, the development of dark tourism is inevitable.

3. SIGNIFICANCE OF DARK TOURISM DEVELOPMENT

Tourism conforms to the needs, no demand, no development. With the development of human society, people's concepts and preferences are changing constantly. Some tourists are no longer satisfied with simple tour any more. A higher level of tourist motivation appears. In addition to the pursuit of challenge, stimulation, or viewing, patriotism, or for educational, scientific expedition, these motivations, of course, do not rule out some subtle and immoral things (Lennon, & Foley, 2000). Therefore, dark tourism product should be developed in a positive and progressive way. Thereby dark tourism will have a lasting vitality.

The emergence of dark tourism, first of all, is a result of market-oriented. For instance, the earthquake 5 • 12 has attracted the attention of people around the world. The local tourism sector launched special travel. These special groups include: a small group of scientific expedition to the earthquake and those who need to have a perceptual knowledge there, volunteers and succors to disaster sites, participants who anyhow concern about disaster sites and are willing to rebuild their homeland (Weekend of the South, 2008). It seems that the expressive nature, fragments and tragedy from dark tourism resources all attract visitors. By dark tourism, tourists can also understand the reasons and proceeds for the tragic incident, from which they can acquire knowledge and gain experience.

As special event tourism, dark tourism has unique significances differing from other forms of tourism other than conforming to the needs of tourists:

3.1 Bringing assistance and stimulation to disaster sites

For disaster sites and the suffered people, tourists' visit will bring material complements and spiritual encouragement to an extent. For example, "Katrina disaster tour" in New Orleans in 2005 immediately attracted media attention and was also welcomed by American tourists. As a memory to victims, three of 35 U.S. dollars paid by each tourist were used directly to aid the disaster sites. In addition, less than a month after the earthquake 5 • 12, 22 volunteers from around moved to 22 scenic spots with a slogan "watch their homes", such as Dujiangyan, Qingcheng Mountain, Xiling Snow Mountain and so on, shooting the status of these scenic areas. It not only inspires the involved people, but also brings them the confidence to rebuild their homeland (Weekend of the South, 2008).

3.2 Changing disaster into resources

Disastrous resources can be fully utilized and protected if development on dark tourism products is scientific and rational. There are plenty of dark tourism resources in our country. First of all, China is a multi-earthquake country. Earthquake resources on tourism is rich and the landscape also has diversities, such as land subsidence into the sea remains caused by the earthquake, Earthquake lake, seismic cracks and drum kits. There are some ancient and modern earthquake

vestiges and inscriptions as well (Cai, & Zou, 2004). Second, China is an ancient country with a long history of civilization. There are many war sites all over the country. Such as Nanjing Massacre, Burns down Old Summer Palace and other world-renowned dark incidents. If these tourist resources are explored and utilized in a reasonable way, it will certainly play an important role in education, patriotism, adventure and expedition.

In addition, how to change the ruins into treasures after the disaster to mitigate the local pressure on economic development is also one of the great significance of dark tourism development. The earthquake caused great loss in Sichuan. Many of tourist attractions have been damaged. Particularly, the Duijiangyan and Qingcheng Mountain have suffered seriously. These destinations are famous tourist attractions which attracted several million people there each year. After the earthquake, tourists decreased significantly. Consequently, unemployment and idle resources were induced. Meanwhile, tourism companies have a holiday ahead of time. Data from the authority of the tourism sector in Sichuan Province shows that tourism in Sichuan Province lost more than 50 billion Yuan. Tourism revenues in May fell around 60 percent compared to the corresponding period of last year (ShowChina, 2008). Sichuan is a province that relies mainly on tourism. It is unrealistic to restore and reconstruct of disaster sites in short time, hence to organize dark tourism with good plans and make full use of the resources there so that visitors have a real travel, such as watching the "bombing Yanse Lake, "" mountains exploded"," mountains gathered up" and" roads humped up" and so on, can ease the local pressure on economy to an extent.

In short, dark incident has an important impact and lasting attractiveness. Exploring of it will reinforce the development of tourism. "As long as we can imagine the loss of their freedom, we will cherish freedoms much more than before" (Dobbs, 1999). The more we can recognize that the war is bloody and the disaster is terrible, the better we will appreciate peace and respect for nature. It's necessary to lower the possibility of repetitions of tragic history.

4. FEATURES OF THE WORLD EXPO

The Expo is a large-scale international exhibition which is hosted by a country's government and participated by a number of countries or international organizations. It is known as "economic, cultural, scientific and technological Olympics with the aim to show the achievements of humanity in the field of society, economy, culture and technology. Together with the Olympics and World Cup it thereby gets the name "one of the three top global events". Its characteristics are "long time lasting, large-scale, a number of exhibitors and far-reaching impact.

4.1 A long time lasting

There are two types of World Expo, one is registered Expo (previously known as integrated Expo), which lasts for six months and is held once every five years. The other is recognized Expo (previously known as professional Expo), lasting for 3 months. In addition, the exhibition hall can be enduringly used after the Expo and the lasting impact is infinite. Thus it is said that the Expo is never a curtain call.

Table1
The number of exhibition halls and land-scale of integrated Expos from 1958 to 2000

time	country	name	Number of exhibition halls	Land-scale (hm ²)
1958	Belgium	Brussels World Exposition	112	202.3
1967	Canada	Universal and International Exhibition	152	287
1970	Japan	Japan World Exposition	116	330
1992	Spain	Exposition Universal Seville	101	215
2000	Germany	Expo 2000 Hanover	190	160

4.2 Large-scale exhibition

Exhibitors of the Expo are from all around the world. All kinds of exhibition halls are large and have their own characteristics and cost much as well. Additionally, the reconstruction project of the city led by the Expo is also very large. Following is a table about the scale of the Expos (Xu, 2000).

4.3 A number of Exhibitors

The Expo is a large international event with a number of exhibitors. Technological and cultural exchanges occur between countries through World Expo. From the Expo “The great exhibition of the works of industry of all nations” in London in 1851, the number of countries participating each previous World Expo is more than 19. The number of exhibitors in the Expo organized in Seville, Spain in 1992, is as many as 110. Later this number increased to 115 in Lisbon Expo in 1998, and up to 187 in Hanover Expo in 2000 (Xu, 2000). With the advanced traffic, there will be more and more exhibitors participating in the World Expo.

4.4 Far-reaching impact

It is a huge project with huge investment to hold the Expo. It embodies the exhibition economy, tourism economy, trade and other economic activities, and involves the construction industry, manufacturing, transportation, commerce, services, and many other industries. It will directly promote a series of basic industries such as raw materials, construction, urban environment, transportation, modern communication facilities, commerce, finance, tourism, services and management. It will also upgrade and expand tertiary industry. Therefore it will have significant impact in all aspects. Besides, the impact of World Expo appears to be long-term, plural and forward-looking. That is, it not only promotes local economic development by creating opportunities of employment and adding income in the short term, but also improves the city in the long term, including the city updating, infrastructure improvement, environmental management, growth of exhibition tourism activities, stimulating the related industries, raise of the quality and awareness of sustainable development of people and so on.

5. THE FEASIBILITY OF PROMOTING DARK TOURISM BY THE EXPO

5.1 Need for an effective combination of dark tourism with other tourism products

There is a difficulty for dark tourism sites to develop its products due to the uniqueness of experience and seriousness on the aesthetic. Thus it can not be sold as a single product. It seems to be a good choice to combine dark tourism with other products for a tourist destination. As an international event, the Expo has characteristics of “long time lasting, large-scale, a number of exhibitors and far-reaching impact. So it’s a good try to promote dark tourism by the chance of the Expo. In addition, dark tourism belongs to event tourism. It has the characteristics of special event in attracting things, periodicity of products and impact of experience. Thereby dark incidents belong to special events. In view of this, it is one of festival events, since festival event is a general name of special events and festivals (Ma, 2005). World Expo is a large festive event. There will be unexpected effect to combine festival event with special event for it contains two important aspects of festival events.

5.2 Making Use of the high-tech achievements of the Expo

One type of dark tourism behavior is travel to the battlefield or disaster sites to witness the occurrence of the disaster (there are no any protective measures, so it’s not currently advocated and is morally proscribed). The other type is to travel to see the sites of mass or individual deaths, after they have occurred, to experience the tragedy (e.g., the "Katrina disaster tour"). It can generally arouse tourists’ sympathy, causing their association to the disaster sites. But somehow it’s not enough. People

tend to choose the former as they are driven more and more by curiosity and stimulation. That is, people tend to go to the scene where disasters are taking place to experience the feeling of superiority. But it's not the way that we will promote. Now it's necessary to take account of applying sound, light, electricity, and other high-tech to simulate the process of disaster. For example, the "storm torrents" of south Water Village in the movie city Hengdian, Zhejiang, was operated in August 2006. This is the first disastrous experience of tourism in the form of movie. The audiences can experience a feeling of stimulation and pleasant in a simulated disaster scene (Hu, & Luo, 2007). World Expo gathers almost all the most advanced technologies and has the ability to provide such high-tech equipments. The third type is travel to view the material evidence, or symbolic representations, of particular deaths, in locations unconnected with their occurrence. This kind of dark tourism is directed towards synthetic sites at which evidence or simulacra of the dead have been assembled. It includes museums where weapons of death, the clothing of murder victims and other artifacts are put on display (e.g., the Museum of the Revolution in Cuban) (Seaton, 1999). The Expo will be a good platform for the displays.

5.3 Making use of the tremendous influence of the Expo

The Expo is invested too much and has profound effects in the world. On the one hand it can expand the city's popularity and raise status of the city in the country even in the world. On the other hand it can promote exchanges between countries so that the participating countries can understand Host country better. Of course, the Expo is aiming to let the countries realize the current level of science and technology and to display the latest achievements on science and technology. All the countries will concern about history and disasters. They will get a lesson as well if dark tourism is promoted by the Expo. The key is to avoid the disasters by making full use of scientific and technological achievements which are best presented in the Expo.

5.4 With the large number of tourists in the Expo

The Expo will be a great magnet and attract domestic and foreign tourists. Moreover, most tourists tend to travel around or have a further tour even before World Expo, which will bring opportunities to dark tourism. Apart from that, after the positive significance of dark tourism is fully conveyed to the visitors during the Expo, they will be motivated again to have a dark tourism. Thereby they have the desire to visit the disastrous scene by themselves. Therefore, enormous source of tourists market are brought to the dark tourism sites.

5.5 Non-trade of the Expo and nonprofit of dark tourism

Differing from the exhibition that aims to promote or bring about investment, World Expo is a non-trade display of the achievements on science and technology around the world. All the participating countries can take great advantage of this big stage to show their achievements of all fields. Thus the status and prestige of host country in the world are improved as well. At the same time, the complex competition between all the exhibitors are excluded during the Expo, for it is non-trade and the participants are proud of the modern civilization. It will be better for dark tourism to be open to the world as a public tourism product. For one thing it is consistent with the significance of dark tourism development. For another it's helpful for its long-term development. The origin of the Expo is the same to the development of dark tourism. Therefore a conflict caused by diverse interests can be avoided. Compared with The Expo which is the glorification of achievements, dark tourism is a pity of failures on humanity. Both of them have great significance to people.

6. MEASURES TO PROMOTE THE DEVELOPMENT OF DARK TOURISM BY THE EXPO

6.1 Led by government

The authenticity of dark tourism is particularly important. If the history is over-exaggerated and distorted due to the enterprise's wishes to attract customers, the tourists will be misled and

historical value as well as educational value of the resources will be lost step by step. Besides, government-led can also control the price of tickets. It will be better for dark tourism to be open to the world as a public tourism product so that tourists can be acceptable psychologically. Many tourists tend to oppose to dark tourist attractions, because they think that they go there to express the patriotism and compassion to the deceased. It seems to be unacceptable for people to pay for such activities. However, it doesn't mean that dark tourism must be nonprofit. The "Arizona" Memorial Hall in Hawaii is free in normal hours. Annually, it attracts about 1.5 million visitors and apparently it has become an "educational base for patriotism" of America. Therefore, dark tourism sites that are financially allowed should open for free to tourists gradually and be supported with specific subsidies by government. It achieves its benefits from the entertainment industrial chain of food, housing, transportation, travel and purchase and combination with other products. It should always be low-keyed in marketing. Dujiangyan Government launched a special tourist route which is open to the community free of charge. The number of visitors per day is controlled. Meanwhile the so called "love without frontiers and gratitude is eternal" cards are sent to domestic and foreign people who participated in rescuing after the earthquake in Wenchuan, Dujiangyan. Owner of the Thanksgiving card can visit the attractions of Qingcheng Mountain-Dujiangyan all his or her life. The implementation has won an excellent response.

The Expo is sponsored by Government, so it's essential to be government-led in the process of developing dark tourism by World Expo. For example, time and the number of visitors must be controlled to dark tourism sites.

6.2 Use of sound, light, electricity and other high-tech to meet the needs of experience

The "storm torrents" of south Water Village in the movie city Hengdian, Zhejiang was operated in August 2006. This is the first disastrous experience of tourism in the form of movie. The audiences can experience a feeling of stimulation and pleasant in a simulated disaster scene.

To give people a feeling of danger of earthquake and realize the power of nature, a seismic Adventure City (Museum) for amusement is built in Tangshan and Shanghai respectively. Tangshan earthquake Palace which used advanced sound, light, electricity facilities and real scene technology creates artificially the effect of the light, sound and the collapse of the bridge and house. The Tangshan Earthquake seems to recur in it. Setting stimulation to adventure, it's educational and interesting by acquiring methods of mitigating disasters. Previous students acquire the knowledge of earthquake purely from the simple pictures and books, while Shanghai earthquake Museum for youth makes a breakthrough. By applying simulated shaking table and the supporting film, it shows the "reality" and "destruction" of the earthquake from 2 to 9 levels. Some young people think emotionally that they have a deep impression on it. After all, experience is much more useful than reading. In short, it's very popular among young people (Xu, & Sun, 2000).

Clearly, customer's needs are in continuous improvement. The development of tourism must meet the needs of tourists' participation and experience. However, not all dark tourism sites have the ability. The high-cost and high-risk should be seriously considered by enterprise or the government. World Expo gathers almost all the most advanced technologies and needs huge investment. It's a super lab where dreams of all the countries are materialized with technology. New concepts, new knowledge, new technologies, new products, new ideas and new cultures are exchanged among countries in it. Meanwhile, as dark tourism has not developed well due to the old concepts like the feudalism, it's the best way to avoid the negative impact and promote dark tourism to a positive direction by the Expo.

6.3 Combining disaster sites with World Expo to be a product line

Visitors (especially for foreign tourists) prefer to travel around the city before or after the Expo. Taking part in the Expo is the most important but not the only goal for them. Many of them intend to have a special tour by the way. After the display of souvenirs or simulation of disaster scene

in the Expo, tourists will be motivated to have a dark tourism. Therefore, it's a good choice to combine dark tourism sites with the Expo into a product line. For instance, it is possible to show the simulated scene of Sichuan earthquake during the period of 2010 World Expo in Shanghai. Later visitors can be organized to the scene in person. On the one hand, people will learn to avoid and reduce the disasters by applying science and technology. On the other hand, dark tourism sites can also be publicized positively.

6.4 Vertically develop in depth and horizontally develop in breadth

Vertical development refers to exploring the cultural and historical context of dark tourism sites and finding out the reasons and process of dark incident according to the specialty of dark tourism sites. Special tourism such as cultural tourism should be developed in depth. After the earthquake 5·12, people traveling to the disaster sites will expect not only to see the superficial "bombing Yanse Lake ", " mountains exploded", " mountains gathered up" and " road humped up" and so on, but also to find out the difference between the two earthquakes in Sichuan and Tangshan. For example, as the earthquake occurred, a teacher lost his life in that he was saving his students wholeheartedly. After the earthquake, the steel bridge of Xinxing Town in Pengzhou City was seriously damaged. The soldiers for rescuing immediately set up a bridge with their bodies just in order to ensure the safety of students (ShowChina, 2008). These moving heroic deeds are the precious spiritual wealth to the places where there will be a development of tourism. It can not only demonstrate the specialty of dark tourism sites, but rather upgrade the overall image of tourist destinations. These resources can be made into documentaries, movies and dramas, then promote them to tourists at home and abroad by some large-scale events such as World Expo (Smith, 2002). The effect can not be ignored.

Horizontal development refers to a combination of dark tourism with other forms of tourist products (e.g., the combination to red tourism, green eco-tourism or white ice-tourism). For one thing it can make up for the gaps of the development of tourism. For another it can meet the diverse demand of tourists. The seismic ruins are reserved in Lijiang, Yunnan after the earthquake in 1996. Earthquake travel, ancient architecture and Dongba Culture Tour were combined well during the period when Lijiang is a sub-site Kunming World Expo in 1999.

6.5 Timely measures of development

Whether dark tourism can be accepted as an attraction lies in the "time distance". Various land subsidence and the pit occurred in Ruichang city in Jiangxi province affected by the earthquake, which immediately attracts a large number of visitors. Accordingly, local authorities said that they didn't intend to change the landscape of the land subsidence and the pit at this time and even protected it as a sign of earthquake. If possible, the land subsidence and the pit would be developed to be tourism projects. Such view was immediately criticized by local residents and outside. People hadn't got a relief from the disaster right after the earthquake and it's urgent to have a self help. How can they profit from the disaster? The media also said that people's thoughts and feelings were ignored and the development of dark tourism wasn't carried out in a scientific way (Hu, & Luo, 2007). Therefore, it's necessary to know which is much more import between relief and tourism development. People still should be first considered according to the immediacy of dark tourism, which is also the goal of a harmonious society. By contrast, the local government took actions appropriately after the earthquake in Sichuan. The situation was basically stable and the safety was ensured one month after the earthquake. Now the key is to restore and improve the economy. So it is the best time to develop tourism. "Coming is to care, traveling is to support", which also reflects the residents' wish.

7. CONCLUSIONS

Although dark tourism has its limits in many aspects, it was common in the past. And with the earthquake 5·12 we can image it will have a bright future due to the great market. This paper puts forward the feasibility of dark tourism development by taking the opportunity of the Expo. The

high-tech and great source of tourists and other elements bring opportunities to dark tourism sites. Then the measures of developing dark tourism are proposed. Apart from that, this paper is expected to be helpful for researches reducing disasters by taking advantage of the scientific and technological achievements in the Expo. Of course, this research has shortcomings for there were no any cases before. The key is to combine the two important events so that dark tourism even the whole tourism will have a great progress.

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ACKNOWLEDGEMENT

In this paper I am grateful to my tutor Junxia Zhang who gives me many helpful suggestions. I also thank Miss Dumeng and Daijuan. They offer me some information about dark tourism.

上海世界博览会文化旅游产品开发研究

郭英之 裴艳琳 邓倩 叶云霞
复旦大学旅游学系

摘要

具有民族特色的上海世博会文化旅游产品开发,是成功举办中国2010年上海世博会的基础。国内外对世博会特色文化旅游产品的相关研究在研究内容和研究方法上,都有较大的差异。本研究认为为了成功举办中国2010年上海世界博览会,应借鉴相关理论,深度开发具有特色的上海世博会文化旅游产品,建立具有特色的上海世博会文化旅游产品开发的重点发展战略。

关键词: 2010年上海世界博览会; 文化旅游产品; 开发

A STUDY ON THE DEVELOPMENT OF CULTURAL TOURIST PRODUCT OF 2010 SHANGHAI WORLD EXPO IN CHINA

Yingzhi GUO Yanlin PEI Qian DENG Yunxia YE
Department of Tourism, Fudan University

ABSTRACT

There were great differences in study contents and methods about special cultural resources at home and abroad. The development of special cultural resources about 2010 Shanghai Expo of China will be the base of successfully holding on 2010 Shanghai Expo. As a result, in order to successfully hold on 2010 Shanghai Expo, the corresponding theories should be used for references so that the special cultural resources about Shanghai Expo could be deeply developed and the key development strategies about special cultural resources of Shanghai Expo could be set up.

Keywords: Shanghai Expo, cultural tourist product, development

一、引言

世界博览会素有“经济奥林匹克盛会”之称,已成为提升当地旅游形象和推动当地经济发展的重要助推器,各国都非常注重世博会与文化旅游产品相关的市场推动、组织管理和主题营销。具有区域文化旅游产品开发特色的世博会是提升本国的国际形象,推动城市经济发展的重要杠杆,各国都非常注重世博会具有民族特色的文化旅游产品开发。本研究的意义在于,首先,文化旅游产品开发研究是上海世博会成功举办的基点。对上海世博会文化旅游产品开发的深入研究,可使上海世博会在依托展馆文化旅游产品建设的基础上,提升上海文化旅游产品精品和文化旅游产品名牌,有助于上海世博会的成功举办,进一步提升上海在全国、乃至世界的形象地位;第二,文化旅游产品开发研究有利于吸引更多游客参观上海世博会。对上海世博会文化旅游产品开发的深入研究,有助于2010年上海世博会文化旅游产品开发走商业运作道路,根据上海世博会参观者的特点与偏好,配套开发特色鲜明、质量优精、适销对路的上海系列文化旅游产品,可极大提高上海世博会的参观率;第三,文化旅游产品开发研究是城市形象和国家形象营销战略的依据。对上海世博会文化旅游产品开发的深入研究,有助于进一步推动世博会展馆文化旅游产品、海派文化旅游产品、区域文化旅游产品、民族文化旅游产品、全球文化旅游产品的优化整合开发,是上海建立城市形象和国家形象营销战略的科学依据。

二、世博会文化旅游产品开发的研究现状述评

(一) 国外研究现状述评

第一，文化旅游产品开发对奥运会和世博会的实证研究。国外对此类研究主要是以重大体育赛事（如悉尼奥运会、韩日世界杯）为案例，通过对参展者、组展者、居民等进行市场抽样调研，研究不同细分人群的特征。如 Lee 等（2005）以韩日世界杯为案例，研究了文化旅游产品开发对韩国形象的影响。Gursoy 和 Kendall（2006）认为大型节事活动中的文化旅游产品开发，会影响居民的支持程度。Roche（1992）以巴塞罗那奥运会为案例，研究了文化旅游产品开发对奥运会举办城市在规划、政治、环境、政府非理性决策等方面产生的影响。

第二，文化旅游产品开发对奥运会和世博会的影响研究。主要分为三类，一是研究奥运会和世博会的文化旅游产品开发对当地的经济社会环境等方面的影响，如 Baloglu 等（2005）探讨了文化旅游产品开发对举办奥运会和世博会在经济、社会、环境等方面产生的影响；二是研究文化旅游产品开发对参观者参与奥运会和世博会的感知研究，如 Kim 和 Chalip（2006）探讨了文化旅游产品开发对韩日世界杯参观者的影响，Waitt（2003）运用社会交换理论，研究了悉尼奥运会的文化旅游产品开发对参观者在不同年份热情度产生影响；三是文化旅游产品开发对奥运会和世博会组织者的影响，如 Gursoy 等（2004）和 Dogan（2002）等考察了组展者对文化旅游产品开发的感知影响。Fenich（2001），Go 和 Zhang（1997）研究了文化旅游产品开发对会议策划者选择会展目的地的决策影响。

综上所述，从研究内容而言，国外同类相关研究大多是从市场需求特征出发，通过案例实证分析，对相关问题进行研究。研究方法不但有定性研究，而且有定量研究；研究范围不但有单一因子研究，而且文化旅游产品开发对会展旅游目的地、参展者、组展者产生的多种影响。研究结果依赖于市场抽样调查数据，并运用统计学分析方法，其研究结果分析具有客观性，为会展旅游管理者提出具体细分目标与市场定位战略。

（二）国内研究现状述评

第一，文化旅游产品开发对奥运会和世博会的经济社会影响。这方面的研究主要分为两类，一类是文化旅游产品开发对奥运会和世博会的经济影响，如邹统钎和彭海静（2005）比较了文化旅游产品开发对悉尼奥运会和雅典奥运会所产生的长期与短期社会效应，陈浩、陆林（2003）、张世贤、马莉（2004）分别比较研究了北京奥运会和上海世博会对地方经济和旅游发展带来经济效应；另一类是文化旅游产品开发对奥运会和世博会的社会影响，如周常春等（2005）通过对'99 昆明世博会的案例研究，认为文化旅游产品特色是旅游者出游的主导决策因素。王成书（2003）认为上海世博会文化旅游产品开发可为交通运输业和旅游业等相关产业带来巨大商机。

第二，文化旅游产品开发对奥运会和世博会的价值性。马岳良（2006）认为雅典奥运会开幕式中的文化旅游特色与民族特色，有助于全球受众了解雅典奥运文化旅游产品、民族文化旅游产品以及世界多元文化旅游产品。王莉、翟方（2006）在多元文化的视角下，分析了奥运会独特的文化旅游产品开发特点，认为奥运会为世界文化旅游产品与中国文化旅游产品的交融做出了贡献。陈玉忠等（2005）认为奥运会的文化旅游产品与其他经济旅游产品一样，具有稀缺性。姜智彬（2005）认为把握好上海世博会文化旅游产品开发中的历史独特性、时代性和民族性，是上海世博会成功的关键所在。万君宝（2006）认为上海世博会为促进世界文化旅游产品交流、展示民族文化旅游产品提供了极大的机遇。

综上所述，国内同类研究无论在研究内容的原创性，还是研究方法的学术性，都与国外同类有相当大的差异，国内同类研究绝大多数是从供给市场出发的定性研究，大部分建立在中国深厚的历史文化底蕴上，主要运用思辨性研究方法，鲜有客观性的市场抽样调查，主要为北京奥运会和上海世博会提出宏观发展战略及对策，其研究结果具有主观性，鲜有上升到文化旅游产品开发层面上的深入研究。

三、上海世博会文化旅游产品开发的类型研究

第一，上海世博会展馆自身的文化产品开发研究。研究上海世博会展馆自身文化旅游产品的开发，上海世博会文化旅游产品的主题设计与传播，提供高质量的文化旅游产品艺术品和文化旅游产品娱乐服务，展示世博会主办国海纳百川的气度和万国争艳的气势，世博会上缤纷多彩世界文化产

品大聚会，可以通过音乐、歌剧、电影、雕塑、摄影、实物展示、学术报告、现场辩论等多方面烘托世界文化旅游产品大融合的气氛，带给人们视觉享受和感官冲击，使主办国所要传达的世博文化旅游产品主题交融渗入到参观者心中。

第二，上海世博会依托的都市文化旅游产品开发研究。深入挖掘上海世博会 10 种特色文化旅游产品精品开发，即一是上海自身以现代标志建筑为依托的新城市文化旅游产品开发；二是以海派文化为依托的上海城市文化旅游产品和城市购物餐饮文化旅游产品开发；三是以名人故居、纪念馆和爱国主义教育基地为依托的上海红色文化旅游产品开发；四是民间艺术为依托的上海民俗风情文化旅游产品开发；五是以主题公园和生态旅游为依托的上海观光及休闲度假生态文化旅游产品开发；六是以国际会议为重点的上海会展商务文化旅游产品开发；七是以节事文化为重点的上海节事庆典文化旅游产品开发；八是娱乐康复为主的上海康体健身体育休闲文化旅游产品开发；九是以各种产业为依托的上海特色产业文化旅游产品开发；十是以宗教故里和特色景区为依托的上海民俗宗教文化旅游产品开发。

第三，上海世博会依托的长三角文化旅游产品开发研究。研究上海世博会长三角文化旅游产品竞争优势，主要考虑充分利用江浙两省文化旅游产品，开发上海至南京沿线的上海+江苏的世博文化旅游产品产品，形成上海与江苏的巡游文化旅游产品；开发上海至杭州沿线的上海+浙江的世博文化旅游产品产品，形成上海与浙江的巡游文化旅游产品。为促使长三角文化旅游产品的深入开发，可注重以下工作：一是上海世博会文化旅游产品开发，应以江浙沪长三角整体区域形象出现，突出各自特点，强调文化旅游产品的互补性、密切性和互相性，以展示长三角区域合作的文化旅游产品竞争优势；二是上海及长三角共同推动各自区域范围内的旅游企业，可联合制作具有长三角特色的文化旅游产品产品和线路，提供海外买家参考组团，使之成为长三角吸引海外游客的文化旅游产品优势品牌。

第四，上海世博会依托的区域文化旅游产品开发研究。上海世博会在联合长三角文化旅游产品同时，还可以形成更大的区域文化旅游产品联合开发，即以上海世博会的文化旅游产品为起点，以江浙的文化旅游产品为圈层，带动包括南京、蚌埠、九江、武汉、三峡、重庆等整个长江黄金水道线上文化旅游产品的立体开发。为使区域文化旅游产品的有效开发，可在成立长三角世博会联络组的同时，还应该成立长江黄金水道世博会联合开发委员会，以世博促文化旅游产品，以文化旅游产品促投资，以投资促文化旅游产品开发，形成上海世博会区域文化旅游产品开发的立体格局。

第五，上海世博会依托的民族文化旅游产品开发研究。上海世博会不只属于上海，还属于整个中国，整个中华民族，中国 5000 年灿烂文明产品，儒家、道家、法家、兵家等丰富的中华民族传统文化旅游产品，56 个民族绚丽多彩的民族风俗文化产品，北国风光、江南水乡、青藏高原、新疆沙漠等特色文化旅游产品，改革开放 20 多年的辉煌文化旅游产品，是上海世博会开发不尽的民族文化旅游产品宝藏。上海世博会依托的中华民族文化旅游产品开发与整体营销，可突显中华民族对外来文化的兼收并蓄的博大胸怀和睦邻怀远的同化力。

第六，上海世博会依托的全球文化旅游产品开发研究。研究上海世博会在促进世界各国多元文化旅游产品的和谐开发与交流融合中，在上海世博会多样性世界文化旅游产品格局中，通过亚洲、欧洲、美洲、非洲、澳洲等各具魅力的板块文化旅游产品碰撞，彰显上海世博会所具有的世界各国文化旅游产品的全球性和独特性，上海世博会的全球文化旅游产品开发可以充分吸收全球的文化旅游产品精髓，以更增添上海作为东方文明之都和世界文化之城的巨大吸引力。

四、上海世博会文化产品开发的战略发展方向

第一，上海世博会文化旅游产品开发内容的原则性与时序性。上海世博会文化旅游产品开发内容的原则是：实施文化旅游产品精品战略，着力开发上海世博会文化旅游产品精品，重点推出上海世博会文化旅游产品精品线路，从而提高上海世博会文化旅游产品的质量和知名度，进一步增强上海世博会的国际吸引力和国际竞争力。上海世博会文化旅游产品开发内容的时序是：首先，先重点后一般；其次，根据市场需求随时调整文化旅游产品开发组合。依托 2010 年上海世博会，着重文化旅游产品开发的结构调整、升级换代，在完善城市观光文化旅游产品基础上，着力开发城市度假

休闲文化旅游产品、宗教朝圣文化旅游产品、现代城市文化旅游产品、城市修学文化旅游产品、城市产业文化旅游产品、城市购物文化旅游产品，培育会议文化旅游产品，努力办好各项大型文化旅游节庆活动。依托 2010 年上海世博会，进一步优化和丰富上海世博会的各类文化旅游产品，使之更富有参与性和趣味性。

第二，上海世博会文化旅游产品开发形式的重点精品线路。依托 2010 年上海世博会及其展馆文化旅游产品，以上海独具特色的城市文化旅游产品风光为背景，在更大的范围内推动上海世博会与长三角区域合作，以长三角各类文化旅游产品精品为基础，面向国内外市场，重点开发以下 4 条文化产品精品线路：其一，针对上海世博会的国内外各级市场需求，要积极开发以下 10 条形式的文化旅游产品线路：（1）生态文化旅游产品线；（2）观光文化旅游产品线；（3）世界遗产文化旅游产品线；（4）城市风光文化旅游产品线；（5）购物餐饮文化旅游产品线；（6）特色产业文化旅游产品线；（7）娱乐保健文化旅游产品线；（8）红色访习文化旅游产品线；（9）节事庆典文化旅游产品线；（10）会展商务文化旅游产品线。其二，针对上海世博会的国际客源市场需求，要积极开发以下 3 条形式的文化旅游资源线路：（1）面向上海世博会的东北亚客源市场，重点推出世博—上海—苏州—杭州—无锡—南京等经典文化旅游产品线路，世博—上海—江苏—浙江—福建等滨江文化旅游产品线路，上海—世博—北京—吉林等宗教文化旅游产品线路，同时推出城市文化旅游产品、生态文化旅游产品、城市文化旅游产品、民俗文化旅游产品、特色文化旅游产品等具有上海世博会特色的文化产品。（2）面向港澳台、东南亚市场，重点推出世博—上海—江浙—北京—大连等城市文化旅游产品线路，同时推出上海城市文化、宗教朝圣文化、滨江文化游、旧居寻访文化等具有上海世博会特色的文化旅游产品。（3）面向欧美澳市场，重点推出世博—上海—江浙—四川—云南等生态文化旅游产品、世界遗产文化旅游产品线，同时推出生态科考文化旅游产品、历史文化产品等具有上海世博会特色的文化旅游产品。

第三，上海世博会文化旅游产品开发模式的公共政策思路。根据市场规律和上海经济发展，特别是上海世博会市场需求，上海世博会文化旅游产品开发模式的政策思路是：以现代立体交通网络为依托，以良好的城市环境与丰富的城市文化产品为基础，突出上海世博会的六大文化旅游产品特色，绘好世博城市文化旅游产品画，办好世博文化产品旅游节、做活世博文化旅游产品特色篇，拓展世博文化旅游产品生态游，连接世博文化旅游产品产业线，挖深世博文化旅游产品会商路；实施上海世博会文化旅游产品的精品名牌工程，着力推出上海世博会文化旅游产品的精品线路，使其优势互补，相得益彰，形成以文化旅游产品精品为龙头，以文化旅游产品名牌为重点，以上海品牌级文化旅游产品线路为主干，以长三角文化旅游产品为联动，以区域文化旅游产品为骨干，以民族文化旅游产品为导向，以全球文化旅游产品为背景，建立上海世博会文化旅游产品开发的立体发展格局。

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致谢

本研究得到国家自然科学基金（批准号 70873025）、上海市哲学社会科学规划系列课题（批准号 2008XAH004）、复旦大学学生学术研究计划“曦源项目”的资助，特表感谢。

**A CROSS –NATIONAL COMPARATIVE STUDY ON 2008 BEIJING OLYMPIC
SPONSORSHIP AND AMBUSH MARKETING CHINA AND KOREA:
BEFORE AND AFTER GAMES**

Ha In Joo
Guanghua School of Management
Peking University

ABSTRACT

The main purpose of this research is to examine changes in brand awareness and image of the 2008 Beijing Olympic sponsors and ambushers perceived by Chinese and Korean consumers before and after the 2008 Beijing Olympics. Therefore, the two experiments were conducted before and after the 2008 Beijing Olympics in order to investigate the effectiveness of the 2008 Beijing Olympic sponsorship in the presence of ambush marketing, and determine if official sponsors achieve consumer awareness and image of their sponsorship status. Ambush marketing involves the efforts of an organization to associate itself indirectly with an event in order to reap the same benefits as an official sponsor does. It does this by engaging in promotions or advertising that trade off the event. As a relatively new phenomenon, the ambush marketing as a mega-event sponsorship is becoming a more important issue. Therefore, it is necessary to investigate ambushers' activities along with overall profit or loss of Olympic sponsorship to measure the actual benefit or loss of Olympic sponsorship. Changes in consumer awareness can be estimated based on experiments that took place before and after the Olympics.

Keywords: Olympic sponsorship; ambush marketing; brand awareness; corporate image

INTRODUCTION

The 2008 Beijing Olympic Games was the first mega-event held in China and the 51 sponsors have put all their marketing efforts to attract the national's and world's interest. Most consumers generally think that Olympic sponsor is the best company in its industry, suggesting that Olympic sponsorships have image-enhancement value (Crimmins & Horn, 1996). Firstly, supporting the Olympic Games could generate positive associations among consumers by showcasing the company's ability to provide quality services to the public. Secondly, Olympic sponsorship strengthens their image of trust and brand development with their customers and increases the prestige of the company (Apostolopoulou, & Papadimitriou, 2004).

More recently, a new means of building brand equity, sponsorship has become an increasingly visible element in the marketing communications mix (Cornwell & Maignanm 1998; Crowley, 1991; Meenaghan, 1983; Javalgi, Traylor, Gross, & Lampman, 1994; Quester & Fallery, 1998; Sandier & Shari, 1989). Japanese electronic companies familiarized their products and brands through sponsoring the Tokyo Olympics, and Samsung, the Korean brand of Electronics, is well known as the most successful case of globalization of brand by Olympic sponsorships. Samsung has come into the best known brand in Asia by sponsoring the Games of Sydney 2000, Athens 2004, and Beijing 2008.

As the global market goes into the fiercely competitive environment, companies in China have rushed into the brand competition as well. Numbers of firms in China grow their brand recognition, however, the level of brand globalization is actually low. Will then, Lenovo, Haier, and Yunli, the representative Chinese corporations, take the advantages of the Games as Samsung and Korean Air, Seiko and Sony did? The Olympics, from the corporations' side, is surely a great chance. Not only the sponsors, but also the ambushers had already embarked on practicing their marketing plans. Although most of studies have used recall and recognition tests to compare the performance of ambushers and official sponsors, no vigorous empirical research image and sales effects have been used to compare the success of official sponsors and ambushers. This study intends to investigate

the changes in firms in China derived from the Beijing Olympics, and to examine the brand value of sponsors and ambushers in Korea and China, to each other.

The Olympic Games, as the world's largest and most prestigious sports event, has been a major target for ambush marketing activity (Payne, 1998). A growing number of companies without any official designation are finding creative ways to associate themselves with the event and engage in the tactic of "ambush marketing" (Graham, 1997). This result very confuses customer who is unable to distinguish between companies and their level of association with the event. Thus, official sponsors or potential sponsors are beginning to question their return on the sponsorship investment (Sadler & Shani, 1998). Several researches in this area already have suggested that consumers may have difficulty when distinguishing between official sponsors and ambush marketers (McDanniel & Kinney, 1998). Although ambushing was first thought to be a somewhat devious, unethical, tactic, and an unfair marketing practice, recent work has recognized its place as a legitimate marketing strategy (Meenaghan, 1996). This study, in this sense, I would argue the ambushers, not as violators of other's rights but as friendly rivals. This purpose of this study is to investigate how effectively the official sponsors and ambushers took advantages of the chance of 2008 Beijing Olympics.

REVIEW OF LITERATURE

1. Sponsorship Brand Knowledge

Customer-based brand equity (CBBE), can be extended to sponsorship, most of the researchers who examined the effectiveness of sponsorship utilized this model (Apostolopoulou, & Papadimitriou, 2004; Berinett, 1999; Miloch and Lambrecht, 2006; Pope & Voges, 1995). What makes a brand to be strong? According to Keller, to understand the content and structure of brand knowledge is important because they influence what comes to mind when a customer thinks about brand. Customer-based brand knowledge is defined as a differential effect of brand knowledge on customer response to the marketing of the brand, which has two components, brand awareness and brand image (Keller, 1993).

Brand awareness and image, in turn, are integral to the idea of brand equity, the set of value-adding assets linked to a brand (Aaker 1996). Brand awareness consists of brand recognition and brand recall performance (Keller, 1993). Brand recall requires that consumers correctly generate the brand from memory and brand recognition relates to consumers' ability to confirm prior exposure to the brand when given the brand as a cue and recognition requires that the respondent to choose a company from a list of potential sponsors (Keller, 1993; Pope and Voges; 1995). Through these preconceptions, numerous studies of measurement of sponsorship, two methods, recognition and recall measures are commonly used to measure customer's awareness of and reaction to sponsorship communication techniques (Cornwell & Maignan, 1998). A brand is a name with the dual purpose of identifying a firm's goods or services and differentiating those goods or services from those of their competitors (Aakers 1991). Thus, Sponsorship has been able to develop brand equity by focusing on name awareness (Olberding & Jisha, 2005).

As Pope (1998) and Pitts (1998) pointed out that the companies' primary goal was to increase product awareness through sport sponsorship activities. In addition, research has also shown that sponsorship activities can improve consumer attitudes about corporations and increase product sales. Miloch and Lambrecht (2006) examined consumer awareness of sponsorship at a grassroots sport event through an examination of recall and recognition rates and purchase intentions. On average, event attendees' recall and recognition rates ranged from 55% to 66%. Forty-five percent of respondents noted a likelihood of purchasing the product of an event sponsor and 55% also noted a feeling of personal contribution to the success of the event by purchasing a sponsor's product. Among the numerous of measurement of sponsorship, most empirical studies have employed over time effects (McDonald 1991; Quester & Farrelly, 1998; Pitts & Slattery, 2004).

It is possible to track awareness of which companies are sponsors (both "top of mind" and

prompted with company and brand names) during and after the occurrence of sponsored event (McDoald, 1991). Pitts, and Slattery (2004) investigated the effect of time on sponsorship recognition. Findings indicated that there were increases in the percentage of recognition rates for 8 of the 9 sponsor companies over the period of time utilized. 62.4% of respondents stated that they would not be. Pitts (1998) found that a staggering 92% survey respondents at the Gay Games IV indicated that they were most likely to purchase the products of sponsors because of that company's presence at the event.

The corporate sponsorship can improve corporate image (Javalgi et al, 1994 ; Sandier & Shani,1989). As suggested much research of sponsorship effects has been conducted into corporation image, strong brand knowledge means that customers maintain a favorable brand image (Cornwell & Maignan, 1998; Miloch & Lambrecht, 2006). Javalgi, Traylor, Gross and Lampman (1994) suggest that corporate sponsorship can improve corporate image, but its effects differ among companies. According to Abatt & Grobler (1989) and McDoald (1991), respondents had a more favorable image toward the sponsoring companies and were more likely to purchase their products in the future.

2. Olympic Sponsorship

Mega events sponsorship, long associated with world's premier sporting event such as World Cup and Olympic Games is considered as one of the most promising opportunities which a sponsor may wish to identify (Barros, Santos & Chadwick, 2007; Brown, 2000; Meenaghan, 1991; Miyazaki and Morgan, 2001). Especially, the Olympic Games represent a major global brand with highly recognized symbols and high levels of association with specific brand values. For these reasons, billions of dollars are invested in mega events as an advertising tool in around the world. Most of the researchers who examined that Olympic sponsorships have image-enhancement value (Crimmins and Horn, 1996). In sum, multinational corporations employ Olympic sponsorship to achieve two major communications objectives at both the corporate and brand level (Meenaghan, 1996).

As mentioned above, using Olympic sponsorship, many international corporations are seeking to gain differentiation due to the intangible nature of their businesses and the level of competition offered by companies offering similar products (Brown, 2000). Using their Olympic sponsorships for brand development is also a common objective in all three cases, although Visa's strategy is inevitably more international and more closely aligned with the tourism industry. AMP, Visa and Ansett's are seeking to gain differentiation due to the intangible nature of their businesses and the level of competition offered by companies offering similar products (Brown, 2000). This trend has been accompanied by growing concern about the way sponsorship is handled by large, diversified companies (Sandier & Shari, 1989).

Sponsors of the Olympic Games could generate positive associations among consumers by showcasing the company's ability to provide quality services to the public. Similar objectives were set by yet another sponsor who saw Olympic sponsorship as a way to strengthen their image of trust and credibility with their customers and increase the prestige of the company (Apostolopoulou, & Papadimitriou, 2004). Scott and Suchard (1992; as cited in Apostolopoulou, & Papadimitriou, 2004) found that increased media coverage, improved company sales performance, enhanced client relationships, and the extension of promotional efforts are all reasons for which companies decide to be an Olympic sponsor. The supporting the Olympic Games could generate positive associations among consumers by showcasing the company's ability to provide quality services to the public. Mega events sponsorship, long associated with world's premier sporting event such as World Cup and Olympic Games is considered one of the most promising opportunities which a sponsor may wish to identify. (Barros, Santos & Chadwick, 2007; Brown, 2000; Meenaghan, 1991; Miyazaki & Morgan, 2001). Especially, the Olympic Games represent a major global brand with highly recognized symbols and high levels of association with specific brand values. For these reasons, billions of dollars are invested in mega events as an advertising tool in around the world. Most of the

researchers who examined that Olympic sponsorships have image-enhancement value (Crimmins & Horn, 1996). In sum, multinational corporations employ Olympic sponsorship to achieve two major communications objectives at both the corporate and brand level (Meenaghan, 1996).

3. Ambush Marketing

Although most of the works on sponsorship have focused on effectiveness of sponsorship or the results from sponsorship effort (Abratt & Grobler, 1989; Cornwell & Maignan, 1998; Gardner & Shuman, 1987; Harvey, 2001), recent sponsorship literature emphasizes the ambush marketing. Ambush marketing strategies typically involve a rival brand from an official sponsor's product category attempting to draw the event audience's attention toward itself (and away from the sponsor brand) by strategic use of advertising and promotion misconstruing its involvement with the event (Meenaghan, 1994). The first visible ambush marketing effort is associated with Eastman Kodak. In 1984, Fuji Film won the sponsorship right for the Los Angeles Olympic Games. Kodak could not just sit back and watch a major competitor receiving such exposure so, in response, it "ambushed" Fuji with a well-planned campaign. Kodak became the "proud sponsor". Another example is Nike's actions during 1996 Games. Nike is not an official sponsor of the Games, and it is playing that outsider status to the max. It plans to ambush Reebok with an intense, hard-hitting campaign starring a range of US athletes, some well known (like Carl Lewis), others more obscure. In the end, Nike tried to associate with the event and was accused of ambushing the event.

Consumer research on the effects of ambush marketing has examined the extent to which ambushing companies have been successful compared to official sponsors of major events. Research has in the main concentrated on the Olympic Games (Crimmins & Horn, 1996; Kinney & McDaniel, 1995; Sandler & Shani, 1989; 1993). These studies have used recall and recognition tests to compare the performance of ambushers and official sponsors. Sandler and Shani (1989, 1993) by using an experimental design, to investigate potential differences in sponsorship awareness, brand attitude, and purchase intentions between groups exposed to either sponsors' ads or those of ambush marketers. They asked viewers of the 1988 Winter Olympic Games who they thought were official sponsors, and found that viewers recalled the official sponsors more often than nonsponsors in only four of seven product categories. Eleven of the 20 brands most often identified as worldwide sponsors of the 1998 Winter Olympics were not in fact sponsors 12. They observed Wendy's ambushing McDonald's, American Express ambushing Visa, Quality Inn ambushing Hilton. In the similar manner, McDaniel and Kinney (1998) suggested certain effects of the ambush marketing strategy. Its focus is on the potential impact of recency (of ad exposure), as well as gender differences, on measures of memory, brand attitude, and behavioral intentions for brands perceived to be official sponsors.

Consequently, an ambush marketing strategy offers companies the potential benefits of official sponsorship, without them incurring the initial investment of event rights fees (Meenaghan, 1994; Sandler & Shani, 1989). Subsequently, a company wishing to enjoy the awareness and attitudinal benefits of event sponsorships, without paying large sums to event properties, can employ what has come to be known as ambush marketing, where brand presence near a major event is used to create an illusory association in the minds of consumers.

METHOD

1. Study population and sample selection

The population of interest in this study is Chinese and South Korean people. The author, first selected capitals of two countries: Beijing and Seoul. Although it is recognized that this sample cannot be representative of the whole population, it is felt that the sample provides the mixture of various groups.

2. Data collection procedure

Pre-event survey was implemented four weeks prior to the opening ceremony of the Olympics and post-event was planned to implement four weeks after its closing. Data were collected twice: before the games (July 11–July 25, 2008) and after the games (September 28 –October, 12, 2008). When the Olympic Games were over, author deliberately waited approximately 4 weeks and began distributing questionnaires.

To select the subject of sponsors and ambushers, another test was implemented before Olympic Games. The test was administered by one hundred of students of the Sejong University in Seoul and Peking University in Beijing. Respondents were asked to write down brand name of Beijing 2008 Olympic worldwide official sponsor that comes first to your mind. In this survey, a total of 24 corporations were adopted. The 24 corporations were grouped into eight categories; (1) sports, (2) mobile phone, (3) non-alcoholic drinks, (4) computers, (5) fast food restaurants, (6) automobiles, (7) milk products, (8) banks. Each category of companies were divided into three corporation categories: sponsor, international ambushers and domestic ambushers.

- sports : Adidas, Nike, Lining
- mobile phones : Samsung, Sony, Bird
- non-alcoholic drinks : Coca Cola, Pepsi, Wahaha
- computers : Lenovo, Dell, Acer
- fast food restaurants : Mc'Donalds, KFC, Yonghedawang
- automobiles : Audi, Hyundai, Dongfung
- milk products : Yunli, Nestle, Mengniu
- banks : Commercial Bank of China, CitiBank, Bank of China

This survey was designed for four parts. Every part measures two sponsors, two international ambushers, two domestic ambushers.

The pre-survey was administered by student volunteers attending the Sejong University in Seoul and Peking University in Beijing. Those students were instructed to go to places where many passersby could gather such as subway stations, train stations, bus terminals, theaters, restaurants, hotels, and city halls, malls and asked people to voluntarily participate in the study. On average, one of every five passersbyes who was contacted agreed to participate. After the purposes of the study were explained, respondents completed the questionnaire on the spot. In on-site field situations as seen in this study, probability sampling is difficult to achieve. Consequently, the convenient sampling method was used. One of the major weaknesses associated with convenient sampling is the selection bias. To prevent field researchers' selection bias, the surveyors were instructed to seek an equal portion of male and female respondents in various age groups (at least 16 years of age).

The post-event survey was conducted by the same student researchers who volunteered earlier. They visited the same survey sites and used the same method to distribute questionnaires. Therefore, two different samples (one from pre-games and the other from post-games) were collected for this study. Some may argue that a panel study, which uses the same sampled individuals, is the best for a longitudinal study. However, it is not uncommon to see different random samples utilized for longitudinal studies on perceptual or attitudinal changes over time (Kim, & Morrision, 2005).

3. Scale

This survey was designed for four parts. Every part measures two sponsors, two international ambushers, two domestic ambushers, has a total of 78 items, they were adopted bases on a number of source in sponsorship literature concerning awareness and corporation image. The questionnaires were written in Chinese, translated into Korean, and then back – translated into Chinese to ensure language equivalence. Two statements measured the top-of-mind brand recall, respondents are asked to “write down the 2008 Beijing Olympics sponsor that first comes to your mind. Then, to measure brand recognition, the respondents were given two items of three firms

asked to choose those which were official sponsors. Eleven statements measured the corporate image of three firms of same product category. For example, one item was “Coca-cola has good product & services”. To measure corporation image, this research used a seven-point, Likert-type scale ranging from 1 (strongly disagree) to 7 (strongly agree). Three statements measured the amount of time respondents watched the Olympics on TV and their type of advertising which they perceive the sponsors. Domestic questions were also included in the questionnaire to obtain a profile of the respondents.

4. Hypotheses development

Ambush marketing could not be a successful tactic in a well-informed marketplace. Ambush marketing can be a successful tactic only when consumers are not well informed about who are the official sponsors, what are their rights, and what is the role the sponsors play in staging the Olympic Games (Meenaghan, 1994; Sandler & Shani, 1989; 1993; Payne, 1998). Based on these preconceptions, the following hypotheses were formulated:

H1: After the Games, sponsors awareness levels (awareness and recognition) and image will be more increased than before the Games.

H2: After the Games, ambushers' awareness levels (awareness and recognition) and image will be lower than before the Games.

More recent studies support the nation and gender differences in sponsorship effects (McDaniel & Kinney, 1997). Based on these preconceptions, the following hypotheses were formulated:

H3: Sponsors and ambushers' awareness levels differ by nation. (i.e., After the Games, Koreans higher perceive the Chinese sponsor and national brand awareness level than before the Games.)

H4 Sponsors and ambushers' awareness levels differ by gender. (age, education, income)

Sandier and Shani (1989) examined seven categories with official sponsors of the 1988 Winter Olympics and found that four of the seven official sponsors succeeded in building awareness of that sponsorship and three did not. Based on these preconceptions, the following hypotheses were formulated:

H5: Sponsors awareness levels (The awareness and recognition) and image differ by the categories of product.

Scott and Suchard (1992; as cited in Apostolopoulou, & Papadimitriou, 2004) found that the Olympic Games could generate positive associations among consumers by showcasing the company's ability to provide quality services to the public.

H6: The group that identifies the sponsor appropriately will recognize the corporation's image favorably than the others.

H7: There will be differences in the form of advertisements the groups encountered appropriately or inappropriately recognized.

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上海世博旅游的辐射效应及周边城市的承接策略研究

王显成
嘉兴职业技术学院

摘要

2010年上海世博会给上海旅游业的发展带来了巨大机遇,其旅游效应也辐射到长三角及周边其他城市。周边城市借助于上海世博会举办能提高城市知名度、提高城市旅游管理能力、提升旅游要素、争取更多客源市场。周边城市对外可与其他城市通过资源互补、信息共享、交通共联、人才共用、市场共扩来分享上海世博会给本地区旅游业带来的机遇,同事在城市内通过旅游资源整合、旅游产品创新、旅游形象提升、旅游要素完善、政府部门联动来吸引更多世博游客到本地区旅游,通过内外两个途径承接上海世博会给本地区旅游业发展带来的机遇。

关键词:上海世博会; 旅游效应; 辐射; 承接策略

THE RESEARCH OF THE TOURING RADIATION EFFECT OF SHANGHAI WORLD EXPO AND THE CONNECTION STRATEGY OF THE SURROUNDING CITIES

Xiancheng WANG
Jiaxing Vocational Technical College

ABSTRACT

Shanghai World Expo in 2010 gives an enormous opportunity to Shanghai development of tourism trade, and its radiation effect of tourism also arrives at the Yangtze River Delta and its surrounding cities. By the aid of Shanghai World Expo, the surrounding cities can improve the city notability and tour managing ability, advance tour key elements, and strive for more customer resource marketplaces. The surrounding cities can also share the opportunity that Shanghai World Expo brings to local tourism by mutual complement of resources, information share, traffic unite together, talented person share and market exploitation together. Meanwhile, within the cities, these cities will attract more World Expo visitors through the tourism resource integrating, tourism product innovation, tourism image hoist, tourism key element perfects, and government departments linkage. By inside and outside approaches, the cities can gain more opportunities for tourism development from Shanghai World Expo.

Key words: Shanghai World Expo; tourism effect; radiation ; Connection strategy

作者简介:王显成(1978—),湖北天门人。硕士,嘉兴职业技术学院讲师,主要研究方向为旅游企业管理

第二部分 节事活动及其影响

Part 2 Events and Impacts

**ASSESSING CONSUMERS OF EVENTS (ACE):
PROJECTED IMPACTS OF THE 2009 U.S. OPEN GOLF CHAMPIONSHIP**

Douglas Michele Turco
Department of Sport Management, Drexel University

and

Amy S. K. Scott
Department of Business, DeSales University

ABSTRACT

Spectators at mega-sport events are an aggregation of market segments with distinct consumer behaviors. Relatively few economic impact studies have distinguished spectator market segments or the event tourists crowding out other visitors, resulting in inaccurate results. Despite a plethora of prior studies, there remains a need for a refined and agile model to predict a sporting event's economic impact. The purpose of this study is to describe the *ex ante* model, *ACE: Assessing Consumers of Events*, developed to estimate spending impacts by spectators. ACE is then applied to the 2009 U.S. Women's Open Golf Championship to illustrate its data requirements and results. U.S. Open spectators are projected to spend \$6.7 million in the host economy and induce a slight crowding out effect. Future applications of the ACE model are discussed.

Keywords: economic impact, sporting events, sport tourism

INTRODUCTION

Large-scale sport events including the 2009 U.S. Open Golf Championship require considerable planning and investments, attract international media interest, and thousands of sport tourists to host cities. Economic impact studies are one of the most common forms of evaluating mega events, and have been conducted on a wide range of events using a wide range of methods - from automobile racing (Burns, Hatch, & Mules, 1986) to World Cups (Lee & Taylor, 2005; Baade & Matheson, 2004). Despite widespread use there is growing skepticism surrounding sport event economic impact research, in part, because of faulty studies and over-inflated findings (Crompton, 2006; Baade, Baumann, & Matheson, 2006). There are several reasons for the inaccuracies, including purposeful falsification. Crompton (2006) argues that some event studies are inflated for political reasons i.e., to justify public investment, improve public relations, etc.

Mega-events are bid upon primarily for the expected value added to the host city. An economic impact study essentially measures how value the event adds to the city. Put another way, what would be missing from the economy without the event? One can visualize a giant hand pulling an event from a city and ponder how much money would be extracted.

There are a number of operational definitions pertinent to event economic impact studies that should be described before discussing models of measurement. Sport tourists are visitors to a destination for the purpose of participating, viewing, or celebrating sport (Turco, Riley, and Swart, 2002). Among sport event spectators, several distinct market segments exist as identified by Preuss (2005): Runaways, Changers, Casuals, Time Switchers, Avoiders, Extensioners, Eventers, and Home Stayers (See Table 1). Casuals are visitors who attend a sport event but were in host community primarily for other reasons i.e., visiting friends and/or relatives, business, etc. Day-trippers or excursionists are visitors who do not stay overnight in the host community. Primary sport event tourists are those visiting the host community specifically because of the sport event in question. Residents are sport event attendees in their home community. Resident spending represents a switching of transactions from one local business i.e., dining out, cinema, theatre, etc. to another, in this case the sport event. Time switchers are those who purposely schedule their visit to coincide with

the sport event but who would have visited at another time anyway. Runaways are residents who purposely leave the host city during the event due to the event. Homestayors are residents who purposely stay in the host city during the event due to the event. Preuss and Schutte (2008) suggest that primary sport event tourists spend at higher levels than the overnight visitors they displace in hotels and other paid accommodations. In such cases, the value-added of primary sport event tourists must be factored in the crowding out effect. Visiting friends and relatives (VFR) are a market segment referring to nonresidents in the host community whose primary motive is to visit friends and or relatives. Watching friends and relatives (WFR) are VFRs with friends and/or relatives participating in the sport event.

Table 1.
Sport event spectator market segments and description

Segment	Description
Runaways	Residents who leave the city and take a holiday elsewhere
Changers	Residents who leave the city and take their holidays at the time of the event rather than at some other time in the year
Casuals	Tourists who would have visited the city even without the event
Time Switchers	Tourists who wanted to travel to the city but at another time
Avoiders:	Tourists who stay away but would have come without the event
Extensioners	Tourists who would have come anyway but stay longer because of the event
Eventers	Residents who consume at or near the event at the expense of other local attractions
Home Stayers	Residents who opt to stay in the city and spend their money at home rather than on a vacation somewhere else at some other time in the year

Adapted from Preuss, H. (2005). The economic impact of visitors at major multi-sport events. *European Sport Management Quarterly*, 5, 3, 281-301.

A sport tourism event’s “pull” or drawing power is measured by its ability to attract nonresidents and induce consumer spending at and near the event venue. It is possible that visitors drawn by a major sport event may displace others who would have visited but did not because they could not secure accommodations or they were not willing to deal with the crowds attracted by the event, termed crowding out. Other tourists and residents avoid the mega-event or are priced out and, in turn, the host city loses money that would have otherwise been spent. Crompton (2006) contends that “if each of these visitors merely replaces another potential visitor who stayed away from the community because of the congestion associated with the tourism event, there is no new economic impact.” However, it has been shown that sport tourists at prestigious events are high-value tourists, spending more money on average than the tourists they crowd out (Tang & Turco, 2002).

Preuss, et al (2007) divided visitors to a mega-event into three groups based on their expenditures. The first group does not bring event-related consumption expenditures to the city (re-allocation of funds). The second group brings event-related consumption expenditures to the city (inflow of funds). The third group carries out income-dependent expenditures outside the city caused by the event (outflow of funds). This leads to the question whether an event generates additional consumption expenditures of visitors when inflow and outflow of funds are balanced. Preuss states: “If this equation is greater than zero there is an event-related inflow of funds, if it is smaller than zero there is an outflow. Some of the multiplier analyses of past mega-events lack this differentiated view because they did not distinguish between the various groups or because they simplified the analyses and considered all consumption expenditures.”

Despite a plethora of prior studies, there remains a need for a refined and agile model to predict a sporting event’s economic impact. Many studies fail to account for variances in consumer behaviors amongst spectator market segments and the crowding out effect. As Preuss (2002) puts it:

The expenditures of the casuals (A) and the time switchers (B) are wrongly included and the crowded out consumption expenditures of some residents (G) and tourists (C)

are ignored. Group C gives good reason to consider the extent of crowding out of the remaining tourists in view of the realistic assumption that regular visitors might stay away in the future.

Distinguishing sport event tourists by their spending behaviors will lead to more accurate economic impact estimations. For example, the Watching Friends and Relatives (WFR) market consists of sport tourists with significant others participating in the sport event. Scott and Turco (2007) and Turco, Cox, and Ally (2008) found that friends and relatives of sport event participants to comprise approximately 12% of all spectators, and spend up to three times more than other sport event tourists.

The purpose of this study is to describe the ex ante model, ACE: Assessing Consumers of Events, used to estimate the spending impacts of event spectators. ACE is then applied to the 2009 U.S. Women's Open Golf Championship to illustrate its data requirements and results. Participants, officials, volunteers, media, allied event businesses, and the local organizing committee contribute economic benefits to a region but were not measured for this study.

EVENT DESCRIPTION

The 2009 U.S. Open Women's Golf Championship will be held at Saucon Valley Country Club, Bethlehem, Pennsylvania, 6-12 July. The U.S. Women's Open is the premier women's golf championship in the world. Eight of the last 15 champions have been foreign-born, whereas only four of the first 40 champions were foreign-born. South Koreans dominate the Ladies Professional Golf Association (LPGA), holding eight of the top 15 places on the 2008 prize money list.

Geopolitical boundaries are often used to define economies for impact studies since governments maintain tax records and multiplier coefficients are computed for various jurisdictions. For the purpose of this study, the economy is designated as the Lehigh Valley, combining the neighboring cities of Allentown, Bethlehem, and Easton, Pennsylvania. Thus primary sport tourists are defined as nonresidents who travel to the Lehigh Valley to experience the 2009 U.S. Women's Open Golf Championship. The Lehigh Valley is an official metropolitan region consisting of Lehigh, Northampton, and Carbon counties in eastern Pennsylvania and Warren County on the western edge of New Jersey in the United States. It is the third most populous region of Pennsylvania, following metropolitan Philadelphia and Pittsburgh. The region is called the "Lehigh Valley" because of the Lehigh River, which runs through it. There is a geological valley that lies between two large Pennsylvania mountain ranges, Blue Mountain to the north and South Mountain to the south. The Lehigh Valley is approximately 110 km west of New York City and 80 km miles north of Philadelphia. The area has a current population of 790,000 (estimated 2005) and is the fastest growing area in Pennsylvania as it is a popular bedroom community for Philadelphia, New Jersey and New York City. It is also home to eleven colleges and universities. The 2009 U.S. Open Women's Golf Championship is the premier event for the Lehigh Valley and will occur a few weeks after another significant event, the opening of the Sands Bethlehem Casino, slated to open in June of 2009, the first casino in the Lehigh Valley.

RESEARCH METHODS: ACE

ACE starts with an event's projected attendance. The golf course at Saucon Valley Country Club can accommodate a capacity of 25,000 per day Monday-Sunday for a total of 175,000 visitors. Some of these are repeat visitors. To begin the analysis, attendance and economic impact data for the past ten U.S. Women's Opens were examined. At least nine of the last 12 had attendance over 100,000. Therefore it is projected that the 2009 U.S. Open will attract 100,000 spectators.

To construct spectator spending profiles, several data points are required including event attendance, number of days/sessions visitors attended, whether or not attending the event was the primary reason for visiting, residency, average visitor group size, and average visitor spending by

lodging, meals, event tickets, etc. An accurate event attendance projection is vital to the accuracy of the ACE model. Some events tally individual visits scanning barcodes on ticket passes but most do not. For multiple day or session events, total attendance must be adjusted to reflect the total number of primary visitors or visitor groups.

ACE adjusts event attendance totals, taking into account repeat visitation, residency of spectators, and primary reason for visiting the host community to compile distinct spending profiles for overnight and day visitors. ACE segments spectators into three categories: “Primary” out of town spectators, “Residents” of the Lehigh Valley who will attend the event and “Casuals,” spectators in town for other reasons but decide to attend the U.S. Open while visiting. The assumptions are slightly different for each based on situational characteristics of the spectator.

The first type of spectator is the Primary visitor. “Primary sport event tourists” are those visiting the host community specifically because of the sport event in question, the 2009 Women’s U.S. Open. These spectators are in two categories: the overnight and the day-tripper. The “day-tripper” or excursionist” does not stay overnight in the host community. These spectators are from outside the Lehigh Valley but return to their home each night or travel through to another destination. They could be from metro Philadelphia or New York, New Jersey or elsewhere outside the Lehigh Valley. Daytrippers do not require a hotel room but may be more inclined to do some shopping in the Lehigh Valley area, eat meals at a restaurant, and purchase petrol for their automobiles.

The primary overnight spectator resides outside the Lehigh Valley and has made a special trip to see the Women’s 2009 U.S. Open. This fan requires lodging at a paid accommodation or will stay at the residence of a relative or friend. The former will eat more meals at the tournament and at local dining establishments. This spectator may spend more in souvenirs as they have made a significant commitment to attend this event.

The next type of spectator is the “Resident” from the Lehigh Valley. “Residents” are sport event attendees in their home community. Resident spending typically represents a switching of transactions from one local business i.e., dining out, cinema, theatre, etc. to another, in this case the sport event. “Home Stayers” are residents who opt to stay due to the event and spend their money in the home community rather than on a vacation somewhere else at some other time in the year. “Eventers” are residents who consume at or near the event at the expense of other local attractions. It is predicted that residents will spend the least because the U.S. Open is in their home area – there is not a special draw to the local shops or dining. However, these spectators may spend slightly more for souvenirs, as they want mementos of their local area as keepsakes.

The final type of spectator is the “Casual.” “Casuals” are visitors who attend a sport event but were in host community primarily for other reasons i.e., visiting friends and/or relatives, business, etc. This spectator was in the area already and decided to attend the U.S. Open. Typically their spending is not included because it is spending that would have already occurred in the economy. However, the US Open will likely induce spending from the Casual beyond what they would have otherwise made.

To predict the proportionality and spending of the aforementioned spectator market segments, findings from several other studies were analyzed including the 2008 U.S. Open in San Diego, the 2006 Ryder Cup in Ireland and the 2005 Players Championship in Florida (Stevens, Hodges, & Mulkey, 2005). Attendance at sport event varies based on several factors including: Geographic area, weather, event prestige, destination attractiveness, and competitors. The geographic home of the spectators is important to the economic impact of the event. Are most of the spectators from the host economy or are they traveling to witness the event? The 2005 Players Championship study found that 55 percent of visitors were from the surrounding seven counties with 80 percent visiting only to attend the tournament. In contrast the 2008 U.S. Open Championship found that 36 percent of visitors were from the local San Diego area. Of the 64 percent who were non-local, 94 percent were there primarily for the golf tournament. For the 2006 Ryder Cup economic impact

prediction Watkins and Funari assumed that 25 percent of the attendees each day were golf enthusiasts who would not be in Ireland if it were not for the Ryder Cup. It is predicted that most out-of-region spectators at the 2009 U.S. Open will be primary visitors and not casuals. We expect the U.S. Women's Open to draw a slightly different spectator market than the Men's Open. ACE anticipates 45 percent of attendees will come from the Lehigh Valley. Of the remaining spectators, 30 percent are projected to be day-trippers, 20 percent will be overnight visitors and 5 percent will be casuals.

Another component of attendance is length of stay and number of visitor days. The Players Championship found that local spectators attended for 2.5 days on average while non-local spectators attended for 2.2. The Torrey Pines U.S. Open had the opposite numbers. The local spectators came on average 2.2 days while the non-local spectators came 2.8 days. It should be noted that the 2008 U.S. Open required an additional day for a playoff. The Ryder Cup study assumed that all spectators stayed for the entire six days of the tournament. None of these studies differentiated the "day-tripper." Based on this research ACE predicts that both overnight and resident spectators at the 2009 Women's Open will attend on average 2.4 days. ACE predicts that day-trippers will make two trips to the Lehigh Valley and will attend for an average of 2.0 days. Casuals will attend for one day as they are only attending because they are in town for another reason.

A third component of attendance is visitor group size. The 2008 US Open study found that non-residents came in relatively large groups with an average size of 3.5. The group size at the Players Championship was not calculated. ACE predicts that most spectators will come in a group of two or larger and therefore a group size of 2.5 is assigned for all visitors.

Watkins and Funari (2006) estimated the average Ryder Cup visitor would spend €220 or \$281.60 per person per day (at the 2006 exchange rate of 1.28€ per \$1). Spectators at the 2008 U.S. Men's Open spent an average of \$107 on food (median \$75), \$126 on shopping and souvenirs (median \$100), \$82 on entertainment (median \$50) and \$45 on transportation and parking (median \$25) for a total of \$360 (\$250) per person per day, though some big spenders at the top end pulled up the averages. At the Players Championship, spectators spent on average \$77.37 per person per day at the event. In 2009 dollars this is approximately \$83.75.

Pennsylvania's leisure travelers spend on average 42 percent of their dollars for lodging accommodations (PA Department of Tourism, 2003). As of 1 August 2008 there were 5,069 hotel rooms in the Lehigh Valley area in 59 hotels along with 142 additional rooms at inns and bed and breakfast establishments. The average hotel rate for the Lehigh Valley is projected to be \$94.00 or three percent higher than rate as of 1 August 2008 (\$91.33 per night). Overnight leisure visitors to Pennsylvania's southeast region spent \$95.40 per person per day and spent an average of 3.3 nights. Using the median numbers the ACE estimates compensate for the difference between the cost of living in San Diego and the Lehigh Valley. There is also a difference in price point between men's and women's events. Spectators are willing to pay more at a men's U.S. Open event. This assumption is supported by the cost of tickets at each of these events. A Saturday pass for the 2008 U.S. Open at Torrey Pines cost \$100 while a Saturday pass for the 2009 Women's Open at Saucon Valley will cost \$45.

ACE spending profiles for primary day and overnight visiting spectators, residents and casuals are revealed below and summarized in Table 2. Addressing each of the spectator market segments previously identified by Preuss et al (2007), ACE projected spectator consumer behaviors based on several assumptions:

Primary Daytrippers: \$75 per day for meals and souvenirs both on and off site plus \$45 for tickets to attend the event (\$120 total)

Primary Overnighter: \$214 per day with \$94 for the hotel being split amongst the 2.5 people per group (\$37.60 per person per day) and \$176 in tickets, meals, souvenirs and shopping. Compared to major golf tournaments for men, the U.S. Women's Open is a slightly less prestigious event.

Compensating for inflation, \$214 is an accurate visitor spending estimate. This means that the average overnight visitor would spend a total of \$513.60 over the 2.4 days that they attended the Women’s Open.

Runaways: Since the US Open is during peak summer travel season and follows the Fourth of July holiday weekend, some residents will be vacationing in the Pocono Mountain resort area or beaches along the Atlantic Ocean. Few if any will be running away from the event due to its self-contained and relatively remote local.

Changers: Insignificant due to relative remoteness of SVCC location

Casuals: Hotel occupancy in the Lehigh Valley for July 2007 was 74 percent; Spontaneous attendance is unlikely as all tickets must be purchased in advance though some casuals could attend the Open with compensated or “comped” corporate hospitality tickets given to them as a business client on a spur-of-the-moment. Projected spending to be \$60 for meals, souvenirs and tickets per day beyond what they would normally spend in the host economy.

Time Switchers: Tourists (and their spending) who wanted to travel to the city but at another time; if they purposely switch their visit to coincide with the event, their spending should be counted as direct impact. Sport event time switchers will likely spend more money locally than other leisure tourists.

Avoiders: Tourists who stay away but would have come without the event; NA for the US Open for same reason as Changers

Extensioners: May include Daytrippers who return for an additional day of viewing; Since the U.S. Open is considered one of golf’s major tournaments, Extensioners may emerge should there be a tie score after the final round. An additional round would be played on Monday.

Eventers: The novelty of the event combined with the popularity of golf in the Lehigh Valley lead to high levels of resident Eventers attending the U.S. Open. There are no benefits to be realized from being near the US Open without ticketed access to the spectator areas since SVCC is geographically isolated. Residents events will spend \$60 for meals, souvenirs and tickets per day beyond what they would normally spend in the host economy.

Homestayors: Volatility in U.S. financial markets combined with the popularity of golf in the Lehigh Valley will influence upwards the number of home stays or “staycations.” Homestayors are expected to be 10% of the spectator market segment and “high-value” in terms of discretionary income. Saucon Valley Country Club has 984 total members and a wait list for new members. Approximately 422 members (43%) volunteered to assist with hosting the 2009 U.S. Open. Membership costs are \$50,000 with a \$12,000 annual fee.

Table 2.
Projected consumer behaviors of 2009 U.S. Open Spectators

	Spectator market segment	% of total	Spending amount per capita per night	Length of stay/visits	Group size
Primary Out of Town	Overnighter	20%	\$214	2.4	2.5
	Daytripper	30%	\$120	2.0	2.5
Resident	Eventer	35%	\$60	2.0	2.5
	Homestayer	10%	\$60	1.5	2.0
Casual	Casual	5%	\$60	1.0	2.5

Assuming event attendance at 100,000, 2009 U.S. Open spectators will contribute a total of

\$6,784,849 to the Lehigh Valley economy (See Table 3). In comparison, Watkins and Funari (2006) estimated the 2006 Ryder Cup brought €26.9 million to Ireland. ACE projected all 2009 U.S. Open overnight visitors to spend \$4,279,829, daytrippers \$1,125,000, residents \$1,080,000 and casuals \$300,000.

Increases in hotel occupancy rates above prior year levels is one indication of a sport event's value added. The Lehigh Valley Convention and Visitors Bureau reported hotel occupancy rates for July 2007 and 2008 at 67% and 73% respectively. In 2008, the Lehigh Valley had 5,069 hotel rooms in 59 hotels. There were also an additional 142 rooms in inns and bed and breakfasts for a total of 5,241 rooms. There are plans for additional rooms by the summer 2009 to accommodate the new Bethlehem Sands Casino. Using an average of the 2007 and 2008 occupancy rates, the projected average occupancy rate in the Lehigh Valley for the summer of 2009 will be 70%. Assuming that there will be a 70% occupancy rate without the Open, non U.S. Open visitors to the Lehigh Valley will use 3,669 hotel rooms, leaving 30% or 1,572 rooms for the spectators of the Open. There will be 8,333 overnight visitors attending the event. We believe that 40% of the overnight visitors will stay with friends and relatives and 60% will stay in hotels then overnight hotel visitors will require 2,000 hotel rooms. This indicates a "crowding out" of 428 hotel rooms at a rate of \$94 per night for a total "crowding out" effect of \$40,232. While this number may seem insignificant, it does not include other spectators such as the event competitors, officials, volunteers, media and VIPs who will also require a hotel room. According to Preuss (2005) the main limiting resource for destinations hosting mega events (and therefore economic impact) is hotel capacity. The hotel market develops on long-term demand, not on short-term peak demand and change is slow.

DISCUSSION

An annual event such as the U.S. Open may experience significant fluctuations in attendance, spectator market segment proportionality and spending from year to year. The composition of the tournament field influences the media attention, gallery size, and its economic impact. For example, when Tiger Woods is in contention for a tournament victory, all these factors are increased. Known as the "Tiger Woods Effect," in 88 tournaments since 2003, Woods finished in the top five 54 times, pushing final-round television rating share to a 4.4 average. The 34 other events averaged a 3.4 - a 29 percent difference. In 2007, weekend ratings were 58 percent higher in tournaments in which Tiger played (Sandomir, 2008). Due to the recent retirement of Annika Sorenstam and leave of absence by Lorena Ochoa, women's professional golf is in transition. The game does not have a bankable star though Michelle Wie may be soon ready to assume this expected role.

The 2006 Ryder Cup study examined three separate groups for economic impact: those attending the event, those sport enthusiasts in the area but not attending the event and the media (Watkins and Funari, 2006). The ACE model for the 2009 U.S. Open only accounted for event spectators. An estimated 1,200 media representatives will be on hand at the 2009 U.S. Women's Open, most requiring lodging accommodations. Also important to event organizers are corporate clients and volunteers. According to MSG Promotions, Inc., a sell-out of corporate hospitality would result in approximately \$5,736,720 in revenue. As of September 2008, 53 companies had reserved corporate hospitality services at the U.S. Open and most were local.

Visiting volunteers are another stakeholder group associated with mega-events. The 2009 U.S. Women's Open has secured 3,487 volunteers from 37 states. A representative of MSG Promotions, Inc. anticipated that most out of state volunteers would reserve a hotel room. Excluding volunteers from Pennsylvania (2932) and New Jersey (260), 295 visitors would also need hotel rooms and spend money in the economy. U.S. Open volunteers are responsible for securing their own hotel rooms.

The ACE model estimated that spectators to the 2009 U.S. Open Championship will spend \$6.7 million in the Lehigh Valley. An advantage of the ACE predictive model is that it can give

stakeholders advanced information in the event bidding process. Though ex ante economic analysis has at times overestimated an event's economic impact errors are often as a result of faulty assumptions. The next phase of this study will be performed during and after the event (ex post analysis) and compare ACE's ex ante findings to the ex post findings. Results will be published in August 2009. The ACE predictive model will also be extended to include direct spending by volunteers, media, and the event organizing committee.

Table 3.
Spectator Market Segments and Consumer Behaviors 2009 U.S. Open Golf Championships

	Primary Overnight 20%	Primary Day-Tripper 30%	Resident 45%	Casual 5%
Total number of spectators x type	20,000	30,000	45,000	5,000
Average days or sessions attended by visitors	2.4	2.0	2.5	1.0
Total individuals attending event	8,333	15,000	18,000	5,000
Average per capita per night-day spending	\$214	\$120	\$60	\$60
Total spending in host economy by visitor groups	\$4,279,829	\$1,125,000	\$1,080,000	\$300,000

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IS HOSTING THE OLYMPICS WORTHWHILE? TOURISM EFFECTS OF TURIN 2006 OWG

Piervincenzo Bondonio & Alessandro “Chito” Guala
University of Turin

ABSTRACT

Turin, the first capital of a unified Italy, went through many changes in its history. In the XX century it became the automotive district of Italy and a typical “one company town”. In the last fifteen years Turin started a further, challenging change: under the lead of a new and stronger local government a new Master Plan was set (with its urban regeneration implications) and the bid for hosting the 2006 OWGs was presented and won. The success of the Games put Turin on the world map, under a new and brighter light. The post-Games outcomes in the tourism sector so far obtained by Turin (and the whole Piedmont region) are presented and discussed, using both quantitative and qualitative (customer satisfaction) data. The paper ends recalling a short list of actions and policies advocated for by influential managers of local institutions (public and private), in order to optimize the “Turin system”.

Key words: Turin; Torino 2006 Olympic Winter Games; tourism legacy; customer satisfaction

THE BACKGROUND ENVIRONMENT: TURIN, AN ANCIENT HISTORY WITH MANY TRANSFORMATIONS

From its origins to the capital of a unified Italy

Turin is currently the capital of the Piedmont region located within northwestern Italy at the foot of the Alps. Its population of 900,000 ranks fourth in Italy in terms of size; its province includes 312 communes with circa 2,250,000 inhabitants.

The city was founded in 29 B.C. as a military outpost for a Roman garrison during the reign of the emperor Caesar Augustus (which explains the name Augusta Taurinorum, based on the name of the tribe of Gauls which inhabited the territory). Its strategic geographic position (on the main route from the fertile Po basin to the primary Alpine passes leading to northern Europe) made it a prime military location which repeatedly fell under the dominion of various powers from the end of the Roman Empire to the Early Middle Ages.

Following its conquest in 1280 by the Dukes of Savoy, its destiny became linked to this royal lineage which, in 1563, transferred the capital of its duchy and subsequently of its kingdom from Chambery in the Savoy region to Turin itself. The magnificent Baroque historical center of the city serves as evidence of the economic and political development which was already attained in the 18th century (when it became an important manufacturing center, particularly in the textile sector). The free trade policy of the government promoted – in the middle of the 19th century - further economic development for the city and its territory in conjunction with significant public works on infrastructures (railways, roads, canals), as well as support for private initiatives in the educational and social fields (mainly religious in origin).

Following the constitution of 1848, the economic growth was accompanied by political growth and the House of Savoy found itself leading the movement which would – following an intricate series of diplomatic alliances and military campaigns – lead to the political unification of Italy in 1861 where Turin became the first capital.

The modern period: from ex-capital to the Italian automotive city

The transfer of the capital to Florence in 1865 (and subsequently to Rome in 1870) resulted

in a sudden (and bloody) crisis for the city which lost power, wealth and its political role. Turin finds itself in a position to have to invent its own future (an effective metaphor compares Turin to a beating heart which expands and contracts: Barbano, 1992); this is achieved by following the wave of positivist thinking, implemented through an alliance between the leading intellectual class and the entrepreneurial bourgeoisie. This alliance leveraged the role of science and technology to promote economic development and trigger the growth of the local economy. The National Exhibition of 1884 represented an extraordinary event to demonstrate the material and intellectual resources of the territory. Local governments (the Commune and Province), on the other hand, implemented policies promoting development by means of projects in the educational field (particularly in vocational schools) and in the energy sector. A crisis in the agricultural, banking and commercial sectors in the last decade of the 19th century provided an opportunity to find investment opportunities for local capital in the manufacturing sector. In 1889, a group of thirty Turinese businessmen and aristocrats founded the “Fabbrica Italiana Automobili in Torino” (FIAT) which, at the time, was one of the many companies within the rising automotive sector (the other significant automotive Turinese firm, from 1906, was Lancia). This company was destined to characterize - through its successes and crises - the economy and society of Turin for a long time. In the last decade of the 19th and the first of the 20th century, industrial growth resulted in increased segmentation of urban life: the working class grew significantly and were mostly located in the northern and southern suburban areas of the city, often overcrowded. These conditions strengthened the bonds of solidarity between workers and resulted in political movements that exercised a strong influence on the life of the city. During the first World War, Fiat was converted for military purposes and grew significantly with a resulting proportional increase in employment. Worker discontent after the war, however, resulted in frequent strikes culminating in the occupation of factories and in semi-insurreccional activities which caused a reaction amongst the bourgeoisie. The advent of the Fascist dictatorship in Italy marked the violent end of worker leadership, even at the local level: Giovanni Agnelli, the founder of Fiat, received government support – also due to his direct relationship with Mussolini – which strengthened the dominant position of the company in the local economy. The acquisition in 1926 of “La Stampa”, the primary Turinese newspaper, further entrenched his influence over the life of the city. After surviving the major crisis of the 1930’s – due to the support of local banks and government – FIAT played a significant role in guaranteeing the survival of the city during the difficult period between the fall of Mussolini (1943) and the end of World War II, offering paternalistic support to thousands of people as well as providing homes and other welfare benefits for its workers. The failure of other local firms further strengthened the locally dominant position of FIAT which received an elevated quota (38%) of the funds allotted to Italy as part of the Marshall Plan for the mechanical industry.

Post-World War II: an asymmetrical governance system

In the years of the Italian economic “miracle” (1950-60), FIAT (and therefore Turin) is an absolute protagonist. Under the energetic and capable leadership of Vittorio Valletta (together with Giovanni Agnelli, the “Attorney”, grandson of the founder and renowned member of the international jet set who was profoundly attached to his city), the company sets itself and achieves the objective of “motorizing Italy”, specializing in the production of small car models (the 600 and 500, above all). Its success is extraordinary: at the end of the 1950’s, tens of thousands of new jobs are created in Turin each year. In 1963, the three city plants employed 145,000 workers and produced more than one million cars per year; the automotive sector represents 80% of the city's industrial output (in 1971, 58.6% of the population of Turin is employed in the manufacturing sector) while a thick network of small companies across the outer area of the city supplies components and services. The industrial growth attracts migrants, particularly from the southern regions of Italy: the social and cultural composition of the city changes dramatically, often creating tensions within the fragile structure of local services. The population reaches a peak of almost 1.2 million inhabitants in 1975: local authorities (due to political expediency and difficult financial conditions) allow the weakly regulated market (the city lacks a modern town master plan) to tackle the task of providing most of the homes for new inhabitants, resulting in questionable urban developments and low-quality homes, as well as inadequate public services and hotbeds of hostility between the locals and the newcomers.

Resentment within the working class (the average wages paid by Fiat are at the lower end of the scale) results in strikes and other forms of often violent opposition; the most striking demonstration of the latter occurs in 1968-1969 (the “hot autumn” in connection with student protest movements following the May protests in Paris in 1968) and would last for more than a decade. These are the “years of terrorism” which affect all of Italy but feature particularly bloody episodes in Turin. A turning point occurs on October 14th, 1980 with the "March of the 40,000" white collar workers and middle managers of Fiat in which the silent majority of the most important company of Italy makes its voice heard in a demonstration which changed the relationship between workers, trade unions and the company. The period of continuous growth in automotive production has come to an end; following the initial oil crisis in 1973, the previously buried national problems become evident: excessive dependence on oil imports, rigidity of the labor market and – from the perspective of public financing – double-digit inflation (after more than 25 years) and the massive and foolish use of public debt financing which even now is a powerful handicap to public finance and the Italian economy.

The crisis of Fiat and the identity crisis of the city

The crisis does not leave Fiat unharmed, nor Turin: the company moves a growing part of its production to the south in order to avail itself of generous government aid. In 1980, two thirds of production is still located in the three Turin plants while in 2002 the quota falls to less than one third (Whitford and Enrietti, 2005); similarly, FIAT reduces its workforce in Turin: after the job cuts in the early 1980's, job figures in Turin and its surrounding areas fall from 92,000 to 47,000 employees during the 10-year period from 1986 to 1996 (Rosso, 2004). Following the loss of market share due to the opening of national markets to international competition (sales of FIAT in Italy shrink from 52% in 1990 to 34% in 2001), employees in Turin are reduced to fewer than 30,000. This crisis – although serious and with distant origins – does not however have devastating effects on the company nor on the local economy and community for two primary main reasons: the massive use of the Special Wage Supplementation Fund (through which unemployed workers receive 60% of their previous wage from primarily public financing) and a shrewd diversification policy with respect to new international markets, gradually implemented by the network of local suppliers (Whitford and Enrietti, 2005).

So, as of the early 1990's Turin is no longer the city of FIAT. This label still sticks, however, despite the facts deny it, and the city continues to be considered the "grey Italian Detroit". Moreover, what other identity characterizes the city? What new image does the city have and want to promote?

Another transformation is underway as the result of multiple players. In order to describe this change, reference must be made to the public player, the Municipality.

Creating a new identity: the role of players, the stakes, the leverage

Mention was made of the substantial strategic subordination of the municipality's policies to the choices of FIAT which marked the city for more than forty years, regardless of the political colors of the alternating governing administrations. In addition to the power of the industrial sector to influence policy, this state of affairs was also due to two weaknesses in the local system: one economic in nature, the other political. The economic weakness was due to the limited financial autonomy of the Municipality due to national regulations on local finances which has privileged (since the early 1970's) State transfers which undermined local taxation. The political weakness – of even greater importance – derived from the difficulty in generating consent for broader projects due to the weakness and precariousness of local government, as well as the limits of their role and the crisis affecting certain historical political parties at national government level (as well as frequently at the local level).

Local expressions of these crisis factors included the inability – on the part of the left wing governments, in power since 1975 – to combine their political agenda with a consistent policy for local development which could directly tackle the economic crisis of the automotive industry and

provide strategic and shared future prospects. Then, the local government's involvement in (if marginal) corruption practices, and its replacement in 1992 by center-left coalitions which were precarious and unstable (four different mayors in seven years and, in 1992, the administration holding office was dissolved by the central government and replaced by a Commissioner entrusted with ordinary administration and calling for elections in 1993).

The case of Turin preceded the considerably more extensive events centered around Milan – with consequences that were still not imaginable – involving the courageous yet controversial judges of the public prosecutor's office (the so-called "Tangentopoli") which, as of 1992, managed to literally wipe out five parties that were protagonists of the Italian national governance system for 45 years: Democrazia cristiana (Christian Democracy), Partito socialista italiano (Italian Socialist Party), Partito socialdemocratico italiano (Italian Socialdemocratic Party), Partito repubblicano italiano (Italian Republican Party), Partito liberale italiano (Italian Liberal Party).

In the meantime, new conditions and decisions developed within the country, offering new opportunities for the effective renewal of local administrations and their policies; Turin showed that it was capable of fully exploiting their potential.

These opportunities included the significant strengthening of local autonomies, thereby providing local entities (i.e. the municipalities) with powers and opportunities much broader than in the past.

At the same time, the direct election of mayors and presidents of provinces was introduced, strengthening the hold on its majority in order to guarantee stability to local government. In Turin, the first direct election of a mayor – with the new rules – took place in 1993: Valentino Castellani – a professor of the Polytechnic and expression of local society through a civic list not influenced by political parties, although he received the policy support of a center-left coalition – became the first mayor directly elected by citizens through the new system. Castellani and the forces for renewal which sustained him started work with a calm determination to profoundly renew the commune's policies by opening up to new ideas and alliances – on a non-dependent basis – with economic and social forces of the city and with other local entities (the Province of Turin and the Piedmont Region, first of all).

"Now the leadership of an empowered and non-party-politicized mayor who was therefore necessarily rooted in local priorities gave Turin's administration a refreshing credibility, which was to prove one of its key assets" (Winkler, 2007, page 21).

In 1997, Castellani was confirmed as the mayor for a second and final term, in accordance with the new limits set by law; his successor is Sergio Chiamparino from a coalition that was very similar to that of Castellani (although with a civic list holding a lower weighted proportion of center-left parties, which were re-constituted in the meantime). Chiamparino was confirmed for a second term in 2006.

THE CREATION OF A NEW TURIN?

Some strategic choices of the city in the 1990's

The awareness that facing the new challenges of globalization would require competencies and resources that were not available to the commune alone led the Castellani administration to search for and find new alliances at the local level (for example, by hiring experts from the university and corporate worlds within his administration), as well as at the global level (by consolidating relations with other local entities such as the Region, first of all, and by establishing international connections such as with the European Union). The traditional public spirit of the Turinese found a point of reference in the administration which managed to mobilize the citizens in its innovation projects. The fundamental condition for initiating new projects was fixing the finances of the municipality: this

occurred by utilizing the extra tax revenues provided by the new property tax (ICI) capable of producing a significant level of income, as well as by tax revenues generated by the privatization of companies or institutions which were previously completely owned by the commune (for example, the municipal company for electrical energy was converted into a corporation; certain public museums were transferred to foundations with private partners). Also important was the support of the two Turinese bank corporations (Compagnia San Paolo and Fondazione Cassa di Risparmio of Turin) which systematically contribute to the co-financing of urban renewal projects launched by the commune (annual flow of circa 300 million Euro).

There were three key projects which characterized the new municipal policy initiated by Mayor Castellani (and then continued by his successor Chiamparino). Two directly involved urban renewal and had a direct impact: one of a regulatory nature (the new Master Plan of the city) and the other of a planning-construction nature (the city suburbs). The third project, of equal importance, formulated strategic lines of development for the city, and subsequently the metropolitan area, for the first time in Italy; this was the end-result of a process involving the active participation of many parties (public institutions, special interest groups, experts): the 1998-2010 Strategic Plan. The winning idea of putting forward the city as a candidate for the 2006 Winter Olympic Games was born within this laboratory of ideas and initiatives, in partnership with certain locations of the nearby Alpine valleys.

The new **Master Plan** of the city, approved in 1995 after years of postponement due to a lack of general political consensus (Winkler, 2007, pp. 24-25), was an opportunity to re-design the city, starting with two key ideas. The first was placing the railway underground, given that it was a barrier dividing the city in two from north to south causing serious communication problems: this would thereby increase the capacity of underground railway transportation and 12 km of wide roadways would become available to the city (the “central backbone” consisting of four sectors). The second idea was the conversion of four major industrial brownfields along the central backbone, covering 2.1 million square meters of land, for other purposes in order to create mixed use neighborhoods, with half of the land designated for residential use, the other half for commercial use and parks. In connection with the new Master Plan, a decision was made – after 50 years of discussion – to build the first subway of the city: a highly automated line 15 km long with 21 stations along the north-south axis (with a foreseen total cost of about 2.45 billion Euro in public and private investments).

The **Marginal Neighborhoods Plan**, complementary to the Master Plan, and drafted in 1997, had highly innovative features in terms of scale, methodology and objectives. It was, in fact, an urban regeneration and social inclusion plan which has allowed for the identification, planning and gradual implementation of various types of works (urban recovery and renewal as well as local development) in 17 areas of the city within neighborhoods affected by urban and social decay (for a brief overview: City of Turin, 2007:14 and Winkler, 2007: 36-41).

Between May 1998 and February 2000, on the initiative of the municipal administration, Turin was involved in a complex project with many partners – the first city in Italy – that resulted in its own **Strategic Plan** (International Turin, 2000): a medium-term (10 years) planning document in which a shared vision of the future was planned and the strategic objectives and lines of actions were outlined on the basis of available (or reasonably obtainable) resources (Kresl, 2007).

The process which led to the Plan and was inspired by other European cases (in particular, Barcelona), was marked by the mobilization of key figures (special interest groups, sector experts, academics, members of the public involved in multiple seminars and debates), strong contextualization within the economy and society of Turin (International Turin, 1998, a, b) and the adoption of an informal style (which facilitated the participation of many entities, regardless of formalities, although in a general and undetailed manner (Winkler, 2007: 26).

CANDIDACY FOR HOSTING THE XX WINTER OLYMPIC GAMES (AND THE IX

PARALYMPICS): TOURISM OBJECTIVE (BUT NOT ONLY)

The idea of proposing Turin as a candidate for the XX Winter Olympic Games was put forth by a few individuals within the political/economic elite of the city: the success of the candidacy was announced in Seoul on 20 June 1998 during the time of formulation of the Plan. The two initiatives (drafting and implementation of the strategic Plan as well as preparation for the Games) mutually strengthened each other and the second immediately become an irrepeatable occasion to re-position Turin on the world map and to show the world that there was an ancient and modern Turin (serving as a catalyst for accelerating change) which was innovatively immersed within its revalued past and open to international culture - a city seeking to receive and host visitors from around the world (according to Castellani, in Bondonio and Crivello, 2007: 164-5). It was not coincidental, in fact, that the six lines of action which the Strategic Plan proposed to key players in Turinese society included line 1, "Integrating the metropolitan area into the international system" and line 4, "Improving urban quality by upgrading the environmental and urban areas" – both concerning the international positioning and attractiveness of the city – followed by line 5, "Promote Turin as a city of culture, tourism, commerce and sports". The objectives of the latter were as follows:

- develop and promote the city's cultural heritage
- consolidate the city's cultural offer and plan international events
- develop the tourism industry
- promote Turin-Piedmont as a destination
- expand local trade and improve its offer for tourists
- promote sports and sporting events as tourist attractions
- use the Winter Olympic Games as a driver for local development and international promotion of the city.

The overall objective is fully in line with the trend expressed by many cities in the last few decades: pursuing growth and regeneration through new strategic policies, in particular by promoting tourism (Guala, 2007, who notes, however, several cases of cities and territories which did not associate the organization of events with a significant and lasting growth in tourism; see also below).

In a certain way, the decision to host a mega event (and Olympics are the the most significant of the mega events - Preuss, 2004 - at least in their Winter edition, although the recent extraordinary growth of the Winter Olympics - Chappellet, 2002 – makes them a lesser but significant mega event) was also a choice of promoting growth as a result of growing consumer demand (of the services offered by the mega event itself and their induced activities: Andranovich, Burbank, Heying, 2002: 180). From this perspective, the 2006 Winter Olympics were meant to serve as a catalyst for the international development and promotion of the territory.

The wording used in the candidacy file was, in fact, very clear: "Piedmont intends to dedicate the forthcoming years to relaunch its tourism industry, focusing in particular on the Alpine territories and their rich historical legacy" (from the First Candidacy File: 42).

Major events, urban renewal, tourism

As is known, tourism is an enduring myth linked to the organization of major events: although it is always listed as a primary objective, it is however not always attained; the same cities which host mega events often end up pursuing other choices during the implementation of their actual renewal actions, in accordance with interests and ideas that differed from those initially conceived.

Mega Events, and in particular Olympic Games, are characterized by a certain organizational uniformity (standardization of procedures, phases, timing, services ...) that is linked to a significant variability in effects and real situations and with other implications according to the pursued goals. A very varied scenario therefore emerges with positive or negative situations,

advantages and difficulties, ranging from the various “utilizations” of the Games and their orientation with respect to other “general goals”. These general goals obviously include objectives such as urban renewal, international visibility, economic development and finally tourism and other goals. There is obviously a plurality of goals and potential “uses” for the Olympics. Of the last editions of the Olympics, certain prevalent characterizations can be illustrated. Several cases are described below (De Moragas, 1996; Preuss, 2004; Chappelet, 2002).

- Barcelona 1992 and Sydney 2000 are two actual cases of urban renewal although the first case involved a "distribution" of effects across a large portion of the metropolitan area (as an example of global and continuous growth), while the second "concentrated" them in a single area; although Barcelona serves as a true example of tourist success (but not only), Sydney began with a disadvantaged situation due to the distance of Australia from major international tourist flows, thereby "starting lower" in terms of "final" absolute attained values.
- Atlanta 1996 set goals relative to economic development, new investments, territorial marketing; one could not say it was a success in terms of tourism but it certainly was in terms of visibility and economic growth.
- Athens 2004 was a case involving the modernization of infrastructures and logistics: Athens does not “need” notoriety but it is obvious that an improvement in services could “also” have a positive effect on tourism; the effect of the Games were particularly noted in terms of urban restructuring as well as new roads and highways and in the subway and airport.
- Of the Winter Games, Albertville 1992 is an example of success at the tourist level, bringing success to the whole region (with an international repositioning of Savoy); one should not forget that this advantage also depended upon new facilities, the improvement of hosting structures and new road and railway connections.
- Lillehammer (1994 Winter Games) is an example of relative success for a rather small and isolated city in the heart of Norway, but the event itself improved tourism and the image of the entire nation at an international level in terms of both the labor market and new companies. Lillehammer could not grow to a significant extent but the event turned out to be useful for Norway overall.
- Other cases which were mostly directed towards tourism growth served, on the other hand, as opportunities for the political affirmation of the nation at the international level: this is the case of Seoul 1988 and South Korea; this is particularly the case of the 2008 Beijing Olympics in which the political legitimization was obviously accompanied by a high level of modernization and economic development which typically results in the growth of internal and international tourism.

Investments in Turin at the beginning of the 21st century: not only for the Olympic Games

Public works relative to the implementation of the new Town Master Plan were completed by adding the investments required for the realization of the Olympic Games. This implied a significant amount of expenses and charges which served to enrich the fixed capital of the city and which can be put to good use after the Games. On another occasion, it was questioned (Bondonio and Campaniello, 2007) whether – compared to other editions of the Winter Games – the 2006 Turin Games should be considered an "expensive" edition (which occurs when its implementation requires ample investments in transportation infrastructures, communication systems, the construction of buildings to host the athletes, the Olympic family and media operators as well as sports facilities) or "cheap" (as occurs when only the strictly necessary investments are implemented) (Preuss, 2002: 4).

The answer is that it has undoubtedly been an expensive edition which is typical when the Games are held in European countries where the investment is primarily funded by the public sector

(central and local), while it is not expensive for those held in the US (where investments and organizational expenses are primarily financed by private entities).

In order for an “expensive” edition to be successful, local authorities must be capable of persuading central entities that it is worthwhile providing generous levels of funding for Olympic investments given that they are located in a limited area of the country (as occurred in Barcelona 1992: Brunet, 2004). In the case of Turin, the Olympics probably served the purpose of solving certain delays in government financing of local infrastructures, particularly in the transportation sector, which is a significant element of the "northern question" (Berta, 2008). It is also necessary, however, that investments are planned in the light of their subsequent utilization after the Games, even the more specific.

The data of Turin highlight two elements:

1. That Olympic investments are a fraction of total public investments that are planned (and partially implemented) within the territory. According to calculations by the OMERO Center in 2005 (Catalano and Arresta, 2006: 66-77), they are not more than 16.17% of overall mobilized financing. There are therefore significant levels of financing underway in Turin which will permanently improve the overall infrastructures of the city.

2. That Olympic investments in the strict sense of the term, i.e. those for the construction of dedicated facilities (within the city and the Olympic valleys), are less than one third of the total. This implies that the remaining amount of the investment was allocated for a "natural" post-Games use, thereby contributing towards the enrichment of the fixed assets of the city (and of the Olympic mountains).

Table 1
Proper Olympic investments of Turin 2006 spread by type (US \$ million at constant 2000 prices)

Type of investment	Total cost
Infrastructures	1023
Housing, offices, commercial sites	523
Sports facilities	654
Environmental infrastructures	8
Total	2207

Creating and promoting the new Turin: a new tourism oriented strategy

Turin was a center of creative activities in the 20th century and continues in this tradition in sectors such as cinema, fashion, design, TV and contemporary art. The historical center is renowned for its compact nature and elegance (Baroque palazzos, piazzas, arcades) while the three primary rivers and the adjacent hills as well as the vicinity and view of the Alpine ranges contribute environmental qualities. Assets also include certain museums of international caliber: these include the Egyptian Museum as well as the Museum of Cinema in the Mole Antonelliana. In 2007 the Castle/Palace of Venaria, a splendid treasure at the gates of Turin, was opened after a long and costly restoration period (see: www.lavenaria.it); it has had more than 235,000 visitors in 2007 and more than 384,000 in the first half of 2008 (data provided by the Ficcaraldo Foundation by means of an email dated July 30th, 2008).

This and other cultural structures offer a great potential for network development (first of all, those connected to the Savoy residences and collections). The material culture offered by the city and the surrounding areas (Langhe, Roero and Monferrato) – including foods, niche products (truffles) and important wines – has contributed towards increasing the attractiveness of Turin as a city with an

excellent quality of life.

Up until the end of the 1990s, however, the Piedmontese capital was virtually unknown as a city of art and culture and was not a tourist destination (with the exception of business tourism linked to its productive activities): its name was sluggishly linked to images of an industrial past. Within the scope of initiatives to valorize and relaunch the city, the Municipality also undertook experimental projects in the promotional area in 1998 in cooperation with certain private entities; this was then stabilized within a specific function (Martina, 2006). The XX Olympic Games provided the new external communication of the city with new opportunities. A full-scale campaign was initiated at the national and international level involving various target audiences: citizens, institutions, opinion leaders and opinion makers, foreign residents, national and foreign communication media, meeting planners and tour operators.

There were two primary objectives:

1. Increasing the notoriety of Turin by means of improved and more widespread information.
2. Promoting knowledge of the characteristics and potential of the city in order to modify its perception and image.

The attainment of these objectives was also realized by utilizing recurrent images such as:

“A city in the heart of Europe”, “A city of industry, technology, design and knowledge”, “An arts and culture city with museums and contemporary art”, “An attractive city (gastronomy, savoir vivre, wide urban space and environment)”, “Host city of the 2006 Olympic Winter Games”.

In particular – and for the purposes of promoting the city for the Olympic Games – strategies aiming to correct and modify the image of the city were implemented, utilizing national and international media, as well as the editors and writers of tourist guides.

A few figures give an idea of the effort that was made (and the results): between 2003 and 2005, Turin hosted 270 journalists, including 131 during six educational in 2004 and more than 60 in the educational of 2005.

Up until 2003, there were no tourist guides focusing on Turin within the international market and there were few in the Italian market. One guide dedicated to Italy characterized Turin as a “grey, sad and provincial city” (Merlain), another as a “closed city where young people always go to the same places while the bourgeoisie closes itself in its own circles” (Routard), or as a “a boring city whose nightlife is far from the trendy and glamorous nightlife of Milan and Bologna” (Frommer’s).

There are currently 22 tourist guides on Turin in 10 different languages (Lonely Planet, Time Out, Hachette, Dumont, Doring Kindersley, Mondadori, Touring Club, etc.) while extended pieces and updates appeared in numerous guides dedicated to Italy. Here are some examples of the new prose being used: “Turin has begun its Renaissance and has emerged as one of the wonders of Italy” (Lonely Planet); “you will discover a gourmet city that enjoys living and entertaining itself, aristocratic and with an indescribable artistic heritage” (Hachette); “Turin presents itself as a modern entertainment park which jealously preserves its secrets. Spread the word because Turin is truly magical!” (DuMont).

A recent recognition of the new position of the city within the tourism publishing industry involved the awarding of three stars (specifying a destination not to be missed) to the city, in conjunction with Genoa, within the French edition of the 2008 Guide vert Michelin, drafted in the French language. Turin thereby attained - according to the specifications of the French publisher – a position previously held by Milan, Verona, Venice and Ravenna within northern Italy.

A broader tourism supply, and of greater quality

If one limits oneself to analyzing of hotel facilities, the supply of Turin increased by 28% in the last six years in terms of number of businesses/hotels (with a slight decrease in 2007 compared to 2006) and by 36% in terms of number of beds. The “Olympic effect” was quite evident in both cases, with a sharp increase reported in 2006 compared to the constant but moderate growth in previous years.

Table 2
Accommodation structures and beds in Turin, 2002-2007
(absolute value and index figures with a base for 2002 equal to 100)

Year	Businesses (hotels)	Beds
2007	366 (128)	18,673 (136)
2006	376 (131)	18,380 (133)
2005	330 (114)	14,289 (104)
2004	313 (109)	14,214 (103)
2003	305 (106)	14,133 (102)
2002	287 (100)	13,756 (100)

Source: Regional Tourism Monitoring Center- Piedmont Region

In addition to the quantitative growth of accommodation facilities, hotel services tend to position themselves in higher price categories: compared to 2002, in fact, the number of 4-star hotels increased in 2007 and there were four 5-star hotels (of which one is a luxury hotel). In terms of beds, 3-star hotels remain the only modal typology but the lower categories (1- and 2- star) only represent 13% of the global offer while the three superior categories (four, five and luxury five-star) represent 51% of the global supply.

Table 3
Hotels and hotel beds in Turin: a 2002-2007 comparison
(absolute values and percentage)

	1-star		2 -star		3 -star		4 -star		5 -star		5 -star L		Total		
	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%	
2002															
	Hotels	49	35.8	17	12.4	56	40.9	15	10.9					137	100
	No. of beds	1164	12.7	642	7.0	3943	43.0	3418	37.3					9167	100
2007															
	Hotels	44	30.1	13	8.9	62	42.5	23	15.8	3	2.1	1	0.7	146	100
	No. of beds	992	8.5	500	4.3	4292	36.6	4732	40.3	711	6.1	501	4.3	11728	100

Source: Regional Tourism Monitoring Center- Piedmont Region

Another indicator of the quality of hotel supply is the presence of product clubs and the voluntary support of hotelkeepers to these clubs. In the province of Turin, the brand YES! Turin quality for travelers has existed for some time. It is granted annually to hotels which apply, regardless of their category, if they can prove to possess the following (and maintain them over time): courtesy, efficiency, cleanliness, easy access and booking, respect for the environment, and ability to unveil the territory, its culture, traditions, events and the local artistic heritage. That which YES! guarantees is not the prestige or elegance of a hotel firm, but its responsiveness to the maximum hospitality standards of its category. In the 2008 edition, a total of 90 hotels qualified within the province of Turin, 37 of which are in the city; they are distributed across the categories as illustrated in the table 4.

Table 4
Hotels in Turin adhering to YES! Turin quality for travelers, 2008 Edition.

Category	No. of adhering hotels	Quota of hotels of their category
*****L	1	100
*****	3	100
*****	16	69,6
***	15	24,2
**	2	15,4

Source: processing of data from www.yestorinohotel.it

TOURISM IN TURIN BEFORE, DURING AND AFTER THE GAMES: INITIAL COMPARISONS

A positive trend with a few problems during the immediate post-Olympic phase

Following the success of the Winter Olympic Games, Turin managed to “get on the map” as a destination worth visiting (as demonstrated by investigations conducted by the OMERO Center and by others: Scamuzzi, 2007; Ceresetti, Olivero, Turco, 2007; Bassignana, 2006 as well as the data presented below that was derived from surveys conducted with visitors, the hosts of the main sponsors and the population).

But can initial objective results be confirmed? How is tourism proceeding in the city following the Games?

Table 5
Arrivals, stays and average stay of tourists in Turin, 2002-2007.

Years	Total arrivals	Total stays	Arrivals foreigners	ofStays foreigners	ofAverage stay% (days)	Change in% arrivals previous year	Change in% vsstays year	Change in vs previous
2007	738,782	1,939,360	156,690	456,782	2.62	-10.86	-26.05	
2006	828,765	2,622,415	267,637	962,252	3.16	-2.82	5.16	
2005	849,276	2,493,669	309,994	892,777	2.94	31.85	24.19	
2004	644,119	2,007,898	233,156	722,730	3.12	6.25	11.54	
2003	606,255	1,800,207	203,424	576,907	2.97	5.6	-1.02	
2002	574,078	1,818,833	204,017	602,329	3.17	=	=	

Source: Processing of data from Regional Tourism Monitoring Center- various years

The official data on tourist arrivals and stays in Turin within official accommodation structures report a constant growth for the three year period from 2002 to 2005, followed by a decrease in the actual Olympic year (2006) which increased in 2007. Trends in overall visitors was not better: 2007 figures fell to the level of 2004: the average stay is subject to significant fluctuation (average of three days) with a decrease in 2007 (2.62 days) (Table 5). The arrivals and stays of foreigners were particularly affected: the first after the peak attained in 2005, the second after the 2006 peak.

To conclude, lack of success of the policies pursued by the city and an “intermezzo effect” during the Games themselves, an expression coined at the time for Lillehammer ? (Spilling, 1994).

Searching for explanations.

This quantitative data certainly does not paint a particularly bright picture but we believe it is not sufficient to conclude that the tourism challenge ended in a scalding defeat for Turin. Certain data and additional thinking on this topic lead to a different conclusion and therefore we suspend our judgment until we have presented this data as evidence; the latter will, however, have to be analyzed in depth over time on the basis of other data and less rudimentary interpretational assumptions.

1. The Turin data are part of the overall tourism system of the entire Piedmont region whose trends are, on the other hand, positive from a variety of angles, including (Rossi, 2008):

- 2007 as the best absolute result in terms of tourist arrivals: +32.2% compared to 2000 and +1.2% compared to 2006, for a total of 3,351,621 arrivals (one third from abroad).
- 2007 ranked second for number of stays after 2006, with more than 10 million units.
- Piedmont ranked first amongst Italian regions for tourism growth: +30% in 2006 versus 2000.
- New promising foreign markets for Piedmontese tourism: Russia (2007 stays tripled compared to 2006); the consolidation and growth for Germany (+4.1%) and Switzerland (+3.4%).
- The contribution of tourism to regional GDP grew from 2.1 to 2.2 in 2006 (growth margins are, however, enormous: the Italian average is in fact 5.7%).
- Estimate of stays in the first quarter of 2008: +2.7% over 2007.

2. According to the estimates and assessments of the Piedmont Tourism Development Company, "the Piedmontese capital is the new leisure destination and the most positive note within the Italian range of cultural cities: according to the data of hotel chains in the first quarter of 2008, Turin reported a 17% increase in the number of utilized hotel beds compared to the same period of 2007 while destinations such as Venice and Rome reported 10% decreases" (Rossi, 2008: 7). This observation should be systematically analyzed in more depth: the underlying assumption is that the Olympic effect had a positive effect on Turin while mitigating the significantly negative trend in the other Italian cultural cities.

3. Certain qualitative evidence based on very positive impressions and attitudes of tourists in Turin (as well as in other areas identified as strategic for regional tourism) during the year 2007 (and processed during 2008) seem to attenuate the negative impact of the quantitative data. This data is presented and commented upon in the conclusive paragraph of this paper.

4. The above-mentioned data refer to tourists from a statistical perspective (i.e. those who are not resident in the city and report stays of at least one night in hotel or other accommodation facility). It does not refer to day tourists who do not stay overnight. Their statistical measurement is an old problem that has never been fully solved. However, given the fact that day tourists come to Turin to visit the city, indirect data is attainable from the number of people visiting the city's tourist sites, net of visits by residents and taking into account multiple visits. Certain visits provide evidence: this is the case of museums and exhibitions which require the purchase of a ticket. For this reason, the number of tickets sold in Turinese museums serves as an additional indicator of the attractiveness of the city's tourist sites.

The museum network of Turin includes more than 40 museums, 35 of which are located in the city. The Cultural Monitoring Center of Piedmont is elaborating the data of 2007 and the first quarter of 2008, which are not yet published, but were directly provided by the Fitzcarraldo Foundation by means of a personal email dated 30 July 2008; data of previous years (from the Cultural Monitoring Center of Piedmont, 2007) show that the total visits were as follows: 2,333,962 in 2004; 2,508,203 in 2005 (+7.3%); 2,944,373 in 2006 (+17.4%); 3,229,735 in 2007 (+9.7%) and 1,884,578 in the first quarter of 2008 (+ 21.3% in the first quarter of 2007). A research study that is periodically realized by the Department of Economics of the University of Turin, in collaboration with the Municipality of Turin and the financial support of "Compagnia di San Paolo" and "Fondazione CRT" (two Turinese banking companies), estimated – within its most recent report

(Department of Economics, 2007) the quota of visits to museums by tourists and day-tourists (pages 34-37). The calculation is based on certain assumptions as well as information obtained with a questionnaire utilized during the period of April-June 2008 with a broad sample of visitors (12,000 collected forms) from the three primary Turinese museums. By applying the parameters of the research study in question and assuming that tourists and day tourists would only be attracted to major metropolitan museums (the Castle of Rivoli, the Modern Arts Gallery, the Egyptian museum, the Museum of Cinema, Palazzo Madama, the Royal Palace, the Castle Palace of Venaria and, for only 2007, the Museum of Antiquity which hosted an important exhibition on the gold of Afghanistan), an additional estimate of 240,886 and 155,151 day tourists for 2007 and the first quarter of 2008, respectively, can be estimated.

TURIN 2006 AND TOURISM: EXPECTATIONS AND ASSESSMENTS OF PUBLIC OPINION

Once the city obtained a nomination for the XX Winter Olympic Games in 2006, Turin initiated a series of opinion surveys; the first survey was conducted in November of 2002 and was subsequently repeated every year. A total of six surveys were implemented in Turin: four before the Games in the period from November and December of each year (2002-2005) and two after the Games (March 2006 and January 2007). We collected a file with 5,200 interviews over the course of five years (900 interviews in the first five surveys, 700 in the most recent one). The method used was CATI (Computer Assisted Telephone Interviewing), applied to a representative sample of the Turinese population aged 18 and up with divisions according to age, sex and territorial distribution with control based on educational degree (Guala, 2006 and 2007; Scamuzzi, 2006 and 2007).

Three primary phases in the development of these surveys can be defined, thereby verifying trends in expectations and the varying focus of the population with respect to the prospects for the cultural and tourist development of the city. The phases may be subdivided as follows:

1. Initial surprise, pride and optimism.
2. While awaiting the event, worry and trust.
3. Access once the Games had just finished and more rational assessments over time.

Initial phase: surprise, pride and optimism

Initially (at the end of 2002), research naturally followed an exploratory course, aiming to verify whether the population of Turin knew that the city would host the Games and which areas (of the city and Alps) would be involved. At the same time, the survey investigated certain general attitudes of the population: in particular, it attempted to understand whether the organization of the Games would retain the support of the local community and if the Olympic event would create a cultural shock within a city worried about the negative economic situation of its primary employer, FIAT, which was involved in a difficult period of economic conversion the positive outcome of which was far from certain.

Ever since the first survey, it was discovered that all interviewees were proud of the nomination and considered year 2006 as an opportunity for transforming the development model of the city. Negative responses were a minority. This can be illustrated by reporting a few of the questions (Segre and Scamuzzi, 2004).

Table 6
 “Are you in favor of holding the Winter Olympic Games in Turin in 2006?” (% , 2002 Survey)

In favor	79.0
Moderately in favor	13.4

Moderately against	1.1
Against	2.7
Don't know	3.8

Table 7
 “Do you believe the city should be proud of having won the international competition to

become the site of the Olympic Games?" (%,
2002 Survey)

Very	66.7
------	------

Fairly	24.6
Not much	4.4
Not at all	3.1
Don't know	1.2

In the two questions reported above, a clearly favorable attitude emerged with respect to the Games: those "in favor" total almost 80% of responses while the net "participation" in the feeling of "pride" was equal to 66.7%; contrary opinions were very marginal in weight.

The responses of the interviewees also identified the opportunities linked to the Games. Here the interest with respect to tourist development was clearly evident in the responses. The analytical distribution of the responses is reported below, noting that trends in the data remained very similar during all subsequent surveys, including those of the two "ex post" surveys. On the basis of this data, it clearly emerges that the population of Turin is willing to bet on the future of their city as not only an industrial city but also a tourist and cultural center.

Table 8

"Some believe that the Olympic Games will also be useful for the city after 2006 for a variety of reasons. To what extent do you agree with the following reasons?" (% , 2002 Survey, 900 cases)

	Very	Fairly	Not much	Not at all	UD ^o
Strengthening of infrastructures, communications, services	43.8	43.8	7.3	2.7	2.4
Upgrading of sports facilities (otherwise impossible)	39.4	43.1	11.0	2.4	4.0
Increased visibility and notoriety abroad	51.8	35.1	9.0	2.1	2.0
Tourism and cultural development	45.8	38.3	12.2	2.1	1.6
Employment, new companies, productive investments	26.9	42.3	23.2	4.4	3.1
Business and investment opportunities for private citizens	29.8	42.3	18.6	3.0	6.6
Acceleration of urban works (subway and road system)	56.3	33.6	5.6	2.4	2.1

(UD: unrecorded data point, no answer)

The data reveal a certain degree of differentiation in the responses: on the one hand, interviewees recognized the importance of infrastructures and services (the acceleration of public works, the upgrading of sports facilities) and, on the other, they emphasized objectives such as the visibility of the city at the national and international level and the strengthening of cultural and tourism services. These items refer to urban renewal processes: the development of tourism is a significant component of local economic growth and the Olympics serve as a trigger for urban renewal (Essex and Chalkley, 1998).

With respect to other objectives, it is clear – from the first survey – that trust in investments for the private sector (new companies and employment) appeared to be lesser in degree; almost all interviewees acknowledged the fact that a mega event such as the Olympics serves as an accelerator of public works which otherwise would never have been started or would have been initiated with long delays and probable down-sizing: this is the case of Turin's subway line.

As a result, there initially was a strong degree of agreement with respect to the "2006 operation" although there was no lack of worries. The most common of the latter focused on the issue of corruption (of particular concern in public opinion with respect to political and administrative events in Italy) and on two real problems found in all cities which host major events: inconvenience linked to the realization of public works and the probable disruption associated with traffic, parking, confusion and queues. During the course of the interviews conducted in Turin, other problems were

less felt, such as pollution and environmental damage; this worry took on a different hue amongst the population of Alpine valleys, the other important area involved in the 2006 Games and located about 80 km from Turin. Another study conducted simultaneously with that of Turin (Scamuzzi, 2004) highlighted the fact that interviewees in these regions are more sensitive to environmental risks.

It should be noted that in this first survey of 2002 no specific worries emerged with regards to sports facilities which are expensive and not easy to manage once the Games are over. As is known, this is a significant problem during Olympic Games and organizers tend to overlook this point during the preparation phases of the event. It is not only a question of the “gigantic entity” of the Games (many facilities for specific sports without any guarantee of an adequate demand in the future) but also of reliability and management criteria once the Olympics are over, as well as the careful planning of future allocations of buildings and facilities.

Second phase: awaiting the event with worries and confidence

During subsequent investigations (November 2003 and 2004), there was still a high level of consent amongst the Turinese population although with a slight fall as a result of two factors: firstly, the city was affected by many public works directly or indirectly linked to the Games; secondly, public opinion reflected certain political and managerial difficulties (problems of decision-making within TOROC, the Local Organizing Committee, controversies on the contracting system, actual or presumed disputes between local authorities, the Piedmont Region and central government). These difficulties were partly real, partly “political” (an interesting interpretation of encountered difficulties is provided by Valentino Castellani, president of TOROC: Bondonio and Crivello, 2007: 154-158). The press did not hesitate in reporting them: they contributed towards decreasing the overly optimistic expectations and created more realistic and rational responses. It was clear that the Olympics could not be the solution to the economic crisis and that of the automotive sector but might provide an opportunity for urban renewal if suitably planned: this is exactly what many scholars stated with regard to the implications of the Games in the medium to long-term (Cashman and Hughes, 1999; Preuss, 2000). This phase is interesting in that it gradually shifted the focus from the Olympic event to its legacy, as illustrated in table 9.

Table 9

An assessment on the positive or negative effects of the Games on the territory (2002-2005 surveys)

	Year							
	2002		2003		2004		2005	
	N.	%	N.	%	N.	%	N.	%
Effects on the territory	5	0.6
1. No answers								
2. Very positive	130	14.4	145	16.0	85	9.3	104	11.4
3. Slightly positive	668	74.2	687	75.9	675	73.8	653	72.0
4. Slightly negative	37	4.1	44	4.9	92	10.0	55	6.1
5. Very negative	9	1.0	7	0.8	11	1.2	10	1.1
6. Don't know	57	6.3	22	2.5	52	5.7	80	8.8
TOTAL	900	100	905	100	915	100	907	100

The data are positive for all surveys although in the later surveys the "very positive" assessments tended to decrease as some worries emerged.

Confidence also varied over time, as noted in the two tables below – one on a summary “score” assigned to Turin (2004 and 2005 surveys) and the other a projection of the "score" which the city should have earned at the end (maximum score was 10).

Table 10

“What score has the City of Turin earned so far?” (average of 2004 and 2005 surveys)

2004 score	5.97
2005 score	6.48

Here it should be noted that the critical year was 2004 (public works and political controversies) while the score became more favorable in the months preceding the beginning of the Games (November 2005) when the event was getting closer, the tests of the facilities had worked and the majority of the works had been completed.

The same trend can be seen in another question with an initially higher score, then lower scores in 2003 and 2004 and finally growing confidence as the Games were about to begin (November 2005). The data are illustrated below.

Table 11
 “What score will the City of Turin earn in the end?” (2002-2005 surveys)

2002 score	7.5
2003 score	7.39
2004 score	7.29
2005 score	7.67

As of 2004, in particular, there was a growing conviction that the bidding process for beating international competition and winning the nomination had “liberated” energies and expectations for a new Turin, thereby no longer making it a One Company Town: as previously noted, the transcendence of the image of automotive city was accepted, or was in the process of being accepted, also because FIAT showed signs of recovery in the meantime.

This process favored the idea that the city might focus on tourism and culture, thereby favoring the birth of a new identity for the city.

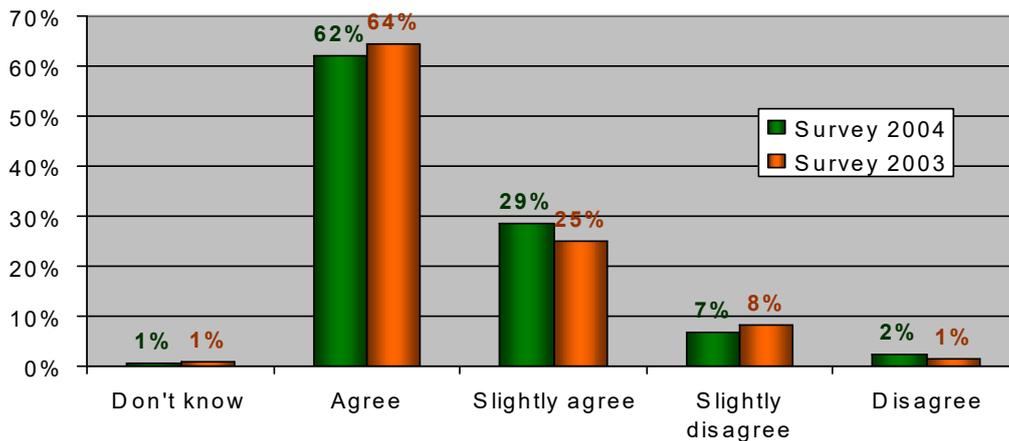


Figure 1
 “According to some people, Turin should work to get rid of its traditional image of an industrial city and create a tourist and cultural city image. Do you agree?”

The Turinese survey subsequently (particularly in 2005) directed its focus to the planning of the Olympic legacy which was considered the true stake of a city hosting a mega event such as the Winter Olympics.

Third phase: after the Games, initial success and more rational assessments over time

During the two post-event surveys, particularly that conducted in March 2006 (one month after the closing ceremony of the Games), the interviews analyzed the future of Turin as well as the short-term and long-term effects of the Games and the re-utilization of the sports facilities. Here we are, however, particularly interested in the attitudes of the population with respect to prospects for economic diversification linked to the tourism and culture sectors. It was then clear that the old image of the city as an automotive capital (and, we should add, of the Agnelli Family and FIAT, which in the end were the same thing) no longer existed. A glance at the questions below confirms this, illustrating a community that was happy to participate and "utilize" the city (Scamuzzi, 2007).

Table 12
 "Have you visited the center of the city of Turin during the extraordinary evening opening hours of bars, stores and restaurants during the Olympics?" (% , 2006 survey)

Yes	65.9
No	34.1

Table 13
 "Have you attended the outdoor theater shows or the exhibitions during the all-night events?" (% , 2006 survey)

Yes	42.6
No	57.1

Table 14
 "Are you confident that Turin can create a new image of itself as a city of tourism and culture?" (% , 2006 survey)

Don't know	0.3
Not at all	3.2
Not much	11.1
Somewhat	53.7
Very much	30.5
I don't know	1.5

We can use another question to verify how the more positive responses of the March 2006 survey (one month after the Games) were followed by equally positive, but more rational, responses after ten months (January-February 2007); the score changed from 9.1 to 8.1 across the two post-event surveys.

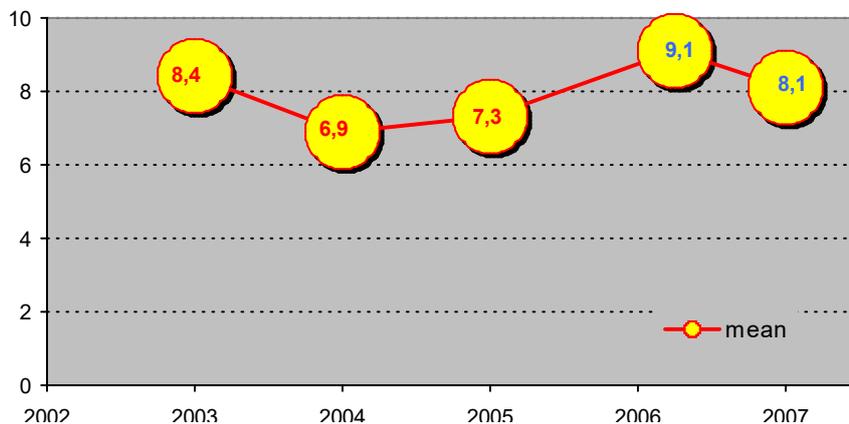


Figure 2
 "How do you evaluate the global experience of the Olympic Games of Turin 2006? Please give a score from 1 (min.) to 10 (max.)" (2003-2007 surveys)

The same trend can be observed when assessing the positive effects linked to the Games: following the critical phase of 2004 and 2005, confidence in lasting positive effects grew by 53% in 2006 but fell slightly in 2007 (from 53% to 51%) while those who believed that these effects were only visible during the Games increased from 6% to 18%. This is a clear sign of a halo effect which

acted in an excessive manner a few weeks from the Games and then left space for less optimistic and more rational assessments. The data of the graphic below are clear.

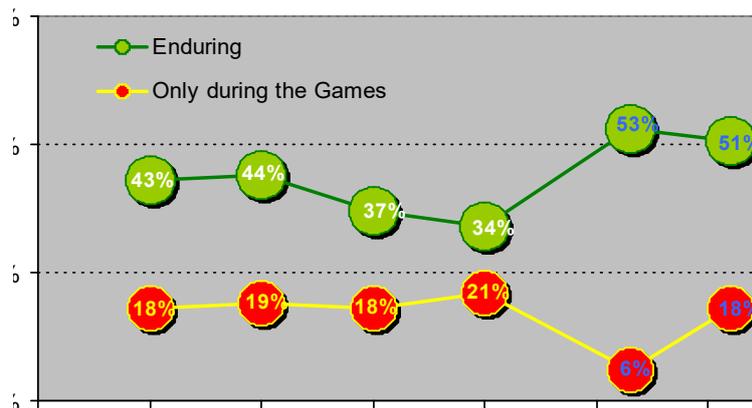


Figure 3
 People confident that the positive effects of the Games will be long-lasting after the OWG
 (% , 2002-2007 surveys)

This leads to a question on the future of tourism in Turin: the cultural and psychological component of the answers is evident here, given that the interviewees could not have a reliable picture of current trends in terms of arrivals and overnight stays in the Piedmontese capital. The positive effect of the Games which just closed (the data are from March 2006), however, provides and legitimates an entirely optimistic answer, as can be clearly seen in the data.

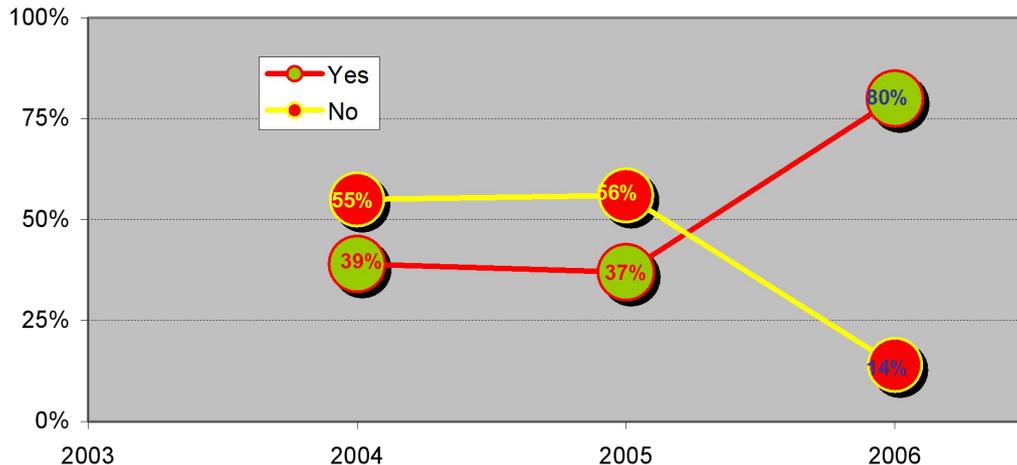


Figure 4
 “In your opinion, will tourist arrivals in Turin also increase after the end of the Games?”
 (2004-2006 surveys)

AN IN-DEPTH QUALITATIVE ANALYSIS. TYPOLOGIES OF TOURISM IN TURIN (AND IN PIEDMONT) AFTER THE GAMES

A research experiment on regional tourism

In addition to the polls directly linked with the Olympics, the Piedmont Region decided – during the course of 2006 – to analyze the dynamics relating to tourism with the idea of creating a systematic file of data concerning certain characteristics of flows in addition to the available

secondary data. The project – initiated in 2007 and still underway – intends to establish a systematic Monitoring Center with a monitoring tool based on longitudinal files that can be implemented each year with specific data collection activities in certain strategic areas. Turin represents the area where these changes are most evident.

In addition to winter accommodation (e.g. ski weeks) or summer stays (in the mountains but also in the areas of the lakes), other forms of tourism have developed in Piedmont, i.e. certain flows have changed (such as social composition, expectations, tourist destinations). This is particularly the case of Turin: so long as arrivals and overnight stays were essentially linked to economic and productive activities, “cultural” tourism, although important, was relatively marginal, even rather irregular. The current situation is changing. In many ways, it has already changed.

Finally, many initiatives in the cultural and eno-gastronomic sector – which have also developed in areas that were previously relatively marginalized (in our case: the hills of the Langhe and Roero and southwestern Piedmont, world-renowned for truffles as well as Barolo, Barbaresco and other valuable wines) – have expanded the demand of visitors and contributed towards diversifying the regional offer.

In 2007, the OMERO Center initiated an experimental collaboration with the Regional Tourist Monitoring Center in order to create a Monitoring Center for Turin and the other three sample areas of the Piedmont Region (noted above) for the purposes of systematically monitoring the composition, motives and assessment of tourists (customer satisfaction). This file is created through the regular collection over time of information by means of questionnaires or structured interviews with representative samples of tourists/visitors and in which the individual unit of analysis is composed of the individual visitor. The model of reference is the tourist monitoring system created some time ago in Barcelona (www.barcelonaturisme.com).

In our case, and taking into account the regional scope of the study, it should also be noted that the differentiation by territory (and by flows) provides depth to the study as a product and is in accordance with the general idea of the Regional Tourism Monitoring Center which identifies four different territories: Turin, Hills, Lakes, Mountains. This is also consistent with the other geographical areas of tourist interest that were identified in the Regional Strategic Plan for Tourism, which is currently being drafted (www.regione.piemonte.it/turismo/pianistrategici/regionale.htm).

Subject and methodology of the study

The experimental study initiated by the OMERO Center concerns the four areas reported by the Piedmont Region, which differ in terms of their original vocation, and take into account their differing characteristics in terms of supply and demand, the latter being represented by visitors’ samples built taking flows, territorial distribution, accommodation facilities and their differences (in terms of stars or categories) into account.

Overall, 1,668 complete questionnaires were collected and codified for the entire 2007 period:

1. The Mountains in the Winter (307 case studies collected in February and March).
2. Turin (460 case studies collected in April and May).
3. The Lakes area (Stresa and other locations) (560 case studies collected in July and August).
4. A highly esteemed eno-gastronomic area (Langhe and Roero) (361 cases collected in the Autumn).

The comparative data presented herein must be considered in light of the following additional elements:

- the survey forms and therefore the questions and response modalities have maintained a similar structure across the various areas, but have also been adapted to the specific nature of the

environments and characteristics of the visitors/tourists. The data which are taken into account in this paper concern questions that are utilized in a manner which is standardized (similar or comparable) to all four areas. A few questions and items changed slightly and therefore the data which follow was somehow standardized;

– the sampling criteria concerned tourist flows as well as hotel areas and categories, while the distribution of the forms was dependent upon the operators of the accommodation facilities, as well as the availability of individual visitors. There is therefore a problem of self-selection which is typical of questionnaires filled out by responders.

The results: four areas and four (distinct) tourism markets

While taking into account the limits inherent in this first survey, the available data are rather interesting and display a picture of significant diversification of tourism across the four regional areas under study.

Duration/reasons for the stay and organizational elements.

A winter stay in the mountains is largely based on ski weeks while stays in the Lakes are often longer; a visit to the Hills (Langhe and Roero) tends to be completed within one day (generally associated with the weekend); brief stays are also linked to Turin but with an interesting modal value of two or three days.

Table 15
Duration of the stay (%)

Duration of the stay	Mountains in the winter	Turin	Lakes	Langhe and Roero
Week end	21	20	15	52
Two or three days		63	25	23
One week	66		32	17
Longer periods	7		19	
Other	6	17	8	8

The Mountains in the Winter are associated with a higher loyalty rate in comparison to the other areas under study, with the lowest rate attributed to the Lakes where there is the highest "first arrival" rate. There are many "returns" in the case of Turin where the utilized survey form did not report the modality "I have been there many times": it is therefore likely that 49% of those declaring to have been to Turin "for the second time" are including other visits.

Table 16
Loyalty rates of guests (%)

<i>This stay represents the</i>	<i>Mountains in the Winter</i>	<i>Turin</i>	<i>Lakes</i>	<i>Langhe and Roero</i>
First time in the area	44	51	59	51
The second time	21	49	18	18
I have been there many times	35		23	31

The motives for stays are clearly distinguished amongst the responses of the visitors, as is evident in the emphasis of the "sports" motive for the Mountains in the Winter area (a choice which is not reproduced in the Lakes area or in other destinations where the more general concept of "vacation" prevails). Other motives are linked to this reason: e.g., gastronomy, wine and cultural interests take on significant importance within the Langhe and Roero and within the Lakes culture.

Table 17
Reasons for the stay (%)

<i>Primary reason for the stay</i>	<i>Mountains in the Winter</i>	<i>Turin</i>	<i>Lakes</i>	<i>Langhe and Roero</i>
Vacation, relax	30	37	61	44
Sports (and sports events)	54	2	8	5
Work and business		23		
Congresses, fairs		4		
Visits to relatives or friends		11		
Culture		9	18	24
Wine & gastronomy		3		15
Other (and multiple responses)	16	13	13	12

The motives for visits to Turin are much more differentiated: in addition to responses associated with "work" (with various reasons linked to "work"), there is a frequent reference to visits to relatives and friends, as is expected given the networks of relationships within a large city; the "cultural" motivation is significant (although perhaps lower than expected).

Who do visitors tend to share their stay or vacation with? The answer to this question is different across the four areas taken into consideration.

First of all, a vacation in the Lakes area - and to a certain extent a visit to the Hills area (Langhe and Roero) – is strongly characterized by the family factor; vacations with friends are, on the other hand, more common within the mountains area, while Turin again presents a highly varied situation with a certain presence of individual visitors and a certain quota of other responses. Visits to Turin involve a mix of motivations which are not found in the other three areas.

Table 18
Selected company for the stays (%)

<i>With whom did you share your stay?</i>	<i>Mountains in the Winter</i>	<i>Turin</i>	<i>Lakes</i>	<i>Langhe and Roero</i>
With my partner/family	35	38	76	60
With other relatives	11	4	4	2
With friends	40	18	17	30
By myself	6	20	3	8
Other	8	20		

Modalities for selecting a destination

The selection of location depends upon many factors, including the relevant role played by word of mouth between friends and relatives; the role of travel agencies in "suggesting" destinations to visit continues to decrease. The Internet is growing in scope, even within a non-majority sub-sample of "Web surfers", a sign that those who use Internet also use it to organize vacations.

The quality of hospitality and customer satisfaction with respect to the stay is an important variable for not only creating customer loyalty, but also for creating trends with respect to a given destination.

Table 19
Modalities for selecting a destination (%)

<i>How did you choose the location?</i>	<i>Mountains in the Winter</i>	<i>Turin</i>	<i>Lakes</i>	<i>Langhe and Roero</i>
Suggested by friends and relatives	38	30	34	35
Ads on newspapers and magazines	12	7	8	10

Internet	15	19	25	17
Travel agencies	9	4	7	4
Organized trip/vacation	15	5	3	7
Other	11	10	23	15

The more positive (and less than positive) aspects of the stay

The aspects of the stay which are evaluated in a more positive light (and which certainly play a role in creating visitors' loyalty) also tend to significantly differ amongst the various areas.

The three areas significantly emphasize the various items such as wine/gastronomy services, hotel and accommodation services, the knowledge of languages on the part of operators and a good price/quality ratio (particularly emphasized in Turin and in the Lakes area).

We omit here any reference to the "negative" aspects of a stay for the simple reason that there almost are none. This is due to the fact that criticism is almost always very contained: the only "negative" element which is occasionally highlighted (but never with quotas of more than 15-20%) is the "lack of entertainment options/nightlife" which is, in certain ways, eccentric and ambivalent with respect to the many attractions of the territories under study (it is obvious that this problem is highlighted only amongst the younger age groups and is not noted in the middle and advanced age groups).

Table 20
The most positive aspects of the vacation (%)

<i>Positive aspects of the vacation</i>	<i>Mountains in the winter</i>	<i>Turin</i>	<i>Lakes</i>	<i>Langhe and Roero</i>
Beauty of the location, nature	71	76	94	78
Hotel quality	67	83	83	68
Easily reachable area	36	58	68	44
Wine/gastronomical services	35	61	67	68
Quality of skiing area	37			
Hospitality and information	21	63	78	51
Knowledge of foreign languages (operators)	29	46	70	36
Good price/quality ratio	40	59	59	40
Shopping, stores, handicrafts	8	52	58	37
Entertainment/nightlife	16	39	42	16

Intentions to return: generally good in all areas, excellent in some cases

The declared intentions to "return" to the vacation area or location are high on average, with percentages that are significantly different across the four areas under study: greater certainty in the Langhe and Roero areas followed by Turin and the Lakes and finally the Mountains in the Winter area. The "probable" intention to return reported higher complementary data for the Mountains and other areas; critical responses of those who "probably" or "certainly" will not return total circa 10%; the "uncertain" percentage should, however, not be underestimated (between 15% and 9%).

These responses illustrate the fact that "certain" or "probable" returns range between 72% for the Mountains in the Winter area, 80% for Turin and the Lakes and 85% for Langhe and Roero.

Table 21
Intentions to return (%)

<i>Intention to return to the location within the next three years</i>	<i>Mountains in the winter</i>	<i>Turin</i>	<i>Lakes</i>	<i>Langhe and Roero</i>
Yes, certainly	30	43	41	48

Yes, probably	42	39	38	37
Probably no	11	8	8	4
Certainly no	2	1	2	1
Do not know	15	9	11	10

CONCLUDING COMMENTS

This paper has illustrated how Turin, a city of Roman origins, has recently been served a historical role as the motor of Italian unification and then underwent a series of growth and crisis phases. The destiny of the city has been linked – over the last few decades – to that of its largest firm, FIAT, and the automotive industry in general, thereby earning the nickname of a “gray industrial automotive city” - a sort of Italian Detroit. Even the local governance mechanisms have been dominated, for a long time following the end of World War II, by the industrial culture and power.

The gradual delocalization of FIAT from the city in the 1980’s and the subsequent crisis of the company (which at the beginning of the new millennium appeared to be irreversible for analysts until the recent renaissance guaranteed by the new management) have “eroded” the hold of the company over the city. Reforms relative to local autonomies which again granted a role and authority to the Municipality and to local governments have resulted in a new political leadership in Turin, which has had a decisive role in formulation actions and strategic policies for the re-birth of the city. One of the assets which the "new Turin" intends to leverage is culture, creativity, tourism. At the time of initial implementation of this strategy, a decision was made to propose Turin as a candidate for the XX Olympic Winter Games. The success of the candidacy and the subsequent success of the Games ("These were truly magnificent games", declared Jacques Rogge, the president of the IOC, during the closing ceremony) has decisively positioned Turin on the world map as a charming and organized city with many attractions.

“Torino is fortunate to have some outstanding attributes that became extraneous during the industrial era but are now being revaluated as assets, on which to build its new post-industrial image and future: a spectacular physical and cultural environment at the foot of the Alps; two excellent universities; attractive historic buildings, squares and urban features; and a general ‘quality of life’ that is positively associated with Italian cities and features good food, characterful public spaces and warm weather” (Winkler, 2007, page 50).

The new tourist vocation is also linked to the Games in terms of the utilization of the infrastructures which were built for them. Fortunately for Turin, they also fall within realms that were very needed: urban renewal and the transportation system. The facilities built for ice sport events are amongst the legacies provided to the city by Turin 2006: although they were conceived in light of multiple alternative uses, they have only been actively managed for a year and a half with encouraging, although not definitive, results by TOP (Turin 2006 Olympic Park: www.torinolympycpark.org), a public foundation entrusted with managing the facilities located in Turin and within the Olympic valleys. They are part of a new group of fixed capital assets which the city can now utilize due to the Games.

Quantitative data on tourism in Turin provide a particularly brilliant picture for the time period following Turin 2006. These data, however, are part of an average time period trend in which the vocation of the city, even in terms of tourism, now appears to be a conquest without return although the effective size of the growth must be quantified more exactly. The fact that regional data are growing is positive while customer satisfaction surveys report very positive qualitative data. In light of the relatively solid indications that the data provides, a tourist arriving in Turin (or in the other analyzed Piedmontese locations) will express an elevated degree of satisfaction for the elements of his/her stay and for the services offered by the latter. This leads to 80% of those interviewed expressing their intention to return to Turin. This makes the quantitative data for tourist flows at the Commune level after the Olympics less dramatic even if this data is not particularly encouraging; the

interest of visitors in the city is therefore not to be considered ephemeral.

Similarly positive were the results of ample population surveys - conducted before, during and after the Games – on expectations, attitudes and willingness to personally volunteer for the organization and support of high-level and challenging events. The data of the surveys conducted between 2002 and 2007 revealed an unexpected side to the city, capable of transcending the stereotype of an industrial city and planning a diversified future marked by culture and tourism. This choice - even before its political implications - was born in a local community that critically reflects on itself and imagines a future that is different from the past.

The positive expectations for the future were confirmed by a general feeling of confidence that phases of economic depression can be overcome; that the advantages linked to the 2006 Games can be extended to the whole territory involved in the Games; that these advantages are at least partly permanent; and that culture, tourism, wine/gastronomy, museums and cultural facilities can provide opportunities for local development that were unthinkable ten years ago despite the fact that the 1980's and 1990's provided many clues (within university research and in the world of culture and art) that something was changing. Then came the Olympics, a true shock for the local identity and culture, a mega event capable of bringing other events that were sought after with determination: the 2007 University Olympics, Turin as the world capital of architecture and design in 2008, the 150th anniversary of the Unification of Italy in 2011, preceded in 2010 by the Exposition of the Holy Shroud and Turin as the European capital of Science. The success of the mega event therefore draws other events – on a smaller scale but still important – all of which aim to definitively transcend the image of an automotive city and look towards new resources: culture and tourism. A renewed sense of belonging and a renewed social conscience are certainly amongst the most significant legacies of Turin 2006 - intangible but no less powerful.

In order for this legacy to serve as a lasting renaissance of the city, it is also necessary for institutions and private interest groups to have learned the positive lesson of the Games: thinking big is possible and is a duty, and cooperating for the purpose of reaching challenging objectives is useful and still possible.

A few important events were brilliantly managed by Turin after the Games, as noted above, while others are planned for the future in light of a partnership with Genoa and Milan (the three key players in the now defunct "Italian industrial triangle" of the 1950's to 1970's period) (Bondonio, Guala, Mela, 2008); two are more important than others: in 2011 the 150th anniversary of the Unification of Italy - in which Turin will serve as a focal point and will provide a dense program of events of national interest; the World Expo in Milan in 2015, in which Turin is well positioned to contribute.

In order to verify any attitudes, fears, projects and behaviours in the post-Olympic period in light of Turin 2011, the OMERO Center – in collaboration with other three research centers from Turin, now federated into CREO (Centro Ricerche Eventi Olimpiadi, "Olympic Event Research Center": www.creo.to.it) – has conducted a brainstorming on the past April 30th with the SWOT Method. About 15 authoritative figures from structures and entities which took part in the organization of Turin 2006 participated and are now directly involved in drafting policies, plans, projects and events for the City, Province and Region. After having examined the strong and weak points of Torino 2006, the following list of actions was drafted in order to cover any weak spots and render the "Turin system" optimal. This list is as follows:

1. Adequate equipment for the facilities of fairs and congresses.
2. Targeted and selected planning for museums and cultural events.
3. Optimal management of TV magazine programs (particularly with regards to Olympic facilities).
4. Overall integrated strategic management.
5. Clarity in urban planning choices for Turin 2011 and beyond.

6. Incentives for the participation of private entities and for cross-institutional cooperations by means of governance systems which functioned in the past and now risk becoming looser.
7. Definition of the territory of reference which the promotions will target (Italy, Europe, ...).
8. Involvement of citizens.
9. Integrated promotion of new functions (technologies, tourism, culture, training).
10. City policies for consolidating strong points and resolving critical areas.

This agenda is simply a draft from a technical point of view; an attempt to seriously and adequately resolve the problems it outlines will be a challenge for the leadership of Turin, and not only in the tourism arena.

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ACKNOWLEDGEMENTS

Financial help for editing this paper of Torino Incontra, the congress center of Turin Chamber of Commerce, is gratefully acknowledged. Much of the information on which the initial paragraph is based is drawn from Winkler (2007); more generally, refer to Cardoza, Symcox (2006). The last paragraph draws from a research conducted for the Regional Tourism Monitoring Center (now part of the company Piedmont Tourism Development, www.piemonte-turismo.it). That research was managed by Chito Guala and Piervincenzo Bondonio with the collaboration of Isabelle Saggin; data processing was managed by Gianluca Bo (Metis Ricerche, Turin). The project was initially drafted for the OMERO Center (University of Turin) by Piervincenzo Bondonio, Chito Guala and Sergio Scamuzzi.

MEGA-EVENTS AND SHARED GROWTH IN URBAN TOURISM: THE 2010 FIFA WORLD CUP CHALLENGE OF INCORPORATING EMERGING SMALL TOURISM ENTERPRISES

Christian M. Rogerson
School of Geography, Archaeology & Environmental Studies
University of the Witwatersrand, Johannesburg, South Africa

ABSTRACT

One of the most distinguishing features of tourism policy in South Africa is the commitments made to transformation of the ownership structure of the tourism economy. A major policy goal in South Africa is to leverage opportunities associated with the 2010 Football World Cup for achieving 'shared growth', an objective which demands the expanded involvement of emerging black entrepreneurs in the tourism economy. This paper analyses the challenges that face national government in achieving this policy goal.

Key Words: South Africa; 2010 World Cup; urban tourism; small enterprise development

INTRODUCTION

Getz (2008, p. 403) argues that events are "an important motivator of tourism and figure prominently in the development and marketing plans of most destinations". In particular, sport hallmark or mega-events, which are hosted on either a one-off or regular basis, have become increasingly significant in the contemporary era of globalization (Hillier, 1997; Cornelissen, 2007). Sport mega-events are a central element of urban place entrepreneurialism as cities seek to gain advantage in the global economy (Harvey, 1989; Hall, 2006). As Smith (2005) stresses, a growing number of post-industrial cities are utilizing sport initiatives for purposes of place promotion and re-imaging. Accordingly, it is not surprising that event planning, event management and event tourism are themes of rising significance in the annals of tourism scholarship, particularly in developed countries (Getz, 2005, 2008). Across both developed and developing countries, a common thread is the vital position of mega-events for boosting local economic development and urban tourism (Law, 1992, 1993; Rogerson and Visser, 2005, 2007). Although the catalytic potential of mega-events for business development in destinations is widely recognized (Getz, 2005; Hall, 2006), a contemporary review of existing research in event tourism is silent on issues relating to the impact and implications of mega-events as a whole for small firms (Getz, 2008). Equally, despite a surge of international scholarship on urban tourism over the past decade, there remains "a gap in the literature concerning small tourism businesses in urban areas" (Schofield, 2001, p. 434).

The aim in this paper is to address this neglect of the role of small tourism firms in the existing literature of both sport mega-events and urban tourism, using the planning challenges surrounding the 2010 FIFA World Cup in South Africa as empirical canvas. The South African bid for the 2010 FIFA World Cup contains a strong developmental agenda which stresses that the tournament should function as catalyst to improve the life conditions of those groups historically disadvantaged under apartheid (Pillay and Bass, 2008). In terms of tourism, the development agenda contains a special commitment to achieving 'shared growth' as the outcome of this mega-event in the host cities in South Africa. A central element of shared growth in tourism planning is that the tourism benefits associated with the 2010 World Cup should be spread widely to include small tourism enterprises rather than simply to benefit the group of large tourism enterprises that control and dominate South Africa's tourism economy (Rogerson, 2005a). The task is to examine planning for shared growth in urban tourism which is linked to the 2010 World Cup and highlight certain critical challenges that face the achievement of this goal. Analysis of the challenges for shared growth is undertaken through research on the problems facing the growth and development of emerging black-owned small tourism establishments in host cities with a special focus on Johannesburg, which is scheduled to be the venue for the final of the 2010 World Cup.

URBAN TOURISM IN SOUTH AFRICA: SCOPE AND EXPANSION

Until as late as the early 1980s, urban tourism in South Africa was undeveloped (Rogerson and Visser, 2005). A new chapter in tourism planning in South Africa's cities began to open from the mid-1980s. In common with the international experience of urban economic restructuring, the promotion of tourism grew markedly in significance on the South African urban policy agenda. This was linked to the perceived role of tourism in urban economic regeneration and the promotion of local economic development in South Africa's leading cities, Johannesburg, Cape Town and Durban (Nel and Rogerson, 2005; Rogerson, 2006). Beginning in the 1980s and buoyed by the 1994 democratic transition, South Africa's urban managers and policy makers intervened actively to promote tourism development as a means by which to stimulate local economies. Currently, tourism promotion is an element of economic development planning in all South African cities (Nel and Rogerson, 2005; Gibb, 2007; Rogerson and Visser, 2007). The most dramatic manifestations of tourism promotion are the waterfront redevelopments that have transformed large areas of inner-city Durban and Cape Town (Maharaj et al. 2006; Ferreira and Visser, 2007). Among South Africa's major cities, Johannesburg is the most important newcomer to tourism promotion. Significant amounts of capital have been invested in establishing a range of urban-based tourism products with the objective of diversifying the city economy and contributing more widely to the making of Johannesburg as 'Africa's world class city' (Rogerson, 2005b; City of Johannesburg, 2008a).

In a parallel with the international experience (see Law, 1992, 1993), there are a number of unfolding strategies to enhance South African cities as centres for consumption and correspondingly, to further develop urban tourism. Business tourism has been promoted through the building of new international convention centres and linked hotel developments in Durban, Johannesburg and most recently in Cape Town (Gibb, 2007; Rogerson and Visser, 2007). The development of business tourism has been identified as a vital base for urban economic development in these three major South African cities. The critical and lucrative activity of MICE (meetings, incentives, conferences and exhibitions) tourism has been augmented by the attraction of 'mega-events' to South Africa such as the World AIDS Congress and the World Summit on Sustainable Development (Rogerson, 2002). In Johannesburg a 1999 World Bank survey of large tourism firms disclosed that 63 percent of firms were engaged in business tourism as compared to 59 percent in different forms of leisure tourism (Chandra, 2002). This finding underlines the special role of business tourism in Johannesburg's tourism economy as compared to either Cape Town or Durban, two cities where leisure tourism is of relatively greater importance (Maharaj et al., 2006; Rogerson and Visser, 2007). In contemporary tourism planning for the city of Johannesburg, explicit recognition is accorded to the role of MICE tourism and the importance of expanding business tourism in Johannesburg (City of Johannesburg, 2008b).

Beyond the activity of business tourism, the potential for South African cities as sites of leisure tourism also has been greatly expanded. In coastal cities the traditional mass market of beach tourism has been boosted through new waterfront redevelopment programmes (such as in Cape Town or Durban) as well as flagship leisure projects such as the Shaka Island development in Durban (Maharaj et al. 2006; Ferreira and Visser, 2007). As a result of radical post-1994 changes made in South African gaming legislation large casino investments have taken root in the country's cities making them new destinations for casino tourism (Rogerson, 2003). Cruise tourism is a further growing element of leisure tourism in coastal cities, in particular for Cape Town and Durban (Rogerson and Visser, 2007). Further, new leisure markets have been aggressively sought to expand urban tourism. Cape Town has been promoted as a centre for international gay tourism and is emerging globally as one of the leading gay tourism destinations (Visser, 2002). In addition, Cape Town has been the major beneficiary of South Africa's emergence as an increasingly popular focus for 'low budget' backpacker tourism and youth travel as a whole (Rogerson, 2007a).

The growth of shopping tourism has been another element of urban tourism development in South Africa. Mega-entertainment mall developments, such as Century City in Cape Town as well as Sandton City in Johannesburg, have underpinned the rise of retail tourism in cities. A distinctive role

in shopping tourism is assumed by Johannesburg with local initiatives to maximize revenue from regional tourist flows from countries in sub-Saharan Africa (Rogerson, 2002, 2004a). Overall, Johannesburg is South Africa's major focus for retailing tourism and currently is touted as the 'Dubai of Africa' for the city's range of shopping attractions. The vibrant cross-border retail economy is of particular significance with recent estimates suggesting that the city attracts one million visitors a year coming by both air and land transportation for purposes of shopping in the city (Rogerson and Visser, 2007). Johannesburg is seeking to further extend its role as shopping mecca for sub-Saharan Africa through the hosting of a cross-border shopping festival in the city (City of Johannesburg, 2008). Local festivals involving arts, culture and heritage are a further element in the economy of urban tourism in South Africa (Rogerson and Visser, 2007).

The promotion of heritage and cultural tourism is part of national initiatives for diversifying South Africa's tourism product away from its traditional focus on nature-based attractions (Rogerson and Visser, 2004). In the country's major cities the growth of heritage and cultural tourism has been supported through the building of new museum complexes such as the apartheid museum, Constitution Hill or the Newtown cultural precinct in Johannesburg (Rogerson, 2002). By contrast, in South Africa's township areas – sites of political struggle against apartheid – other forms of cultural/heritage tourism products are being promoted. In townships such as Soweto or Alexandra in Johannesburg, Inanda in Durban and Khayelitsha in Cape Town international tourists engage with the poverty of marginalized communities. Briedenhann and Ramchander (2006, p. 124) observe that "prior to the 1994 democratic elections, urban tourism in South Africa was strictly confined to so-called 'White areas'". With political transition and the accompanying surge of South Africa's tourism economy, urban townships have become accessible for tourists (Ramchander, 2004). Opportunities were opened for black South African communities to recount their stories of their struggles against apartheid to a receptive audience after decades of having their voices repressed by a hostile government (Scheyvens, 2002). An essential dimension of township tourism relates to what Ashworth (2004) styles the 'heritage of atrocity', or managing the heritage of apartheid for purposes of entertainment. One good example is the Hector Pieterse Memorial in Soweto, which is dedicated to a key event in the anti-apartheid struggle, paying tribute to the victims of the 1976 Soweto uprising. Other urban tourism elements of what Scheyvens (2002) refers to as 'justice tourism' include developments at Robben Island in Cape Town.

Health or medical tourism is a small but emerging segment of urban tourism in South Africa. In particular, South Africa's cities are the key focal points for domestic health tourism. In addition, both Cape Town and Johannesburg are seeking to engage with the lucrative international industry of medical tourism (George, 2004; City of Johannesburg, 2008b). To further the future expansion of medical tourism, the City of Johannesburg is planning to support an interactive online portal to connect stakeholders as well as potential visitors to the city's quality medical and related services (Muirhead, 2008).

Finally, hallmark events have become another significant driver for the growth of urban tourism in South Africa. Hallmark tourism, which encompasses a range of sporting events, fairs, festivals and expositions, assumes a distinctive role in shaping contemporary urban tourism in the country. The city of Cape Town has included hallmark events hosting and promotion as one of the key aspects of its local tourism development strategy. Indeed, the city is now being marketed internationally as "The Cape of Great Events" (Rogerson and Visser, 2005). Local government argues that "events are the shop window of the city or region and as such the number of people looking in and the quality of the window dressing plays a big role in building national and international impressions of the place" (City of Cape Town, 2001, p. 19). As part of the category of hallmark or mega-events, sports tourism has been an increasingly critical component of urban tourism economies in South Africa. The rise of sports tourism in urban South Africa has been spurred by the confidence drawn from the successful hosting of the 1995 Rugby World Cup, the 1996 African Cup of Nations soccer tournament and the 2003 Cricket World Cup (Cornelissen and Swart, 2006). As compared to other South African cities, Johannesburg has taken the lead in actively pursuing international sports tourism events.

FIFA 2010 WORLD CUP AND SHARED GROWTH IN TOURISM

In May 2004 South Africa emerged as the winner of the bid to host the 2010 FIFA World Cup, the first time that an African country had been selected to host such a prestige sports mega-event. Coming in the aftermath of Cape Town's earlier failed bid to host the 2004 Olympic Games, the positive developmental expectations of hosting this mega-event in South Africa are "very high" (Donaldson and Ferreira, 2007, p. 354). Several observers point with much optimism to the potential importance as well as economic and social benefits of South Africa's hosting of the World Cup, including for the provision of small business opportunities (Dlamini, 2008). Nevertheless, based upon lessons learned from the international experience of exaggerated claims surrounding the hosting of such mega-events, other researchers offer more cautionary assessments of the potential 'legacy' of South Africa's hosting of the 2010 World Cup (Pillay and Bass, 2008).

It is widely appreciated that the South African tourism sector is expected "to draw most long-term gain from the World Cup tournament" (Cornelissen, 2007, p. 256). The tourism-related benefits of the event are considered as twofold; first is the opportunity to increase tourism arrivals in South Africa during the event and second is the widespread media exposure and focus on the country before and during the event (DEAT and South African Tourism, 2005, p. 7). Addressing the imperatives of development and transformation in a post-apartheid society forms the critical axis of South Africa's bid to host the event (Cornelissen, 2007). For the sector of tourism this commitment translates into a consistent theme of using the 2010 World Cup as a lever for the 'economic empowerment' of those (almost exclusively black) communities disadvantaged under apartheid and formerly excluded from participation in the national tourism economy. The opportunities arising from the World Cup are planned to contribute towards 'shared growth' in tourism by extending benefits to newly emerging black entrepreneurs in the South African tourism economy. As has been officially stated: "Government and the 2010 Local Organising Committee are committed to the social legacy of the World Cup and want to ensure that this opportunity is shared by all" (TEP, 2006a, p. 29).

For the first time in the history of the World Cup FIFA's official accommodation and ticketing company, MATCH, has agreed to contract with non-hotel accommodation in addition to normal hotel accommodation (Krugel, 2006; TEP, 2006a). Under the terms of this agreement, MATCH is seeking to contract a target of 10 000 non-hotel star graded rooms from the total of 55 000 rooms required for fans and visitors attending the World Cup soccer tournament (Swartz, 2008). These non-hotel rooms are to be provided by a range of small tourism establishments (tourism SMMEs) and include accommodation in the form of bed and breakfasts, guest houses or backpacker lodges.

At one level, the opportunities to supply these contracted rooms are limited spatially by the distribution of venues which have been selected for hosting of the 64 matches and 32 teams. The 2010 event will be of special benefit to tourism development occurring in the nine selected 'host cities' for the competition. In particular, the city of Johannesburg will be the prime beneficiary of the event as it is the only South African city with two stadia planned to be used for the tournament. Overall, therefore, it can be stated that the major tourism benefits of this mega-event inevitably will flow to urban tourism destinations in South Africa. Indeed, it is within the nine host cities (and designated 'satellite areas') that the 2010 accommodation sign-up campaign is under way to achieve the target of 55 000 rooms.

As part of this strategy, the 2010 Host City Programme has been launched to assist SMMEs in the tourism industry to benefit from the opportunities offered by the World Cup. The Host City Programme represents an initiative of the Tourism Enterprise Partnership (TEP) (until April 2008 known as the Tourism Enterprise Programme), which has functioned since 2000 as a dedicated support initiative to assist the development and upgrading of tourism small firms in South Africa (Rogerson, 2007b; Pillay, 2008). In particular, TEP has sought to bridge the enormous chasm that exists between the groups of well-capitalised large tourism enterprises and well-resourced white-owned tourism SME entrepreneurs on the one hand and the emerging group of less

well-resourced black entrepreneurs seeking to enter the South African tourism economy on the other hand (Rogerson, 2007b). For SMMEs TEP provides assistance to obtain necessary professional services for business development including, if needed, quality certification, debt and equity finance, appropriate business planning, packaging, legal advice, marketing and technology support (see Rogerson, 2007b). Within the Host City Programme TEP's special role is to ensure the 'readiness' of emerging tourism SMMEs to secure opportunities associated with the World Cup (Daniller, 2008). The objective of TEP "is to assist SMMEs in the tourism industry to benefit from the overall opportunity offered by the 2010 FIFA World Cup in South Africa and to make a significant contribution to the national shared growth initiative" (Daniller, 2007).

In addition to the normal package of assistance made available to qualifying tourism SMMEs, as part of the 2010 accommodation sign up TEP is seeking to improve the standard and quality of accommodation by ensuring that SMMEs are star graded by the Tourism Grading Council of South Africa. The requirement for grading is deemed essential as MATCH insists that it will contract only to suppliers of graded accommodation (Krugel, 2006; Swartz, 2008). The minimum requirements for grading approval include public liability insurance cover; safety and security measures in place for clients and staff; establishments must be in possession of a health and safety certificate and adhere to fire and building regulations; and, be registered as a legal business with the requisite authorities.

At the heart of TEP's Host City Programme is a large-scale national research initiative, undertaken mainly in the nine host cities and scheduled for completion by end-October 2008 (Daniller, 2008). This research strategy is essentially an audit of emerging black SMMEs in tourism across South Africa (Daniller, 2008). The study seeks to identify inter alia, what SMME products exist, where, what skills SMMEs require, a diagnosis of the local tourism economy, and (importantly) whether SMMEs meet existing quality standards (Daniller, 2007). Although the full results of this audit may only be available in 2009, a number of parallel research investigations look at the problems that challenge transformation in South African tourism. These existing studies pursue a detailed analysis of the business growth problems that face emerging black-owned SMMEs in tourism (Rogerson, 2004b, 2004c, 2005a; TEP, 2005, 2006b). The next section turns to a review and key findings of research with particular reference to evidence drawn from Soweto.

THE CHALLENGES OF SHARED GROWTH WITH SPECIFIC EVIDENCE FROM SOWETO

Although large companies drive and economically dominate the South African tourism industry, the vast majority of South African tourism enterprises fall into the category of SMMEs. Within the category of tourism SMMEs must be recognized two different sub-groups of businesses (Rogerson, 2005a, 2007c). On the one hand are established, almost predominantly white-owned SMMEs which operate a host of different establishments from travel and touring companies, restaurants, small hotels, self-catering and resorts, game farms, bed and breakfasts or backpacking hostels. On the other hand is the emerging black-owned tourism economy, a mix of formally registered micro-enterprises and informal tourism enterprises many of which function at levels of bare survival. As research conducted by the World Bank in Johannesburg's tourism economy disclosed this second category of enterprises emerged only since the democratic transition (Chandra, 2002).

In terms of understanding the problems that challenge emerging urban SMME entrepreneurs, the most detailed material derives from research which examines problems of tourism SMMEs in the accommodation sub-sector (Rogerson, 2004b, 2005a). The findings show that emerging entrepreneurs are mainly confined geographically to the apartheid-designated spaces of townships with the largest clusters found in Soweto (Johannesburg), Khayelitsha (Cape Town) and Inanda (Durban) (Rogerson, 2004c; Lourens, 2007). These emerging black owned SMMEs operate at a disadvantage with respect to both the enormous market power enjoyed by large tourism enterprises and to the advantages of economic, social and cultural capital of established white owned SMMEs (Rogerson, 2004b, 2004c, 2005a). Official acknowledgement is given to the fact that SMMEs face particular problems in terms

of their constrained access to information and opportunities linked to the tourism channel (Department of Environmental Affairs and Tourism & South African Tourism, 2005, p. 17). Against this backdrop, national government support for tourism SMME development is targeted through TEP to address the challenges facing emerging black entrepreneurs in order to contribute toward the ‘transformation’ of the South African tourism economy (Rogerson, 2007b).

The results of research undertaken in Soweto during 2005 highlight the leading constraints upon and challenges for achieving shared growth in urban tourism, not least with respect to incorporating the emerging entrepreneurs within the potential opportunities linked to the 2010 World Cup. The tourism industry in Soweto is part of the wider tourism economy of Johannesburg and its major tourism products are associated with the political struggle against apartheid. During 2005 it was estimated that Soweto received 140 000 leisure or business tourists, of which 70 percent are international visitors (TEP, 2005). The 2005 audit revealed 119 tourism product owners in Soweto, the largest number being the group of suppliers of accommodation. The location of these accommodation suppliers close to two stadium venues for the hosting of World Cup matches potentially offers considerable opportunities for 2010.

The 2005 audit disclosed key problems for business expansion of these tourism SMMEs. Improvement in the volume and quality of destination marketing was identified by Soweto product owners as a priority issue (TEP, 2005). Emerging tourism entrepreneurs argue that despite individual efforts made to market their respective establishments (mainly by word of mouth), insufficient effort has been made by local, provincial and national tourism marketing authorities “to promote Soweto as a desirable destination in both the domestic and international markets” (TEP, 2005, p. 39). Widespread dissatisfaction is expressed by product owners concerning the level and impact of official government support to Soweto tourism and local entrepreneurs.

In addition, basic infrastructure such as signage or information necessary to support tourism entrepreneurs is either lacking entirely or of poor standard. At least half of Soweto’s bed and breakfasts operate “without any form of signage, be it directional or on the property” (TEP, 2005, p. 18). Another critical issue for tourism authorities is to address tourist (mis-) perceptions of safety and of fear of crime surrounding visits to Soweto. This is a key explanation for the low number of overnight stays and of tourist preferences for accommodation in Sandton or Johannesburg northern suburbs. An average of less than 6 percent occupancy was recorded in more than 60 percent of surveyed establishments in Soweto; only 3 percent of establishments registered annual occupancy levels above 40 percent (TEP, 2005).

One further set of growth constraints on Soweto tourism SMMEs relates to the failure of local enterprises to cooperate effectively together. The small tourism industry of Soweto is divided and fragmented with four different tourism associations. Associational membership of Soweto tourism product owners is high; 93 percent of the sampled 75 product owners were members of an association (TEP, 2005). The existing benefits of membership relate to marketing assistance and production of business cards which are facilitated by associations. Nevertheless, there is widespread dissatisfaction with the functioning of the four different associations. Soweto tourism is currently in a situation of oversupply of certain tourism products, such as accommodation or restaurants, alongside under-demand of required products and services. This translates into intense competition and rivalry between product owners which stems from a belief that well-established and known businesses receive preference from tour operators and from associations or marketing organizations.

Beyond issues of enhanced marketing, infrastructure or associational issues, some of the main constraints upon Soweto tourism were disclosed as associated with poor product quality and of lack of investment in tourism products. The research disclosed that tourism products in Soweto often fall short of the expected standards of the tourism industry in several respects (TEP, 2005). The skills base for tourism service provision is limited with 70 percent of employees classed as unskilled. Further, “80 percent of people employed in currently operating establishments are not sufficiently trained to provide the level of service required in the tourism and hospitality industries” (TEP, 2005,

p.7). Although the leading accommodation establishments provide relatively high quality services, the majority of smaller establishments do not currently offer the same level of service and product quality. Many of Soweto's bed and breakfast establishments fail to comply with minimum requirements in terms of provision of separate ablution facilities, off-road parking and fire extinguishers. Indeed, the survey revealed one in eight of sampled SMMEs do not have the required legal status to operate as a tourism business and "most establishments do not register their businesses for a period of 12 to 18 months from the start of operations" (TEP, 2005, p. 27).

Further critical issues of product quality emerge in terms of enterprise compliance with insurance, health and safety regulations. The 2005 survey found inter alia, that, 74 percent of Soweto accommodation establishments are not insured at all; 70 percent of tour operators do not have the required carrier permit and 43 percent have no public liability to carry tourists; 53 percent of food and beverage establishments operate without any insurance cover; and 20 percent of tour operators use unqualified guides without the necessary provincial or national accreditation. The main reason given by entrepreneurs for lack of licensing or product compliance was their lack of knowledge about necessary requirements, regulations and procedures. As a whole these enterprises reflect common managerial weakness of tourism SMMEs in respect of not being "equipped with all the procedures involved in successfully running a tourism enterprise" (TEP, 2005, p. 44). Unless these licensing and compliance conditions can be addressed and legal requirements adhered to, Soweto will not be able to strengthen as a competitive and unique tourism destination. In addition, emerging SMME entrepreneurs will not be able to access opportunities such as those linked to provision of services for the 2010 FIFA World Cup because of the contractual requirements made by MATCH that accredited suppliers be graded according to the criteria applied by South Africa's Tourism Grading Council.

CONCLUSION

Achieving 'shared growth' is an important objective of tourism development planning in South Africa. One of the most distinguishing features of the tourism sector in South Africa is its "transformational component" with the commitment made by national government "to provide opportunities for wealth distribution in the sector through facilitating the entry of previously disadvantaged individuals into the sector" (Department of Environmental Affairs and Tourism, 2008, p. 32). The potential opportunities for urban tourism associated with the 2010 Football World Cup in South Africa suggest a potential lever for transformation and an expanded role for emerging black entrepreneurs into the tourism value chain. Through the activities of the Tourism Enterprise Partnership a set of support programmes have been instituted to upgrade the capacity of emerging black tourism SMMEs to provide accommodation and other tourism products (Rogerson, 2007b).

The evidence presented here from Soweto shows the lack of 'readiness' of most emerging tourism SMMEs to attain the grading standards which are demanded by MATCH, FIFA's officially mandated company responsible for the provision of accommodation. This finding suggests that much of the expected potential social impact and 'legacy' of the 2010 Football World Cup upon the South African tourism economy seemingly may not be reached. In final analysis this reflects the wider control exerted by FIFA upon the hosting of the World Cup and the limitations which it imposes upon the potential for local economic development in South Africa both prior to and during the event.

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ACKNOWLEDGEMENT

Thanks are due to Mrs Wendy Job, Cartographic Unit, for the preparation of Figure 1 and to the Faculty of Science, University of the Witwatersrand for research support.

CATHOLIC PROCESSIONS: FESTIVALS THAT CAUSE DISTURBANCE IN THE CITY – AN EXPLORATORY STUDY THROUGH OBSERVATIONS

Ubaldino Sequeira Couto
Institute For Tourism Studies, Macau

ABSTRACT

Macau is a cultural Janus, and for many years, the city has been celebrating western and predominantly Chinese festivals harmoniously together. Through observations, this study aims to examine Catholic processions as religious events and to explore the positive and negative impacts associated with this unique type of event. There are a few Catholic processions celebrated each other, ranging from small, localised ones to large-scale processions dedicated to Jesus Christ and Our Lady of Fátima and celebrated in February or March and May every year. It appears that processions differ in several ways when compared to other types of events. Moreover, Catholic processions, like other festivals, seem to function as a tool to enhance the social capital of a destination. The paper concludes by suggesting several ideas for future research into the area of Catholic processions as religious festivals.

Keywords: festivals; religious processions; social impacts of events

INTRODUCTION

Cheng (1999) calls Macau a ‘cultural Janus’; a city that constantly looks, harmoniously, back at its Portuguese heritage and forward to its Chinese modern and future. With its inscription to the UNESCO’s world heritage list not long ago and the mounting pressure of modern developments, Macau still manages to preserve its historic architecture along with classy new mega resorts and high-rise apartments. Not only the physical cityscape is changing, the people mix is also changing with immigrants and foreign workers attracted by the unprecedented prosperity of the economy who now call the little city ‘home’.

‘Little’ is an understatement when the city is merely, including its two outlying islands (connected via bridges and causeways), is only 29.2 sq km. Over the past five years, the population has risen from 446,700 in 2003 to 538,100 in 2007 (DSEC, 2008a), making the city the most densely populated area in the world. Among the mere half a million people in Macau, 93.9% are Chinese, 2% are Filipino, 1.7% Portuguese and the rest as others (DSEC, 2007). In 2007, Macau welcomed nearly 2.7 million visitors (DSEC, 2008b), a rise of 22.7% from 2.1 million visitors recorded the previous year, making the city one of the fastest booming tourist destinations in the region.

Shortly after the handover of Macau to Chinese from Portuguese administration, the government recognised that in order for the city to catch up with the regional economic development, the city has to make changes to its economy. Therefore, in 2003, the deregulation of the gaming industry in 2003 marked the beginning of the tourism boom where the gaming industry has become the dragonhead industry, supplemented by tourism and business events. This has placed Macau under the international spotlight, especially following the establishment of mega-resorts.

Thanks to its Portuguese heritage and influence, in the same year, parts of the city, known as “The Historic Centre of Macau”, has been designated a UNESCO World Heritage Site, which has further increased the city’s tourism prestige. Naturally, with its 450-year influence of the Portuguese culture, architecture is not the only remains of the rich heritage, but also its people, food, rituals and many other aspects of life. Brought to Asia to Macau as a steppingstone, Catholicism has also marked its prominence in Macau, a common religion of the Portuguese, which now has nearly 28,000 followers, 5.2% of the total population, including local people and expatriates (Macau Yearbook, 2007).

Many of these local people are mixed-blood of Portuguese-Chinese origins, known locally as the Macanese. The Macanese people are traditionally referred to *Os Filhos da Terra*, meaning ‘the sons of the land’. This breed of both Portuguese and Chinese ancestry is yet another heritage Macau is known for as Macanese speak fluent Portuguese, Chinese and most speak English; they have, although dying, their own Creole named *Patuá*, own cuisine type, own community and are, as mentioned above, mostly Roman Catholics. They celebrate ‘western’ festivals, such as Christmas and Easter, as opposed to the majority of the local Chinese people who attend celebrations to honour Buddhist and Taoist gods; they attend masses every weekend and on holy days, and many participate in processions dedicated to Catholic saints and Jesus Christ. There are a number small, localised processions dedicated to parish patron saints and two larger processions, the Procession of the Passion of the Lord, Jesus Christ, celebrated in February or March (presiding Lent) and the Procession of Our Lady of Fátima celebrated on 13 May.

On one hand, cultural events like Catholic processions form part of the local community’s pride and heritage; on the other, these events inevitably bring some form of disruption to the city. Through participant observations, this exploratory study aims to examine how festivals can cause disturbance in the city, mainly social impacts, as will be described later, using Catholic processions as a case study. The paper presented here should be viewed as a case study and a foundation to further studies of religious processions as festivals and how they affect the city.

Not to withstand the validity of this study and certainly not the research methodology used, participant observation as a qualitative research method is subject to a degree of subjectivity as the personal account of the author may, one way or the other, inevitably incline to a particular side of the debate. However, it is also the professional spirit of such research methodology that authors present views and observations as objectively as possible, and that is precisely this spirit this paper is based on.

BACKGROUND TO THE STUDY

As with many other cultural festival events, civilisations have been celebrating religious festivals for a long time. For instance, the [ancient] Greeks and Romans “held festivals to honor the divinities of the Olympus and the local gods... The important gods and goddesses of Rome were honoured with appropriate temples and feasts” (Alinsangan, 2008). Many religious festivals and events are held to celebrate and to commemorate specific events (Getz, 2007). Among others, they can take form as pilgrimages such as the Hajj, carnival parades and processions.

According to the Catholic Encyclopedia (Thurston, 1911), there are broadly two types of Catholic processions. The first being smaller scale, which occurs within the church grounds, such as when the celebrants proceed to the altar, when the coffin is being carried out of the church in funeral rites, the entrance of the about-to-be newlyweds into the church during wedding ceremonies, and so on. The second type, ‘extraordinary processions’, refers to processions for special conditions, such as for good weather, famine, disasters and so forth. Other processions, which are non-liturgical, more localised and not regulated by the Vatican, are held for specific occasions such as to honour or to dedicate to a particular saint or holy person (Encyclopaedia Britannica, 2008).

In Macau, many religious festivals, whether Catholic or not, are celebrated at large and on a frequent basis. As with the rest of Macau’s heritage, these festivals, presented in Table 1 below, are of both oriental (mostly Chinese) and western (mostly Portuguese) origins.

Catholic processions are held a few times each year in the city of Macau, ranging from small, community-based processions like the one dedicated to St. Anthony, the patron saint of a parish in Macau, to larger-scale processions of the Passion of Our Lord, Jesus Christ in February or March and Our Lady of Fátima on 13 May. Set in the 1930s, the novel *The Bewitching Braid* (de Senna Fernandes, 2004:172-173), gives an account of what Catholic processions were like during that time:

Table 1
Religious Festivals in Macau

Date	Festival	Origin
February/March	Procession of the Passion of Our Lord, Jesus Christ	Western
March	Feast of Tou Tei	Oriental
March/April	Easter	Western
April	Birthday of Pak Tai	Oriental
	A-Ma Festival	Oriental
May	Feast of Bathing of the Buddha (Buddha's Birthday)	Oriental
	Tam Kong Festival	Oriental
	Procession of Our Lady of Fátima	Western
June	Procession of St Anthony (localised)	Western
August	Feast of Hungry Ghosts	Oriental
September/October	Feast of Ancestors	Oriental
December	Christmas	Western

Unlike the processions of the Good Lord of Passos [Passion of Our Lord, Jesus Christ] and Our Lady of Fátima, which brought together all the Catholics of the city [Macau]..., that of Saint Anthony was essentially a local one, limited to the quarter. Lacking the pomp and circumstance of other processions, and being much shorter, it had a more down-to-earth, genuinely popular character, even though it was followed with the same fervour and piety... For those who enjoyed abundant tasty food and plenty of drink, it was also a memorable day. In the big houses along the route the procession took, there was the traditional chá gordo [traditional Macanese snacks]... markets and grocers' shops were stripped of their stock, and the hawkers of snacks and pastries were kept on their feet... the fair in the churchyard that had begun on the first day of the novena [nine-day prayer dedicated to a saint preceding to the feast day]... with games and refreshment stalls... with illuminations, fireworks and the launching of traditional balloons.

However, in modern times, these processions differ as outlined above. For instance, smaller-scale processions like the one dedicated to St. Anthony still remains localised but hawkers, games and fireworks became stories of the past. Such processions are limited to the parish quarters, therefore, conflict and clashes are rarely reported between the procession participants and tourists. For this reason, for the purpose of this study, only observations made in the two larger processions are taken into account.

The first of the larger processions, *Procession of the Passion of Our Lord, Jesus Christ*, celebrated in February or March, takes place just before Lent and is actually divided into two parts. On the first day, a shorter procession of an image of Christ carrying a cross is transported from St. Augustine's Church to the Cathedral for an overnight vigil, and on the second day, it is then transported back to the former church with a longer procession. The image is carried by male escorts in magenta robes, and the bishop, chanting hymns and prayers, and is surrounded by Catholics and curious residents and tourists. The route cuts through parts of the central business district, busiest streets of the city and the main tourist area (Senado Square).

Very similar in nature, the *Procession of Our Lady of Fátima*, is celebrated on 13 May annually. It is a large-scale procession from the Cathedral to the Penha Church (dedicated to Our Lady of Fátima) to commemorate the miracle of her appearing to the villagers of Fátima in Portugal on 13 May 1917. The procession, led by the image of Our Lady of Fátima, the bishop and female escorts dressed in white gowns, is attended by devotees who chant hymns and recite the Rosary prayers throughout the journey ending with an open-air mass at the destination. This procession route also cuts through the same important streets and busy districts of the city including the Senado Square, as well as additional portion of the city roads leading up to the Penha Hill where the destination is.

FESTIVALS AND THEIR IMPACTS

Getz (2007:31) defines festivals as, simply, “themed, public celebrations”, which are important to the destination as they are tourist attractions, and may help to lengthen tourist stays. Derrett (2004:33) explains that “festivals link landscape to lifestyle in simple and complex ways by introducing human dimension... festivals are attractive to communities looking to address issues of civic design, local pride and identity, heritage, conservation, urban renewal, employment generation, investment and economic development”, festivals can strengthen the image of the community portrayed by visitors. Getz (2007:32) continues and prompts the misuses of the word ‘festival’:

Some so-called festivals are nothing more than commercial promotions or parties. Indeed, ‘festivity’ is often used in the same way as ‘having a good time’. Many community and broadly programmed festivals seem to forget what they are celebrating, or at least they do not interpret the meaning. In this sense ‘festival’ has often been reduced to a public entertainment programme, or a special time for fun and activities, rather than a celebration. Even arts festivals are guilty of using the term without paying attention to the meanings and how they are interpreted.

Because of the disambiguation of the word ‘festival’, one should not assume that festivals as seen in literature and public media do necessarily always relate to heritage and culture. Religious festivals, however, may include, but not limited to, ceremonies, cultural celebrations especially those related to mythical figures and gods, carnivals are celebrations before Lent, parades, processions and pilgrimages (see Getz, 2007). Given the fact that social costs like congestion and disruption to the local people’s lifestyle, as will be discussed below, are applicable to virtually all events, the social impacts of events and of festivals outlined above are thus applicable to processions as religious events, the subject of investigation covered in this paper.

Previous research work has been largely focused on economic impacts of events and until recently the social impacts of events, and of festivals, have received increased attention (Arcodia & Whitford, 2006; Sherwood et al., 2005; Small et al., 2005; Wood, 2005). In a study conducted by Wood (2005) to conceptualise a framework to measure economic and social impacts of community-focused local authority-organised events, Wood identifies the positive and negative impacts for event evaluation, and they are listed in Table 2 below.

Table 2
Positive and Negative Impacts of Events

Positive Impacts	Negative Impacts
Community development	Disruption to residents’ lifestyles
Civic pride	Traffic congestion
Event product extension	Noise
	Vandalism
	Crowding
	Crime
	Property damage

An empirical study of festivals and special events organizers by Gursoy et al. (2004) conclude that perceptions of festival impacts can be broadly categorised into four types: community cohesiveness, economic benefits, social incentives and social costs. Findings suggest that organizers believe festivals bring together the community but doubt whether festivals generate economic benefits. However, organizers are confident that festivals create less social costs, like traffic congestion, pressure on local services and increased crime rates, than social incentives, such as providing additional and family-based recreational opportunities, improving the relationship between visitors and the local people, and so on.

Sherwood et al. (2005) evaluate the use and applicability of the triple bottom line approach at how sustainable development, in terms of economic, environmental and socio-cultural aspects, can be evaluated at special events while Small *et al.* (2005) introduces a framework for evaluating community perceptions of festivals. The items to be measured on a Likert-scale include community, leisure/recreation, infrastructure, health and safety, and cultural impacts.

Research work on human and traffic congestion caused by tourist activity has been receiving increasing attention, particularly in the heritage management discipline (see Shackley, 1998). In the 'Congestion Handbook' (dedicated to such an impact at World Heritage Sites) published by the United Nations World Tourism Organization (UNWTO, 2004:3), congestion refers to a time when "physical obstructions block the natural flow or narrow passages [that] cause the flow to slow down... or the number of visitors is excessive in relation to the capacity of the destination or site to accommodate that flow". It further categorises congestion into permanent and fluctuating congestion where the prior refers to a time when a particular area receives continuous visitation and the latter a time when visitors arrive seasonally and/or temporally. In a study conducted by Couto and du Cros (forthcoming), a third type of congestion was identified, named background congestion, which refers to congestion caused by the local people, such as during peak times when travelling to work and school, increased visitors at parks during statutory holidays and so forth.

Another form of negative impacts that religious festivals, specifically processions, could cause is documented by Seales (2008). Local residents who were predominantly Protestants were met with a large influx of Latin American migrants who were mostly Roman Catholics in the 1980s. One of the disruptions to the local religious heritage, the century-old July Fourth parade which demonstrated the political presence of the Protestants, were taken over by Latino-Catholics' Good Friday town centre processions. The Protestants, whose parades ended in 1988 in part due to economic downturn, viewed the Catholic procession as a way of invasion to their community, passing through important buildings and the parade's route until the Catholic processions were moved out of town following the revival of the Protestant parades in the late 1990s. The first Catholic procession aroused much attention which "literally stopped traffic, as drivers pulled over on the side of road and got out of their cars to observe close to one hundred Latino Catholics move through the city streets" (Seales, 2008:57). Although to the Catholics seem to have caused disruptions to the local people, they merely "initiated and carried out a tradition familiar to them".

Meanwhile, Gabr (2004) examines the perceptions by residents and domestic tourists on the use of urban historic sites for festival events, specifically Dubai Shopping Festival. Conclusions indicate that unlike some previous studies, both residents and domestic tourists support the use of heritage sites for festival events. Although Gabr argues if international visitors were surveyed instead of domestic tourists, the perceptions could be significantly different.

While negative social impacts may destroy the development of social capital brought forth by festivals, Arcodia and Whitford (2006:15) argue that festivals have "the potential to provide a variety of predominantly positive social benefits... by providing the community with specific opportunities for accessing and developing community resources, improving social cohesiveness, and providing a focus for celebration". Derrett (2004:40) shares the same idea and relates the role of visitors to the community's festivals, "festivals and events provide an opportunity for community cultural development... an invisible phenomenon... a sense of community which visitors can feel when they participate in a festival is an intangible amalgam of services and experiences. While such festivals allow local people to satisfy their leisure [and cultural] needs, residents are able to work as volunteers... another way for visitors to get a sense of local values and interests". The social benefits of festivals are further elaborated by Getz (2007), and further discussion here would prove to be meaningless to the objectives set out for this paper.

A brief survey of the literature reveals that the term 'festivals' is sometimes used more as a marketing tool than really reflecting the cultural values festivals hold. The benefits and costs of holding festivals for the host community are also immeasurable, and there still seems to be a debate

whether such events are healthy or not for the destinations. While social costs and benefits like congestion and social cohesiveness seem to dominate existing work on social impacts of festivals. For the purpose of this study, the indicators of impacts of festivals and events as used by Gorsay *et al.* (2004) will be discussed in relation to Catholic processions: community cohesiveness, economic benefits, social incentives and social costs. Table 3 in the following shows the comprehensive list of the attributes.

Table 3
Indicators of impacts of processions to the local community (Gursoy *et al.*, 2004:175)

Community cohesiveness
Generate revenues for civic projects
Enhance community image
Build community pride
Help preserve the local culture
Help create cohesion in the community
Economic benefits
Increase employment opportunities
Increase standard of living
Encourage locals to develop new facilities
Social incentives
Provide more recreational opportunities
Promote organizations and businesses
Offer family based recreation activities
Enhance community image to outsiders
Help foster relationship between residents and visitors
Educational-make people aware
Social costs
Increase traffic congestion
Put pressure on local services
Increase the crime rate

As previously mentioned, this paper employs a participant observation research methodology. Pictorial evidence is also used to support claims and observations recorded on field notes. The above indicators, whenever applicable, are discussed in relation to three groups of people, regardless of religious beliefs: ‘community’, the local people and local businessmen; ‘tourists’, the visitors to the area from abroad; and ‘pilgrims’, those who actually participated in the processions.

IMPACTS OF CATHOLIC PROCESSIONS IN MACAU

The impacts of the two larger-scale Catholic processions, which are of discussion in this paper, will later show, to be contradictory.

Catholic processions have been celebrated for a long time, how effective they are in bringing the community together cohesively is doubtful. On one hand, this celebration brings together different walks of life together, Catholics and non-Catholics, encompassing all ethnic, professional and social backgrounds, and even those from neighbouring countries. However, on the other hand, Catholics only account for 5% of the population, so how about the others who are non-Catholics? How would they feel? Although such processions have been celebrated for years, would it be another case of ‘culture invasion’ as documented by Seales (2008)?

Something is certain, though. By celebrating these festivals with processions, the more ‘intangible’ aspect of Macau’s heritage and Portuguese influence can be preserved, that is, the Catholic religion. It helps building community pride as, probably, the only city in China that

celebrates, openly, Catholic festivals in the form of processions in the city centre. Even the Macau Tourist Board uses the procession footages and photos in its marketing campaigns. Processions, without doubt, enhance Macau's image as a vibrant destination of both East and West heritage, they diversify the tourist products on offer, and these events showcase the built heritage, the UNESCO World Heritage Sites, as the procession routes cover many sections of the Historic Centre of Macao. Perhaps the findings of Gabr (2004) were not at all surprising when in Macau, the community, the pilgrims and the tourists should all support such a notion.

Therefore, how much more cohesive is the community because of Catholic processions? This remains as doubtful but one should not forget that for so many years, the Catholic processions have been celebrated peacefully in the midst of the majority of non-believers of the religion, could it be, without the population realising, that this is already an example of community cohesiveness?

As a Catholic event, processions are organised through the local Church groups and associations, therefore, producing scarce employment opportunity. However, because of the non-profit, high-human resource nature of the event, Catholic processions become a platform for volunteers and local scouts groups, yet another chance to demonstrate to tourists the peaceful community cohesiveness within and between the community and pilgrims that Macau, for decades, is so proud of.

Unlike other types of festivals, like arts and music festivals, processions are not economic-generating events so do not improve the community's overall standard of living, at least, in terms of economic aspects. However, they do increase the community's standard of living by supplying annual family-based recreation, particularly for Catholic families, and a platform for the curious, the youths and non-Catholics, to be aware of Macau's heritage and world religion. This is, another example of fostering relationship between the community and pilgrims, and showcasing Macau as a dynamic and vibrant destination for tourists. Catholic processions do, it appears, to develop social capital as explained by Arcodia & Whitford (2006).

Traditionally held late in the afternoon for both processions, at six-thirty pm to be precise, these twice annually Catholic processions also traditionally cause major disturbance to the local traffic, at its daily peak hours. As the procession routes lie within the World Heritage area, as well as right through several major roads, and the central business district, local traffic has to be stopped and diverted to allow the procession to pass through, which often takes at least 20 to 30 minutes. Exhibit 1 shows the procession taking up the major roads in the business districts, which often cause traffic to halt for at least half an hour.



Figure 1
The procession takes up the whole streets in the CBD

Not only traffic has to be stopped, human activities are affected too, even on pedestrianised areas. Exhibit 2 shows the area adjacent to the church (where the procession starts) begins to accumulate with pilgrims up to two hours before the processions, and Exhibit 3 shows that the full procession crowd, particularly at the beginning as pilgrims (especially the elderly) start to disperse towards the hilly and final route of the procession, takes up the whole pedestrianised streets full of shops, which lie also right in the tourist-popular area, Senado Square.



Figure 2
City streets are crowded with pilgrims



Figure 3
City streets are crowded with the procession

This is not background congestion as observed by Couto and du Cros (forthcoming) but a time of fluctuating congestion (UNESCO, 2004). The traffic disruptions and human congestion cause the area where the route cuts through to stop all business and tourist activity for several hours to wait for the crowd to disperse. This can be viewed as a negative economic impact and major inconvenience to the tourists but tourists in turn have a chance to see firsthand a local festival so unique in the region.



Figure 4
Tourists take photos amidst the crowds

For the community and tourists, it is all about toleration, but how about tourists and local people who ignore and disrespect the holy processions, walk through the procession crowd, shout and demonstrate inappropriate behaviour surrounded by pilgrims performing holy rights? Exhibit 4 shows a group of tourists using the procession crowd as background for photo taking. For many years, the community and the pilgrims have been tolerating each other, whether it becomes a norm or forced tolerance is unknown and requires further research, but one thing is certain: the community tolerates each other, and this is yet another example of community cohesiveness.

CONCLUSIONS

Processions are, unlike most other festival events, do not have a fixed venue. They only cause physical disturbance at the time and place where the crowds are, but positive impacts like social benefits are long, if not eternal. How the community perceives Catholic processions is not known, and requires further research into the area. What is known of, is that these Catholic processions are never and will not be considered a community invasion. More westernised events, like Catholic processions, have been celebrated along Chinese festivals, and neither the Chinese nor Portuguese, Catholics nor non-Catholics, ever complained and objected each other's presence and celebration. This, along with other mixed architectural and 'intangible' heritage, our food, people and culture, shows Macau is a cohesive community. This helps, hopefully, to build up and improve Macau's image as a vibrant tourist destination of multicultural and diversified tourist activities.

Processions, unlike other festival events too, cause localised and temporal human and traffic congestion rather than a prolonged disruption to traffic. The temporary suspension to business activities at the route during the procession brings inconvenience to the local people and tourists but processions do add prestige to the overall destination's profile of tourist activities, whose effect is longer, if not permanent. Likewise, processions, unlike other festival events, do not cause many impacts to the heritage sites when used for festivals. Conversely, processions can further strengthen the prestige and beauty of the heritage sites, blending in the built and living heritage together as one, further showcasing Macau to tourists as a vibrant destination.

Social costs like congestion are temporary but the benefits are long-term. This is in line with what some authors (Arcodia & Whitford, 2006; Derret, 2004; Getz, 2007) believe in that festivals do develop social capital, enhance community's sense of pride and bring the community together. A true festival in its own right, Catholic processions are different from other types of festival and event. The

similarity between processions as festivals and festival events are, it appears, their ability to develop social capital, especially in bringing the community together.

The biggest limitation to this case study is the research methodology as no objective data is available to support claims and comments on the phenomena observed. Moreover, the history and statistics of Catholic processions are not easily and readily available. Further research is needed to systematically and objectively gauge the perceptions of Catholic processions by the community, the pilgrims and the tourists. Although it appears that religious processions appear to be somewhat different from other types of festivals, in terms of negative impacts caused, it is imperative to have this hypothesis tested. Catholic processions as religious festivals can be compared with other predominantly Chinese religious festivals to see where and how they differ from each other. Longitudinal study to measure the change of the profile of participants of the processions is also of interest as well as a comparison of Catholic processions in Macau and in another country, such as the Philippines.

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MEGA EVENT ON PERMANENCE – SOCIAL IMPACT OF TOURISM IN DUBAI

Anna Dłużewska
Tourism and Recreation Department
SWPR University

ABSTRACT

The aim of this article is finding an answer to the question on the social impact of a mega-event on permanence on indigenous inhabitants of Dubai and the kind of measures that are taken by the authorities to avoid social and cultural dysfunctions of tourism. The article is based on field studies carried out in Dubai in 2004 and 2006, during which altogether deep interviews with indigenous inhabitants, top business hotel managers and tourists have been conducted.

The results have shown that despite the common opinions the planned development of tourism based mostly on mega events limits to a large extent the social and cultural dysfunctions. High rank of the events influences the increase of national pride of indigenous population (the impression of being the centre of the world) and eliminates many tourist behaviours which cause dysfunctions and which would have occurred in case of leisure tourism. Additionally, the domination of exclusive tourism enhances the level of refinement of tourists (which is due to, among other things, the education necessary to assume top positions). An important threat is the increasing number of tourists from Eastern Europe, who are not used to cultural differences and the behaviours resulting from such. The tourists of this category (irrespective of the aim of their stay and their financial status) have no qualms about wearing a bikini in the centre of the city, showing each other affection in public or abusing alcohol. The preventive policy concerning this category of tourists, bearing in mind that the general tourist circulation should not be weakened, is at present the greatest challenge for the authorities in Dubai.

Keywords: Dubai; tourism impact; exclusive tourism; event tourism

INTRODUCTION

The history of social success of Dubai, mainly connected with intensive development of tourism, took place in a period equivalent to the life of one generation. In such a short time this country experienced a transformation on an unparalleled scale and has become one of the most powerful tourism countries in the world. The dominating type of tourism in Dubai is business tourism, concentrated around mega-events (fares, festivals, sport competitions).

Fast development of tourism in Dubai seems even more surprising when we take under consideration the culture type represented by indigenous inhabitants of the Persian Gulf region, which is considered highly conservative and, as a result, particularly susceptible to dysfunctions resulting from increased cultural contact with tourists (Ritter 1975).

The aim of this article is to approach the extent of social impact of a mega-event on permanence on indigenous inhabitants of Dubai. The article is based on field studies carried out in Dubai in 2004 and 2006. The research was conducted with the use of cultural anthropology methods with tools such as deep interviews, participant observation (Babbie 2001, Jorgensen, 1989 Spradley, 1980), therefore its results are of qualitative character (Hammersley and Atkinson 2000, Mason, 2000). The field studies were performed in order to indicate the factors influencing social dysfunction potential in various tourism areas in the world (Tunisia, Dubai, Kenya, Turkey, Malaysia, Maldives, Uzbekistan etc.) During the research carried out in Dubai altogether 122 deep interviews with indigenous inhabitants, top business hotel managers and tourists have been conducted.

The field studies conducted for the purpose of the present work falls into the concept of tourism as an encounter of cultures which originates in social sciences (Willems 1970, Podemski

2004). According to this concept tourism is considered as cultural or civilization contact. E. Willems defines the encounter of cultures as a “relationship which comes into being between various groups or societies which differ from one another in civilization that usually causes conflicts, shocks (clashes) or changes in some or all spheres of civilization remaining in interaction” (1970). Notions such as cultural shock (Lexikon zur Soziologie, 1975) and cultural conflict are used here.

BACKGROUND

United Arab Emirate’s Travel & Tourism Economy (direct and indirect impact) in 2008 is expected to account for 22.6 % of GDP and 620,000 jobs (17.9 % of total employment). In practice tourism industry shown on average for all Emirates is mostly generated by Dubai – with a surface of 3,885 km², 1.04 million inhabitants. The tourism investment boom began in 1994-1996 and reached as much as 35% of all investments in the United Arab Emirates. Nowadays it amounts for 28% and this index is the highest in all Middle East countries (World Travel and Tourism Council).

Tab. 1:
Four- and five-star hotels in Persian Gulf countries (GCC) 2006–2010

Country/City	Number of operating hotels	Number of hotels under construction	Change	Number of available hotel rooms	The number of hotel rooms in the hotels under construction	Change
Dubai	103	103	100 %	17,170	39,890	232 %
Abu Dhabi	28	25	89 %	4,797	7,560	156 %
Fujairah	7	6	86 %	780	1,076	138 %
Ras Al. Khaimah	7	10	143 %	1,162	2,201	189 %
Oman	18	7	39 %	3,066	889	29 %
Bahrain	26	27	104 %	3,917	6,560	167 %
Qatar	13	43	331 %	2,956	11,284	382 %
Saudi Arabia	52	22	42 %	14,428	4,188	29 %
Kuwait	21	22	105 %	3,439	3,890	113 %
Total	275	265	96 %	51,715	77,538	150 %

Source: TRI Consulting, *Golf Business*, vol. 11, issue 8

Dubai has actually the richest tourism infrastructure among all Middle East countries: most luxurious chain hotels, conference and shopping centres, etc. (tab. 1). Tourist attractions are nevertheless mainly created by special investments, which not only serve tourists but become tourist attractions on their own (Dluzewska, 2004).

Since 1990, tourism in the whole United Arab Emirates is experiencing constant increase concerning both the number of visits and the income generated by this sector (fig. 1, 2). A decrease in the number of visits had not been noticed even at the turn of 2002 and 2003, when many Muslim countries suffered from recession caused by September, 11.

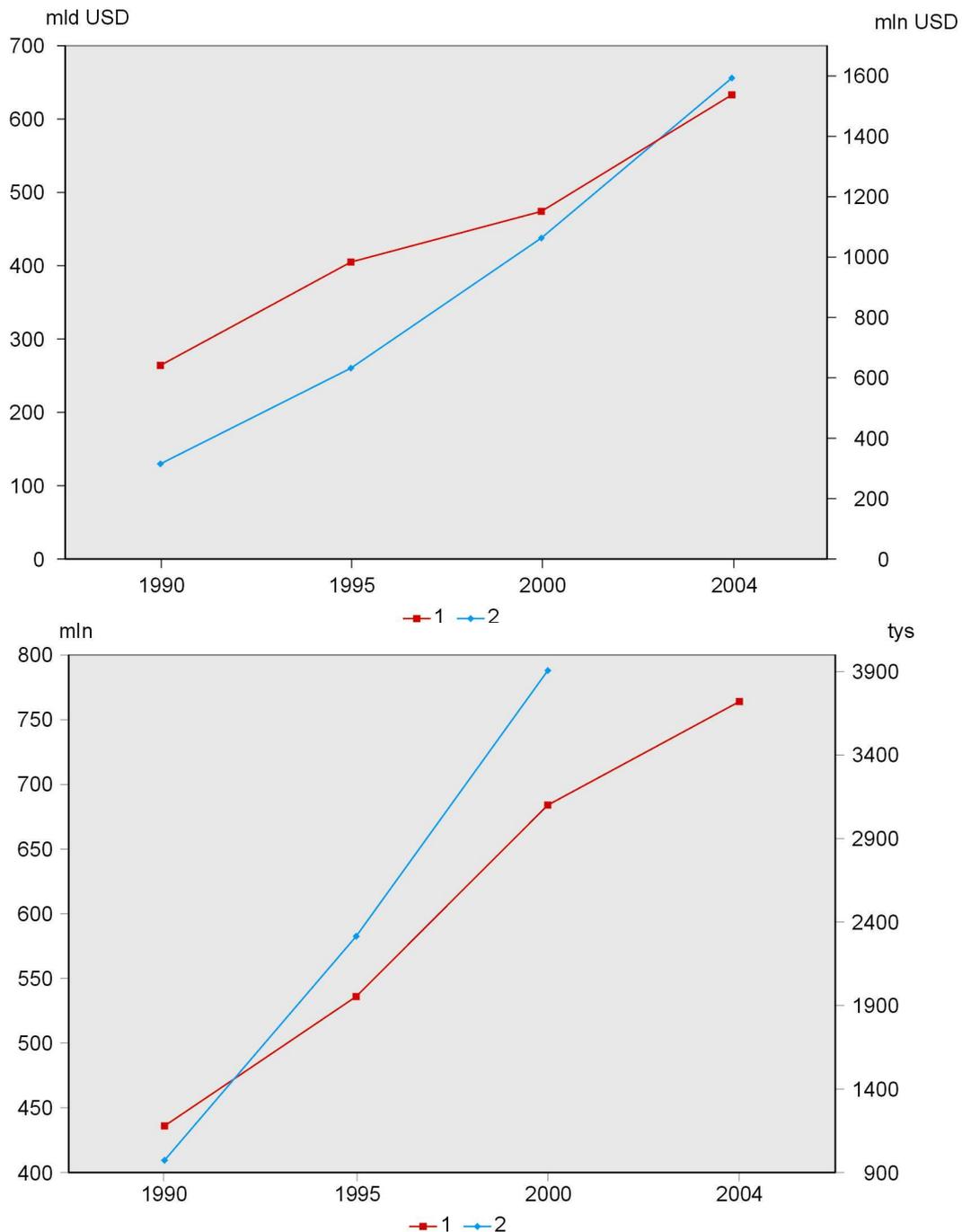


Fig. 1, 2 The development of tourism in the United Arab Emirates compared to the development of tourism in the world in 1990–2004 (source: UNWTO): 1 – world, 2 – Dubai: a – change in the income generated by tourism in the United Arab Emirates compared to the change in the income generated by tourism in the world; b – change in the number of tourist visits to the United Arab Emirates compared to the change in the number of international tourist visits in the world

Apart from directing the promotion towards Eastern-European markets, where the anxiety of the extremism of Muslim societies is smaller, the increase in income from tourism in Dubai, despite the relatively negative position of Muslim countries after the attack on WTC in 2001, was possible thanks to conference, festival and congress tourism. There will be no exaggeration in the statement that Dubai owes its position on the international tourism market to mega events. Trade and congress tourism in Dubai showed an increase of 10.1% in 2004 (in comparison to 2003), whereas leisure tourism increased by 3.9% in the same period (World Travel and Tourism Council).

Main sport events are organized in Dubai (tennis, Formula One Race, golf, sailing, etc.), film festivals, shopping festivals and fashion shows featured by most prestigious brands, numerous fares, congresses and conferences. New investments emerge constantly, aiming at further development of Dubai's position on the tourism market, which focuses on luxury mega events (Festival City, Media City) and objects constituting attractions for the participants of exclusive mega-events (Palms, The World, The Lagoon etc.). It is though worth stressing that irrespective of their scale mega events in Dubai have business or exclusive character. In the development plans of Dubai exclusive tourism focusing on mega-events has a crucial position (Dubai Strategic Plan 2015).

Thanks to numerous fares, congresses and festivals as well as to the reasonable price policy, tourism in Dubai does not suffer from seasonal tourism problems. Tourism flourishes and decreases only slightly in the Ramadan period and, due to high temperatures, in July and August.

The Dubai government leads a pro-tourism policy in both the investment aspect and image creation. The promotion campaign is most of all directed to business tourists: fare, workshop, congress and festival organizers. The recipients of the campaign are also the participants of standard trade tourism – Dubai is presented as a perfect location for business meetings with clients. Also shopping, family and motivation tourism are promoted. Within the scope of the leisure standard the target groups are only the participants of exclusive tourism. In the advertising campaign luxury (designer shops, luxury hotels and fashionable restaurants), modernity (architecture, artificial islands and lagoons projects), safety and friendly atmosphere is stressed. Indirectly, the information on the country's culture is also transmitted. Dubai has been created as a „place of miracles”, where tradition has been unified with modernity. The image of the country created in the campaign is to a great extent unanimous with the cultural reality (only the information on the advanced conservatism concerning women's dress is omitted).

The authorities also introduce „preventive” Policy aiming at elimination of some symptoms of culture shock possibly caused by tourism. In Dubai there are no casinos, alcohol is only available in restaurants of the most expensive hotels (there is a ban on alcohol consumption apart from indicated places). Sunbathing topless is illegal. There are no restrictions concerning exposing naked body parts in public. Wearing a swimming costume, even in the city centre, is not a crime from the legal point of view (Clements 1998, Government of Dubai Official website, law 2007, Ritter 1986).

Dubai is visited by tourists from all over the world. Tourists from Muslim countries are the dominating group – 60 % (including 17 % of United Arab Emirates citizens), 20% of tourists come from Asia (mostly India). Tourists from Europe make around 13 % (mainly Germans and Russians). 3% of tourists visiting Dubai are Americans (fig.3). Tourists from the former republics of the Soviet Union are visiting this country more and more often. In a sense these tourists replaced those from the USA – the number of Americans visiting Dubai fell dramatically after September, 11 (Dłużewska 2005, 2007a,b, Henderson 2006).

The statistics of the National Office for Dubai Tourism and Commerce Marketing point to the fact that the tourists visiting the country represent a better social status than before – this is a result of an increase of the scale of business tourism and the constant specialization of Dubai in the scope of luxury tourism offers.

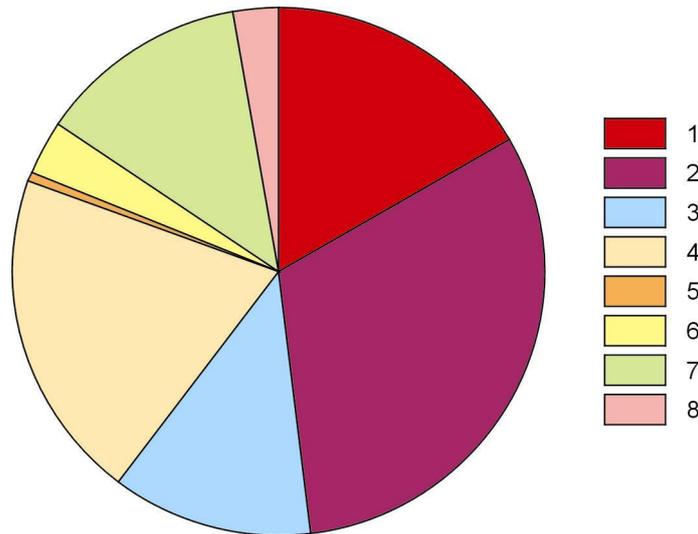


Fig. 3. The percentage of tourists from chosen countries visiting Dubai in 2001 (source: DTCM): 1 – other Emirates (UAE), 2 – other GCC countries, 3 – other Arab countries, 4 – Asia, 5 – Australia and the Pacific region, 6 – Africa (apart from its Arab part), 7 – Europe, 8 – America

RESEARCH FINDINGS

Natives

The level of social and cultural tourism dysfunctions in Dubai may be considered as very low. Nevertheless, some differences in the perception of tourist behaviour in the city of Dubai and in the Hatta oasis have been observed (fig. 4).

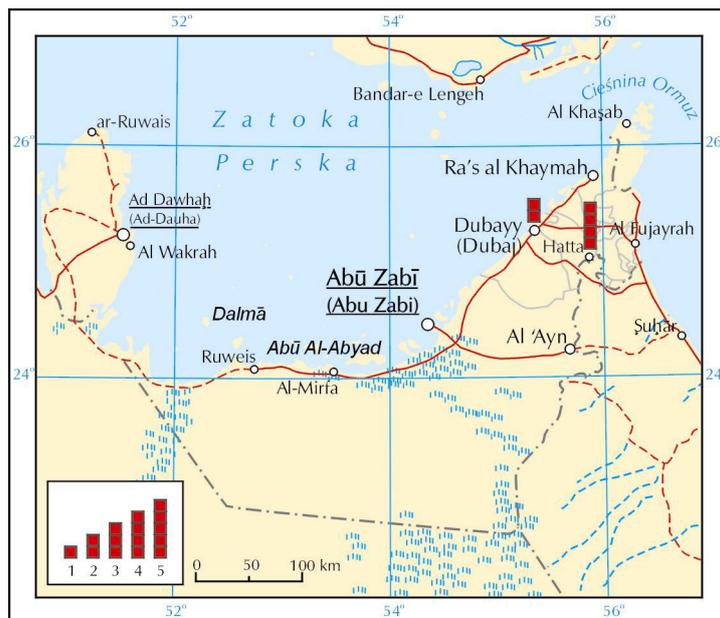


Fig. 4. The level of criticism towards the infringement of cultural norms by tourists according to the studies conducted in tourism areas of Dubai (own research made in 2004 and 2006) 1 – very low, 2 – low, 3 – average, 4 – high, 5 – very high

The inhabitants of Dubai have a very positive attitude towards tourism. All interviewees have shown high level of support for the development of trade and congress tourism of exclusive character. Due to the small number of citizens in Dubai and appropriate legal regulations all interviewees were directly or indirectly connected with the tourism sector. Tourism was for them

synonymous with economic development of the country. The Dubai citizens showed national pride of everything which attracts tourists: the only 7-star hotel in the world (when Abu Dhabi built its competitive 7-star hotel, Dubai decided to build one with 9stars), the islands called the eight world miracle, artificial skiing slopes, etc. The citizens of Dubai have the feeling of being the „world centre” – increasing tourism was in their opinion one of the proofs of this fact. Most of the interviewees had a feeling of holding control over the kind of tourism and the category of tourists visiting “their country”. There were answers such as „*we do not let no matter who visit our country*”, „*if there is something wrong with the tourists, they will be stopped at the border*” etc. No criticism was expressed towards tourists if not lead by additional questions. No behaviour was named, which would infringe local culture or be irritating. It was not earlier that after additional questions were asked, e.g. “*doesn't it disturb you at all when a female tourist is dressed in shorts and a bra*” (Own research – *Heritage Village*, Dubai, a restaurant by the boulevard at *Creek*), when the interviewees expressed their lack of acceptance for such behaviour. The interviewees „recalled” that some tourists indeed walk around „*almost naked*”, but they did not associate it with the representatives of a certain nationality or a certain type of tourism.

They explained such behaviour by indicating the special culture of the country where tourists come from. In this context they did not see the point in preventing such behaviours (fig. 5).

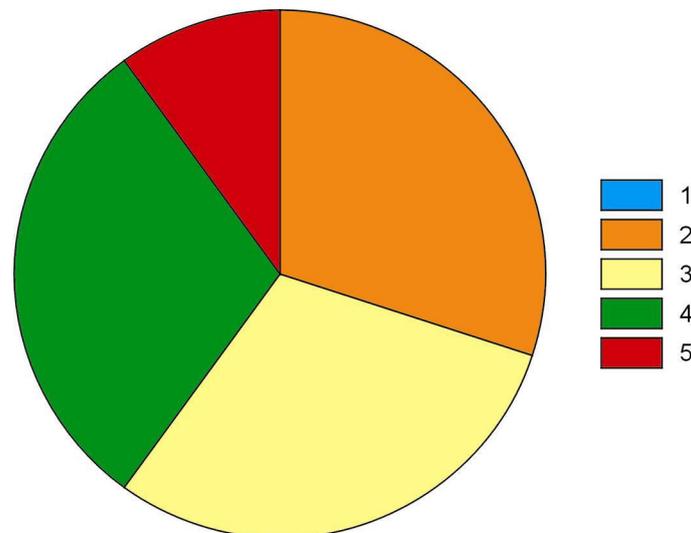


Fig. 5. The evaluation of tourist behaviour by the receiving community (based on own research in 2004 and 2006): 1 – the behaviour of tourists is „an offence to Allah”, 2 – the behaviour of tourists is unethical and primitive, 3 – the behaviour of tourists results from their culture – one should not interfere with it, 4 – the tourist behaviours results from their ignorance, 5 – I have no opinion on that issue

Tourists

Depending on the nationality of the interviewees there were huge discrepancies in the level of knowledge concerning cultural norms in Dubai and respect for local customs (fig. 6, 7). Tourists from India, Great Britain, USA, Germany and Italy were aware of the cultural uniqueness of the UAE and showed respect towards the rules concerning the outfit. In public places they put on trousers/skirts covering knees and shirts/blouses covering the neck and back. In the hotels, clubs and restaurants they put on dresses suitable for the given hour, thus it was common to see a cocktail dress in the evening with uncovered back and neck. On closed beaches and in the area of closed swimming pools they behaved freely.

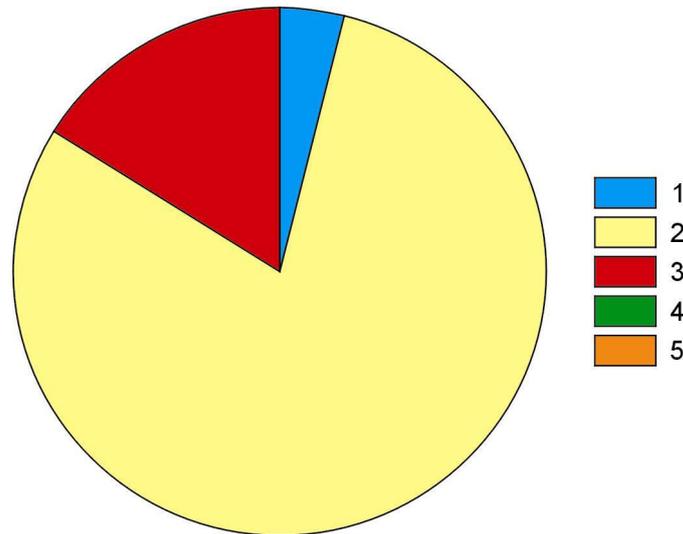


Fig. 6. The pledged attitude of tourists concerning cultural and religious differences (basing on own research made in 2004 and 2006): 1 – I adapt to the cultural differences in the hotel area, 2 – I adapt to the cultural differences outside the hotel area, 3 – cultural differences do not occur – Dubai is a tourism country, 4 – I am not interested in cultural differences – I am on vacation, 5 – the people of Dubai gain their income thanks to my stay and they should adapt to me

The tourists from the former Soviet Union republics did not actually differentiate between various types of space (private, public, etc.). Their outfit was dependent on the temperature rather than on any kind of norms. These tourists wore swimming costumes and scanty dresses in public places such as Heritage Village, Creek etc., paradoxically (because of the air conditioning) they covered their bodies in the hotel restaurants and bars. Such behaviour was observed in case of tourists from the former USSR regardless of the cost of the tourism they participated in, thus they encompassed also the participants of exclusive tourism.

There were no significant discrepancies between the behaviours with regard to the education level and the age of the interviewees

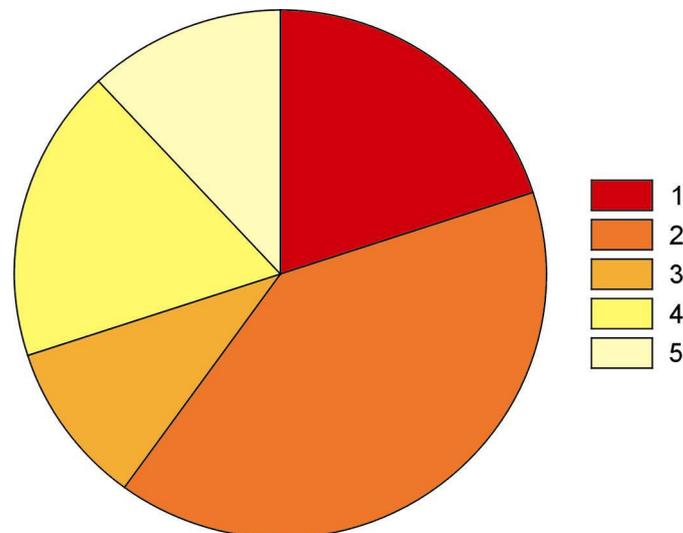


Fig. 7. The evaluation of the real knowledge of tourists on proper cultural behaviours in Dubai (on the basis of own research made in 2004 and 2006): 1 – very good, 2 – good, 3 – average, 4 – poor, 5 – lacking

Managers

The managers of hotels in Dubai are mostly foreigners. In the interviewed group only 1 person (the manager of the Kempinski Hotel) was a native of Dubai. The research conducted on a group of hotel managers allowed to gather information concerning the behaviour of tourists and the UAE citizens themselves, who are keen to rest in the most luxurious hotels.

The interviews confirmed the sexual freedom of tourists from former Soviet Union republics and the increasing problem of prostitution in some four-star hotels. Nevertheless, very disparate attitudes could be observed in this case. Managers of four-star hotels confirmed the observations of the author, yet they did not consider either of the phenomena as a problem. The kind and form of the offered entertainment, which they introduced to the hotels, could only escalate such tendencies. In quality hotels of the worldwide known hotel chains prostitution was restricted (by the form of entertainment, type of service, dress code etc.).

Instructions on the Dubai customs and local *savoir vivre* have recently been distributed in some of the five-star-hotel rooms. In the hotel information, under the paragraph dress code, apart from guidelines concerning the suggested dress in certain hotel restaurants, there is also an information on the necessity of a decent, non-sexual dress during a city tour.

CONCLUSIONS

The scale of social and cultural dysfunctions of tourism in Dubai is very low in comparison to the countries where the research was conducted. It is typical that a significantly higher level of social frustration caused by tourist behaviour was noticed in the Hatta oasis (sightseeing tourism), where tourism occurs on a far smaller scale than in the city of Dubai. This may indicate that business tourism, including mega-events, is low dysfunctional.

While discussing the issues of social and cultural dysfunctions of tourism in Dubai we should not forget about the unique proportions of indigenous inhabitants and foreign short-term employees. The proportion is currently 5:95. The domination of foreigners among the inhabitants of Dubai makes the indigenous inhabitants of Dubai more “used to” many types of behaviour. Due to the character of events, the participants of tourism which focuses on mega events do not significantly differ from engineers, tradesmen, doctors, university teachers working in Dubai on a contractual basis.

Also business tourists – participating in various fares and conferences, officers of trade ships calling at the port in Jebel Ali – behave similarly to middle and higher level employees working for UAE companies: they do not infringe local dress norms, norms concerning the consumption of alcohol etc. This applies actually to tourist of all nationalities. Their presence in Dubai is not a source of dysfunctions, which may only be associated with tourism, yet dysfunctions of other character are intensified – those connected with the considerable domination of men in this group. A large percentage of men staying far away from their families, both among the cooperators, the participants of business tourism and Muslim citizens of the neighboring countries, are the cause for spreading prostitution.

The results have shown that despite the common opinions, the planned development of tourism based mostly on mega events, can limit an extent the social and cultural dysfunctions. High rank of the events influences the increase of national pride of indigenous population (the impression of being the centre of the world) and eliminates many tourist behaviours which cause dysfunctions and which would have occurred in case of leisure tourism. Additionally, the domination of exclusive tourism enhances the level of refinement of tourists (which is due to, among other things, the education necessary to assume top positions). An important threat is rather the increasing number of tourists from Eastern Europe, who are not used to cultural differences and the behaviours resulting from such. The tourists of this category (irrespective of the aim of their stay and their financial status) have no qualms about wearing a bikini in the centre of the city, showing each other affection in public

or abusing alcohol. The preventive policy concerning this category of tourists, bearing in mind that the general tourist circulation should not be weakened, is at present the greatest challenge for the authorities in Dubai.

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THE NEW YORK CITY MARATHON: THE SOCIAL IMPACTS OF A MEGA-EVENT

Georgina Harris, Graham Busby
Faculty of Social Science and Business
University of Plymouth

ABSTRACT

Large events produce positive (Emery, 2002) and negative impacts which affect the community (Fredline, 2004). Previous research has predominantly assessed economic impacts (Hiller, 1998) therefore this study concentrates on the social impacts of the New York Marathon, a logical point of study as it is the worlds' largest single day sporting event (Anon, no date) and there is growing acknowledgment that social impacts can be substantial (Fredline and Faulkner 2000). It was found that the marathon is a mega-event and resident responses were predominantly positive towards its presence.

Key Words: Marathon; Mega event; Social Impacts

INTRODUCTION

Throughout the last two decades increasing attention has been given to tourism's impacts as resident's attitudes are important in successful tourism development (Ap, 1992). Mega-event research predominately concentrates on the Olympic Games. Waitt (2003) investigated Sydney and Teigland (1996) studied the impacts of the Calgary 1988, Albertville 1992 and Lillehammer 1994 Olympics on tourism. Getz and Fairley (2004) studied the Gold Coast Airport Marathon however there appears to be no research on the New York marathon's social impacts, therefore this study is important and aims to understand the New York marathon's affect on the community through resident responses due to it being a mega-event.

THE NEW YORK MARATHON AND THE SOCIAL IMPACTS OF EVENTS

The New York Marathon

The marathon is growing in popularity with 2,090 participants in 1976 (Traum, 1998) compared to 38,557 finishers in 2007 (Anon, 2008) and the 2006 marathon had approximately two million spectators (Anon, no date). For these reasons it is therefore logical to assess the impacts of this event as they have the potential to increase as the event grows in both participant numbers and popularity.

Social Impacts of Events and Tourism

Sporting events can create a shared entertainment experience (Bowdin, McDonnell, Allen and O'Toole, 1999, 2001) and special events can generate civic pride (Dwyer, Forsyth and Spurr, 2005). Events also generate a large amount of attention (Deccio and Baloglu, 2002) which can lead to the improvement of the area (Spilling, 1998) Tourism provides entertainment opportunities for residents also (Bramwell, Henry, Jackson and van der Straaten, 1998), therefore bundling of events may benefit the resident. The marathon organisers construct a number of non compulsory events such as a fireworks display, a runner exposition and reserved seating at the finish line. The majority of extra events are complimentary and open to the public; residents may therefore view the marathon positively as it provides entertainment for them. If the overall benefits outweigh the costs residents are willing to accept some negative impacts (Mason, 2003) which may exist.

Social costs may accompany the prominence resulting from events may (Hall, 1989) and benefits may be unevenly distributed (de Tolly, 2000). Increased noise is a negative impact of tourism development (Mason and Cheyne, 2000). Where the influx of tourists is seasonal impacts such as

crowding and congestion are heightened and become more noticeable to residents (Faulkner and Tideswell, 1997). This can also be said for events, where the seasonality effect disrupts local lifestyles (Barker, Page and Meyer, 2002). Badly managed events have wider effects on the community (Bowdin et al, 1999). Negative impacts include community alienation, negative community image, bad behaviour, loss of amenities (Hall, 1989). Throughout the New York Marathon traveling on race day is difficult (Anon, no date a) as most streets along the marathon route are closed during the race (Anon, no date a).

Problems may occur as residents and tourists simultaneously use public space, seeking different benefits from them (Bramwell, 1998). High concentrations of tourists attract negative attitudes (Pizam, 1978). This may occur throughout areas in close proximity to the marathon route where there is a significant number of runners in one area. All events may potentially have a social impact on the host community (Bowdin, McDonnell, Allen and O'Toole, 1999) and the larger the event, the more potential there is for negative impacts to occur (Getz, 1997), it is therefore vital to assess the impacts.

Define and Operationalise the Concept of a Mega-Event

From authors such as Persson et al (1998 in Hiller, 1998) Bjelac and Radovanovic (2003) Ritchie and Yangzhou (1987:20 in Hall, 1989), Getz (1997), Lloyd (2000) and Roche (2000) a definition in which to and to define the New York marathon as a mega-event and to measure the social impacts of the marathon, is operationalised:

For this study, a mega-event is defined as a tourist attraction, attracting large numbers of visitors for either participation or observing purposes, and affecting the entire host community through a number of socio-economic impacts.

Mega-events include sporting spectacles due to their mass audiences and celebrity presence (Hall, 1997), therefore, the New York marathon could be defined as a mega-event as seen from the spectator numbers and celebrity visits mentioned later. Also, Kurscheidt (2000) describes marathons as mega-events and the Chicago Marathon, which, ranks along New York in terms of finishers and commercial gain (Ramsak, 2006), is a mega-event (Suozzo, 2002). The New York marathon is the largest in the world (Anon, no date), therefore, if the Chicago marathon is a mega-event, New York is also.

However problems arise from several definitions. "The Olympic Games epitomize the concept of a mega-event" (Baade and Matheson, 2002:3) and characteristics of mega-events such as the Olympics or the FIFA World Cup are that they are bid for by competing cities (Gratton, Dobson and Shibli, 2000). However, this is not the case for the marathon which was founded by the NYRR and Fred Lebow (Anon, no date). In some cases the term hallmark event is utilized rather than mega-event. Hede, Jago and Deery (2004) state that the Olympics are a mega-event; however they describe the Boston marathon as a hallmark event. A hallmark event is "a major one-time or recurring event of limited duration and often developed to enhance awareness, appeal or profitability of a tourism destination over a short time" (Allen, O'Toole, McDonnell and Harris, 2002:13). Olds (1998) states that mega-events are also known as hallmark events, therefore, for this study, it is appropriate to remain using the term mega-event.

METHOD AND METHODOLOGY

The hypothesis states that the New York Marathon is a mega-event which has a significant impact on the social fabric of the host destination. The null hypothesis is that there is no relationship between the New York Marathon and the residents.

In choosing a sampling frame the type of information needed, the statistical quality of the data needed and resources available must be considered (Cannon, 1994). The sampling frame

included residents from the five boroughs visited throughout the marathon to gain a complete picture of the social impacts and allow generalizations to be made. The next to pass strategy was utilized to limit interviewer bias. Okuyama, Boonhai, Boonmee, Mananunsap, Charuchinda and Arai (no date) gained 172 resident responses regarding ecotourism development in Thailand. It was therefore believed this would be a suitable and reachable target for this study. Interviewer completion structured questionnaires were appropriate due to their ability to generate data from samples representative of a wider population (Veal, 1992). Interviewer completion would reduce misunderstanding and ensure a higher response rate. Tourists often use spaces that are primarily for the local residents (Pearce, 1995); therefore observation was undertaken throughout public areas.

FINDINGS AND DISCUSSION

A sample of 171 residents from Manhattan, Brooklyn, Queens, the Bronx and Staten Island were questioned resulting in a 37.4% response rate. 61.4% were male and respondents' aged between 16 and 50+.

More residents state that they would not watch the marathon, limiting Roche's (2000) idea that mega-events have mass appeal. However, here this test only focuses on residents, not spectators; therefore the marathon may have mass appeal due to fans of the sport watching. Also, the idea of mass appeal was not confirmed by other authors and therefore not included in the operationalised definition. This therefore does not mean that the marathon is not a mega-event; however it must be mentioned as it may become relevant if future elements of the operationalised definition are not confirmed by this study. If they are confirmed the idea of mass appeal will be neglected as it is only the opinion of one author.

There is a relationship between the perception of maintenance and the borough of the resident. 42.7% of residents disagreed and 16.4% were unsure that maintenance took place due to the marathon contradicting Persson et al (1998 in Hiller, 1998) who state that destinations hosting events are upgraded. Residents have even opinions as to whether their borough was maintained or not, arguing that the marathon is a mega-event based on Spilling's (1998) opinion.

80.5% of Manhattan, 52.9% of Brooklyn, 45.5% of Bronx, 57.1% of Queens and 30.3% of Staten Island residents believed their area to be more crowded during the marathon, correlating with Matheson (2006) and Barker et al (2002). It not surprising that a greater number Manhattan residents agree as the finish line is located here and Manhattan is New York's main borough, containing the many tourist attractions and hotels. An increased number of tourists will be in the city during marathon weekend. This could be termed an influx; therefore seconding Faulkner and Tidswell's (1997) opinion that an influx of tourists leads to crowding. It is to be expected that Staten Island residents did not believe their borough to be crowded as the start line is the only part of the marathon located here. The low figures for the other boroughs are surprising as the marathon covers several miles in each of these. The findings for these boroughs therefore do not correlate with Matheson (2006), however, overall their opinion that mega-events cause crowding is confirmed as when totaling the figures for all boroughs 53.8% believed crowding to occur. The marathon is therefore a mega-event.

75% of Manhattan, 91.2% of Brooklyn, 91% of Bronx, 80% of Queens and 75.8% of Staten Island residents were proud to host the marathon. Though not statistically significant this correlates with Ritchie (1984), Mill and Morrison (2002) and Dwyer et al (2005). The marathon can be defined as a mega-event as this finding agrees with Persson et al (1998 in Hiller, 1998) opinion that mega-events increase civic pride, implying that the marathon positively affects New York's residents.

83.3% of Manhattan, 85.3% of Brooklyn, 94% of Bronx, 77.1% of Queens and 94% of Staten Island residents believed the marathon to be entertaining, confirming Korca's (1996) and Bowdin et al's (2001) findings. Here residents may also be placed in Doxey's (1975) euphoria category. Bramwell et al (1998) state that tourism can provide entertainment for residents; as the

marathon is an element of tourism this study confirms this. As the marathon spends a significant amount of time in Manhattan and Brooklyn it is appropriate that they find the marathon entertaining. However it is surprising that a significant proportion of Staten Island residents find the marathon entertaining as this borough is only used as a starting point. They may believe this to be so due to the music played at the starting line or they may travel to another borough to watch the marathon, or visit events associated with the event, as noted in the literature review. However, this requires further research. This finding defines the marathon as a mega-event as when seen as a form of entertainment it may enhance the appeal of the destination, an element of a mega-event as stated by Ritchie and Yangzhou (1987 in Hall, 1989) and Kang and Perdue (1994), for tourists who either travel to support a particular runner, or for tourists only interested in the sport, an idea supported by Alper (2003 in Anon, 2003).

Only 31% believed that noise increased, contradicting Fredline (2004). However Fredline investigated the impacts of motorsports, where motorvehicles create a higher level of noise than runners which may account for this difference. However this study also contradicts Mason and Cheyne (2000) who state that increased noise coincides with tourism development, therefore it may be applicable that Fredline (2004) is refuted. These results are surprising as performing bands were noted within each borough. It seems appropriate that Staten Island suffered the least from noise pollution as the marathon spends the least time here. Some respondents noted that noise was offset by decreased traffic due to road closures. This may have been the reason for respondents disagreeing that noise increased.

55% of respondents disagreed with Fredline's (2004) statement that the ability to park decreased during an event. However, some respondents disagreed because parking is always problematic. It is to be expected that Manhattan was most likely to agree that parking would be difficult as this is the main tourist area and is therefore the most likely area for runners to congregate. With the marathon only spending two miles in the Bronx and less than one in Staten Island it is appropriate that these boroughs were the most likely to disagree with Fredline (2004).

83% of respondents stated that the marathon did not disrupt their lifestyle, disagreeing with Barker et al (2004) and Fredline (2004). It is not surprising that more Manhattan residents agreed that the marathon disrupted their life as this is the area with the most road closures and is also where the majority of runners are likely to be located as this borough contains the most hotels and attractions. The marathon spends the longest amount of time in Brooklyn, therefore it is unexpected that more residents from here disagreed that the marathon disrupted their life. However this may be due to a slightly greater number of Brooklyn residents deciding to watch the marathon, however more research is required. Some respondents stated that the marathon was a disruption, they were not necessarily unhappy about hosting it; therefore it cannot be deemed a negative impact.

81.9% of residents were happy to hold the marathon with the largest percentage being from Brooklyn and as the marathon spends the longest amount of time here there appears to be a positive perception of the marathon. No resident was purposely avoiding the marathon, thus contradicting Hall's (1992) idea of the displacement effect. Also, no placed in Ap and Crompton's (1993 in Busby and Hambly, 2000) withdrawal stage.

CONCLUSION

When analysing a range of authors their definitions allow the marathon to be defined as a mega-event with the most significant examples being the associated prestige associated and the ability to attract tourists. Resident opinions also confirm the operationalised definition.

The marathon had positive impacts upon New York's residents with the majority of respondents being happy to host it due to positive social impacts such as the marathon giving residents a reason to be proud of their city, the entertainment and the economic benefits available to the residents. However, the marathon also leads to several negative impacts, the most significant being

road closures and increased crowding. Despite these negative impacts this study argues previous studies of event impact, stating that impacts such as a decline in civil liberties does not necessarily occur.

RECOMMENDATIONS

Various recommendations have been made throughout the findings and discussion however others could be made. As the researcher employed the next to pass strategy there was no guarantee of what occupation a respondent had. No respondent was employed within the tourism sector therefore this study is unable to either confirm or refute the opinions of Haralambopoulos and Pizam (1996) and Ryan and Montgomery (1994) who state that those employed within tourism were more likely to be favourable to the industry. This area requires further research and again, qualitative research may be appropriate. Finally, as little research has been undertaken on the marathon, it may be appropriate to carry out this type of research over several years to see if a trend emerges.

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PERFORMING PLACE AND ETHNIC IDENTITY WITHIN ETHNIC TOURISM AMONG THE MIAO OF DEHANG VILLAGE WESTERN HUNAN CHINA

Liping Liu

Department of Tourism and Hospitality, University of Hawaii, Maui

And

Edward Ruddell

Department of Parks, Recreation and Tourism, University of Utah

ABSTRACT

This study explores how performative practice within ethnic tourism is used as a medium in which ethnic identity and place identity are constructed and negotiated by the locals. Place identity and ethnic identity are both subparts of self-concept for individuals. Performance theory suggests that performance can be used for identity expression, construction, or resistance. Through ethnographic research, this study focuses on the description and interpretation of Miao people's cultural practices and everyday life experiences as a means of identity performance in an ethnic tourism environment. This ethnographic work provides accounts of role playing among different groups of Miao people. By so doing, it examines the identification process and the self-acquired meanings in cultural practices and everyday life among both Miao elites and ordinary Miao people. The ethnographic fieldwork was carried out in Dehang Miao village, Western Hunan, China. Participant observation and unstructured interviews constitute the main methods for data collection.

Keywords: Place Identity; Ethnic Identity; Tourism Performance; Ethnic Tourism; Miao; Western Hunan

INTRODUCTION

In ethnic communities throughout China, "ethnic tourism" development has received increased recognition by both governments and local residents during the past two decades. The term "ethnic tourism" refers to the packaging of ethnic cultural activities, lifestyles, performances, and scenic spots for tourist consumption (Cohen, 2001). Officially promoted by Chinese state and regional governments, ethnic tourism has several purposes. Among these are economic growth, modernization of ethnic communities, and ethnic community unity.

The advent of ethnic tourism in the mid 1980s has provided local employment opportunities and economic diversity to ethnic communities (Li, 2004; Wang 2000). It has also offered a way to alleviate the uneven development of Chinese state resources, by drawing attention, investment, and labor to the sparsely settled inland of the Southwest (Harvey, 1993). Ethnic tourism has become a paradox for locals -- it demands that ethnic minorities be "relics of the past" in order for them to be modernized. Most prominently, this type of ethnic tourism is characterized by its stage performance either on a large formal scale or a smaller informal scale where the ethnic cultures, costumes, and stories are recreated and presented in an elaborate way. It is apparent that ethnic tourism has brought the "exotic" ethnic culture and their "mysterious" traditional way of living to the "front stage" (Goffman, 1959, p.22). The changes brought by ethnic tourism to local people and places can be viewed through economic, cultural, and political perspectives whereby local people's identities might be influenced in various ways, and to different degrees. As the main focus of an industry is on selling cultural symbols and ethnic life for tourist consumption, ethnic tourism is not limited to economic activities, it permeates the daily cultural-social reality of the locals. By providing political encouragement, the supportive and guidance role of the state and regional governments further amplifies the impact of tourism on the meanings of ethnic cultures. These kinds of practices under ethnic tourism influence ethnic cultural meanings of staged symbols, the productive patterns of ethnic locals, and power relationships in host communities. Along with the invasion of modern lifestyle

and transformation of physical landscape in villages, the collision between ethnic traditions and contemporary modernization seems inevitable. As a consequence, the villagers' life experiences, and their sense of self and sense of place differ from those of twenty years ago.

Under the force of change the villagers are not passive or powerless. Individuals' responses toward change are different, and their modes of reaction are not displayed in a homogeneous way. Generally speaking, how individuals incorporate and maintain ethnicity and sense of place depends on self-evaluation and the self-esteem that one associates with a role or ethnic group (Liebkind, 1983; Stryker, 1980), and with the place (Lalli, 1992; Twigger-Ross and Uzzell, 1996). Individuals who feel good about their ethnicity and sense of place are likely to internalize, maintain, and promote traditional identities (Breakwell, 1986; Korpela, 1989; Liebkind, 1984, 1992), whereas, those who think negatively about their ethnicity or place they associate with, often have a tendency to separate themselves from existing conditions and embrace changes. Some of that change includes the construction of new and different identities. The role that an individual plays in tourism performance influences that person's choice of response. Moreover, the meanings and expectations associated with the role and performance are of particular importance as they form a set of standards that guide action (Burke and Reitzes, 1991; McCall and Simmons, 1966; Stryker 1990). The diverse modes of reaction toward change and strategies used to cope with the change are connected to the internalized meaning of role. Without careful observation or analysis of the experience of ethnic people, it is difficult to spell out the subtleties of the modes of reaction.

Various scholars have noted that performance can be tactically employed by locals both for (re)constructing the desired aspects of identity and also for resisting the ascribed dimension of identity by others (Blacking, 1983; de Certeau, 1984; Liebkind, 1983; MacAloon, 1984; McCall & Simmons, 1987; Schechner, 1985; Turner, 1977, 1982, 1990). As rules and principles play roles in generating performative behavior, through scripted performance, cultural knowledge can be learned, rehearsed, and practiced among ethnic group members (Schechner, 1985). Locals' embodiment of identity may become possible under different larger contextual environments, but ethnic tourism serves as a most convenient and earnest appeal for locals' identity performances (Li, 2004; Oakes, 1998). By stimulating a re-imagining of place and ethnic identity, ethnic tourism further enables local people and areas to re-position themselves within regional and global economies (Li, 2004, Oakes, 1998). As "a double-edged sword," ethnic tourism provides a platform where locals are able to display their sense of pride, and to express and confirm their identities. It also opens up new ground to explore the politics of identity and power resistance in contemporary Chinese ethnic minority regions.

Through an ethnographic fieldwork in Dehang village Western Hunan China, this study describes and interprets how self-presentation and everyday life shape Miao people's ethnic role identity and place identity, and how individuals acquire self-meaning through role playing. This ethnographic work also provides an observation of interaction between hosts and tourists (insiders and outsiders), between stage performers and lay villagers, and the negotiation between villagers and government officials (either Han or Miao). By so doing, it examines the identification process among Miao elites, Miao cultural experts, stage performers, and villagers. Through the investigation of how ethnic tourism impacts the Miao sense of self and sense of place, the productive patterns of locals' performance, and power relationships in tourism host communities, it also aims to contribute to a better understanding of the processes of cultural transformation among minority groups when they experience radical changes and manage to live in this environment.

METHODS

I conducted several trips to Dehang village from 2004 to 2007. These initial visits helped me gain a preliminary understanding of the village setting, Miao culture, and Miao people. My three-month fieldwork in Dehang was carried out through late April to late July 2007.

Participant Observation & Interviewing

The techniques for data collection that I used in the field primarily included participant observation, informal interviews, audio and visual data collection, and a review of secondary sources. During the initial stage of my fieldwork, I spent most of my time observing people's daily life activities and building rapport with the locals. As my ethnographic work progressed and when there were opportunities, I sought to attend various activities and events, which furthered my perspective on identity performance among different groups of people within the Dehang community.

Activities and events that I participated in ranged from informal to formal or official, and fell into three categories. I was invited to attend the company's staff meetings on a weekly basis and to visit staff dorms. I dined at the canteen with company employees, and made trips to various locations in Dehang Scenic Park for sanitary inspections. In addition, I visited several schools for dancers and drummers' recruitment. I attended Miao drum playing tutoring sessions, Miao customs performance rehearsals, and Miao drum queen and king competitions, etc. I also participated in various family and farming activities. For example, I assisted in transplanting rice sprouts in the field, and chopping bamboo for basket making. I learned to graze cattle in the valley and do laundry in the river. I learned to greet the locals in Miao language, say a few Miao phrases, and sing a few Miao folk songs. I also accompanied villagers when they saw their relatives, visited the village Land Temple to worship local deity, and burned incense in front of the Guanyin Temple. I was invited to attend family funerals and Duanwu festival celebration, and so forth. I made several trips to Jishou University, which was 25 kilometers away from my research site, to discuss my research questions with Professors in Miao Studies. To explore the similarities and differences in deity worship among the local Han and indigenous Miao, it was recommended that I visit the Heaven Temple (Tian Wang Miao) in Yaxi, Jishou. On the Miao festival Siyueba (fourth moon eighth day), I was invited to attend the celebration ceremony in San Jiang, Fenghuang County. The ceremony was coupled with a scholarly presentation and discussion on Miao festival studies. I also made a trip to Fenghuang County to visit the Miao Museum. There I had a two-hour discussion about tourism policy in the region with Long Wenyu, the former vice governor of Xiangxi Tujia and Miao Autonomous Prefecture.

During the data collection process, I attempted to maintain veracity and objectivity (Stewart, 1998) by using a more interactive approach. Before knowing the community very well, I primarily relied on informal, open-ended conversations. Some initial daily conversations were intended to yield general information about ethnic tourism and changes. After living in the village for some time, more focused, open-ended interviews were conducted with specific persons who, upon investigation, were believed to have specialized knowledge.

I sought out four different groups of people for interviews. The first group I interviewed was comprised of Miao intellectuals, Miao cultural and ritual experts and practitioners, Miao song masters, and a Miao peasant filmmaker. My interviews with this group benefited greatly from the interviewees' hospitality, enthusiasm and openness to sharing their stories with me. Their answers to my questions sometimes appeared to be less cohesive, but were always poignant and down to earth. The second group of interviewees included dancers, drummers, program directors, choreographers, tour guides, and other employees of the Dehang Tourism Company. My interviews with this group were spontaneous and generally conducted at their office, dorm, canteen, performance sites, or village courtyard. The third group was Miao elites and government officials, both current and retired. This group represented the dominant force in shaping Miao cultural staged performance at my research sites. The final group was lay villagers who's age-ranged from 30 to 80. In contrast to the other three groups, this group of people seldom exposed themselves to a researcher or an ethnographer; I thus paid special attention not to press for any further information once I discerned a slight uneasiness or signs of discomfort during our conversation or interview. Questions directed toward individuals in different groups varied, but occasionally overlapped. For example, some questions concerned how they felt about village tourism. What satisfaction did they gain from their cultural practices? What support or obstacles did they encounter during their participation in Miao cultural activities? What differences did they experience before and after tourism in the village? And, how did they perceive their physical environment and the life changes brought about by tourism?

During field research, I used a small digital tape recorder. I always requested permission before recording people talking, singing, drumming, or playing music. Sometimes taking notes was difficult at an interview site. Therefore, relying on memory upon returning home at night I immediately wrote down my experiences from the day. Collecting printed materials or artifacts from the site was helpful in retrieving the information and refreshing my recollection of experiences not otherwise recorded. Those artifacts included video and audio CDs of Miao folk songs, drum dancing, and the printed materials made available to tourists. These materials described the programs; provided maps of the site, and other information. They served as important supplementary sources and visual evidence for data analysis.

Respondents were assured of confidentiality. I chose to use pseudonyms for identifying some interviewees when reporting their words; for some I used real names after gaining verbal consent. As an interviewer, I was constantly aware that I was acting as an active participant in co-constructing the conversations, and I acknowledged my influence in guiding the topics and encouraging talk about specific goals for this research.

Data Reduction & Drawing Claims

To begin data analysis, followed by downloading my audio-recorded interviews from my digital recorder to my laptop, I first transcribed them verbatim in the language recorded, mostly in mandarin Chinese or Xiangxi dialect, and then translated them into English. Afterward, I returned to the recordings and listened to them while reading the transcripts to fill in any portion of the recorded segments that were inaudible due to overlapping speech or background noise. During the transcription process, I paid particular attention to cues that might convey facts and feelings such as “pitch, loudness, strength, speed, pronunciation, and sounds that are not words” (Baum, 1991, p.26). In reviewing transcribed audio-recorded interviews, I made footnotes and added comments which provided contextual information and helped me clarify coding categories. For those recordings in Miao language, Yang Yujie, my hostess in the village helped me translate them into mandarin Chinese. I later reviewed them with her and clarified unfamiliar terms and concepts that were used during the interview.

Data reduction involved reviewing field notes to search for cultural symbols that were usually encoded in local terms and relationships among those symbols. To prevent myself from becoming overwhelmed by the growing data and accumulation of preliminary codes, I adopted one technique suggested by Glaser and Strauss (1967) of writing initial memos on themes, phenomena, and patterns that appeared most frequently across a number of specific incidents. I looked for themes, issues and recurring motifs within these observation field notes and transcribed interviews. During the process of close reading, I highlighted areas that reflected identification, representation, and contextual features directly, or that contained ideas that were repeated. Through this reading I began to conduct line-by-line categorization of ideas, themes, and issues, a procedure known as open coding in seminal writing as developed by Glaser & Strauss (1967). I tried to seek indices of saturation, such as repetition in the information obtained and confirmation of previously collected data and developed working themes that explained the behavior under study. As a result, themes and meanings were derived gradually from my field notes and recorded files that documented ritual, costumes, language, and other symbols representing the dynamics of Miao distinct cultural performance.

PERFORMING MIAO

Multiple players actively participated in Dehang’s ethnic tourism. The dominant forces were represented by local government officials and the Dehang Tourism Company management team, which in this paper were categorized as Miao elites. Mr. Deng Yaping, president of the Dehang Tourism Company, for example, has been a key architect for the village tourism development. As a native Miao, Deng is also a well-known writer on Miao history and culture in Western Hunan. Not

only has he had several books published, he has also written all the scripts for masters of ceremony and a number of lyrics for the Dehang daily show. His engagement in Miao cultural production work has brought him intrinsic value and prestige. Deng's enthusiastic support for my research on Miao culture and his personal recommendation that I observe and report on their works, itself demonstrated the expressive practices of his identity and ethnic pride as a member in this group. Deng avowed a lofty inspiration behind the Miao cultural work in which he had been engaging. Using his own words, the alleged purpose of his work was because he felt "proud being a Miao", and "it was my duty to do something good for my folks." (personal field notes, June 2007). In the eyes of Miao elites, the marketizing climate in ethnic tourism was not seen as "corruption of culture", rather as a way to preserve and celebrate it through commodification, and as means to construe the Miao identity. The endeavors that Miao elites undertake for cultural production within tourism development have not only become their opportunity for manufacturing the identity of other people, but also resulted in an occasion for the exploration of their own personal identities associated with social status and prestige.

My accounts gathered from field study highlight local response and cultural practices among ordinary Miao people, namely the Miao drum dancers, intellectuals, and village folks. It traces individuals in each group demonstrating how they embraced or reacted to change, and took part in the cultural performance within ethnic tourism. Miao drum dance in Dehang, as a symbol of Miao tradition, not only served a purpose for tourism, but also played a part in shaping the performers' ethnic and place identity. In Dehang, five generations of Miao Drum Queens and two generations of Miao Monkey Kings have been proudly honored and also honored, by association, was the village in which they live. Ethnic tourism has made Dehang well known as a home of Miao drum dance. The Long family in Dehang has been well known in the region for producing two generations of Miao Drum Queens. Long Julan and Long Juxian, two sisters from the family, were elected as the third and fourth generation Miao Drum Queens respectively in 2002 and 2004. Members of the performing troupe in Dehang actively embraced the opportunity for tourism performance through their earliest appreciation and enthusiastic participation in Miao drum dance.

The Dehang evening show that was dubbed Mountain Customs and Drum Rhythm (*Shanfeng Guyun*) emphasized the remoteness and quaintness of the Xiangxi locale while accenting Dehang as the home of Miao drum. A team of sixty or so young women, and a few young men, sang, danced and played drums in highly choreographed programs. The drum instructor Ma Fubao abstracted among the Xiangxi Miao two types of drumming, which he called *ji gu*, meaning pounding the drum (the ox skin part) and *qiao bian*, meaning beating the edge (the wooden part). The former aimed at maximizing the strength and volume of each pounding, and the latter prioritized variegating the compositions of rhythm in beating. Most Miao drumming in Xiangxi combined both while the "pounding" element was the most important characteristic of the Miao drum. The dominance of the pounding model had appeared just naturally. Both males and females participated in the performance. From stage setting, performers' costumes and make-up, to performers' *xing* and *sheng* (posture and expression), the production of the aesthetic Miao drum performance was designed to affect audiences' emotions and to make-believe that Miao drum playing was an enactment of Miao mythical heritage. To Miao drum dancers, the performance itself had seemingly become moments of embodiment of the Miao identity, whereby their sense of freedom, sense of continuity, and self-esteem were enhanced.

Miao intellectuals, in the meantime, organized and engaged in diverse forms of Miao cultural practices. While expressing resentment toward the dominant cultural production, individuals in this group strove to act independently from government influence on behalf of all Miao by autonomously organizing cultural resources such as Miao folklore, various arts, music, and artifacts for their self-presentation. Shi Shougui, 8th generation of *Miao Bat Deb* (Miao ritual masters) was a prime example of representing this group of indigenous cultured Miao people. Through inheriting and acquiring knowledge, skills, and resources for performing Miao rituals at weddings and funerals, Shi had become a well-known *Miao Laoshi* in Western Hunan. Not only had Shi been busy conducting Miao ritual ceremonies, he had also been actively engaging in research on

Miao history. Shi felt compelled to bring the lost *Miao Bat Deb* culture back to life. His paper on *Miao Bat Deb* Culture presented in front of the Symposium of Construct Cultural Xiangxi and Xiangxi Cultural Celebrities (*Jianshe Wenhua Xiangxi Ji Xiangxi Wenhua Mingren Yantaohui*) held in Fenghuang in August 2005 had caught attendees' attention. Shi contended that it was misleading for Han Chinese scholars to frame Miao culture as *wu* (witchcraft) culture. Those Chinese terms such as *Wushi* (shaman), *Miao Laoshi* (Miao ritual masters), or *Miao Fashi* (ritual practitioner) did not accurately reflect the real meaning of Miao culture. "It is time to return the original features of Miao culture," proclaimed Shi. By reifying Miao historical legends and manufacturing a "make-believe" effect, this sort of "bottoms-up" approach could be compelling in countering the dominant definition. Although the content or the format of their practices sometimes appeared contradictory, over time the common goal revealed behind their self-presentations was to affirm the players' avowed dimensions of Miao identity in contrast to the stereotyped cultural representation supported by the government and Miao elites who represented the dominant force.

Local Meaning of Miao Role Identities

My analysis of role identity performance among the villagers accentuates the interplay of multiple role identity practices in daily activities. The multiplicity of various domains of identities comprising the positions of the class subject, the commodified subject, and the gender role coexisted in a person's daily existence. By taking on a role in a specific time and occasion, a villager adopted expectations imposed by society or others. When a villager demonstrated a commitment to or investment in the role, he or she created and preserved self-meaning as a Miao in the community. Due to competing duties and interests, role performances among lay villagers were often achieved through conflict and negotiation.

The class divisions in the village between the urban and the rural, the tourists and the locals, the Miao elites and the lay villagers, the Tourism Company employees and the villagers, and the rich villagers and the poor farmers were apparent. The villagers' social lives were full of moments in which status and position compared to other Miao or the mainstream culture was negotiated. The villagers based their sense of ethnic difference on different income levels and social prestige. The class issue for understanding this rests on how class distinction in terms of resource mobilization either facilitated or obstructed a sense of ethnic distinction upon the villagers. In this way, class distinction is considered a social condition and social medium for the development of ethnicity, rather than solely being a contradictory and competing factor.

The costumes of batik and embroidery, the emblem of Miao culture, had been the main items defining the female subject-position and sense of self-esteem among the Miao. Much of the symbolism surrounding Miao female art work today is associated with Miao historical legend. Those Miao women who maintained the skill of Miao embroidery were mostly illiterate and over fifty years of age. They said many designs and patterns of their works of art were not fixed, but improvised. Their sources of creativity came from their belief system and daily life experiences. For example, as animism was permeating Miao's life, Miao people attributed conscious life to natural objects or phenomena, a practice that eventually gave rise to the notion of a soul. As such, the art works by Miao women aimed to reveal the beauty and sublime essence of nature. The imaginative combination of flowers and animals was embodied in designs, such as, *feng chuan mu dan* (phoenix wears peony), and *shi liu cheng die* (pomegranate transforms a butterfly). The patterns also incorporated the mix of a fish and a bird, pig dragon, lion-head dragon, and so on. Some elder Miao village women were following the conventions and faithfully playing their virtuous roles at home while some middle-aged Miao women could hardly conceal their agony and despair when facing domestic maltreatment. For some village women I talked to, the development of ethnic identity was dependent on their consciousness of being a poor and deprived woman. Their gendered identity became the repository for their sense of deprivation, and failed to be improved by the rising consciousness of being a national and minority subject.

In the meantime on particular occasions tourism seemed to offer a source of empowerment

for women. These occasions sometimes also impelled and informed individual Miao women to produce self-representations. In Jidouzhai, for example, some Miao women who had experienced the problems associated with being daughters and wives spontaneously joined together in singing or drum playing to censure those who had created difficulties for them and, increasingly, to criticize the social and political system that allowed or brought about the abuse. Some Miao folksongs provided a cultural resource and an alternative perspective on the lives of Miao women. It was an alternative way of understanding one's life path and oneself as female. The stress for a woman as a caregiver in the family and a victim of an abusive mother-in-law, or a violent husband was revealed in one type of Miao song called *ku ge* (sorrow or bitter song). The theme of *ku ge* was centered in the expression of being a woman deprived of economic, educational, and social necessities. A song *ku nv lei* (a bitter woman's tears) told a story of how a daughter-in-law had to endure bullying and abuse by her mother-in-law and then had to swallow sorrowful tears by herself. These critical Miao songs, composed and sung as long as the oldest women could remember, have been re-created and sung by younger generations in the village.

Villagers' Place Identity and Performed Resistance

People living in mountainous areas like Dehang and other regions of Western Hunan came to identify themselves as *shan li ren* (mountain persons). The mountains and the place where Dehang villagers lived played an important role in shaping the Miao identity. Those mountain persons' beliefs, feelings, behaviors, and personalities over generations of time became a reflection of their physical environment. Dehang villagers demonstrated their personalities as mountain persons with traits of kindness, simplicity, hospitality, hardiness, resilience, and stubbornness. Villagers' physical and emotional attachment to the land and place was powerful, and often personal. This kind of attachment contributed to the villagers' sense of distinctiveness, and well-being, as well as their sense of being "remote" and "backward".

Each year on the 2nd day of the second month, the birthday of the land God, villagers in Dehang gathered at the village Land Temple (*Tudi Tang*). They killed a pig and two chickens on the site, and brought their homemade wine and food to the temple for worshiping the land deity. Whenever the village suffered a drought, villagers came to the temple to pray for rain and good harvest. For the villagers, the land deity had become an omniscient god who protected villagers' life in every aspect, such as his efficacious power of curing human illness. When a child was sick, the mother would come over to fetch a handful of ashes out of the censers at the Land Temple and brew them at home for the sick one to drink. If people had neglected making offerings to him, the deity would fail to protect the village, its children, its crops, its animals, and its tress. The tradition of worshiping land deity was the materialization of villagers' place-based identity. The worship of land deity affirmed the continuing potency of the natural village. Natural disasters were commonly regarded as curses to human's lack of reverence to the land.

Despite Dehang's popularity as a tourist site in recent years, villagers maintained a strong sense of remoteness and hardship defined by the mountains. Place identity, accentuating agricultural locality, was still prominent among the villagers who were living there. A villager's experience might have more to do with his or her own perceptions rather than with the physical constraints of the place where one lived. While some villagers were enthusiastic in presenting their place to outsiders, some tended to attribute their misery to the physical environment where opportunity for development was limited. Consequently, their perceptions and attitudes toward the place became ambivalent even negative. In the eyes of some local villagers, living amidst the tall mountains, their sky views might be blocked, lives impoverished and future limited.

Villagers expressed that ever since the Dehang Tourism Company took over the village's tourism business, the natural resources and Miao cultural heritage had been largely appropriated for commercial purpose. Villagers felt marginalized and pushed further into poverty as a result of the development of tourism. Based on the agreement between the Tourism Company (Party A) and the Jishou Municipal Government (Party B), Party A pays 400,000 yuan annually to Party B for "buying

off the management right” in running the tourism business in Dehang. Between 2002 and 2004, the Jishou Municipal Government gave 70,000 yuan, and in 2007, gave 98,000 yuan respectively to the village collective. The village collective received 168,000 yuan total. The villagers thought it was their right to demand the remaining 232,000 yuan. In May 2006, the villagers sent a petition to the municipal government demanding payment. The petition was rejected. The municipal and township governments sent officials to speak to the villagers and attempt to pacify them; however, the villagers did not give in. They continued submitting petitions to the municipal government, but no further response was ever received. As a result, on November 27, 2006, the villagers of Dehang congregated and blocked the entrance of the village, which was also the entrance of Dehang National Scenic Park as designated by the Ministry of Construction in China.

All villagers participated in the month-long protest. It was a peaceful sit-down demonstration. There was no violence. According to the villagers, the planned protest was conceived and discussed for months among village leaders. They scheduled it during the winter season, so no agricultural work would be delayed. During the first two days of the protest, the village leaders demanded a meeting with the leader of the Tourism Company. Deng Yaping, President of the Company, arrived and participated in a dialogue with village leaders, but no agreement was reached. Deng advised the villagers to be rational and attempted to persuade them to return home. No villager was willing to withdraw. On December 27 2006, the Jishou Municipal Government sent more than five hundred police to Dehang to suppress the protest. At the end of the day, seven male villagers were taken away by police to the Jishou municipal jail.

Apparently, the protest became a power struggle between three parties: the Dehang villagers, the Tourism Company and the Jishou Municipal Government. After listening to the villagers' complaints, I also spoke with several people from the latter two parties to learn their points of view regarding the incident. I heard comments and discussion about the incident from the leaders and staff of the Dehang Tourism Company, government officials, and tourists. Synthesizing the information I gathered from these groups, the following three issues emerged: 1) whether the villagers' request of the Company was reasonable; 2) whether the villagers' strategy of blocking the entrance was appropriate; 3) and whether the government's action of utilizing police to suppress the protest was lawful.

Both the managers and employees of the company with whom I spoke acknowledged that the villagers' action in blocking the entrance had caused great harm to the company's business. During the one-month protest, no tourist was able to enter the village and the company faced grave difficulties in conducting business operations. They assumed the protest had hurt the image of Dehang as a tourist destination as well as Fenghua, Zhangjiajie, and other nearby popular tourist sites. The company believed that if the protest was not dismantled by police, tourism in Western Hunan would drastically decline. Ultimately it is estimated to have taken the company more than two years to recover from the financial loss caused by the protest. Some employees of the company said the villagers' irrational conduct had heavily undermined the region's shehui hexie (societal harmony). The heads of the Dehang Tourism Company believed that they had fulfilled their responsibility according to an agreement created with government officials in which the company paid the government an amount necessary to purchase management rights. As an investor and business entity, their goal was to make a profit. The Company believed the Jishou Municipal Government, as representatives of the villagers, was obligated to deal with the villagers. They regarded the villagers' demand as unjustified, and believed it was the government's responsibility to mediate the dispute. At the same time, the heads of the Company admitted that while running this tourism program, they had been dealing directly with government officials instead of with the Dehang villagers. They thought that cooperation between the Company and the government was most crucial to their business success. They failed to realize the importance of the villagers' concerns.

The Jishou Municipal Government and the Dehang Tourism Company seemingly shared a common interest in developing Dehang's tourism. They claimed what they had done was to promote the Miao culture and to improve villagers' standard of living. The government officials viewed the

villagers as being irrational and unreasonable. They emphasized that their intention in helping Dehang develop tourism was to benefit the villagers. With the strategy of so-called *jie ji sheng jin dan* (borrow the hen to lay the golden eggs), the government had to rely on the Tourism Company's capital and management expertise to turn Dehang into a tourism destination.

The protest in Dehang demonstrated that there were multiple players in the process of tourism development who had competing interests, such as how prestige would be accorded, and convergent values, such as the longing for profit. Loss of control by the villagers, whether in preserving the village's natural and cultural resources, realizing tourist income, or directing planning, was the primary cause for their conflict with the Tourism Company and the government. The Dehang villagers' protest had created a significant moment in villagers' lives and social circumstance. As members of a "backward" minority community commonly portrayed as unselfconscious and tradition bound, the act of the Dehang villagers protest reverberated in ways that marked them as active and aware, in charge of defining themselves, dominated neither by their weighty past nor by the subsuming mainstream. By confronting the government and the company, reclaiming their place and their resources and sharing their stories and grievances with outsiders, the villagers' avowed place identity was negotiated. Although they might not have their voices heard in a dominant way, the Dehang villagers did represent a group of people who share the experience of ethnic tourism and simultaneously play a role of displaying their self-defined place identity. While the outcome of the villagers' protest might not be clearly defined, the enactment of identity itself as a type of Miao place identity construction and power resistance certainly had potential to enhance locals' empowerment and to bring positive social change.

SUMMARY

I consider the unique aspect of this study to be the analysis of how individuals in different groups acquire self-meaning through role playing within tourism. Those different modes of role playing concern both staged and everyday life spheres of identity performance. Identity performances range from formal, informal, or private settings. The roles that an individual plays are often overlapping; sometimes an individual in the community belongs to several different groups simultaneously. I have looked at the conflicting aspects as well as an individual's endeavors in achieving role harmony in identity performance. I have also mentioned how an individual's choices relay their engagement with a wide range of images, objects and practices. Everyday life and daily work practices among lay villagers, stage performers, cultural experts, leaders and employees of Dehang Tourism Company achieve various levels of visibility of identity performance.

More specifically, at the staged tourist performance the focus lies in the arena of the demonstration, which depicts Dehang as a real Miao village. In these public settings, individuals like Miao elites, government officials, drum dancers, tour guides, managers and employees of Dehang Tourism Company also express information about their conceptions of self as Miao. I have described how Miao identity influences Miao elites, in role playing when "serving his folks" and writing about Miao history. I have pinpointed how cultural performances like the Miao drum dance can be used to express Miao cultural identity and place identity of Dehang.

As for the Miao intellectuals, I have traced their practices in attempting to restore Miao culture despite the frustration of lacking government support. Their complaints about the dominant cultural production by the government and Miao elites have not stopped them from undertaking their own pursuits. By engaging in activities such as organizing Miao rituals, conducting research about Miao history, writing books about Miao, singing Miao folksongs, filming movies, educating the young generation to play *lusheng*, or sharing their knowledge of Miao culture, the expressiveness as Miao is evident. Behind their performative practices lie their aspirations for achieving self-esteem, cultural distinctiveness, continuity, and change.

With Xiangxi people addressing themselves as *bendi ren* (local persons), and Dehang villagers identifying themselves as *shanli ren* (mountain persons), I have paid special attention to the

connection between the people and the place. In particular, I have looked at the issue of how the place and the mountains shape the villagers' identity as Miao. Both positive and negative perceptions of the place and the mountains have worked to construct the Miao identity. Villagers' daily life practices and narratives have shown their attachment to place. The villagers' protest incident that occurred in the winter of 2006, on the other hand, represents a more marked event. I have included accounts from both perspectives: the lay villagers on one side, and the Dehang Tourism Company and local government on the other. Politics and power struggles among different interest groups involved in the incident can be far more complex than this paper has revealed. As Liebkind (1984) points out, the identity construction process is full of moments of conflict. Additionally, resistive practices against ascribed dimensions of identity comprise a major part of identity performance. I have interpreted the incident itself as a means of identity negotiation among the villagers.

Departing from most studies on Miao in Western Hunan, the present study uses the lens of both stage and daily life performances by Miao people within ethnic tourism to study how individual's ethnic identity and place identity was constructed, enhanced, or negotiated. From the performance perspective, this project examines various modes of performance by different groups of people, and emphasizes the self-meaning assigned by each player. It also highlights day-to-day locals' environment dynamics that were occurring at the village level in 2007. My role as an insider participant allowed me to directly participate in and observe the daily routines of local residents, so that I was able to gain an intimate view of local people's sufferings, strengths, and "weapons of the weaker" in terms of access to and control over cultural and natural resources. In particular, I explored the problems and conflicts in the community that I might otherwise have never known without an interactive experience and ethnographic study.

My research, undoubtedly, was constrained by not living in the village over the entire agricultural year. Since some of the Miao rituals and festivals occur at certain times of the year following the lunar calendar, I was only able to see a recording or a replicate of the events instead of witnessing the occurrence in person. Moreover, the discrepancy of data was a challenge that I encountered constantly in the field. Villagers' memories were sometimes unreliable, not only was what they remembered different from the actual event, as evidenced by interviewing divergent people, but they also offered different versions of the same event. Using multiple sources of data allowed me to crosscheck various testimonies.

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THE REVERSE SIDE OF THE MEDAL: ABOUT BEAUTIFICATION PROCESSES AND THE EFFECTS FOR THE 'ORDINARY PEOPLE'

Caroline Newton
Departement Industriële Wetenschappen en Technologie
Erasmus Hogeschool Brussel
Partner in the University Association Brussels

ABSTRACT

In 2010 South Africa will host the FIFA World Cup. The costs are estimated to be more than 2 billion euro. The country is preparing itself to welcome and accommodate over 50.000 football fans and expects that about 27 million spectators around the world will follow the cup on TV. The international media will show the world all good things South Africa has to offer.

It is clear that a mega-event, such as the World Cup, can contribute to the image of the country and to that of the host cities, hence attracting not only tourists but also businesses. Thus, one has to look smart and show its best side to the world. To accomplish this, the government has engaged in a process of 'beautification' of the cities.

This paper aims to show the reverse side of the (football) medal. The N2 gateway project in Cape Town, is presented, by government and media, as a 'flagship' project of the new BNG (Breaking New Ground) strategy, to fight the housing backlog of 400.000 houses in the city. But I want to argue that the fast-tracking of the project has to be understood as a beautification strategy to prepare the city for 2010. Massive slum eradication and the construction of 'beautiful formal housing opportunities' between the airport and the mother city are becoming a painful reminder of the forced removals under the previous apartheid regime. With this paper I want to make a plea to be conscious about the 'lower scale' human effects of mega-events and for an equitable distribution of funds.

Keywords: mega-events, beautification processes, Cape Town, slum eradication, South Africa, urban development

INTRODUCTION

In 2010 South Africa will host the FIFA World Cup. The costs are estimated to be more than 2 billion euro. The country is preparing itself to welcome and accommodate over 50.000 football fans and expects that about 27 million spectators around the world will follow the cup on TV. The international media will show the world all good things South Africa has to offer.

It is clear that a mega-event, such as the World Cup, can contribute to the image of the country and to that of the host cities. Hence, one hopes to attract tourists and businesses alike long after the event has finished. Besides investments in infrastructure, such as stadiums and transportation, the South-African government has also created a broad developmental agenda around the event. Pillay and Bass (2008) point our attention to the fact that the issues which are included in this agenda build on those from the previous Olympic 2004 bid, such as sport programmes for deprived communities and job creation or, interesting within the frame of this paper, the provision of affordable housing (Hiller, 1998, 2000; Pillay & Bass, 2008).

This brings us to the focus of this contribution, namely the N2 gateway project in Cape Town, presented, by government and media, as a 'flagship' project of the new BNG (Breaking New Ground) strategy, to fight the housing backlog of 400.000 houses in the city, and fast-tracked within the light of the coming World-Cup. I want to argue that this housing initiative has to be understood as part of the 'beautification process' initiated by the government to prepare the city for 2010. Massive slum eradication and the construction of 'beautiful formal housing opportunities' between the airport and the mother city are becoming a painful reminder of the forced removals under the previous

apartheid regime.

To validate this statement I will, in a first part, briefly summarise relevant thinking in the international literature about both mega-events and beautification processes. Next the case study is introduced and its geographical location used to explain why precisely this part of the city is being restructured. In a third part I will discuss some of the effects of this particular beautification process for the ordinary people. In the following part I try to understand how a so-called democratic government was able to pursue its 'apartheid' strategy of forced removals to realise this 'beautification'. Finally a critical note alerts us to be conscious about the 'lower scale' human effects of mega-events and makes a plea for an equitable distribution of funds.

MEGA-EVENTS AND BEAUTIFICATION PROCESSES

Mega-events: mechanism for poverty alleviation or excuse for beautification of the city?

In its bid for hosting the 2010 World Cup, South Africa paid serious attention to the legacy the Cup would leave behind. A comprehensive development agenda was put together, in which the tournament was being regarded as a catalyst for poverty alleviation and an opportunity to undo the urban segregation of the past. Besides building new stadiums or upgrading old ones, an engagement was taken to initiate sport programmes in deprived neighbourhoods, to improve medical services and to develop community art centres.

Mega-events have been serving as spectacular opportunities for cities, or countries hosting them. These one time occasions are used as catalysts for image creation and civic boosterism (Andranovich, Burbank, & Heying, 2001). The 1992 Olympics in Barcelona are exemplar. Pagano and Bowman (1995) have shown how the uniqueness of these events is used by governments as an justification for redistributing funds. Resources are being allocated in such a way that the hoped for prospective economical gains and competitive advantages are maximized. Androvich et al. (2001), after their study of three American cities bidding for the Olympics, concluded that public interest was not necessarily guaranteed and they raised concerns regarding citizens' participation in all three cases. Eisinger (2000), amongst others, is critical about the allocation of resources to sport temples when the money could be used to fight deprivation.

Confronting this knowledge with the explicit focus on development issues in the South African bid for the World Cup, makes us alert of the possible mismatch between the government's projected image of a more inclusive and prosper society as a result of 2010 and the actual reality on the ground. The claim that mega-events, such as the Cup in South Africa should be seen as a mechanism for poverty alleviation has been heavily criticised in the international literature. Matheson & Baade (2004) question the allocation of resources, as an increased spending on infrastructure means that cuts have to be made in other areas, affecting those "who where least likely to enjoy benefits from the mega-events (or even to attend them): the urban poor, ..." (Whitson, 2004, pp. 1227-1228). In several cases, as with the Olympics in Sydney and even in Barcelona, job creation has been rather temporary and focused on low-paid employment opportunities (Horne & Manzenreiter, 2006; Lenskyj, 2002). Additionally Lenskyj (2002) emphasised that the Sydney Olympics exacerbated the existing housing gap and that homelessness and housing problems intensified. As Hiller (1998) already pointed out, there are undeniable effects of residential polarisation. This residential relocation basically has two causes. The first one being a change in property values in areas or neighbourhoods near new stadiums, a second one being a conscious relocation of people to other areas to clear ground for developments directly related to the upcoming event.

Thus, besides the fact that a quick scan of the international literature on the effects of mega-events doesn't bring about any proof for them being mechanisms for poverty alleviation, I want to add that mega-events might additionally be used as excuses for urban developments, which might otherwise be publicly contested. If we want to understand the importance of mega-events as a justification for beautification processes, we first need to elaborate over the meaning of these

beautification processes, both in our Western history and in the South.

Beautification processes

Over time, and still today, tabula rasa approaches of deprived neighbourhoods are regarded as being a quick and easy solution for city redevelopment. As long ago as the 1960s by Jane Jacobs (1961) these ideas were criticised and contested. Today, in third world cities in particular, refuge is still sought in modernistic planning principles. Davis speaks of the Haussmannisation of third world cities, as populations are being removed on a large scale in order to re-develop entire parts of a city, so as to realise economic profits and, at the same time, enhance social control (Davis, 2006, pp. 95-102). Haussmann was the architect/planner responsible for the redevelopment of the France capital during the 1860's. To realise the broad and spacious boulevards characterising the present image of Paris, massive neighbourhood clearances were organised and the people inhabiting them forcibly removed. In our present day society, these massive and forced relocations are often happening in Southern countries. From Dakar and Manila during the seventies to Myanmar in 1996, where an hallucinating 16% of the urban population was moved to low quality shelters in the periphery to make room for fancy hotels and golf courses to attract tourists and businessmen. From Rio where the military regime, with the help of USAID cleared the city of its slums and favelas in order to beautify the upper class areas, to Seoul and Beijing where the Olympics were/are the excuse for massive neighbourhood clearances and the relocation of more than 300.000 people (Barke, Escasany, & O'Hare, 2001; Broudehoux, 2004; Davis, 2006; Skidmore, 2002; Taschner).

In this light, the flagship project, the N2 gateway, deserves our attention in the context of Cape Town as an host city for the 2010 World Cup. By promising the people in the squatter settlements around Langa decent housing, the N2 gateway resulted in their relocation in order to "beautify" the main road from the airport to the city for the forthcoming 2010 football World Cup. The speed with which this re-development is taking place is remarkable, particularly given the fact that people living in other deprived areas have been waiting for 15 years or more for improvements to their living conditions (Newton, 2008). The squatter settlements' original inhabitants are being 'relocated' to TRAs (temporary relocation areas) on the fringes of the city. Does this not resemble urban politics from a former regime? Or is the relocation of people allowed, provided it is not conducted on the basis of race?

N2 GATEWAY: A NEW RELOCATION STRATEGY OR TRULY BREAKING NEW GROUND?

Context

South Africa's complex and contemporary society is rooted in the country's successive periods of colonisation, during which the main trains of thought that would go on to shape the country's appearance, both metaphorically as well as physically, were established. But in 1948, the National Party came to power and 'apartheid' became the guiding political principle. The scale and ruthlessness of segregation policies reached previously unknown heights. This meant a complete separation of the different population groups on every intra-personal level. To accomplish this, leaders used undemocratic and racist laws, some of which were already in existence ('Natives Land Act', 'Natives Trust and Land Act', 'Natives (Urban Areas) Act'), whereas others were introduced, for example, the 'Population Registration Act' and the 'Prohibition of Mixed Marriage Act'.

The 'Groups Areas Act' (1950) was of particular importance to the issue of urban planning because it confined the different population groups to specific areas. The consequences were disastrous: city neighbourhoods were completely segregated, or were even demolished, with their inhabitants being forced to move. The partition of the state was a cornerstone of the government's policy to assure white supremacy (Christopher, 2001; Coleman, 1998). The spatial organisation of the country, as well as that of the cities, was being used as a weapon: the urban areas were shaped by an elite, who thanks to distance and accessibility, succeeded in superimposing, and even reinforcing, the

social and political power structures into a physical reality. Urban planners drew up schemes comprising the ‘ideal apartheid city’, and taking their geographical circumstances into account, local authorities had to make every effort to follow this model. The so-called ‘White area’ were situated as close as possible to the Central Business District (CBD), and were separated from the other ‘zones’ by the use of natural barriers, which were reinforced with infra-structural barriers (e.g. railroads) where necessary. Everything possible was done to see to it that people did not have to cross into the ‘areas’ populated by the ‘others’. Furthermore, the notion that the different race groups may have different needs in respect of building, site, and site development’ was accepted (as can be seen in the Durban City Council’s Technical Sub-committee report, 1951, cited in Western, 1996, p. 88). In reality, what this actually meant was that the ‘Black’ and ‘Coloured’ populations weren’t afforded the same space as their White neighbours, and that their houses were not of the same quality. The apartheid era clearly illustrated Bourdieu’s (1999) views on space and accessibility: moving the socially weak to the edge of the city resulted in a spatial image which was a reflection of the social and political power structures.

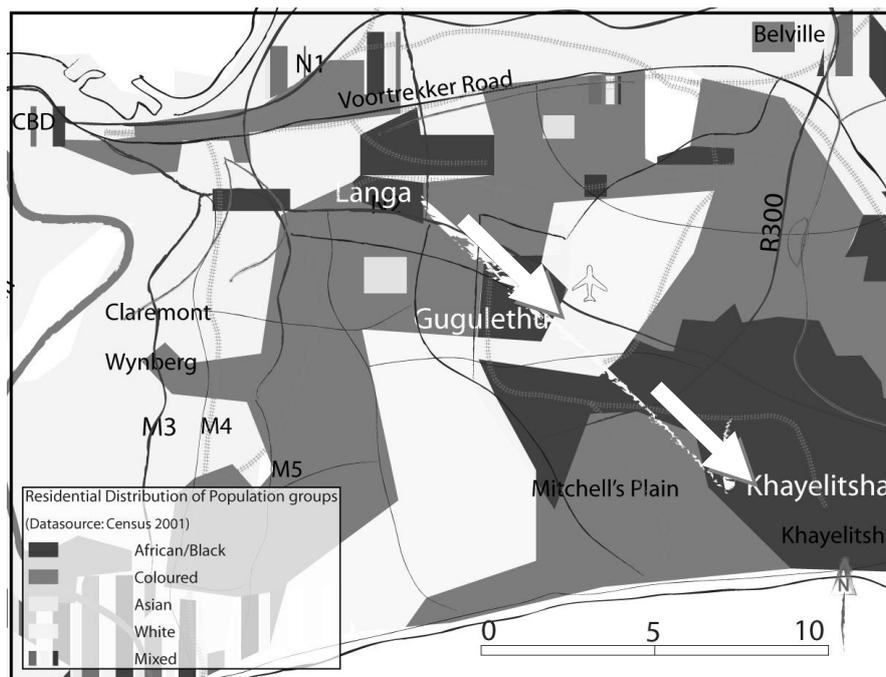


Figure 1
Movement of the African labour force to the fringes of Cape Town

Urban housing policy in South Africa has always been closely related to securing and controlling African labourers as a workforce (Maylam, 1990; Parnell, 1994). At the beginning of the 1900s, the numbers of Africans in the cities were relatively low, and both they and the regions could autonomously handle ‘African urbanisation’ as they wished. The mining cities in the North, such as Kimberly and Johannesburg, opted to group the African workers in closed compounds, thereby enabling their employers to keep a tight rein on them. In Cape Town, African urbanisation was predominantly shaped by two factors, namely the arrival of large numbers of Africans to work as unskilled labourers at the docks, and who were initially housed in closed compounds, and the outbreak of the Bubonic Plague in 1901. Unlike in the mining cities, the call for segregation did not emanate from the employers, but from the city’s middle-class inhabitants. The local government took the decision to house the African workforce at a separate location. Ndabeni was the first in a series of such places, which were always located on the fringes of the expanding city. After Ndabeni, successively, came Langa (1920-1930), Nyanga, Gugulethu and now Khayelitsha (see fig. 1).

One of the promises made by the democratically elected government in 1994 was that they would provide 1 million new houses within the following five years. Responsibility for this task was

placed upon the 'National Department of Housing', which was also in charge of the formulation of an 'Urban Development Strategy' (Huchzermeyer, 2003). In 1997, they presented their 'Urban Development Framework' in which they stated that future urban settlements should be "...*spatially and socio-economically integrated, free of racial and gender discrimination and segregation and enabling people to make residential and employment choices to pursue their ideals*" (National Department of Housing, 1997). This clearly highlighted their good intentions: urban planning has to enable spatial and social integration. Yet when we look at the reality today, we have to conclude that these goals were not met. Even worse, the use of certain policy instruments resulted in segregation being supported, and even intensified. The realisation of the vast amount of houses happens mostly (80%) with a 'project linked subsidy mechanism'. This meant that a fixed amount was provided for each unit constructed, which then became the property of the applicant for the subsidy. The funds provided had to cover not only the construction itself, but also the purchase of the land and the necessary infrastructure. Because of the pressure they were under to provide the new units, the local authorities worked with private developers. It must be made clear, however, that these developers not only played the 'free market game' (profit maximisation), but also tried to meet two significant demands, namely the sheer number of houses they were expected to build, and the financial-economic realities. To have any chance of success, the developers needed to find sites that were not only large enough but were also reasonably priced. This resulted in the selection of a number of locations on the periphery of the city. Accordingly, the elite's residential security was safeguarded by the realisation of 'social housing projects' on cheap sites on the outskirts, and by the provision of huge numbers of units at one time (Huchzermeyer, 2003; Kühne, 2003). As a result, it must be concluded that this mechanism of subsidies helped to sustain, and even reinforce, the existing patterns of segregation.

In 2004, the government launched a new initiative called 'Breaking New Ground' (BNG), which was a 'Comprehensive Plan for the Development of Sustainable Human Settlements'. The main purpose of the plan was to move the focus of the housing policy away from the mere delivery of vast numbers of houses, towards creating sustainable human settlements, defined as "well-managed entities in which economic growth and social development are in balance with the carrying capacity of the natural systems on which they depend for their existence and result in sustainable development, wealth creation, poverty alleviation and equity" (Department of Housing, 2004). It is interesting to observe that one of the ideas was to approach housing, not merely as a basic need, but also as an instrument for job creation and for the development of sustainable human settlements.

To illustrate the intentions behind the BNG scheme, pilot projects were set up around the country, with the N2 Gateway probably being the most significant. On a 10km strip of land, between the city and the airport, newly developed rental flats have been built, and in the following phase, terraced family houses are being constructed. In order to provide these 22.000 housing units, massive slum clearance was necessary (Rust, 2006).

It is interesting to note that the selection of the N2 Gateway as a flagship project for the BNG concurred with the acceptance of the South African bid for the 2010 World Cup by the FIFA. From the start government and media succeeded in drawing all attention to the importance of 2010 and as shown above the mega-event served as a catalyst for civic boosterism.

For quite a long time there was a public belief that the redevelopment of the squatter strip along the N2 would re-house the initial inhabitants of Langa. Some experts and academics were aware of the true nature behind the development and when this eventually also became clear to the general public, angry squatters from Langa blocked the N2 during the week of the 17th September of 2007. They hoped that their demands and protests would be heard.

Being one of the oldest townships in Cape Town the community of Langa is a deeply anchored and strong one. Social networks and ties have developed over time and the area actually constitutes of 4 sub areas, of which the squatter section is one. Children, initially living in their parents' houses wanted to stay in the area when they had families of their own, which is not surprising given the fact that they could depend on long established social networks and the townships location

near the Cape Town CBD. As such they started to build their own shacks adjacent to the existing township (see fig. 2).

When they learned about the planned development and the fact that the N2 project would be fast tracked in the light of the World Cup, people had hope that they would finally receive government subsidised housing, for which most of them were on a waiting list. Alas, the planned housing along the N2 is comprised of rental accommodation and so-called 'gap housing' and the original inhabitants were moved to areas at the edge of the city.

THE EFFECTS OF THE BEAUTIFICATION

During the time I was conducting fieldwork for my PhD research in 2005 and 2007, the developments along the N2 intrigued me and in the margins of my own research about the relation between urban planning, social housing and social capital, I also started to research the N2 Gateway project. I am grateful to the people of the Thubelisha office (the housing support institution to the National Department of Housing, responsible for the realisation of the N2 gateway) in Cape Town, as they not only allowed and helped me to conduct interviews with the residents but also, very honestly and openly, discussed the difficult issues (especially those of a political and social nature) related to the scheme. The N2 gateway is clearly a very sensitive project and has become a "political football" (Smit, Macgregor, & Mgwatyu, 2007) to the different levels of government (state, provincial, metropolitan), creating enormous backlogs and delays. Apparently, political gain is more important than alleviating the suffering of the people. Thus, although some people within Thubelisha are aware of the problems and the political game, they are unable to openly give bad press to the whole development. Luckily other, more critical voices are openly contesting the government's intentions for and interventions along the N2. Professor Emeritus of the University of the Western Cape (UWC), Martin Legassick, is one of them, as are Pierre de Vos, Professor of Constitutional Law at UWC and Simon Nicks, Managing Director of CNdV africa, an important planning and design firm in Cape Town (de Vos, 2008; Legassick, 2008; Nicks, 2007). They have all cast aspersions on the "Vanity project" and housing minister Sisulu, who, despite all critique, court cases and protests from the Joe Slovo residents, keeps her foot down and continues with the project still calling it a flagship development and pioneer project for future housing developments in South Africa (Department of Housing, 2008).

The Joe Slovo phase 1, where I was able to conduct 11 in-depth interviews, is comprised entirely of rental flats, which accommodate those who are not poor enough to be eligible for a housing subsidy, but who don't have enough capital to apply for a loan. One might, therefore, think that the project offers a solution to a gap in housing policy, but this is simplistic. Those who are currently renting these flats are unable to save because of the amount of rent they have to pay. Furthermore, a reduction (due to saving) or a loss of income would mean that they are unable to keep up with their rent and would be evicted.

When driving along the N2, the views of the Joe Slovo project are promising, and it appears to be a clean and airy development. But although the patios between the buildings are appealing, the flats themselves are far too small. They consist of two rooms with a small bathroom, and have two entrances, which increases the risk of burglary. As the apartments have only two rooms, one is used as kitchen/dining/living room while the other serves as a bedroom. While the RPD (Reconstruction and Development) houses, provided by government, can be extended, this is absolutely not the case for the flats. Two of the interviewees have sent their children to live with grandparents because there is not enough space. Most of the respondents complain about the quality of the flats and the fact that they receive not responses to their complaints. As from June 2007 they have gone on rent boycott. The development is actually some sort of gated community as it is completely fenced off from its surroundings. There is one entrance for cars and another for pedestrians (see also fig. 2).

To be able to start construction, the squatters' settlements had to be cleared and people had to move. They were relocated to so-called TRAs (temporary relocation areas) near Delft and other

remote areas in the Cape Flats. A study by the Development Action Group (DAG) (Smit et al., 2007) highlighted that many of those living in the TRAs have already started to improve their dwellings there because they do not expect to be moving soon even though 63% of respondents said that they are unhappy living in the TRA. One of the DAG study's key findings was about the impact of the re-location on families' livelihoods. Previously, when they lived in Langa, job opportunities were near-by and thus transportation costs were lower. The DAG study also concluded (again) that a top-down approach, without consultation, cannot expect great support from the households involved. Furthermore, the TRAs have been developed from a single sector viewpoint, resulting in a better infrastructure than in the squatter settlements, but meaning that the broader social and economic impacts of the relocation are ignored.



QuickTime™ and a decompressor are needed to see this picture.

Figure 2
The original squatter settlement compared to the new rental accommodation

Thus the beautification process along the N2 has effect both on its new residents and on those who were forcibly removed to the TRAs in Delft. While the new residents in the flats are unhappy with the quality and size of the houses as well as with safety measurements, the TRAs are described by several sources as almost concentration camp like areas, related to the Foucauldian notions of a Panopticon space, realising an ever present controlling gaze and trying to impose a particular conduct on a particular human multiplicity” (Deleuze, 2006 (1988), p. 29; Foucault, 1980a, pp. 151-152). The TRA's so-called houses are nothing more than four walls and a roof, without electricity. Showers and toilet facilities have to be shared and water is only provided through communal taps (Chance, 2008; Smit et al., 2007). But, as de Vos (2008) writes in his critique on the ruling of Judge President John Hlophe regarding the forced eviction of 20.000 poor from the Joe Slovo settlement: “Before the law they have once again become invisible. They are not treated as individual human beings with feelings and needs but merely as a problem to be dealt with. What we need are more judges who really wrestle with the very difficult issues presented by gentrification of informal settlements and the real hurt and pain of forced removals. ... Perhaps this is too much to ask of a judge who might experience this informal settlement on the N2 as an eyesore and a stumbling block to progress - even as he speeds to his wine farm in his shiny Porsche” (de Vos, 2008).

I believe de Vos touches a crucial point here. The elite in our societies prefer to keep the

undesired at a safe distance. Bourdieu (1999) has already made clear that space is being manipulated by a small elite, who have enough power (thanks to the accumulation of the different forms of capital) to do so, and in a way that only serves to reinforce their position in society. They use distance and accessibility, elements which are strengthened by the inertia of physical space (Peleman, 2000: 336-337). The opportunities that individuals have are largely defined by the specificities (e.g. the availability of schools and jobs) of the place in which they grow up and reside (Bourdieu, 1999).

PUBLIC DISCOURSES PAVING THE WAY FOR A SMOOTH INTERVENTION

In 'The Archaeology of Knowledge' (1972) Foucault shows that "*'discourses', in the form in which they can be heard or read, are not, as one might expect, a mere intersection of things and words: an obscure web of things, and a manifest, visible, coloured chain of words*". He argues that the task we should set for ourselves "*consists of not - of no longer treating discourses as groups of signs (signifying elements referring to contents or representations) but as practices that systematically form the objects of which they speak*" (emphasis added). Thus, through the use of language, meaning is attached to social phenomena, but these phenomena are not merely being described, since through the discourse, significant meanings are attached to them. Because of this, discourse also reproduces the social phenomena it is "*talking about*". This is precisely what is happening with the discourse around the coming 2010 World Cup, illustrated below.

Foucault's interest in discourse is obvious. The relationship with power and knowledge is clear, because if we are cautious about the discourses present in a society, we are able to understand the relationships between the actors and the regimes of truth that are produced. Every society has its own regimes of truth. Norms, values and discourses that are considered to be the legitimate ones, and which organise and normalise society. These are articulated by those who are regarded as being authorised to do so. Thus, discourse is able to (re)produce power relationships. It is with this knowledge that we can understand why, in the context of the N2 gateway project, the deprived are unable to significantly change their positions. To do so, a much deeper/structural change is needed, or as Foucault phrases it: "It is not a matter of emancipating truth from every system of power (which would be a chimera, for truth is already power) but of detaching the power of truth from the forms of hegemony, social, economic and cultural, within which it operates at present time" (Foucault, 1980b, p. 133).

This paper is grounded in the knowledge that by working from a rigidly framed definition of discourse, analysis will not be useful. Instead discourse analysis is approached as a way to understand why people are talking (or acting) about certain matters in a specific way. What is their motivation for doing so, are there hidden assumptions that influence their thinking, which are then reflected in their speech? I partly follow Macleod's approach, relying on both Foucault's and Parker's notions of discourse (Macleod, 2002, p. 21), but I emphasise that a discourse is more than mere text; it is also the gestures that accompany it, or it can be the act that is a consequence of the discourse itself. Accordingly, I strongly adhere to Foucault's notion that a discourse is a practice that systematically forms the object of which it speaks.

With regard to the N2 gateway development on the one hand and the World Cup on the other hand, government is using public discourses to pursue their goals. As de Vos (2008) also argues government is creating a negative image around the squatter society of Joe Slovo. They are being accused of unlawfully occupying the land, of being unwilling and even dumb not to see that they are actually moving up the social ladder, as we can make out of the words of the minister of housing: "A pilot project is not measured by numbers alone, but even by this measure the N2 Gateway is starting to stand tall. We have built 4500 temporary relocation units, halfway houses, as it were, between informal settlements and dignified homes [...]" (Speech by LN Sisulu Minister of Housing at the Occasion of the Budget Vote 2008/9 for the Department of Housing, 2008).

Concerning 2010, an overall enthusiastic and positive discourse is used, as is illustrated in the following quotes. The first one comes from a government's publication with which they want to

excite people for the coming event: “Part of the way in which government will ensure the World Cup contributes to the country’s growth and development goals is by making sure that hosting the tournament brings opportunities that can be accessed by South Africans, in a way that will empower those who were systematically excluded from participation in the economy under apartheid” (Republic of South Africa, n.a., p. 5). This is just one of the many examples of how the government wants to link only positive elements to 2010. In another publication they interview people who are working for the contractors building or upgrading stadiums. Quotes like “This is my first job since I finished school and I am so proud of myself” (Republic of South Africa, 2007) serve as an example of how the World Cup will be beneficial for everyone, especially the poorest.

Thus, I want to conclude that the elite in society are benefiting from the discourse created around 2010, far more than the poor communities do. Let’s bring the remark made about the judge with the Porsche by de Vos (2008) back to mind. And let us additionally look at another quote from the South Africa is ready! publication: “One of the biggest impacts from hosting the 2010 FIFA World Cup will come from the phenomenal marketing and communication opportunity it offers to positively project South Africa and Africa to the world, to build pride, to enable African solidarity and to foster a climate that contributes to growth and development” (Republic of South Africa, n.a., p. 26). I think we are coming closer to the true legacy 2010 will leave behind, and although I risk of sounding cynical, the phenomenal marketing and the positive image South Africa wants to show the world will be beneficial for economic growth an (economic) development, thus serving the already better off. It appears that indeed the image is the most important factor and when all the international media arrive in Cape Town in 2010 the government prefers to show the redeveloped N2, although only from afar, rather than the shabby shacks in which a thriving community life was once housed.

TO CONCLUDE

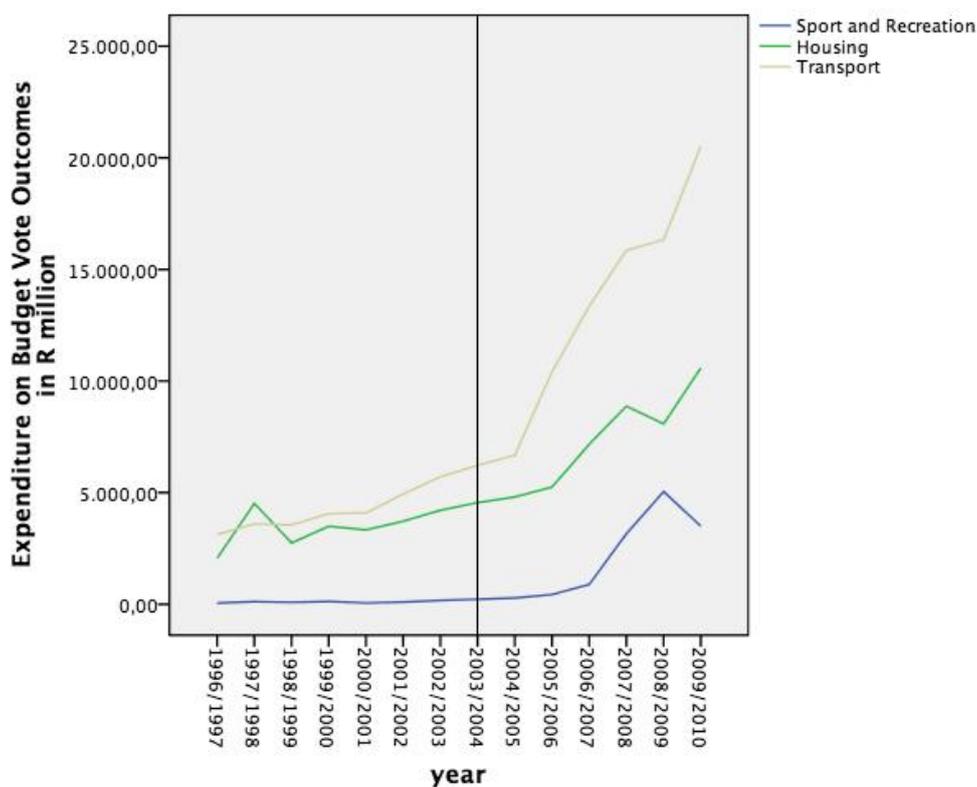


Figure 3
Expenditure on Budget Vote Outcomes
(based on the National Budget Reviews of 2001, 2005 and 2008, accessed on 21.07.2008
<http://www.treasury.gov.za/documents/national%20budget/default.aspx>)

With this contribution I hope to have shown how mega-events, such as the World Cup are influencing urban developments of which the social outcomes are highly disputable. Although one might argue that beside the coinciding of both there is no hard evidence to proof a true interrelation between the fast-tracking of the N2 development and the acceptance of the South Africa bid for the FIFA world cup, I have shown that a public discourse is used to enable a non-democratic urban development very much resembling of its apartheid's pre-descending forced evictions.

To conclude I want to make a plea for a more pro-poor and equitable distribution of funds. Fig. 3 shows the evolution of the budget allocation for the sectors sport and recreation, transport and housing. Is it a coincidence that the housing budget loses out while those for sport and recreation go through the (stadium's) roof in the run up to the 2010 "goal"?

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ACKNOWLEDGEMENT

This paper results from the research conducted for the author's PhD.

The author wishes to acknowledge the Flemish Inter-University Council of Belgium (VLIR – IUC) for their financial support, which helped to realise the PhD research.

大型节事活动对国家形象影响研究： 以韩国主流报纸北京奥运会相关报道的内容分析为例

李祇辉 胡子腾
北京石油化工学院人文社科旅游系

摘要

随着经济全球化，大型节事活动越来越受到全世界的重视，其重要性和作用日益显现出来，如奥运会、世博会等大型节事活动的举办，对举办地的政治、经济、社会、文化等诸方面具有相当重要的影响意义。本文研究目的是对大型节事活动对国家形象影响的相关研究进行梳理，通过内容分析方法，分析韩国主流媒体北京奥运会相关报道内容，旨在研究北京奥运会影响下的韩国媒体上的中国国家形象，以便增进相互了解，为以奥运会为契机制订更有效的入境旅游市场营销战略提供帮助。

关键词：大型节事活动；国家形象；影响；内容分析

STUDY OF IMPACTS OF MEGA EVENT ON NATIONAL IMAGE: CONTENT ANALYSIS OF BEIJING OLYMPICS REPORTS BY KOREA LEADING NEWSPAPERS

Zhihui LI, Ziteng HU
Department of Tourism, Beijing Institute of Petrochemical Technology

ABSTRACT

The purpose of this study is to explore the impacts of mega event on national image so as to provide implications for tourism promotion strategy. To achieve this goal, Beijing Olympics-related reports by Korea leading newspapers were selected.

A total of 137 articles in Korea newspapers of Chosun Ilbo and Donga Ilbo were content analyzed. This paper also suggests some practical directions for tourism promotion in inbound market.

Keywords: Mega event; National image; Impact; content analysis

前言

随着经济全球化，大型节事活动越来越受到全世界的重视，其重要性和作用日益显现出来。中国举办北京奥运会，使中国成为全世界瞩目的焦点。

在国家传播中，传媒通过对他国源源不断的报道，构建他国的国家形象。受众对于他国形象的认知基本上依赖本国传媒（虞继光、刘海贵，2008）。因此，入境游客认知的目的地国家形象，由这些游客所接触的本国媒体的报道倾向来左右，而这种对他国国家形象认知，最终会影响到潜在游客的国际旅游意愿和态度。所以，非常有必要通过分析外国媒体关于北京奥运会的相关报道，了解其对中国国家形象的认识。

韩国是中国第一大入境客源国。韩国媒体报道的中国国家形象将影响到韩国游客对中国国家形象的认知，从而影响潜在来华韩国游客，进而影响中国入境旅游市场，因此，对韩国媒体报道进行相关分析具有极其重要的现实意义。

大型节事活动与中国国家形象研究

1. 大型节事活动相关概念

和其他学科一样，事件及事件旅游理论包括“一系列有逻辑的相关概念”（Gibbs,1972；参考 戴

光全，保继刚，2003），并形成了一个相对独立的完整理论体系，包括以下概念：

节事（FSE）：在事件及事件旅游研究中，常常把节日（Festival）和特殊事件（special event）合在一起作为一个整体来探讨，在英文中简称为FSE（Festival & special event），中文译为“节日和特殊事件”，简称“节事”。

重大事件（Mega event），：从规模和重要性来看，重大事件是指能够使事件主办社区和目的地产生较高的旅游和媒体覆盖率、赢得良好名声或产生经济影响的事件（Getz， D.,1997）。在实际运作中，重大事件一般称为“大型活动”（方圆，2001；Allen Johnny 等，2002；参考 戴光全，保继刚，2003）。

在本文研究中将“Mega event”定义为“大型节事活动”。本文研究者认为将“Mega event”单纯翻译为“重大事件”不足以体现其中包含的“节事”内容。奥运会、世博会、世界杯等都属于大型节事活动。按照研究人员研究角度不同，奥运会、世界杯等也被称为重大体育活动或重大体育赛事（Mega sports events/Major sports events）。

2. 奥运会、世界杯等大型节事活动的意义和影响研究

2001年，Brown和Massey(2001)撰文对重大体育活动（Major sports events）的影响研究进行了回顾，指出，研究主要围绕6个方面进行，即体育活动的参与与发展、社会影响、遗留设施、城市再发展、旅游业以及经济影响（王春雷，2007），更加关注经济影响的现有研究成果居多。

Matheson和Baade(2004)从体育活动的经济影响出发，讨论了重大体育赛事给发展中国家带来的促进作用。他们认为，世界杯、奥运会等重大事件可以作为举办国家展示经济、政治和文化等综合国力的手段，也是一个国家在国际舞台上占有重要地位的标志（王春雷，2007）。

李忠基、Ritchie等学者从顾客角度研究形象感知的变化。结果表明，大型节事活动对举办地的认知度和形象改善有积极影响意义（李忠基，2002；Ritchie,1984）。

韩国KOTRA以72个国家的一般消费者为对象进行了2002世界杯对韩国国家形象影响的相关研究（KOTRA，2002），研究结果表明，韩国国家形象的得分值虽未增加，但由于媒体报道，消费者对于韩国认识发生了积极的变化。

还有一种方法是从传媒角度进行研究，主要对涉及大型节事活动（2002年韩日世界杯等）的媒体报道应用内容分析方法研究大型节事活动背景下的国家形象，如韩国学者吴益根（2003）和金真东、金南助（2003）的研究。研究结果表明，随着2002年韩日世界杯的举办，外国媒体对韩国的正面报道内容增多，韩国国家形象得到改善。

3. 大众传媒与中国国家形象研究

20世纪最后三十年，美国媒体对中国国家形象报道经历了70年代的浪漫化、80年代的天使化和90年代妖魔化三个阶段（李希光、刘康，2000）。

在2006年中国国际公共关系大会上，中国国务院新闻办公室向外界公布了一份关于国际传播和中国国家形象塑造的材料，分析了美国《纽约时报》、《华盛顿邮报》和《今日美国》2005年涉华报道的内容和倾向。国务院新闻办的结论是：在倾向上，三家媒体对中国的中性报道占多数，负面报道略多于正面。

司国安和苏金远（2007）基于《纽约时报》的涉华报道对美国媒体认知的中国国家形象进行了研究，结果表明，2006年，《纽约时报》依然对中国保持了高度关注。涉华报道集中与政治经济领域，正面报道相对于上世纪90年代有所上升，但负面报道依然很多。

张玉（2006）以2005年日本《读卖新闻》和《朝日新闻》为对象，研究了日本报纸中的中国国家形象。总体来看，日本报纸中的中国形象是中性偏向负面的。

冯惠玲和胡百精（2008）以北京奥运与文化中国国家形象构建为主题进行了相关研究。研究结果显示，“文化要素”位列所有中国国家形象要素的第一位。海外媒体（样本媒体包括纽约时报、华尔街日报、路透社、美联社、BBC、南华早报、法新社等）对中国国家形象的议题报道重点放在“奥运政治环境”和“奥运社会支持系统”上。

综合上述分析，可知具有强大影响力的海外媒体报道对一国的国家形象具有重要的影响作用。对于来华的普通外国游客来说，关于中国国家形象认知的形成主要依赖于其所在国主流媒体的涉华报道。韩国是我们的近邻，又是中国第一大入境客源国，值此北京奥运会举办之际，分析韩国主流媒体北京奥运会相关报道内容，旨在研究北京奥运会影响下的韩国媒体上的中国国家形象，以便增进相互了解，为以奥运会为契机制订更有效的入境市场营销战略提供帮助。

研究方法

本研究主要通过内容分析方法进行研究，选择韩国主流媒体的北京奥运会相关报道为研究对象。

1. 样本选取与资料搜集工作

《朝鲜日报》和《东亚日报》位列韩国6大全国性韩文日报第一位和第二位（中国外交部，2008），是韩国历史上最悠久的两家报纸。本文研究者认为上述两大报纸能够反映韩国主流报纸的价值取向和报道倾向，因此，本研究选取北京奥运会举办前夕即2008年5月1日至7月30日《朝鲜日报》和《东亚日报》的北京奥运会相关报道内容为第一手资料进行研究。

2. 分析类目的选择

选定的主要分析类目为报道主题、报道倾向和报道媒体。报道主题类目下又分为国际关系（中韩、中朝、中美、中日）与政治，奥运会带来的中国变化（环境改善、交通良好、城市建筑独特等），奥运安保与反恐，中国历史文化，奥运氛围，人权，圣火传递，奥运、汶川地震等激发的中国人的爱国精神与团结精神和其他等9项小类目。

报道倾向分为负面、中立和正面报道。关于报道倾向的判定，依赖于研究者对文章内容的判断。如文章作者持怀疑、否定态度，可将文章判定为负面报道；反之，如文章作者持肯定、乐观态度，即判定为正面报道；作者为中立态度，即为中立报道。

分析结果

1. 报道数量

表1显示，北京奥运会举办前夕即2008年5月1日至7月30日三个月间《朝鲜日报》和《东亚日报》相关报道共有137篇，其中《东亚日报》有89篇（65%），《朝鲜日报》有48篇（35%）。

表1 各媒体相关报道数量

媒体	频数	比率（%）
朝鲜日报	48	35.0
东亚日报	89	65.0
合计	137	100.0

2. 报道主题

如表 2 所示，报道主题共分为 9 个具体的主题。分析结果，关于国际关系与政治的报道最多，为 32 (23.4%)；其次为奥运安保与反恐的报道，为 24 (17.5%)；其他（包含中国金牌数的预测、中国体育选手介绍、中国证券市场、奥运会门票、奥运会电视转播、奥运期间访华注意事项等内容）为 19 (13.9%)；对于中国人的爱国热情和团结精神的报道也占有相当比重，为 17 (12.4%)；奥运带来的中国巨变的报道数量也不少，为 15 (10.9%)，反映出奥运会对中国国家形象改善的重要影响意义；对于奥运圣火传递和中国历史文化的报道分别为 12 (8.8%) 和 11 篇 (8%)。与西方媒体不同的是，对于中国人权报道并非韩国媒体报道的重点，为 5 篇 (3.6%)；关于奥运氛围的报道也不多 (2 篇：3.6%)。

表2 报道主题

主题	频数	比率
国际关系与政治	32	23.4
奥运安保与反恐	24	17.5
其他	19	13.9
奥运/地震等激发的爱国热情和团结精神	17	12.4
奥运带来的中国巨变	15	10.9
奥运圣火传递	12	8.8
中国历史文化	11	8.0
人权	5	3.6
奥运氛围	2	1.5
合计	137	100.0

表 3 显示了媒体与报道主题的列联分析结果。可知《朝鲜日报》和《东亚日报》都将国际关系与政治作为报道的重点，文章最多。报道主题从多到少排序如下（不含其他）：

《朝鲜日报》的排序：国际关系与政治、奥运带来的中国巨变、奥运安保与反恐、奥运/地震等激发的爱国热情和团结精神、中国历史文化、奥运圣火传递、人权和奥运氛围。

《东亚日报》的排序：国际关系与政治、奥运安保与反恐、奥运/地震等激发的爱国热情和团结精神、奥运圣火传递、奥运带来的中国巨变、中国历史文化、人权和奥运氛围。

表3 各媒体的报道主题

主题	媒体	
	朝鲜日报	东亚日报
国际关系与政治	11 (22.9%)	21 (23.6%)
奥运带来的中国巨变	8 (16.7%)	7 (7.9%)
奥运安保与反恐	7 (14.6%)	17 (19.1%)
中国历史文化	5 (10.4%)	6 (6.7%)
奥运氛围	1 (2.1%)	1 (1.1%)
人权	1 (2.1%)	4 (4.5%)
奥运圣火传递	2 (4.2%)	10 (11.2%)
奥运/地震等激发的爱国热情和团结精神	5 (10.4%)	12 (13.5%)
其他	8 (16.7%)	11 (12.4%)
合计	48 (100.0%)	89 (100.0%)

3. 报道倾向

如表 4 所示，韩国媒体的报道倾向是中立偏向正面的。

由于北京奥运会带来的中国巨变和奥运/地震等激发的爱国热情和团结精神，使韩国媒体关于此

类主题的正面对报道增加，对影响媒体报道倾向发挥了重要作用（表5）。

表4 报道倾向

报道倾向	频数	比率
负面	36	26.3
正面	46	33.6
中立	55	40.1
合计	137	100.0

测定 1：负面，2：中立，3：正面

*平均为2.07，《朝鲜日报》平均为2.19，《东亚日报》平均为2.01

表5 主题与报道倾向

主题	报道倾向		
	负面	中立	正面
国际关系与政治	2 (6.3%)	20 (62.5%)	10 (31.3%)
奥运带来的中国巨变	1 (6.7%)	4 (26.7%)	10 (66.7%)
奥运安保与反恐	13 (54.2%)	11 (45.8%)	0 (.0%)
中国历史文化	2 (18.2%)	2 (18.2%)	7 (63.6%)
奥运氛围	0 (.0%)	1 (50.0%)	1 (50.0%)
人权	4 (80.0%)	1 (20.0%)	0 (.0%)
奥运圣火传递	7 (58.3%)	3 (25.0%)	2 (16.7%)
奥运/地震等激发的爱国热情和团结精神	2 (11.8%)	4 (23.5%)	11 (64.7%)
其他	5 (26.3%)	9 (47.4%)	5 (26.3%)

结论

1. 研究结果总结

第一，韩国媒体的报道主题主要集中于国际关系与政治、奥运安保与反恐、中国人的爱国热情和团结精神、奥运带来的中国巨变、奥运圣火传递和中国历史文化。在奥运会大背景下，与西方媒体不同的是，对于中国人权的报道并非韩国媒体报道的重点。

第二，由于奥运会的举办，韩国媒体报道倾向于中立偏向正面报道，特别是对于北京奥运会带来的中国巨变和奥运/地震等激发的爱国热情和团结精神，韩国媒体以正面报道为主。

第三，国外媒体关于中国国家形象报道中，国际关系与政治一直是媒体报道的重点，本文研究再一次证明了这一点。奥运会既是一次体育盛会，又是国际外交的大舞台。韩国媒体用诸多篇幅报道了各国首脑将出席奥运会情况及围绕北京奥运会展开的各国外交，反映了中国作为大国在国际舞台上发挥着积极作用。

2. 对发展入境旅游的启示与建议

首先，奥运会为中国带来了巨变。环境状况得到了改善，交通变得更畅通，城市焕然一新，建筑独特新颖，因此，为了吸引更多入境游客（包括韩国游客），在营销策划的宣传中，应注重“传统与现代”的融合，开发更多包含现代特色的旅游新商品。

其次，在奥运会大背景下，与西方媒体不同的是，韩国媒体对中国国家形象给予中立偏向正面报道，这势必影响到韩国潜在来华旅游者对中国的认知，他们将对中国国家形象持中立乃至正面态度。为了将这种态度彻底转化为积极态度，在吸引入境游客的具体营销方案中，应注意一方面要强调中国旅游“硬件”提高的事实，另一方面，要重视旅游接待服务“软件”质量的提高，以免使潜在游客对中国形象的中立态度转变成负面态度。

第三,韩国媒体对奥运/地震等激发的中国人的爱国热情和团结精神以正面报道为主,有些报道中还出现了“中国,加油”的内容,这将使韩国人增加对中国人的认识和好感。从本质上来讲,国际旅游即为各国人民之间的相互交流与沟通。以奥运会为契机,入境市场营销方案中应持续向世界人民传递中国人的团结、友爱、互助精神,增进互信,加强了解。

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作者简介

李祗辉(1968-),女,汉族,观光学博士,毕业于韩国庆熙大学,现为北京石油化工学院人文社科旅游系教师,研究方向为旅游市场营销和旅游服务业管理。胡子腾(1987-),男,北京石油化工学院人文社科旅游系学生。E-mail: lizhihui@bipt.edu.cn; zhihuil@hotmail.com。

重大事件对旅游目的地影响研究——以奥运会对北京的影响为例

于海波 吴必虎 俞曦
北京大学旅游研究与规划中心

摘要

本文以奥运会对北京的影响为例，初步分析了重大事件影响的推动性、聚集性、演替性和遮蔽性特点；并且论述了奥运会对于北京作为旅游目的地的旅游形象、吸引物、设施、服务、市场以及空间格局的影响。

关键词：重大事件；旅游；影响；北京

IMPACT OF MEGA-EVENT ON TOURISM DESTINATION —A CASE STUDY OF 2008 BEIJING OLYMPIC GAMES

Haibo YU, Bihu WU, Xi YU
The Center for Recreation and Tourism Research, Peking University

ABSTRACT

The authors analyze characteristics of 2008 Beijing Olympic Games impact to the host city. Impacts on tourism image, attractions, facilities, service, market and spatial structure have been respectively inspected through the Olympic Games by the two authors.

Keywords: Olympic Games; tourism; impact; Beijing

自 2001 年北京申奥成功以来，奥运会这一重大事件深刻地影响了北京乃至中国的诸多领域。重大事件研究也相应引起了关注，在重大事件与旅游关系研究的诸多领域中，体育赛事与体育旅游、节事与节事旅游是我国学者，也是西方事件及事件旅游研究中文献最多的两个领域，同时是相关研究中最受关注的重点领域（戴光全、保继刚，2003）。

北京奥运会圆满结束了，而广州亚运会、上海世博会等重大事件尚在筹办的过程中，需要北京奥运会经验的借鉴，对北京奥运会这一重大事件的研究还需进一步总结和深入，以提供未来事件旅游规划、营销与运作的理论和经验指导。

1 重大事件与旅游的关系研究

重大事件（mega-event）是指从规模和重要性来看：能够使事件主办社区和目的地产生较高的旅游和媒体覆盖率（media coverage）、赢得良好名声（prestige）或产生经济影响的事件（Getz, 1997）。

关于西方学者对于事件及事件旅游的研究，戴光全、保继刚（2003）进行了比较系统的综述，介绍了西方旅游研究中的事件的概念、种类、事件旅游研究以及国内学者的研究进展。而随着 2008 年北京奥运会的临近和召开，奥运会这一重大事件与旅游关系的研究在我国逐渐增多；李健、罗芬、邓金阳（2007）对国内外奥运旅游研究的进行了综述，总结国内关于奥运与旅游关系的文献主要内容集中在：奥运旅游吸引物、旅游客源市场、奥运影响、奥运社会发展影响以及奥运旅游经济效应、奥运旅游营销、奥运旅游纪念品开发研究等方面。这之后的文献在内容上比较有所突破的是有关居民对于奥运会影响感知的分析（周勇、John Ap, 2008）。

伴随着 2008 年北京奥运会的筹备、开幕、举办与落幕，笔者尝试在奥运会结束之际，分析重大事件对于目的地旅游影响的规律及 2008 年奥运会对北京旅游系统各方面影响的具体表现。

2 重大事件影响的特点

本文总结的重大事件对于目的地旅游影响的规律建立在适用于类似于奥运会、亚运会、世界博览会这样的周期性的重大事件的前提下，认识重大事件的影响规律对于规划事件型目的地的旅游营销和规划旅游节事活动具有一定的指导意义。

重大事件的推动作用

由于现代奥运会是参与最广泛的、最受瞩目的世界性体育盛会（张伟、张晓迪，2008），对赛事举办的场所、设备、物资交通、通讯和服务的要求较高，各举办城市在申奥成功以后，都会开展广泛的城市基础设施建设和进行专门的赛事场馆建设或改造，因此奥运会的举办对承办城市以及相关区域的建设、对于目的地系统的旅游吸引物、设施以及旅游服务都有极大的推动作用，甚至使之发生质的提升。奥运会的推动作用使得城市建设的各方面得到提升，更加富有魅力的奥运城市反过来会以城市形象强化奥运会这一重大事件的规模和影响力。关于奥运会对于北京作为目的地的旅游系统的各个方面的影响将在本文的第三部分展开。

2.2 重大事件的聚集作用

在奥运会的眼球效应（武永春、许联锋，2008）过程中，借助奥运平台呈现的节事的多样性是奥运会的一大特色，也是重大事件的聚集作用：衍生与吸附作用的体现。聚集性的衍生与吸附作用贯穿在整个事件的筹备、举办甚至是“后”事件期，当然随着周期不同，衍生与吸附力量会有所变化。北京在奥运赛事的时间范围内，各类丰富多彩的活动十分丰富，比如在北京奥运会期间，北京首都博物馆举行的“中国记忆”展览，国家大剧院的“中国钢琴之夜”表演，中华世纪坛举办的“同一个世界、同一个梦想”大型主题展览等。重大事件的衍生与吸附作用可根据是否为重大事件的举办而进行的必要活动进行区分，例如有些活动是官方或者奥组委组织的，这些活动是为了更好地举办奥运会的需要而进行的，比如一些赛前的测试赛，一些关于奥运会筹办的相关论坛与宣传活动等，这些事件活动属于重大事件的衍生作用的产物；还有一些事件是奥运会的吸附作用的表现，主要体现在一些影响力不大的活动想借助于奥运的眼球效应，加强宣传，比如一些高科技产品的展销，一些表演与展出活动等。当然这两种作用也是互相渗透影响的，并不能截然分开，尤其是各种文化展演活动，既是丰富奥运期间游客活动的必要的休闲活动，也是本国科技、文化、艺术成就借助奥运眼球效应的展示与宣传。当然对于奥运这样与安全、交通、空间紧密相关的特殊事件的聚集作用是相对的，有条件的。

2.3 重大事件对于目的地影响的周期性演替作用

从奥运会每4年举办一次的周期和提前7年确定举办城市的时间跨度来看，奥运会对城市的影响力存在着周期性的提升与衰减规律，即从申办成功开始奥运会对目的地以及目的地城市的影响力逐渐增强，到了奥运会举办期间事件对城市的影响也最大，相关举办城市的知名度也最大（Ritchie, 1991），此时目的地城市甚至国家的正常活动受到奥运会举办的影响发生变化，比如北京市车辆的“单双号限行”、“奥运专用道”的开辟以及中央电视台的“奥运频道”的开播等。奥运结束后随着时间的推移，举办城市的知名度减弱（Ritchie, 1991），而随着下一次周期性事件的时间的临近，未来的承办城市将受到越来越多的关注，表1中同等级别的重大事件：筹办阶段的事件（广州亚运会）的相关网页数目要远高于已经举办过的重大事件（北京亚运会）的相关网页数目，筹办重大节事的城市的知名度的会随着事件时间的临近变得越来越大些（Ritchie, 1991）。

2.4 相似重大事件中，大等级事件的光晕遮蔽作用

在搜索引擎 baidu 上分别检索我国相关的国际性事件“北京奥运会、北京亚运会、广州亚运会”，检索相关结果如下：

表1 互联网检索我国筹办的重大事件的相关网页数量

	北京 “奥运会”	北京 “亚运会”	广州 “亚运会”
Baidu	11,100,000	206,000	957,000

(检索时间: 2008年8月26日7:15-7:20)

表2 互联网检索奥运会与世锦赛的相关网页数量

	奥运会	世锦赛
Baidu	45,900,000	6,180,000

(检索时间: 2008年8月30日1:10)

从检索结果中可以看到这种作用既表现在涉及参与国家及地区范围规模大的事件(北京奥运会)的网页数目要远远高于同性质的规模小的事件(北京亚运会);即区域大的事件对于区域小的事件的遮蔽作用,这种作用也表现在综合性或者多样性的事件对于单一或者单调事件的遮蔽作用,例如:从表2中可以看到“奥运会”的相关网页数量远大于不限种类的各种形形色色的“世锦赛”事件的网页数目。

这里关于重大事件的光晕遮蔽作用只是初步的描述,其规律性需要深入的实证分析。

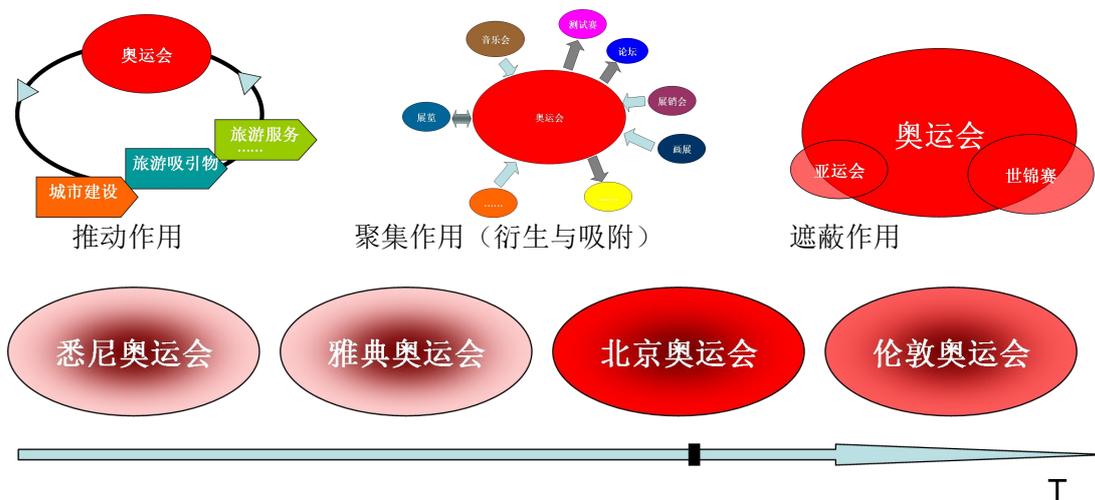


图1 重大事件影响效果的周期性演替作用特征示意图

3 奥运会对于目的地旅游的推动作用的影响

3.1 提升了城市目的地形象

2008 奥运会对北京作为城市目的地的形象的影响表现在两个方面,一是城市的变化带来的目的地形象的提升;另一方面表现在奥运会期间对于北京作为城市目的地的新闻覆盖和奥运相关宣传对于北京旅游形象的提升(孙素,2008)。

3.1.1 城市变化引起目的地形象的提升

2008 北京奥运会的举办,使得北京的现代化气息得以加强。大量的现代化体育场馆、世界著名建筑的建设,旅游设施以及旅游服务软环境的改善使得北京市的旅游形象从经典而深刻的东方古都形象转为古典与现代气息兼备的世界名城形象。

3.1.2 奥运会的新闻覆盖与奥运宣传成为有效营销手段,提升目的地形象

2001 年 7 月 13 日北京申办第 29 届奥运会成功,在奥运会筹办的 7 年中,北京成为全世界瞩目的焦点,各种新闻媒体成为见证为中国政治、经济、文化发展的有力宣传媒介。北京奥运会举办期间,自申办阶段起,北京得到了许多免费的广告宣传 and 媒体关注。得益于“绿色奥运、人文奥运、科技奥运”的口号,北京因为奥运的成功举办而呈现出环保、文明且现代化的国际都市形象。

除了奥运会所吸引的媒体主动覆盖以外，对于北京作为城市目的地的形象宣传也以各种视觉证物以及文字的形式海量被动覆盖多种媒体，尤其是大量的视觉证物营销。譬如一首由阵容豪华的近百名明星演唱的歌曲“北京欢迎你”，其精美的影视画面里展示了北京的各个旅游景点以及北京的非物质文化遗产。

表 3 视觉证物 MTV “北京欢迎你” 涉及的旅游吸引物

类型	吸引物
体育场馆	国家体育场（鸟巢）、国家游泳中心（水立方）、国家体育馆、五棵松篮球馆
古都风貌	北海公园、景山公园、午门、太庙、八达岭、孔庙和国子监、钟鼓楼、德胜门、正阳门、故宫博物院、古观象台、四合院、北京大学博雅塔、琉璃厂、白塔寺、老舍纪念馆、普渡寺、什刹海、湖广会馆、中山公园
现代建筑	世贸天街、国家大剧院、首都博物馆、中华世纪坛、中央电视塔
非物质文化遗产	茶艺、京剧（脸谱）、剪纸、书法、绘画、风筝、皮影、空竹、杂技、刺绣、花艺、美食、民俗等

北京奥运会的成功还增加了奥运会的宣传效果，在北京时间 2008 年 8 月 24 日的奥委会新闻发布会上，国际奥委会主席雅克·罗格表示“北京奥运会金牌和奖牌分布扩大到更多国家和地区，获得奖牌的国家和地区达到了前所未有的 87 个。所有这些成就和欢庆胜利的时刻都通过转播传送到全球各个角落，电视收视率因此增加了 20%-30%，使北京奥运会成为有史以来观看人数最多的一届奥运会。”

3.2 丰富且提升了北京的旅游吸引物与旅游产品

奥运体育场馆的建设与奥运筹备期间北京科教文化休闲设施的建设，使得北京的博物馆、音乐厅、购物娱乐等公共场所平添了现代化与国际化气息，这些公共休闲场所的建设增加了北京的人工景观吸引物，特别是增加了体育建筑景观类的旅游吸引物，这有利于丰富北京旅游产品的种类，更能提升旅游产品的质量。

3.2.1 奥林匹克公园片区的旅游吸引物与旅游产品

为了北京奥运会的顺利进行，北京市新增了许多建设项目，如奥林匹克森林公园、国家体育场（鸟巢）、国家体育馆、国家游泳中心（水立方）、奥林匹克公园多功能演播塔（玲珑塔）、奥体中心体育场等，构成了奥运文化吸引片区。以鸟巢和水立方、玲珑塔的奥运核心区的夜景资源也可以开发为优质的旅游产品。很多旅行社已经在旅游产品中增加了北京奥运游专线。

3.2.2 散点状分布于北京的各奥运体育场馆

北京五棵松篮球场、北京大学体育馆、顺义奥林匹克水上公园等，这些散布于北京各区的不同功能的体育场馆既可以作为当地社区居民的体育休闲健身场所，也可以作为旅游吸引物进行开发。

3.2.3 现代化公共购物娱乐休闲场所的丰富

北京的购物娱乐休闲场所不断丰富，国家大剧院、世贸天街等公共娱乐休闲场所本身既是休闲购物场所又是旅游吸引物，并且借助 2008 北京奥运会的宣传，强化了其在游客心目中的美好形象，激发游客的游览动机。

3.2.4 北京传统旅游产品的强化

在此次奥运宣传中，无论是奥运开幕式、闭幕式还是奥运宣传片，北京的传统建筑、文化与传统的宣传与展示都是奥运宣传的重点。2008 年北京奥运会的大力推广与宣传、国内外媒体的海量新闻播报，都强化了北京的传统旅游产品，包括传统的物质遗产如故宫、颐和园、天坛、八达岭长城等，非物质遗产如国画、茶艺、京剧、书法、中华武术、风筝、刺绣、陶瓷、民俗以及美食等。借

助北京奥运的机遇，北京的非物质文化遗产的旅游开发力度应该进一步增强。

3.3 旅游服务设施的改善

3.3.1 城市基础设施的改善

在北京奥运会全面准备情况新闻发布会上，有关人员介绍说北京的城市总体建设投资，包括城市的基础设施、能源交通、水资源和城市环境建设七年来大约是 2800 亿人民币。在交通方面的改善包括北京市道路承载能力和通行力的提升，以及新建的机场航站楼、四通八达的城市轨道交通和快速公交系统等。在城市环境方面，北京奥运会实施了 358 个“绿色奥运”项目，包括 69 项新能源项目、168 项建筑节能项目以及 121 项水资源项目。

3.3.2 北京旅游接待、体育娱乐以及购物场所与设施的改善

奥运期间，北京的旅游接待及公共休闲场所的设施得到了改善，景区景点加强了游客中心、停车场、索道、旅游厕所、无障碍游览设施等的规范化管理。在北京奥运会全国旅游接待服务新闻发布会上，国家旅游局介绍说申办奥运成功后，北京市星级酒店的数量从 2001 年的 506 家增加到 2007 年底的 806 家，客房数量为 13 万间，床位数超过 25 万张。

3.3.3 旅游服务的提升

在北京奥运期间，北京市的旅游服务硬件设施和软件服务水平也得到了综合提升。例如，北京市的旅游地图标识系统得到了强化与升级、旅游解说系统概念得到重视，导游、酒店服务人员的素质经过一系列培训和实践得到了提高。

3.4 旅游市场的结构变化

北京奥运会的举办对于大众生活方式转变也起到推动作用，积极参与体育运动为标志的“积极的生活方式”(Active Lifestyle)也成为生活的主流，并影响着人们的出游选择(闫新红, 2008)。以北京作为目的地进行旅游的市场营销应该注意体育与康体活动市场，要根据奥运后市场的特殊性，精心设计和开发具有浓郁北京人文特色、反映丰富奥运理念的旅游产品系列。完善观光旅游、度假旅游、商务旅游、修学旅游、文化旅游、科技旅游、生态旅游、民俗旅游等旅游产品的奥运内涵，增加现代奥林匹克场馆、公园、博物馆游览及赛事观战等内容。

3.5 北京旅游空间格局的影响

3.5.1 北京旅游轴线的延长

北京奥林匹克公园—奥运核心区的建设，使得北京南北中轴线向北延长(许铁铨、李东等, 2008)。在北京“两轴—两带—多中心”的新城市空间格局机理下的北京市旅游三圈结构中的“中心城区观光商务娱乐旅游圈”的南北中轴线向北延伸。

3.5.2 异质斑块的嵌入造成的城市功能和旅游功能的变化

奥林匹克公园片区大量建成的奥运场馆与国际国内顶级的通讯、住宿、餐饮、服务设施以及奥体公园森林生态区带来的大量绿地，使得奥林匹克公园片区成为与周围的高密度生活居住区相区别开来的异质斑块。随着后奥运时代的到来，这里预计将形成以奥运体育文化为主题的“体育、会展、节事”综合多功能旅游区，具有观光、休闲、演艺、体验与竞技的多种功能。这种旅游异质功能区的形成完全是因为奥运会这样的重大事件的驱动力作用，由此也可以看出重大事件的巨大影响。

奥运对于北京的影响巨大而深远，有人分析在奥运后三到五年甚至更长时间奥运的后效应还不会消失(胡莹, 2008)，也有学者提出要预防后奥运期的经济和旅游设施使用的“低谷效应”(王洪梅, 2008)。因此要加强北京后奥运时代的事件研究，开发传统产品和特色产品相结合的旅游产品结构体系；同时要看到根据“艾宾浩斯遗忘曲线”与事件关注周期理论，充分加强后奥运时期的北京旅游营销工作，维持奥运会的举办对于北京作为城市旅游目的地的宣传效应。

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大型节事活动对主办地旅游景区知名度影响研究 ——以北京奥运会为例

齐莉娜

北京大学旅游研究与规划中心

李咪咪

香港理工大学酒店及旅游业管理学院

吴必虎

北京大学旅游研究与规划中心

摘要

本研究在分析现有旅游景区知名度的评价方法及局限性之后,提出运用网络链接分析方法确定旅游景区网络知名度。然后验证了这种方法的可行性以及与原有方法比较的优越性。最后,以北京奥运会为例,用这种方法确定了奥运前后北京市主要旅游景区网络知名度变化情况。

关键词: 旅游景区, 网络连接分析, 网络知名度, 北京奥运

THE IMPACT OF MEGA-EVENTS ON THE AWARENESS OF TOURISM ATTRACTIONS: CASE OF BEIJING OLYMPIC GAMES

Lina QI

Center for Recreation and Tourism Research, Peking University

Mimi LI

School of Hotel and Tourism Management, The Hong Kong Polytechnic University

Bihu WU

Center for Recreation and Tourism Research, Peking University

ABSTRACT

The current study was designed to investigate the impacts of mega-events on the awareness of the sponsor cities as travel destinations through Network Link Analysis. The 2008 Olympic Games in Beijing was used as a case. Using data collected from March 2008 to September 2008, the network awareness of tourism attractions in Beijing was examined. Comparison was made between the network awareness and international tourist arrivals. The study results indicated that the 2008 Olympic Games increased the awareness of tourism attractions in Beijing, although there was a downturn of international tourism in terms of number of visitors.

Key Words: Tourism Attractions, Network Link Analysis, Network Awareness, Beijing Olympic Games

1 问题的提出

1.1 旅游景区是城市旅游核心吸引力

旅游景区是以旅游及其相关活动为主要功能或主要功能之一的空间或地域。依据中华人民共和国国家标准《旅游景区质量等级的划分与评定》(GB/T 17775—2003) (*Standard of rating for quality of tourist attractions*), 旅游景区是指具有参观游览、休闲度假、康乐健身等功能, 具备相应旅游服务设施并提供相应旅游服务的独立管理区。

旅游景区构筑了旅游业网络，作为旅游资源主要体现形式和旅游产品的主要载体，旅游景区成为旅游者参观、游览的主要场所，也是各旅游地最重要的旅游吸引物（钟永德，2005）。

Gunn（1988）指出，“尽管旅游系统中各要素都具有各自的重要作用，但唯有吸引物才构成其中的驱动力（energizing power）。广义旅游产品是由吸引物、设施和服务三类要素所构成，其中吸引物使潜在旅游者产生出游动机；狭义旅游产品指旅游吸引物，它可以粗略地等同于旅游景区（点）（吴必虎，2001）。本文中为了集中研究旅游景区，采用狭义旅游产品概念。

1.2 大型节事活动需要旅游景区承载

旅游节事活动对主办地影响是多方面的。它往往成为旅游目的地一种动态性旅游吸引物，从而吸引大量国内外游客的参观和游览（黄翔，2004）。这些旅游需求快速增长，直接导致旅游者对旅游产品需求增加，主要是对旅游景区（景点）需求增加。

旅游景区对大型节事活动（mega event）承载作用表现为2个方面。

一方面为功能承载。举办时和举办后的时间里，除了与节事产品本身以及节事延续产品为重要的新增旅游吸引物之外，旅游景区仍然承担着重要旅游吸引物功能。

另一方面为物质承载。对会展旅游来说，旅游景区是其开展业务活动必不可少的物质基础（周彬，2003）。很多节事活动举办地点就是旅游景区。旅游景区凭借举办节事活动，迅速提高其知名度、美誉度（熊越强，2008）。

1.3 旅游景区知名度提升是主办地知名度提升重要内容

大型节事活动通过对主办地短时间内凝聚大量公共关系媒体报道，瞬时关注度提高。因此，它被认为是最大，最富特色、最有意义的城市广告（张文建，2006）。大型节事活动对旅游业的影响，表现为主办地旅游产品知名度提高，进而产生潜在旅游需求。

对旅游景区知名度的认知，属于目的地品牌营建 3P-3I 模型的重要部分（图 1）。

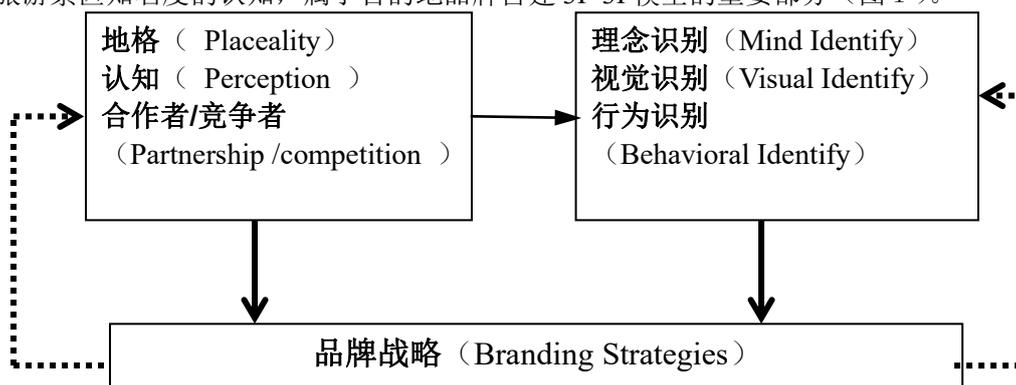


图 1 目的地品牌营建的 3P-3I 模型（吴必虎.俞曦）

从图中可以看出，深入了解旅游者对目的地意境地图的认知，是构建目的地品牌的第二个基础（吴必虎,俞曦）。旅游地知名度和美誉度是旅游者关于目的地映象的定量评价指标。所谓知名度是指真实和潜在的旅游者对旅游目的地识别、记忆的状况，知名度本身无好坏之分，但好、坏两方面都会提高知名度；美誉度是指真实和潜在旅游者对目的地的褒奖、赞誉、喜爱情况（李蕾蕾，1999）。旅游目的地是一个子系统，在该子系统中，旅游产品或者旅游吸引物是引起旅游者出游冬季的直接触发因素。因此，对旅游目的地的认知，很大程度上转化为对旅游产品（旅游景区）的认知。

不同客源市场由于位置、文化 差异，导致出游方式选择和对信息关注各不相同，对旅游景区知名度认知也不同。因此，根据认知主体和所属地域不同分为国际知名度、国内知名度、省内知名

度。

入境游客和国内游客对景区认知明显不同，其差异主要是由景区旅游功能和级别产生。旅游景区知名度、景点类型和旅游者的空间尺度是影响旅游者对旅游景区认知的重要因素(马耀峰.李君轶, 2008)。

会展经济是生产力发展到一定阶段的产物。一般而言，大型节事活动往往突破国家尺度，在国际和洲际范围内经济、政治或者文化交流，国际影响显得尤为重要。

本文集中研究大型节事活动对主办地旅游景区国际知名度影响。

2 研究现状及局限性

知名度和美誉度是在经营、管理、传媒、教育、公共关系学和组织行为学等学科中广泛使用的概念。在如何提高知名度和美誉度的问题上，不同行业提出了不同方法。但是，如何衡量一个组织或者个人的知名度和美誉度，研究文献较少。

在旅游业研究研究中，主要集中在对旅游城市(熊越强, 2008; 郑浙民, 2007; 张同功, 2008)、旅游景区(李辉, 2008)知名度的研究上。

根据相关法令、文献和统计资料，对旅游景区国际知名度评价主要有以下3种方法。

2.1 问卷法

采取调查问卷、使用者量表分析、访谈等方式获得数据，计算知名度和美誉度(李蕾蕾, 1999)。

$$\text{知名度} = \frac{\text{知晓旅游地的人数}}{\text{总人数}} \times 100$$
$$\text{美誉度} = \frac{\text{称赞旅游地的人数}}{\text{知晓旅游地的人数}} \times 100$$

虽然计算方法简单、清晰，但是数据获得具有难度和片面性。调查范围受到很大局限。另一方面，在问卷调查、民意测验等方法使用中，使用者会有一种潜意识防范性，对所获取信息产生了一定程度的修订从而导致不真实性存在的可能。

2.2 国家标准评定法

由中华人民共和国国家旅游局起草、提出，中华人民共和国国家质量监督检验检疫总局发布的《旅游景区质量等级的划分与评定》(修订)(GB/T17775-2003)对相关内容表述如下(表1)。

表1 《旅游景区质量等级的划分与评定》对旅游景区知名度规定

旅游景区质量等级	年接待海内外旅游者数量(单位:万人次)	年接待海外旅游者数量(单位:万人次)	对知名度表述	对美誉度表述
5A	60	5	世界知名	美誉度极高
4A	50	3	全国知名	美誉度高
3A	30	无	周边省市知名	美誉度较高
2A	10	无	全省知名	有一定美誉度
1A	3	无	本地区知名	有一定美誉度

一般而言，旅游景区质量等级越高，知名度越大。旅游景区质量等级在一定程度上反映了旅游景区知名度。

但是旅游景区的质量等级并不等同于知名度。因为质量等级的评定是由旅游交通、市场吸引力等 12 主项以及若干分项共同构成,无法与旅游景区知名度、美誉度完全对应。加之对接待旅游者人数的数量要求进入门槛低和对知名度、美誉度表述模糊等因素,只能将其作为衡量旅游景区知名度的一个基础标准。

2.3 统计法

北京市旅游统计年鉴(2005)提供了北京市 2004 年主要旅游(区)点基本情况统计。其中提供了 35 个“以外地来京到访率较高的旅游景区(点)为主”旅游(区)点的接待旅游者人数和海外旅游者比例。旅游景区实际接待能力从现实角度反映了旅游景区的知名度和美誉度。

这是目前公开统计资料中能找到的最新反映北京市旅游景区接待能力的统计资料。之后的统计资料中,反映某一统计期间内(年度或者月份)接待旅游者总数和国外旅游者总数,也反映同一统计期间内按照不同市场细分的统计数据。但是缺乏以旅游景区为统计单位的统计资料。

和上述两种方法相比较,实际接待旅游者人数能更真实地反映旅游者的知名度。一般而言,到访人数多的旅游景区,知名度一定高。

尽管如此,这种方法也存在一定的局限性。

第一:这种方法不能反映出那些知名度、美誉度高,但是由于某些因素限制,实际接待人数不多的旅游景区知名度。

第二:数据收集困难。如上所述,统计数据缺乏以旅游景区为统计单位的统计资料。也就是说,无法确定每个旅游景区接待不同客源国的旅游者数量,也就无法确定不同旅游景区在不同客源市场知名度。事实上,旅游景区之间存在不同的旅游吸引力,即便是同一城市内、同一等级的旅游景区,其主要客源市场及其知名度也各不相同。由于缺乏数据,对进一步潜在客源市场特征分析造成障碍。

3 基于网络连接分析的旅游景区网络知名度研究

3.1 网络链接分析

网络链接分析是一个新兴研究领域,它是探索网络空间结构和进行网络信息资源计量评价的基本方法和有效工具。目前,有关网络链接和链接分析的研究,已经成为网络计量学研究的核心和重点(庞景安,2007)。

网络链接分析实际上是 Web 结构挖掘,将传统的引文网络链接分析法应用到对网络信息资源的计量和评价,主要被用于搜索引擎技术。但网络链接的作用不止于此。Buyukkokten(1999)等通过链接得到了教育网内信息资源的地理范围,Han Woo Park(2007)等发现韩国政治网站链接能够部分反映韩国政治团体的一些特性。Web 使用挖掘试图从用户访问日志中得到用户的行为模式和群体特征(韩家炜等,2001),对于商业组织其意义十分明显。

3.2 Inlink(反向链接)

在网络链接分析包括入链(inlink)、出链(outlink)和自链(selflink)三种类型。

其中,Inlink(Inbound link)是被学术界普遍接受的一个术语,某些文献称其 Incoming Link, Inward Link, Back Link, 中文名为“入链”,“反向链接”,“导入链接”等。Inlink 可以在一定程度上反映网络信息资源被利用和产生影响的状况,成为网络信息资源计量评价的重要指标。Inlink 对应于文献计量学中的“被引用”,也因此成为网络信息资源计量评价的重要指标(庞景安,2007)。

这种方法已经广泛使用在图书馆学、商业、教育业等领域。入链数源于引文分析中的被引次数,

链接如同引用，代表一种推荐或认可，被链接的次数越多，代表被认可的程度越高（李江，2008）。

3.3 网络知名度

网络知名度已经在其它学科有所使用。网上知名度是指网站上针对某个品牌或其产品或服务的言论的频率，用关注量来表示。一般来说，某消费类品牌的产品的销售量越大，消费者就越多，在网站上的相关发言的频率就越高，关注该品牌及其产品的网民的数量越大，品牌知名度就越高。说明如果发言中赞扬和批评的比例适中，说明知名度和美誉度是相匹配（赵月旺，2006）。在教育领域，陈次白（2004）提出用提高网络知名度的办法提高教师知名度。

随着互联网在世界范围内的广泛传播和使用，使越来越多的国际旅游者通过网络在出行前了解旅游目的地的各种信息（白凯.马耀峰，2007）。在互联网使用广泛而普遍的特征下，旅游产品的供给者——旅游景区能够有效建立本景区官方网站，而且网站数量和质量也在不断加强，将网络营销作为一种低成本而高收益的营销手段。旅游产品的需求者——旅游者将从网络获取相关旅游信息作为一种重要信息获渠道，与其他传统渠道比较，它占据了越来越多的空间。

基于旅游产品供给者和需求者共同对旅游景区网络信息的关注，使得对旅游景区网络数据的获取较之问卷法更具有全面、更容易获取；而与统计法比较，网络分析法能更准确地反映潜在客源市场目标细分。

本文提出用分析旅游景区官方网站反向链接数量的方法确定旅游景区知名度。

4 案例研究——以北京奥运为例

4.1 数据采集

搜索引擎选用 Google、AlltheWeb、Altavista 和 MSN 等四种。Altavista 和 AllTheWeb 是链接分析时使用最普遍的两个搜索引擎。Google 是当前使用最为广泛的搜索引擎，但它不具备 Altavista 和 Alltheweb 对某一站点的链接数进行检索的功能，它只能统计某一网页的链接数，其次 Google 的高级检索虽然能限定在某一分类域名中，但它不能准确地区分内外部链接(Smith, Thelwall,2002)。MSN 为一种广泛使用的搜索引擎也同样被采用。

选用 SEO Elite3.2 作为自动搜索工具。SEO Elite3.2 允许用户使用不同的搜索引擎检索反向链接，自动获得网站 IP、网页 PR 值以及网站的 Alexa 排名等，并以 csv 格式导出搜索结果。

本文试图采集长期数据以跟踪反映奥运召开前后对北京主要旅游景区网络知名度影响。但是由于一些技术因素所限，本研究数据采集时段集中在 2008 年 3 月——9 月之间。

本文对北京市 28 个 4A-5A 旅游景区官方网站使用 SEO Elite3.2 进行了检索。

4.2 统计分析

截至 2008 年 4 月，北京市 154 个 1A—5A 级旅游景区中，已有过半数旅游景区建立官方网站。由于本文研究旅游景区国际网络知名度，所以只对部分有入境旅游者的旅游景区官方网站进行入链数分析，基本情况如下表（表 2）。

从表中内容分析得出，大部分旅游景区都已经建立了官方网站。而且，有入境旅游者接待的旅游景区建立官方网站的比例 72.9% 远远高于旅游景区官方网站的比例 51.3%。说明，接待入境旅游者的旅游景区，对官方网站的建设更为重视。

国外网站 Inlink 数量也随着旅游景区质量等级下降而降低。也就是说，在可以验证的范围内，国际网络知名度与国家标准法提供的旅游景区知名度评价结果一致。

表2 北京市旅游景区网络链接分析相关数据表

旅游景区质量等级	旅游景区数量 (单位:个)	官方网站数量 (单位:个)	所占比例 (单位:%)	2007年接待入境旅游者的旅游景区数量 (单位:个)	有官方网站的旅游景区数量 (单位:个)	所占比例 (单位:%)	3月份国外网站 Inlink 平均数 (单位:个)
5A	4	4	100	4	4	100	89.75
4A	41	36	87.8	25	22	88	22
3A	35	13	37.1	15	8	53.3	16.46
2A	54	23	42.6	20	14	70	4.63
1A	20	3	14.3	6	3	50	0
合计	154	79	51.3	70	51	72.9	

注：2007年接待入境旅游者的旅游景区由北京市旅游局提供。

4.3 结果

基于对接待国外旅游者数量和旅游景区官方网站变化的考虑，本文只对28个4A和5A级旅游景区进行官方网站反向链接分析。通过四种搜索引擎，获取不同旅游景区从2008年3月到9月之间7个月的网络链接数目。其结果如图（图2）。

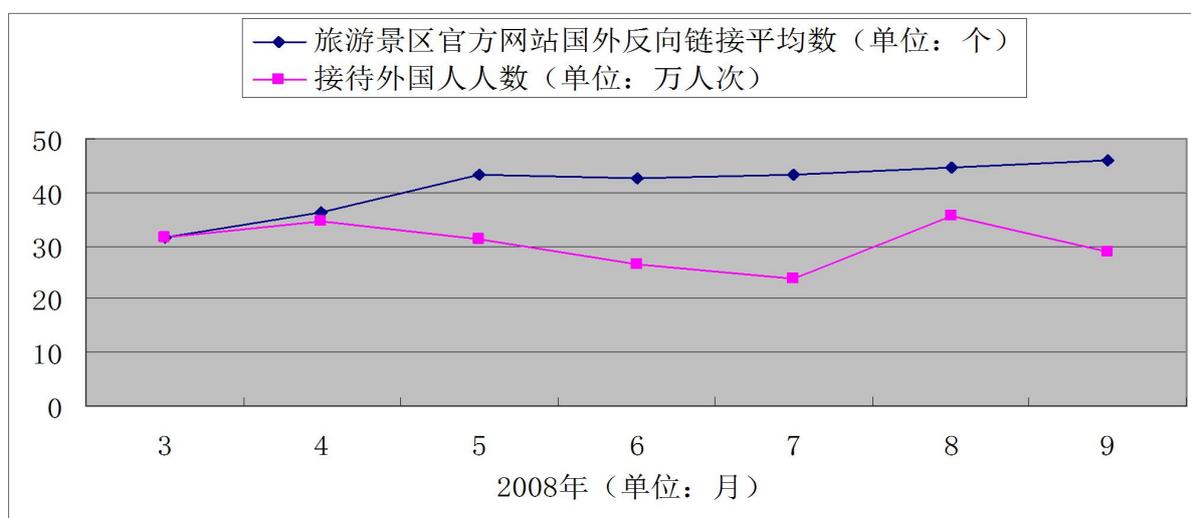


图2：旅游景区官方网站国外反向链接与接待国外旅游者状况图

从图中可以反映出奥运作为重大节事活动，其举办前后主办地旅游景区国际网络关注度变化趋势。首先在奥运召开前5个月开始，出现一个国际网络关注度急剧上升，上升幅度为14.65%。之后，在奥运召开前3个月开始，旅游景区国际网络知名度呈持续、稳定上升态势。到奥运结束后的第一个月，达到最高国际网络知名度。这时，它约是6个月前的1.5倍，显现出网络聚焦效应。这种急剧提升并且持续稳定增长的国际网络知名度独立性强，即使由于某种原因导致同期实际接待国外旅游者数量下降（从4月到7月期间），国际网络知名度上升态势没有受到干扰。

外国网络知名度持续提升状态能持续多久，需要进一步数据跟踪。在较高国际网络知名度的情况下，如何将其转化为现实入境旅游者，为网络营销学提出新的研究内容。

5 结论和展望

5.1 结论

本研究运用网络链接分析方法获取旅游景区官方网站反向链接数量，它是旅游景区网络知名度的数据基础。网络知名度分析作为评价旅游景区知名度的一种方法，在结论上反映出与传统评价方法的一致性。网络知名度方法通过有效而全面地获取数据，可以定量衡量旅游景区知名度。

奥运作为一种大型节事活动,在其召开前后至结束后的一段时间内,主办地旅游景区国际网络知名度相继出现一个急剧上升时期和持续、稳定增长时期。这个时期始于奥运召开前3个月,止于何时还有待进一步数据获取。

5.2 展望

图2只反映了一个客观事实,这个客观事实是对从奥运召开前后,实际接待国外旅游者人数变化和对北京市28个主要旅游景区国际网络知名度表述,并没有确定这种知名度和实际接待人数之间的某种关系。

目前研究由于数据量不够,不能解释这个客观事实的原因。比如网络知名度是正常速度的提高还是奥运带来的网络知名度急剧改变,各占比例多大等等。这个解释需要长时间的数据跟踪来完成。

由于旅游景区官方网站的变化(比如今年5月份开始中央电视塔开始使用官方网站,而九龙游乐园官方网站从2008年9月份开始不能正常登陆等),将导致不同时期各项结果有所变化。各种影响因素的确定,有待进一步研究。

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基金项目:北京市科委软科学研究博士生学位论文资助项目(ZZ06188)

大型节事活动对举办地开展都市旅游的影响

王晓丽
韩山师范学院旅游管理系

摘要

大型节事活动对举办城市的旅游业发展具有重大意义，而对举办城市开展都市旅游更是有着直接、深远的影响。文章将大型节事活动对举办城市开展都市旅游的影响分成积极与消极两方面进行分析，并就如何利用积极影响，应对消极影响做了初步的探讨。

关键词：大型节事活动；都市旅游；积极影响；消极影响

ON THE IMPACTS OF LARGE-SCALE FESTIVAL & SPECIAL EVENTS ON THE URBAN TOURISM OF THE HOST CIT

Xiaoli WANG
Department of Tourism management, Hanshan Normal University

ABSTRACT

Hosting large-scale festival & special events is very significant to the development of a city's tourism, moreover, it will bring about direct and profound impact on the urban tourism development of the host city. From both positive and negative aspects, this paper will analyse how festival & special events affect the urban tourism of the host city. Preliminary studies are also given to how to make use of the positive impacts and how to cope with the negative ones.

Key words: large-scale festival & special events; urban tourism; positive impacts; negative impacts

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作者简介：王晓丽（1981—），女，广东潮州人，广东韩山师范学院旅游管理系助教，研究方向为旅游资源与文化。

第三部分 主人与客人：节事活动的公众参与

Part 3 Hosts & Guests: Involvements of Events

RESIDENTS' ATTITUDES TOWARDS THE IMPACTS OF THE 2009 WORLD GAMES: THE CASE OF KAOHSIUNG CITY AS A HOST CITY

Shang-Chun Ma
Sheffield Hallam University, UK

Shang-Min Ma
National University of Kaohsiung, Taiwan

Ian D. Rotherham, & David J. Egan
Sheffield Hallam University, UK

and

Tien-Hsiu Liu
Shu-Te University, Taiwan

ABSTRACT

The purpose of this study is to investigate host residents' attitudes towards potential impacts prior to the 2009 World Games, with the intention of tracking changes over time. The intent is to inform event tourism planning and management. Factor analysis of twenty-four impact statements recognised five dimensions: event support, economic and image benefits, community involvement, local development benefits, and negative impacts. Results indicated that the respondents agreed that the Games will result in '*economic and image benefits*' and 91% support hosting the Games. Significant differences were found in terms of negative impacts relating to age, marital status, occupation, and education. The results of the logistic regression demonstrated that categories of 'expect to attend', 'perceived level of preparation', and 'interested in event' were statistically significant in the impact model. The findings of this research provide insight into key processes and generate useful information for current and future events managers.

Keywords: Sports mega-event; The Kaohsiung 2009 World Games; Event management; Host impacts

INTRODUCTION

Mega-events are widely known as one-off events that usually have potential to generate long-term outcomes, both positive and negative, for host areas, (Mihalik & Cummings, 1995; Mihalik & Simonette, 1998; Ritchie & Aitken, 1985). Over the last thirty years, the staging of major sporting events and other festivals has become increasingly recognised as part of development strategies for cities, regions, or even countries. Behind such a phenomenon is a fierce competition which is pursued to achieve economic, social, environmental, political, cultural, and tourism benefits for the hosting areas (Gratton et al., 2005). However, events may impinge significantly on host residents' quality of life. Event tourism researchers noted that negative impacts are often ignored by local communities and event planners before staging the mega-event, while the expected benefits are promoted (Gursoy & Kendall, 2006; Kim et al., 2006). It is therefore clear that with increasing reliance on event hosting as a powerful driver for cities' redevelopment and promotion, and with a need to establish relevant strategies, associated impacts on communities have become important (Ma et al., 2006). More significantly, local residents are often influential groups, and the success of the event is largely dependent on a supportive and involved local community (Fredline, 2006). It is also noted that event planners and stakeholders gradually take the views of the staging community as a vital determinant of the success and sustainability of their investment (Williams & Lawson, 2001). An understanding of the nature of whether host residents support the hosting of events could well inform policy makers in planning and promotion of future events (Bull & Lovell, 2007). In this context, it is important to know local people's views about and perceptions of hosting impacts in terms of justifying a successful sports mega-event.

The previous research focused mainly on the impacts after post-events, while the present study was conducted on the host residents' perceptions specifically prior to the Games. This investigation yields outcomes related to host residents' perceptions rather than the actual impacts post-event. However, perceptions play an important part in terms of shaping community opinion (Ohmann et al., 2006). Additionally, it is suggested that perceptions of various impacts of a sports mega-event are likely to be different across resident socio-demographic profiles. This is attributed to each part which interacts with other stakeholders involved in the mega-event (Waitt, 2003). For instance, shopkeepers may welcome the hosting of the mega-event and would have positive attitudes towards the event because they foresee economic benefits. On the other hand host residents who seek a tranquil life may hold a more negative view because visitors and participants may interfere with their daily lives. Thus an exploration of host residents' socio-demographic profiles and how this relates to their views about hosting an event enables a more precise understanding of who are the 'winners' and 'losers' in holding a mega-event (Kim & Petrick, 2005).

Kaohsiung, the second large city in southern Taiwan, used to be symbolic of the Taiwan economic boom in 1980s and 1990s. It now faces a post-industrial era similar to that in many Western European economies during the 1970s and 1980s. The high unemployment rate (compared to other cities in Taiwan) is strongly associated with the shift in industrial structure away from its previous reliance on production-based activities towards high tech and services. The principle factor behind this swift change is mainly China's attractiveness as a huge potential market and source of cheap labour. In this context, Kaohsiung has no choice but to adapt or suffer. In response to key aspects of the economic recession, the Kaohsiung City Government (KCG) copes with criticism by initiating a wide range of strategies such as the adoption of leisure and consumption-oriented development (rejuvenating derelict districts, waterfront development etc.), reviving the Love River and hosting mega-events. In terms of hosting the mega-events e.g. the World Games, the aim is to improve quality of life for Kaohsiung citizens. This was revealed at the 2006 International Summit of Waterfront Cities in Kaohsiung (Ma et al., 2006). However, what is the World Games? It is an international multi-sports event hosted by the International World Games Association (IWGA), under the patronage of the International Olympic Committee (IOC) (AOC, n.d.). It focuses on sports that are not contested in the Olympic Games. The Games are held in the year following the Summer Olympic Games. Unlike the Olympic Games, athletes participating in the World Games are selected by the International Federations (IFs) of each sport rather than by their countries. Its other characteristic is that existing sports facilities are encouraged as the venues for the Games. The Games were founded in Seoul in 1980, when a group of twelve International Sports Federations formed the World Games Council, later renamed the International World Games Association. Table 1 shows the locations of the first eight World Games and the numbers of participants. Total participants of athletes and staff have increased gradually. Despite numerous studies on impacts of event tourism such as the Olympic Games, there appears to be a lack of scholarly evidence relating to the World Games. Only a little evidence was found and this is particularly based on the perspective of the host city's organisers. For example, the following provides the results describing the event tourism impacts of the Akita 2001 and the Duisburg 2005 World Games.

WIGE MEDIA, Host Broadcaster of the games, announced the balance three months after the closing ceremony of the 7th World Games, which took part between July 14th and July 24th, 2005. German TV alone had 116 million viewers and pictures of the games were shown in 137 countries around the world. Nearly 450 hours of broadcasting were disclosed in the report. Duisburg and its partner cities had already announced a new record of more than 500,000 visitors during the games [which have created 60 million Euro and additional values to the City].

(World Games 2005 GmbH, 2005)

The average number of visitors to the Akita City per year is 5.5 million, with 450,000 visitors per month. During year 2001 when the World Games was held, only in August the number of visitors to the Akita area was 3.85 times of average month, counted at 2,110,000.

(Research, Development and Evaluation Commission, KCG, 2005)

Yet, despite such benefits, it is still questionable how they are spread amongst the host residents. Research indicates that there is an absence of an overall evaluation in the case of the Akita and Duisburg World Games. This may be due to the fact that the anticipated results of economic impact help justify public investment in hosting such events and they are possibly used politically by governments to promote substantial consequences of the events to residents of the host city (Jeong, 1998; Kim & Petrick, 2005). However, economic impacts may also inform what has been spent and there is also very little known about host residents' opinions of such events (Bull & Lovell, 2007). Furthermore, in terms of the 2009 World Games, it is worth noting that it is the first international multi-sport event to take place in Taiwan. Yet although a number of national-scale sports events have been held every year, there has been no vigorous empirical research carried out concerning the residents' attitudes towards the potential impacts of sports events hosting in Taiwan. Thus, the purpose of this study was to investigate host residents' attitudes towards potential impacts prior to the 2009 World Games. The intent of this research was to inform event tourism planning and management. To this end, the underlying objective of this study was to answer the following research questions: (1) Are there significant differences in host impacts between different backgrounds of host residents? (2) Why do some host residents support the staging of the Games? (3) Why do some host residents hold positive attitudes toward host impacts within the selected case study communities?

Table 1
Locations of the first eight World Games and numbers of participants

	Year	Host Destinations	Sports	Total Nations	Total Athletes
1st	1981	Santa Clara (USA)	18	n/a	1265
2 nd	1985	London (GBR)	23	n/a	1550
3 rd	1989	Karlsruhe (GER)	45	n/a	1965
4 th	1993	The Hague (NED)	30	69	2275
5 th	1997	Lahti (FIN)	30	78	2600
6 th	2001	Akita (JAP)	26	93	3200
7 th	2005	Duisburg (GER)	32	89	3400
8 th	2009	Kaohsiung (TW)	32	(around 100)	(over 4000)

Source: Adapted from KOC (n.d.) (http://www.worldgames2009.tw/english/World_Game/History.asp)

METHODS

Data were collected from host communities nearby four competition venues (i.e., the Main Stadium, the Kaohsiung Dome, the Lotus Lake, and the Love River) in Kaohsiung City. Those citizens who reside as close to the selected survey sites were considered to receive questionnaires because they are seen to be more exposed to impacts, e.g. the preparatory work (e.g., construction work, the hosting of pre-events etc.) and the competitions taking place during the Games. Distribution of a total of 700 face-to-face questionnaires was undertaken to gauge host residents' views in late January and early February 2007, with 606 useable questionnaires. Purposive sampling was selected

to be the technique for the survey since an accurate sampling frame was unavailable largely due to ambiguous boundaries between host and non-host zones. Finn et al. (2000) indicated that since an accurate sampling frame does not exist all the time, non-probability samples which are usually found in visitor attractions and sporting events are used. In order to minimise sampling error and any potential bias to an acceptable level, various influential factors such as timing (e.g., weekdays vs. weekends; office hours vs. non-office hours), exact locations (e.g., precise streets and block), weather and residential proximity (e.g., tourism zone vs. non-tourism zone), were carefully considered. For example, due to the variation in the number of members of each household related to weekdays and weekends, the weather and also the residential proximity, site visits to survey locations were scheduled to help reach as many households close to competition venues as possible. Most of the questionnaire distributions were completed on the weekends in the tourism zone whilst in non-tourism zone most were undertaken after office hours during weekdays. Moreover, an almost even distribution was shown, with 48% in non-tourism zone and 52% in tourism zone. Further to this, the investigators were directed to seek an equal proportion of male and female respondents, yielding a response rate of 55% from males and 45% from females. This sampling plan is designed with a specific purpose to reflect the characteristics of the residents and their relevance to the topic of the investigation (i.e., host areas) (Denscombe, 2003).

The questionnaire was designed to explore residents' attitudes of the perceived potential impacts of the 2009 Kaohsiung World Games and comprised three sections. This included the verified tourism impact attitude scale (VTIAS) as the dependent variable, items regarding specific topics as the independent variables, and demographic questions. With respect to VTIAS, a total of twenty-seven items were adopted based on the Tourism Impact Attitude Scale (TIAS) and a number of sources in event tourism literature (Getz, 1977 & 1991; Hall, 1992; Lankford & Howard, 1994; Ritchie, 1984; Shultis et al., 1996, Twynam & Johnston, 2004). In terms of TIAS, it was developed by Lankford & Howard (1994) and has been used for assessing residents' attitudes toward tourism. However, it is also noted that the event impacts are quite similar to those of tourism generally (Fredline & Faulkner, 2002). There might be a part TIAS can play in assessing and interpreting residents' perspectives of event tourism (Twynam & Johnston, 2004). VTIAS measured various dimensions of the 2009 World Games, including five statements on economic impacts and the remaining twenty-two on social and environmental impacts. Responses to the items of VTIAS were given on a five-point Likert scale where 1 was equivalent to "strongly disagree", 3 was equivalent to "no opinion", and 5 was equivalent to "strongly agree". Besides, items concerning specific topics encompass residential proximity (tourism or non-tourism zone), period of residence (less or more than ten years), adapted lives or not (yes or no), involvement in tourism (yes or no), aware of hosting the event (yes or no), support for hosting the event (yes or no; reason), expect to attend (yes or no), perceived level of preparation (poor, fair or good), interested in event (low or high) and age (younger than 20, 20-29, 30-39, 40-49, and older than 50). Basic demographic items measured gender, marital status, age, occupation, the highest education, and annual personal income.

A pilot study was carried out when analysis techniques, including Independent-Samples T Test, exploratory factor analysis (construct validity) and reliability analysis (Cronbach alpha coefficient), were specifically performed to test and refine VTIAS. The final twenty-four items included various positive and negative 'host impact' items. The Cronbach alpha coefficient on the total scale was .887, which achieved an ideal standard above .70 (Nunnally, 1978). Data were analysed using SPSS with descriptive statistics, factor analysis, independent t-tests, ANOVAs, and logistic regression. Specifically, independent t-tests and ANOVAs were run to determine if there were statistically significant differences in host impacts between different backgrounds of host residents. Descriptive statistics was performed to explore a profile of the respondents and to determine the reasons for the support of staging the Games. Logistic regression was run to examine the reasons why some host residents were more likely to take 'positive attitudes' (positive attitude= score above 50% of total score on the scale; 'negative attitude'= score below 50% of total score on the scale) toward host impacts.

RESULTS

Across the sample of 606 respondents, males comprised 55% of responses and females 45%. Just a slightly over half (51.4%) were single and 48.6% were married. The majority of respondents were aged between 20 and 50 (68.9%), while the youngest group and the groups aged above 50 made up 31.1% of the responses. Occupations of the respondents included shopkeeper (23.6%), student (21.1%), employed (39.9%), unemployed (4.5%), retired (4.5%), and others (6.5%). The majority (88.2%) of respondents received at least senior or above education, while only 11.8% educated at the junior high school level or below. Annual personal income below NT\$600,000 (\approx US\$20,000) accounted for 82.5% of the respondents, while only 17.5% were above the income level of NT\$600,000.

To answer the first research question, a combination of statistical analyses was used. Factor analysis of twenty-four potential impact statements on VTIAS recognised five impact dimensions. These included *economic and image benefits* ($M= 3.98$), *event support* ($M= 3.97$), *community involvement* ($M= 3.66$), *local development benefits* ($M= 3.50$), and *negative impacts* ($M= 3.30$), with the grand mean score for the five factors at 3.77. This indicated that host residents tended to show a certain level of agreement on the potential positive impacts factors while were uncertain about potential negative impacts. The results of the independent t-tests and ANOVAs revealed that respondents differed significantly on the negative impact factor of the Games depending on their marital status, $t(587) = -3.686$, $p = .000$; age, $F(5, 583) = 7.625$, $p = .000$; occupation, $F(5, 584) = 4.484$, $p = .001$; and education, $F(4, 585) = 4.638$, $p = .001$. In terms of question two, the extent to which host residents support for staging the Games was examined by using descriptive analysis and the reasons provided by the respondents. Results for the assessment of the level of support suggested that 91% were favouring the staging of the 2009 World Games, for the reasons that the Games will bring about profound benefits in economy, tourism, environment, social, psychological, political and others. Conversely, reasons to oppose the hosting of the Games were concerned with issues such as inadequate human resource and facilities, negative outweighing positive impacts, noise, and traffic jams. Only a few respondents doubted but actually support the stage of the Games, that whether support or not, the city government has made the decision. To answer the third research question, a proposed impact model was analysed using logistic regression to examine host residents' attitudes toward overall host impacts. The regression model containing all predictors was statistically significant: $\chi^2 (9, N = 556) = 82.554$ ($p < .001$), indicating that the model was able to distinguish between respondents who hold positive or negative attitudes towards host impacts. The model as a whole explained about 20% (Pseudo R^2) of the variance in attitude towards host impacts, and correctly classified 84.8% of cases, demonstrating that 'expect to attend', 'perceived level of preparation', and 'interested in event' made a statistically significant contribution to the impact model. 'Perceived level of preparation' was the most influential explanatory variable, accounting for around 17% of the explanatory power of the model. The group of 'perceived poor level of preparation' was found to be over 4.5 times as likely as the 'perceived good level of preparation' group to take a positive attitude toward host impact. Those who 'do not expect to attend the event' were over 7 times as likely as those who 'expect to attend the event' to take a positive attitude toward host impact. The influence of 'expect to attend' is the weakest among explanatory variables, contributing 14% of the explanatory power of the model. Those with 'low interest in the event' were over 6.8 times as likely as those with 'high interest in the event' to take a positive attitude toward host impact.

DISCUSSION AND CONCLUSIONS

The results of the descriptive analysis indicated that host residents highly expected benefits relating to 'economic and image benefits' and enthusiastically 'supported' the hosting of the Games. But they were uncertain about whether hosting the Games will cause negative impacts such as political turmoil in local area, environmental impact, worsened crime rate in the local community, and overall negative image of Kaohsiung City. The results of the independent t-tests and ANOVAs revealed that while there was no significant difference on four positive impact factors, respondents' ratings of negative impact factor differed significantly depending on certain socio-demographic

groups. Specifically, married respondents tended to disagree that the staging of the Games will impact negatively upon host areas. Younger respondents were more negative about the potential effects of the Games. This finding is consistent with previous study, suggesting that younger residents tended to express a higher level of perception on the negative impact factors (Kim & Petrick, 2005). It may be attributed to the fact that the younger residents are the group more likely to involve in sports mega-events and thus to have a higher level of concerns about the impacts. Under this circumstance, they might be more sensitive to the planning process of the Games. In terms of occupation, the student group was the most likely to be concerned about or expect negative impacts, compared to the shopkeeper group who was very positive. As discussed earlier, the younger age group appeared to show a negative attitude towards host impacts. Both findings are well-matched, suggesting that the perspective of the student group may be related to age specifically, with younger respondents expressing negative feelings about impacts. Meanwhile, this also provided an interesting possibility in comparison with the results from a previous study by Kim and Petrick (2005) who suggested that the housewife group could be the highest beneficiary of the 2002 World Cup in Korea (e.g., enhancement of Korea's image and interest in foreign culture). In contrast with this, the findings of the present study demonstrated that shopkeepers had the highest mean scores on the four positive impacts and one negative impact prior to the Games. Obviously, on this basis of information, it is expected that the Games are anticipated to play an important role in the boosting economy in host areas, and this in part relates to the wider economic performance in the Kaohsiung City. Therefore, issues in terms of their priorities could be very different at different stages of the Games in different Host Cities. Likewise, the result might be explained by "social exchange theory", regarding the exchange of resources between individuals and groups in an interaction situation (Ap, 1992). It is further speculated that for this interaction there will be some kind of benefits derived from the exchange, and an individual or group will be willing to take on an exchange with another party. Based on this theory, it is reasonable to speculate that the shopkeeper group could be the highest beneficiary in staging the 2009 World Games. In terms of education, respondents at senior high school level were the most likely to expect that the Games would cause negative impacts to the City. However, it should be noted that actual difference in mean scores between the groups was relatively small ($\eta^2 = .005$) (.01 = small effect; .06 = medium effect; and .014 = large effect), suggesting that the results of statistical significance may be attributable to a large sample applied (Pallant, 2007). Overall, the above results may possibly reflect the fact that there was a high level of support for the idea of hosting the 2009 World Games (91%). It is likely that the expected benefits have been successfully promoted by event planners and the government authorities.

The results of descriptive analysis showed that a considerably higher proportion of support was reported for the 2009 World Game, with about 91% of the respondents favouring the staging of the Games in their local communities. A similar trend was also found in the 1988 Calgary Olympics and the 1996 Atlanta Olympic Games (Frater & Mihalik, 1999; Mihalik & Simonetta, 1999; Ritchie & Lyons, 1990). Furthermore, it is also suggested that local support is likely to sustain positive impacts on the local communities (Gursoy & Kendall, 2006). Similarly, the results of this research indicated that approximately 94% of respondents had a positive attitude towards hosting impacts at this pre-event stage. This may be partly due to the consequences of a high level of support. As such, this line of research would benefit from longitudinal research designed to track host residents' attitude during and after the Games. Also, while a high anticipation of benefits from hosting the Games might be associated with support for the Games, host communities were likely to worry increasingly about the costs. Indeed, results indicated that the vast majority of residents support the Games because they can engender great benefits to economy, tourism, environment, social, psychological, political and others. Simultaneously, some realised that this would not come for free. Residents of this kind were concerned with a series of issues, including inadequate human resource and facilities, negative impacts outweighing positive impacts, noise, and traffic jams. Only a few respondents doubted but actually supported the staging of the Games, that whether support or not, the Kaohsiung City Government has made the decision. To a certain degree this explained that before submitting a bid for hosting, the decision-making process did not fully engage host communities or wider residents. To this respect, it is suggested that for a sport mega-event to be successful or to be sustainable, it is important for decision-makers to seek all opinions, support and opposition, from potential groups,

communities, or wider residents (Gursoy & Kendall, 2006).

The results of the logistic regression analysis indicated that 'expect to attend', 'perceived level of preparation', and 'interested in event' were significant predictors of the proposed impact model. The results of this analysis contradicted the findings presented in previous studies. If expected attendance is high, positive perceptions on hosting impacts might also be high (Mihalik & Simonetta, 1999; Ritchie & Aitken, 1984). If residents of host communities are more interested in the event, though all of cases in these studies were single sporting events (car races), they are more likely to be positively inclined to the event and vice versa (Cegielski & Mules, 2002; Fredline & Faulkner, 1998). The findings of this research presented were probably explained by 'social representation theory', which highlights that when people attempt to understand new phenomena around them, they are likely to be influenced by their 'reference point'. In other words, prior to an event, information provided by mass media and government agencies was likely to interact with individual's own knowledge, values, and past experiences with similar event to shape the initial perceptions on the event, which are finally served as a 'reference point' for new encounters (Kim et al., 2006, p.87). For example, though a certain proportion of the respondents have perceived poor level of preparation based on reference point, they realise that hosting the Games will bring huge benefits to local communities. This encourages a positive attitude. On the other hand, these findings could also be a warning to event planners as those with high interest in and willingness to attend the Games may be more aware of the negative impact of the Games and the lack of information offered. As such, they were more concerned about negative impacts that affect personal lifestyle. With this approach the study contributed to an understanding of variations in host community reactions to the planning process of the Games. For event planners, they can take advantage of this understanding to better adjust event strategy, so as to maximise the value of the Games for local communities.

The study of overall impacts, both positive and negative, of a mega-event on the host communities is vital in quest of a successful event. The results of the present research, academically, are noteworthy for event tourism planning and management. The involvement of the host community in and 'owning' an event can release positive message to visitors (Bowdin et al., 2006; Getz, 2005). This has been seen in previous sports mega-events such as the 2000 Sydney Olympics and the 2002 Manchester Commonwealth Games during the Games. Practically, the findings are important to event managers. For example, the results may provide the authorities (Kaohsiung City Government, KCG) and event organizers (Kaohsiung Organizing Committee, KOC) as base-lines to facilitate the effective dialogue with host residents, and thus grow support for the Games. Thus the negative impacts of the Games could perhaps be effectively anticipated, countered, and then managed in accordance with host residents' concerns from the outset. Ultimately, positive impacts are likely to be maximized and therefore to achieve the best balance for all parties involved (Bowdin et al., 2006).

The ongoing assessment of the residents' perceptions during and after the Games is needed to monitor changes in their attitudes. As Waitt (2003) noted, attitudes towards an event are likely to change before, during and after because the formation of an exchange relationship between the individual and the event is continually negotiated and renegotiated, rather static. This change might also mirror the relationship between how an event is managed and how the host community experiences it (Twynam & Johnson, 2004).

While it is difficult to generalise about the applicability of the findings of this research to other sports mega-events because of the method being used (i.e., purposeful sampling), it is strongly believed that the current research offers more insight into the complexities of host residents' perceptions and expectations. Irrespective of the limitations in generalization to other sports mega-events, this research is valuable in terms of its implications for the methodology employed. Future research could consider applying the same approach and measurement tool to different types and scales of events, so as to compare the results and to determine the feasibility of their application in different scenarios. Beyond the above, this research examined the "main effects" as they happened within the host areas, but the 'spillover effects' as they occurred within general areas is certainly a subject for future research. In this way, the "trickle-down effects" of the games that possibly benefit

the broader communities for a longer term can be truly evaluated.

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上海社区居民参与会展旅游动机的实证研究

邓倩 郭英之 陈泌园 叶云霞
复旦大学旅游学系

摘要

本文以上海社区居民作为对象,进行了实地调查,取得一手资料。通过对数据进行主因子分析,找出影响社区居民参与会展活动动机的七个主要影响因子。接着,运用聚类分析方法,根据主因子分析后所得出的数据,将社区居民,分为四类并归纳总结其主要特征。进行人口统计学特征分析,并与前一部分聚类分析的结果结合,总结出这四类社区居民人口统计学的特征。通过本研究希望能寻找到城市居民的会展旅游动机方面的带有普遍性和规律性的问题,以更好地推动上海会展旅游业发展。

关键词: 会展旅游动机; 社区居民; 上海

AN EMPIRICAL STUDY ON RESIDENTS' MOTIVATION TO MICE ACTIVITIES: A CASE OF SHANGHAI LOCAL RESIDENTS OF CHINA

Qian DENG Yingzhi GUO Yunxia YE Qinyuan CHEN
Department of Tourism, Fudan University

ABSTRACT

The purpose of this research is to know more about the residents' motivation to MICE activities and to make some contribution to the development of MICE industry. This study interviewed 300 community residents in Shanghai. By the means of factor analysis, the results reveal that seven main factors affect the motivations of Shanghai residents for participating in MICE activities. Then, the cluster approach is employed to segment these interviewees into four parts based on their motivations for MICE activities. After demographic analysis, we sort out the characteristics of these four market segments. The results are supposed to offer some enlightenment and implications for the exhibition companies and MICE tourism organizations.

Keywords: MICE Tourism; residents of community; Shanghai

一、引言

当今,旅游业作为当今世界范围内发展迅猛的新兴朝阳产业,都被视为第三产业的优势部门。会展旅游业作为旅游业中一个新兴的分支,其快速的发展以及带来的对社会各方面的推动作用,也日益得到广泛的关注。本研究之所以选择上海社区居民作为研究对象,是因为本文认为对会展旅游的研究,还需要从其参与者的角度下手。本研究在实践与理论上都具有一定的意义。理论上,本研究结果在一定程度上可以反映上海会展旅游参与者最新的情况,是以往一些相关研究的延续;在实践意义方面,希望能对会展旅游企业和会展旅游机构的策略制定有一些启发及帮助。

二、会展旅游动机研究的文献综述

第一,国内外会展旅游动机研究的文献综述。国外在此方面的研究主要可以分为以下几类:(1)制定适合研究对象的旅游动机测量工具,并进行动机测量,分析旅游动机的主要方面。例如, Metin Kozak (2002) 设计出测量工具,运用定量研究方法,从而研究旅游动机;(2)探讨旅游动机和人口统计特征、旅游特征的关系。Samuel Seongseop Kima, Choong-Ki Leeb 和 David B. Klenosky (2003) 通过调查韩国 6 个国家公园旅游者动机,分析旅游动机与人口统计特征的关系,并找出相应的推拉因子;(3)比较不同目的地间、不同国家旅游者间的旅游动机。例如 Metin Kozak (2002) 通过实

证研究分析不同国家旅游者旅游动机之间的差异；(4) 考察几种不同类型的动机量表的相关性，例如 Sarah Todd (1999) 的研究；(5) 研究动机的动态变化。Andrew Holden (1999) 通过苏格兰高地 490 余名滑雪爱好者的调查，分析出影响他们旅游动机的内在因素及其变化；(6) 分析推-拉因素的相关性。Seong-Seop Kim 与 Choong-Ki Lee (2002) 阐述了推因子与拉因子之间的关系；(7) 定性动机数据分析方法的比较 (Sarah Todd, 1999)；(8) 以动机为基础对旅游者进行分类，分析旅游者类型和所期望的目的地属性之间的关系。例如 Chris Ryan 和 Ian Glendon (1998) 对英国度假旅游者旅游动机分类的研究。国内对会展旅游动机的研究可以通过多种方法分类。第一，可以根据对会展旅游业主要参与者的研究。刘助忠和龚荷英 (2007) 将会展观众分为普通观众和专业观众，主要分析了他们参展的动机及其影响因素。刘助忠和龚荷英 (2006) 通过研究企业的参展作用和参展需要，认识到企业的参展动机主要为市场动机、宣传动机、技术动机、信息动机、交易动机；第二，不同因素对会展旅游者动机的影响。杨延风、刘啸和马璞 (2006) 研究分析了旅游广告宣传及其对旅游动机影响。杨怡 (2008) 提出了文化的魅力在激发旅游者产生旅游动机中的巨大作用；第三，入境旅游者与中国当地居民旅游动机的研究。孙延红 (2006) 通过实地调查，揭示激发潜在旅游者出游动机与阻止出游的影响因素。赵华、马耀峰和许聪聪 (2006) 通过对中国入境旅游市场的调查，发现入境游客来华旅游的主要动机是观光旅游和休闲度假旅游，文化交流和商务旅游人数逐步上升。

第二，国外会展旅游动机研究文献的比较。通过对以上文献资料进行综述，可以看到国内外研究在研究内容与研究方式上都存在着较大的差异与距离。首先，国内外研究内容的比较。国内外对于旅游动机的研究，都涉及到了多个方面与角度。但两相比较，国内的相关研究多侧重于旅游动机影响因素的分析研究上，对于其他方面与角度虽有所关注，但研究较少。国外的相关研究则比较全面，除了影响因素分析之外，国外的研究触及了包括通过影响因素分析的进一步深入研究，例如与人口统计学特征，市场分类方法相结合的深入进一步分析。更值得提出的是在国内对于会展旅游动机的研究领域方面很少，可以算是一个空缺。其次，国内外研究方法的比较。在对旅游动机的研究上，国外的研究方法较之国内更具有实证性。尽管国内的研究在一定层面上有了定量分析的尝试，但数据多采用宏观层面上的统计数据，国外的研究在这方面则更贴近实际，多为采用一手数据。

综上所述，可以看到国内在对会展旅游活动参与动机的研究本来就很少，而且在研究方法上也具有很大局限性，多采用较为主观的定性研究方法。因此，本文将把定性研究与定量研究方法相结合的方式，例如主因子分析法、聚类分析法，运用到社区居民会展旅游活动参与动机的研究这一课题上。

三、社区居民参与会展旅游动机的研究方法

第一，会展旅游动机的研究设计。国内外相关研究，大多采用文献研究的方法，具有较强的主观性。而且大多都是从会展旅游的供给市场出发，例如是从会展旅游企业的管理者，会展旅游相关政府机构等出发，而很少有研究是从会展旅游市场的需求市场出发。因此，本课题想要避开仅从一方面出发的片面性，将从两方面出发，使本课题的研究结果更全面更具有说服力。首先，对市场调查问卷的设计是建立在对相关国内外资料的研究基础上的。在本课题的研究前期，通过各种渠道，收集了近年来国内外相关课题的大量资料。总结归纳其观点，研究方法，理论等，为问卷设计建立初步的理论框架。其次，本文的研究方法当中包括深度访谈的方法。为了保证市场问卷设计的可靠性及代表性，本研究对上海会展旅游机构和会展旅游企业的 5 位政府官员、企业总经理或高层部门经理进行深度访谈咨询。由于这些会展行业从业人员拥有丰富的实践经验，取得他们的意见相信对问卷的设计会有极大的启发，这样也同时做到了将实践与理论相结合。同时，还对上海会展旅游的专家学者进行深入访谈，设计出市场调研问卷。通过对以上人士的深度访谈，找出社区居民参与会展旅游活动动机的 29 个因子。再次，接着联系社区居委会，对社区居民进行市场分层抽样调查的方法，发放了 30 份问卷，进行了前测检验 (Pilot Study)。通过对前测检验结果进行分析，发现了问卷设计中的一些问题，并及时地进行了修改。

第二，会展旅游动机的数据收集。本文的调查对象均主要是 13 岁至低于 79 岁的上海社区居民。对被访者年龄的限定，可以使被访者有能力对自己的旅游行为和经历做出正确的判断，此界定旨在选出合适的样本并尽可能地确保所收集的数据的有效性。其次，本课题通过深入访谈完成市场调研问卷设计之后，对社区居民进行 300 份左右问卷调查，以获得最基本第一手资料。市场调研将在上

海黄浦区、卢湾区、徐汇区、杨浦区、长宁区、静安区、普陀区、闸北区、虹口区和浦东新区等地的社区进行。市场调研将分层抽样与随机抽样结合的方法，以保证市场调研数据结果的合理性。本研究发放了 300 份调查问卷，回收了 300 份，回收率达到 100%。

第三，会展旅游动机的研究方法。本文所采用的研究分析方法将定性研究方法与定量研究方法结合起来。定性研究方法主要是文献研究法与深度访谈。(1) 文献研究法。通过各种渠道收集了国内外相关研究的资料，进行学习归纳总结；(2) 深入访谈。访谈对象主要分为两部分：政府官员、企业总经理或高层部门经理；会展旅游研究方面的专家学者。定量研究分析方法主要有以下两种：

(1) 主因子分析方法。用于研究和描述中国会展旅游目的地市场定位的主要影响因子，对社区居民参与会展旅游活动动机的主要因子进行主成分分析。只有特征值大于 1 的因子才予以保留；只有因子载荷和公因子方差比大于 0.4，才选入最终的因子结构中；计算每个项目的信度系数大于或接近于 0.70，以确认影响因子的内在一致性；(2) 聚类分析方法。采用 K 均值聚类方法差异多变量分析过程，用于检验会展旅游市场的影响因子以及不同会展旅游者细分市场的总体差异，统计如果发现有意义，可采用 t 检验、F 检验、或多维对比修正，以检验多元方差分析的显著性差异。

四、社区居民参与会展旅游动机的研究结果

表 1 上海社区居民对于会展旅游活动的参与动机主因子分析

动机因子	均值	因子载荷量	特征根	差异解释度(%)	累计差异解释度(%)
追求新奇感动机	3.59		9.895	34.121	34.121
感受独特的会展氛围	3.76	0.497			
感受新奇和与众不同的会展	3.69	0.457			
好奇心得驱使	3.63	0.698			
希望个人需求得到满足	3.61	0.581			
追求新奇感	3.53	0.777			
获得兴奋感	3.50	0.694			
喜欢探险	3.42	0.564			
欣赏体验动机	3.82		1.938	6.683	40.804
欣赏艺术和民俗表演	3.91	0.688			
在当地感受文化的魅力	3.86	0.627			
体验当地不同的人文旅游资源	3.81	0.561			
体验当地不同的自然旅游资源	3.77	0.634			
享受新奇的经历体验	3.75	0.632			
增进家庭成员感情动机	3.55		1.761	6.074	46.878
帮助家人了解更多的当地与各国旅游资源	3.66	0.654			
和家人共度快乐时光	3.56	0.771			
认为这是家庭成员的共同爱好	3.55	0.77			
增进家庭和睦	3.45	0.631			
放松暂避动机	3.6		1.371	4.726	51.604
可以减轻日常生活的压力	3.78	0.717			
可以调整日常生活的节奏	3.67	0.783			
可以解除烦恼	3.54	0.725			
可以逃避日常琐碎生活	3.400	0.577			
会展吸引力动机	3.52		1.332	4.592	56.196
我听说过不同的会展活动，认为很有趣	3.81	0.456			
希望参与会展活动	3.63	0.567			
跟随旅游团参观会展	3.39	0.61			
希望与兴趣不同的人交往	3.24	0.597			
结交朋友动机	3.73		1.207	4.162	60.358
希望见到来自中国/世界各地的人	3.75	0.697			
和朋友一起参观会展	3.73	0.794			
希望与有共同爱好的人交往	3.7	0.577			
增加知识动机	3.62		1.004	3.462	63.82
增加会展的科普知识	3.69	0.718			
了解会展的专业知识	3.54	0.643			

第一，考察原有的 29 个因子之间是否有一定的线性关系，是否适合采用因子分析提取主因子。这里，借助巴特利特球度检验和 KMO 检验方法进行分析。巴特利特球度检验计量的观测值为 4.001E3，相应得概率接近 0。同时，KMO 值为 0.903。Kaiser (2004) 给出了常用的 KMO 度量标准：0.9 以上表示非常适合；0.8 表示适合；0.7 表示一般；0.6 表示不太合适；0.5 以下表示极不合适。所以，由此得知这 29 个因子非常适合进行因子分析（表 1）。

根据因子载荷量的情况（表 1），从本研究中的 29 个因子中提出了 7 个主因子，并分别命名为：“追求新奇感动机”、“欣赏体验动机”、“增进家庭成员感情动机”、“放松暂避动机”、“会展吸引力动机”、“结交朋友动机”、“增加知识动机”。根据表 3，从提出的七个主因子的特征根来分析，追求新奇感动机项的特征根为 9.895，居于第二位的是欣赏体验动机（特征根为 1.938），其余五项主因子动机的特征根也都大于 1，说明了这七项主因子对于上海社区居民参与会展旅游活动的动机能够进行足够充分的阐述。根据累计差异解释来看，七项主因子动机共解释了原有变量总方差的 63.82%。

总体上，原有的信息丢失较少，因子分析效果较理想。其中，值得关注的是追求新奇感动机项就解释了原有 29 项因子总方差的 34.121%。

第二，对上海社区居民对于会展旅游活动的参与动机量表内项进行信度分析，这里采用了克朗巴哈（Cronbach） α 系数来检验其可信度。经验上，如果克朗巴哈 α 系数大于 0.9，则认为量表的内在信度很高；如果克朗巴哈 α 系数大于 0.8（小于 0.9），则认为内在可信度是可接受的；如果克朗巴哈 α 系数大于 0.7（小于 0.8），则认为有一定的参考价值；如果克朗巴哈 α 系数小于 0.7，则认为量表设计存在很大问题应考虑重新设计薛薇（2004）。由此可知，因子分析所提取出来的 7 个主因子的可信度都在可接受范围内。

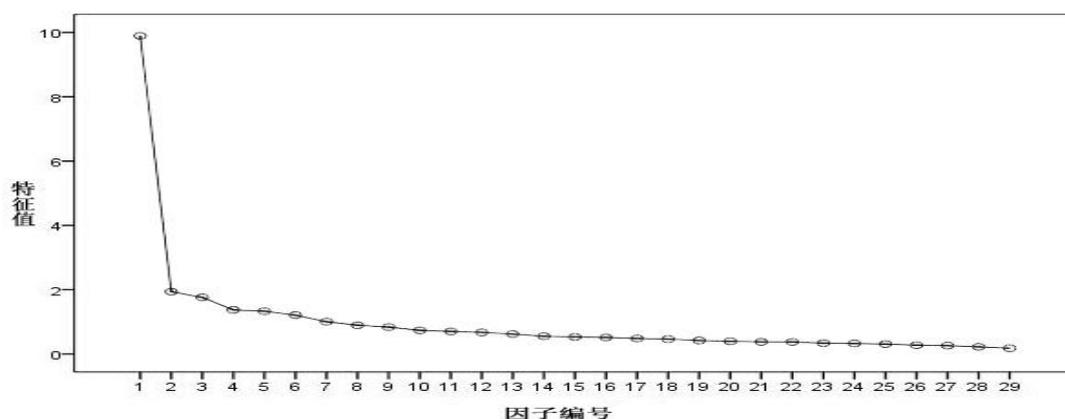


图 1 社区居民对于会展旅游活动的参与动机特征的公因子碎石图（Scree Plot）

由图 1 可知，横坐标为因子数目，纵坐标为特征根。可以看到：第一个因子的特征根值很高，对揭示原有变量的贡献最大；到第 8 个以后的因子特征根值都较小，对解释原有变量的贡献很小，已经成为可被忽略的“高山脚下的碎石”，因此提取 7 个公因子是比较合理的。

表 2 上海社区居民对于会展旅游活动的参与动机量表内项“信度系数”

动机感知变量项目	内部一致性信度	被测量项
因子分析前量表变量总项目	0.930	29
主因子 1: 追求新奇感动机	0.858	7
主因子 2: 欣赏体验动机	0.806	5
主因子 3: 增进家庭成员感情动机	0.819	4
主因子 4: 放松暂避动机	0.793	4
主因子 5: 会展吸引力动机	0.709	4
主因子 6: 结交朋友动机	0.733	3
主因子 7: 增加知识动机	0.716	2

从表 2 可知，最终通过定量分析方法总结归纳出来的七个主因子以及主因子所涵盖的具体因子，

与本研究第一部分中初步分析的结果，都有较大差别。上海社区居民参与会展旅游的动机中，欣赏体验动机是最重要的一项（均值=3.82，居于第一位），不仅希望各种表演，同时更多的希望能够参与到会展旅游活动中，亲身体验当地新奇的人文自然旅游资源。其次，结交朋友动机也是一个很重要的参与动机（均值=3.73），并且我们可以得知上海社区居民更加倾向于和兴趣相同的朋友一起参与会展旅游活动，结交到来自中国/世界各地的人；第三，也有一部份居民把增加知识作为参与会展旅游活动的主要动机，不仅是增加一些科普知识，也希望对会展的专业知识有更多的了解。这部分参观者更多的可以从一些专业性会展中获得这方面的需求满足；第四，从其他几个主因子来看，会展旅游活动在不同方面满足了人们的需求，有的居民将参与会展旅游活动当作放松休闲，逃避生活工作压力的一种方法，例如参与一些公众性会展；也有人将此作为增进家庭成员感情，追求新奇感的一个方式。第五，会展自身的吸引力也是促使人们参与的一个重要因素（均值=3.52）。可见，随着上海会展旅游业的不断发展，上海会展旅游活动已经越来越成熟，已经可以吸引一部分居民的参与。

五、社区居民参与会展旅游动机的研究结论和和建议

第一，通过以上对上海社区居民参与会展旅游活动动机的分析，将本文的主要研究结论总结为，本文对上海社区居民参与会展旅游活动的问卷设计中，提出了 29 个动机因子，并将其大致分为六类：“社会交往方面”、“增加文化知识方面”、“增进家庭成员感情方面”、“追求新奇感方面”、“避免日常生活/恢复身心健康/放松方面”、“会展吸引力方面”。经过对这 29 个因子进行主因子分析以后，运用一些定性研究方法以后，提取出 7 个主因子，并将这 29 个因子归属于这 7 个主因子并进行，内部信度检验等，分别命名为：“追求新奇感动机”、“欣赏体验动机”、“增进家庭成员感情动机”、“放松暂避动机”、“会展吸引力动机”、“结交朋友动机”、“增加知识动机”。

第二，结合市场营销学中市场细分的理论，根据研究结果，可提出相关建议如下。首先，针对会展旅游的供给方，即组织者，参展商，每一个会展活动都有自己的主题，对某一个或者几个市场群体会比较有吸引力。所以，要找准自己这个会展活动的定位及其目标市场，了解目标市场的需求，突出会展活动的特色优势，并采用相应得营销方式，使自身定位更加有吸引力。例如，上海将举办一个探险旅游的展览，其目标市场就应该瞄准“新奇休闲型”的群体，并采用一些较前卫新奇的营销手段，最大限度地吸引这一群体的参与。另一方面，针对会展旅游机构，在其制定相关政策时，也能使其避免盲目性，更加具有针对性科学性。

综上所述，本文通过对市场调研数据的分析总结，结合市场营销学中市场细分的理论，建议对以上分析结果的四类人采取相应得市场营销学策略，希望对上海会展旅游市场的发展以及策略制定有一定的参考性。当然，本研究也有其自身的局限性：调查对象还不够广泛，层次还不够多样化。

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致谢

本研究得到国家自然科学基金（批准号 70873025）、上海市哲学社会科学规划系列课题（批准号 2008XAH004）、复旦大学本科生学术研究计划“曦源项目”、“君政学者”的资助，特表感谢。

居民对旅游重大事件态度的实证研究：以上海世博会为例

彭兰亚 郭英之 耿晓鑫 叶云霞
复旦大学旅游学系

摘要

本研究以居民对旅游重大事件的感知和态度为研究对象，深入挖掘居民对旅游重大事件的可能态度，在归纳前人研究的基础上，同时在研究国内的社会背景与文化背景下，以上海世博会为例，对旅游重大事件的居民态度进行了实证研究。

关键词：居民；重大事件；态度；世博会

A STUDY ON THE ATTITUDES TO TOURISM MAGE-EVENT BY LOCAL RESIDENTS: A CASE OF SHANGHAI WORLD EXPO

Lanya PENG Yingzhi GUO Xiaoxin GENG Yunxia YE
Department of Tourism, Fudan University

ABSTRACT

This paper, trying to make in-depth research on the possible correlations between residents' perceptions and attitudes, holds residents as its major research objective, and endeavors to make in-field research on residents' perceptions and attitudes. Meanwhile, this paper takes Shanghai World Expo which is due in 2010 as a case, studied empirically through questionnaires on Shanghai residents' perceptions on and attitudes toward the Shanghai World Expo, and verifies the assumptions made through the theoretical reviews.

Keywords: residents, mega-events, attitude, Shanghai World Expo

一、引言

在世纪伊始，作为亚太金融中心之一的城市上海，给旅游重大事件活动赋予了新的经济角色并提高了它的重要性。而2010年世博会这一国际旅游重大事件，又为上海这座城市赋予了更多文化的内涵，并且也承担了经济助推器的作用，它将城市带来数以亿计的预算、世界市场和迅捷的资金周转。

然而，相对而言，旅游重大事件的社会影响则很少被了解。事实上，Fredline 和 Faulkner (2000) 还认为，对于旅游重大事件的政治、文化和环境影响的关注已经过多了。而他们的论断在关于悉尼奥运会的影响的出版物中被证实了。很遗憾，这一强调可能被错置于在发展经济的过程中，这将是危险的。居民对于生活水平、公平感、文化可持续性以及环境安全性等方面的感知，是衡量城市是否可持续发展的不可或缺的部分，如果有明显倾向地关注经济利益而忽略其他方面的影响，必将产生危害居民利益的情况发生。而在过去，社会影响的评估大部分是依赖于二手资料包括法庭记录和社会报道 (Hall, Selwood 和 Mekewon, 1989)，或者通常就是对公民态度在某个特定时刻感知的“快照”，因此 Carpenter (1992) 撰文感叹在社会影响方面的调查当代尺度的缺失。

研究当地居民对旅游重大事件的支持程度是非常重要的。首先，旅游重大事件的举办若能得到居民的支持，便能更好地进行基础设施的建设，反之则容易受到居民的抵制；其次，一个友好的社区或城市是由友好的居民营造出来的，而友好的环境对成功举办一场国际性的旅游重大事件至关重要的因素，它能给旅游者和事件参与者一个良好而正面的印象，有利于城市形象的维持和改进，以及让世界更好地了解当地。第三，当地居民对旅游重大事件的支持，能够让旅游重大事件对当地社区产生的正面影响得以充分释放，并且能帮助这种正面的影响持续地产生效应。

而研究居民的支持程度，则必须研究居民对旅游重大事件的感知。社会交易学说认为，面对旅

游重大事件的开办，只有当居民所感知的收益大于他们感知的成本时，居民才倾向于积极地加入到旅游重大事件中去，并且倾向于积极地支持旅游重大事件的开办，也就是欣然接受这个“交易”的进行。而当居民所感知的收益小于成本时，居民会反对旅游重大事件的举办，并且参与的程度也会降低。同时，社会代表学说进一步支持了这个观点，他们认为，居民对是否支持未来的当地举办旅游重大事件的判断，是基于过去的经历之上的，因此，当居民过去经历过比较成功的旅游重大事件，他们获得的收益大于成本，他们就会倾向于支持未来的旅游重大事件；反之当他们过去经历过比较失败的旅游重大事件时，收益小于成本，他们就会倾向于反对未来的事件（Samual Seongseop Kim 和 James F.Petrick, 2005；Hyun Jeong Kim 和 Dogan Gursoy, 2006；K.Kayat, Elizabeth Fredline 和 BillFaulkner, 2002；Gordon Waitt 等, 2003）。

综上所述，为了使 2010 年上海世博会举办成功，争取上海居民的支持和合作是非常重要的。同时，作为上海世博会主要客源的上海居民，将为世博会贡献 1100 万的客源市场，其参与度和感知对上海世博会的成功举办都具有重要意义。

二、文献综述

旅游重大事件，指一次性举办、举办时间较短、通常对举办当地产生长期深远影响的旅游事件（Ritchie, 1984），这种影响包括正面的和负面的影响（Ritchie 和 Aitken, 1985；Mihalik 和 Cummings, 1995；Mihalik 和 Simonette, 1998）。Donald Getz（1997）给予重大事件的定量的标准，提出重大事件的定义是：事件的容量应超过 100 万观众，资本成本至少为 5 亿美元，并且其声誉应是一个“必看的”事件，从规模和重要性来看，特大事件是指能为东道主创造极高层次的旅游、媒体报道、声望、或经济影响的事件。进一步的，旅游重大事件的影响被分成以下六个方面：经济、旅游/商业、环境、社会文化、心理及政治（Ritchie, 1984）。尽管旅游重大事件是一次性举办的，持续的时间并不长，但是它带给举办社区的影响是很深远的，如旅游业的发展，国际社会的认同，经济的快速发展等。正因为如此，许多国家和地区争相举办诸如奥运会、世博会等旅游重大事件，为自己城市的发展争取最好的机会（Hyun Jeong Kim, Dogan Gursoy 和 Soo-Bum Lee, 2006）。

在旅游重大事件举办之前，研究居民的态度，具有重大的意义。由于旅游重大事件的筹办过程是不可逆的，因此它能作为长期纵向研究的一部分，了解居民在旅游重大事件举办之前的感知，与居民在旅游重大事件举办之中、之后的感知进行纵向比较，成为宝贵的研究结果，有利于更深入地辅助事件举办者和当地政府更好地将事件的负面影响减弱、尽可能延长事件的有利影响。目前国际上许多学者正在进行这样的纵向研究，得出许多较为珍贵的研究结论（Hyun Jeong Kim, Dogan Gursoy 和 Soo-Bum Lee, 2006）。

三、研究方法

第一，选取样本。主要采用分层随机抽样的市场调查方法。调查对象：上海市居民各年龄、职业、地区分布、性别等的的数据，对样本进行定比分层，以保证样本能够较为全面、客观地体现上海市居民总体的感知特征。调查方式：本文拟采用多种市场调查方法，进行上海居民对世博会经济、社会、环境三方面感知特征的调研，分层随机抽样和深度访谈相结合，分层随机抽样为主。

第二，研究方法。本文采取理论与实证研究相结合，参考居民对世博会经济、社会、环境三方面感知特征的相关文献、书籍，从中获得理论工具，同时进行一定数量的针对上海居民对世博会经济、社会、环境三方面感知特征的市场调查，以获得研究的素材，从理论和实证两方面同时深入研究。

第三，定性研究与定量研究相结合。本研究拟采用 SPSS 等统计学软件对进行一系列的定量分析，以实现研究目的。如，在确定居民对世博会经济、社会、环境三方面感知特征的主要因子及其内部的项目时，运用主成分分析方法；在分析各居民亚群体（如不同年龄层、职业层、收入层等）对世博会经济、社会、环境三方面的感知差异时，运用方差分析；在分析居民对世博会经济、社会、环境三方面的感知特征、参与世博会的动机特征、居民的人口特征三者之间的相关性时，运用聚类分析、因子分析等。同时，对定量分析的结果采取定性的解释和分析，丰富论文的内容。

四、研究结果

(一) 被调查居民的社会人口统计学特征与居民态度的关系

为更深入地了解居民对上海世博会的态度，本文将居民的人口特征与态度进行了方差检验，通过 ANOVA 分析，检验了居民的年龄、性别、婚姻状况、教育程度、职业、收入、居住地区等人口特征与其态度的关系，看不同人口特征的居民是否在态度上有所不同。在这里，分别设置居民的人口特征为自变量，居民对举办世博会的态度为因变量。通过 ANOVA 分析发现，居民对举办世博会的态度这一因变量在不同性别、婚姻状况之间没有显著差异，但在年龄、教育程度、职业、收入和居住地区方面，有着显著的差异。表 1 中列出了在 0.05 的显著性水平上，所有在人口特征方面有显著差异的因变量，即居民态度因子的因变量。

表 1 被调查居民的人口特征与态度的 ANOVA 分析

人口特征变量	居民态度		变差	方差	F 值	显著性概率
年龄	Y1 参观意向	组间	61.29	12.26	3.94	0.00
		组内	1250.36	3.11		
	Y2 集体主义感受	组间	40.42	8.08	2.99	0.01
		组内	1086.04	2.70		
教育	Y1 参观意向	组间	84.46	10.56	3.43	0.00
		组内	1227.18	3.08		
	Y3 自豪感	组间	29.56	3.70	2.16	0.03
		组内	683.38	1.71		
Y4 志愿活动	组间	60.11	7.51	2.17	0.03	
	组内	1380.48	3.46			
职业	Y1 参观意向	组间	94.13	8.56	2.78	0.00
		组内	1217.51	3.07		
	Y2 集体主义感受	组间	83.30	7.57	2.87	0.00
		组内	1043.16	2.63		
Y3 自豪感	组间	43.42	3.95	2.33	0.01	
	组内	669.51	1.69			
收入	Y1 参观意向	组间	70.82	10.12	3.26	0.00
		组内	1240.82	3.10		
	Y2 集体主义感受	组间	46.85	6.69	2.48	0.02
		组内	1079.61	2.70		
Y4 志愿活动	组间	52.97	7.57	2.18	0.04	
	组内	1387.62	3.47			
区域	Y1 参观意向	组间	95.94	5.33	1.71	0.04
		组内	1215.71	3.13		
	Y2 集体主义感受	组间	79.49	4.42	1.64	0.04
		组内	1046.97	2.69		
	Y4 志愿活动	组间	106.26	5.90	1.72	0.03
		组内	1334.33	3.43		
Y5 承担负面影响	组间	137.89	7.66	2.20	0.00	
	组内	1355.49	3.48			
Y6 全面支持	组间	54.74	3.04	1.86	0.02	
	组内	637.71	1.64			

可以看出，不同年龄的居民的参观意向和集体主义感受有显著差异，具体来说，参观的意向随着年龄的增长呈倒 U 型变化，年龄在 26-35 岁的人群参观意向最为积极，而 18-25 岁和 36-50 岁的人群比较积极，17 岁及以下和 51 岁及以上的人群积极程度降低。而集体主义的感受随着年龄的增长呈增长趋势，年龄越大的人群，因为举办世博会而感觉到的上海居民的集体主义精神越强。

不同教育背景的居民的参观意向、自豪感、参与志愿活动的态度有显著差异，具体来说，教育背景越高，其参观世博会的意向越强烈。而自豪感则随教育背景呈正 U 型分布，教育程度为本科和

硕士的被调查居民评价最低，而更高或更低教育程度的居民热情度升高。参与志愿活动的态度均呈倒U型分布，教育程度为本科和硕士的被调查居民表现最积极，而更高或更低教育程度的居民热情度降低。

不同职业的群体在参观意向、集体主义感受和自豪感方面有着显著的差异。具体来说，参观意向最为强烈的是销售/服务业从业人员、政府公务员、公司职员、企业商人、军人等，而家庭主妇、私营业主的参观意向是最弱的。集体主义感受方面，销售/服务业从业人员、军人、学生和公司职员是最强的，私营业主、专业技术人员最弱。在自豪感方面，被调查居民普遍有很高的自豪感，其中军人、公司职员、家庭主妇是最强的。可以观察到，学生在态度的调查中表现较为平静，可能是由于有一部分受访的学生是外地学生，他们虽然可以归纳到上海市居民的定义中，但对上海的归属感还有待加强。

不同的收入群体在参观意向、参与志愿活动和集体主义感受方面有着显著的差异。具体来说，月收入在8000元人民币以上的居民，参观世博会的意向最强烈，参与志愿活动的热情最高，而集体主义感受方面也最强。同时，月收入在3000元人民币以下的居民，其参观世博会的意向最弱。

居住在不同地区的上海市居民，在参观意向、参与志愿活动、集体主义感受、承担负面影响和整体上支持世博会等态度方面，都有着显著的差异。其中浦东新区的居民对世博会的总体态度较平静，特别是在被问到是否愿意承担世博会带来的负面影响时，表现出了谨慎的态度。而嘉定、金山等地理位置比较偏僻的地区的居民对世博会的态度比较热烈。

（二）对上海世博会态度的居民聚类分析

根据居民对上海世博会的态度，可以通过聚类分析将居民分成几类，从而更简要地了解居民的态度。对居民的态度变量值进行聚类分析，发现从聚类4开始，聚类之间已经没有显著差异了，因此本文决定使用3个聚类的方案。表2列出了聚类分析的结果。

聚类一：理念型支持者。这一聚类包括了44位被调查居民，占有所有被调查居民的10.8%。他们对世博会的参观意向很低，对上海举办世博会所体现上海居民的集体主义精神感受较低，并且对参与世博会的志愿活动的意向也比较中立。而另一方面，他们又具有承担世博会可能带来的负面影响的强烈意向，并且为上海能举办世博会表示自豪，从整体上支持世博会在上海举办。由此可见，他们参与类的意向都比较谨慎，在参观意向和志愿者意向上明显地表现出了其现实的考虑，但从精神上非常支持世博会。

聚类二：全面型支持者。这一聚类包括了268位被调查居民，占有所有被调查人数的65.7%。他们对世博会的态度非常积极，无论是整体上支持上海举办世博会、参观意向、自豪感，还是集体主义的感受、参与志愿活动的意向和承担负面影响的意向都非常强。可以说这类占有总人数65.7%的居民将会是世博会最忠实的支持者，也将是世博会的市内参观者的主要来源。

聚类三：现实型支持者。这一聚类包括了96位被调查居民，占有所有被调查人数的23.5%。这一类居民最为明显的特征是不愿意承担世博会可能带来的负面影响，也不太愿意参与志愿活动，对上海居民在举办世博会一事件上表现出的集体主义感受感知不强，同时，参观意向比较明显，整体支持程度也比较高。

表2 基于态度变量对居民的聚类分析（样本数=408）

变量名	聚类1 (样本数=44)	聚类2 (样本数=268)	聚类3 (样本数=96)
Y1 参观意向	2.091	6.418	4.625
Y2 集体主义感受	3.659	6.011	3.896
Y3 自豪感	6.114	6.646	4.448
Y4 志愿活动	4.250	5.981	3.802
Y5 承担负面影响	5.568	5.567	2.990
Y6 全面支持	6.023	6.813	4.625

五、居民对世博会态度的研究结论和局限性

第一，居民对世博会的态度普遍积极。居民对世博会态度的六个变量中，除了对“我愿意承受世博会所带来的负面影响”（4.96）一项的评价略低以外，其余的评价均超过了5.0。这说明居民对世博会的态度普遍是积极的，并且参与性、荣誉感、自豪感等都比较强烈，其中评价最高的是“世博会在上海举办，我感到自豪”（6.07）。居民对社会利益的感知高于对社会成本的感知，结合居民对世博会的态度评价的结果，可以发现，在居民对社会利益的感知高于社会成本的情况下，居民对世博会的态度是普遍积极的。

第二，居民对世博会的态度与人口特征相关性。研究发现，居民的性别、婚姻状况对居民对世博会的态度没有显著影响，而年龄、教育程度、职业、收入水平、居住区域等人口特征不同的居民，对世博会的支持态度有着显著的差异。

第三，考虑到以上研究局限和未来旅游重大事件在中国的不断发 展，本文未来的研究方向如下：第一，研究时间上，继续展开纵向研究。从现在开始一直到世博会结束后的一段时间内，定期对上海市居民的态度和感知进行调查，观察其态度和感知是否有所变化，研究变化的趋势和原因，由此来完善旅游重大事件的研究体系。第二，研究地点上，扩展到中国的其他城市和地区，了解其他地区的居民对旅游重大事件的感知和态度，以验证和研究本研究中提出的旅游重大事件的假设和理论框架。第三，研究方法上，探索更多新的、有效的方法，对数据进行处理，了解调查结果所蕴含的更多信息。

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致谢

本研究得到国家自然科学基金（批准号 70873025）、上海市哲学社会科学规划系列课题（批准号 2008XAH004）、复旦大学本科生学术研究计划“望道学者”的资助，特表感谢。

举办地居民对会展影响感知的实证研究：以2010年上海世博会为例

谢丽佳

香港理工大学酒店与旅游管理学院

郭英之 吴洛容 叶云霞

复旦大学旅游学系

摘要

2010年上海将迎来第41届世界博览会的召开。随着2010年世博会筹备工作有条不紊地展开，会展发生地的“人和”因素日益凸显其重要性。本研究在测量上海社区居民对世博会影响感知维度的基础上，建立居民聚类模型并明确内部细分群体，并从“内部营销”的角度出发，为相关部门在社区居民中进行世博会形象的有效推广和营销提供理论参考，以更好地实现“全民动员”，办好2010年世博会，促进上海会展业的发展和进步。

关键词：2010年世博会；社区居民；形象感知

AN EMPIRICAL STUDY ON SHANGHAI COMMUNITY-BASED PROSPECTIVE PERCEPTIONS OF THE 2010 SHANGHAI WORLD EXPO IMPACT

Lijia XIE

School of Hospitality and Tourism Management, Hong Kong Polytechnic University

&

Yingzhi GUO Luorong WU Yunxia YE

Department of Tourism, Fudan University

ABSTRACT

With the coming of the 41st 2010 Shanghai World Expo, all kinds of preparing work are in process systematically while the factor of “harmony of human” in the MICE destination is becoming more and more important. On the base of impact perception on World Expo by local residents in Shanghai, this study set up a model of residents’ classification so as to nail down the inner segmentation groups from the view of “interior marketing”. The result of this study could be used as references for the effective promotion and theoretical marketing of image of Shanghai World Expo so as to better realize “mobilization of all mass” and better manage Shanghai World Expo and promote the development and advancement of Shanghai World Expo.

Keywords: 2010 World Expo; residents of community; image perception

一、引言

上海作为我国的经济和金融中心，又是城市形象鲜明、都市旅游业发达的城市，曾举办过一系列的大型会展和事件，如第32届国际商会、《财富》全球论坛、美国亚洲企业年会、上海五国首脑会议、APEC峰会、第9届亚太经合组织会议以及国际网球顶级赛事大师杯赛等。会展业的发展给上海带来了经济和社会效益的显著提升，也与上海社区居民的生活变化息息相关。社区居民对上海会展业的形象和影响着全面而深刻的体验，为本文提供了实证研究的客观条件。

2010年上海将迎来世界博览会的召开。社区居民的支持和理解成为办好世博会至关重要的一环。关注民生，凝聚民意，考察社区居民对2010年世博会影响的感知，制定相应推广政策和营销措施争取社区居民对世博工作的参与和配合，使世博会获得“人和”的支持，将是办好世博会、实现世博口号“城市，让生活更美好！”的重要前提和步骤。本研究对中国成熟会展目的地上海召开的世博

会进行预期影响的民意调查，最终目的是为调动上海社区居民参与世博会工作的积极性提供参考和依据。本研究有助于上海会展行政管理部门认清居民的利益诉求和缺失，作好引导、教育工作，发挥和完善社区居民的参与机制，促进上海会展业的可持续健康发展。

二、文献综述

第一，会展影响的居民感知方面。国外较多地针对大型节事旅游开展了跨类型、跨时间的比较研究，特别是会展前后的影响感知对比研究可以较好地考察会展地居民感知和态度的变化规律，为预测会展地居民对会展事件的态度变化、制定有针对性的措施提供依据；国内这方面的研究还比较欠缺，在会展目的地社区居民影响感知和态度评价研究上总体而言还处于起始阶段，许多方面的研究还有待于进一步的深入和拓展。

第二，居民对旅游影响感知方面。首先，国外从研究方向而言，主要集中在居民对旅游影响的感知类型、居民对某些特殊旅游产品的感知和态度、居民旅游感知和态度的影响因素、相关理论以及基于居民旅游感知和态度差异的群体聚类等五个方面；就研究理论而言，主要有社会交换理论（J. Ap, 1992）、社会表征理论（P. L. Pearce, 1996）、旅游地生命周期理论（G. V. Doxey, R. W. Butler, 1980）、社会承载力理论（R. W. Lawson, 1998）和马斯洛需求层次理论（T. Renata, 2000）；从研究方法而言，不但有定性研究，而且有定量研究；技术方法上不但有单因子分析，更有多因子分析，有的还运用了结构方程模型等研究手段；从研究区域而言，不但有国内旅游影响的感知研究，而且有跨国多目的地的旅游影响感知研究；从研究结果而言，相当的研究结果一来自于市场抽样调查数据，结果分析具有客观性，主要为旅游部门和企业的工作推广和营销管理提出定位战略。其次，国内社区居民对旅游影响感知的研究，从研究方向而言，主要是对区域性旅游目的地影响的总结性研究和居民感知的描述性研究；就研究理论而言，大多借鉴国外理论框架进行本土情况的分析；从研究方法而言，大多是主观性的定性研究，定量研究还处于起始阶段；还未强化数学方法和模型方法在研究中的适用性；从研究区域而言，尚局限于对国内和区域性旅游影响的感知研究；从研究结果而言，大部分停留在区域性旅游目的地影响的感知评价，主要为具体部门和地方政府的旅游发展提出建议及对策。

三、研究方法

第一，问卷设计和前测检验。本研究首先结合国内外文献的相关内容，进行调研问卷初稿设计，然后通过上海政府旅游机构、上海市旅游事业管理委员会的政府官员、世博会主办部门管理者进行深入访谈，根据反馈意见对问卷进行修正和调整。问卷设置若干世博会影响条目，被访者要求根据满意程度从“很不同意”到“很同意”的 Likert 五点式量表作出程度判断（1=很不同意 5=很同意）；其次，问卷调查部分还包括被访者的社会人口统计学背景相关问题。开展主体调研之前，本研究于2007年3月在长宁区上海展览中心举办的世界旅游博览会上进行了初测（Pilot Study），问卷随机分布给50名前来参观的上海居民。基于这次检验性调研的反馈，对问卷再做了局部修改，以消除内容表述上含混的地方，最终形成定稿。

第二，样本选取。首先，本研究所涉及的对象均是年满14岁、低于75岁的上海社区居民。对被访者年龄的限定，可以使被访者有能力对自己的旅游行为和经历作出正确的判断。其次，本研究结合上海行政区划对问卷进行了范围的分布，挑选黄浦区、卢湾区、徐汇区、杨浦区、长宁区、静安区、普陀区、闸北区、虹口区和浦东新区作为调查区域，总人口超过上海市人口总数的50%。尽管这些区域并不能代表整个上海，但它们毕竟融合了不同的人群，尤其是城市与郊区、主办区和非主办区的居民。最后，在样本容量的确定上，一方面由于因子分析方法将用于分析本研究数据，Tabachnick 和 Fidell（2001）提出最低因子分析样本量至少应达到300份；另一方面，Charreire 和 Durieux（2001）也提出“样本越大调研越优”原则，考虑数据分析所要求的统计预估精度，本研究拟发放500份调查问卷。

第三，数据收集。出于省时、节约成本和易于管理的考虑（DeVellis, 1999），本研究采用随机抽样的方法展开调研，共分发500份问卷，回收问卷493份。但其中8份问卷存在较多未填写的关键项目，最后的样本由484个有效问卷组成。问卷回收率和有效率分别为98.6%和96.8%，较好地

符合了进行数据统计分析的条件。数据收集结果表明，男性为 51.4%；年龄在 36-45 岁的占 26.2%；教育背景为大学本科的占 35.3%；家庭月收入在 1000-1999 元的占 22.9%；职业为专业技术人员的占 12.6%。

四、研究结果

（一）2010 年上海世博会影响的感知维度

在文献归纳的基础上，本研究在构建影响因子时，主要以 Dogan Gursoya, Kyungmi Kimb 和 Muzaffer Uysal（2004）会展旅游组织者的社会经济影响感知量表，以及 Elizabeth Fredline 和 Bill Faulkner（2000）的事件和会展社区反应量表为主要参考，并以其他旅游影响量表为补充。通过对文献研究成果整理和归纳，即对研究成果因子中重合的部分进行合并、交集外的部分进行叠加，本研究提出了 36 项 2010 年世博会影响因子的测项，测度范围涵盖经济、社会、文化、环境、生活等方面。36 个观测变量从不同侧面反映了社区居民对于世博会影响要素的感知和评价，但在实际研究中逐一分析尚嫌复杂。为了得到目的地居民对生活质量要素的概括性评价模式，本研究有必要采用因子分析法对各感知项作进一步归纳（表 1）。

表 1 2010 年上海世博会影响因子分析（N=484）

世博会影响变量维度	因子载荷	方差贡献率%	均值	标准差
F1 公共经济效益		17.435		
为市政工程带来经济效益	0.664		4.09	1.002
增加更多商业机会	0.778		4.24	0.948
提升社会形象	0.790		4.21	0.975
建立社会自豪感	0.720		4.15	0.981
有助于保护和促进中国文化	0.667		4.12	1.030
让世界更多了解中国	0.761		4.37	0.912
增加就业机会	0.488		3.94	1.117
促进当地新的基础设施建设	0.616		4.20	0.970
提供更多的旅游娱乐机会	0.651		3.94	1.001
使更多的旅游者到当地旅游	0.705		4.00	1.017
扩大对中国和上海的宣传、促进贸易	0.469		4.15	0.942
F2 社会成本		12.604		
不会增加交通拥挤度	0.763		2.96	1.318
不会增加服务设施压力（如火警等）	0.802		3.08	1.290
不会增加犯罪率	0.786		3.22	1.258
不会打扰当地居民平静的生活	0.849		3.08	1.265
不会增加当地物价水平	0.811		3.10	1.306
不会增加当地环境的恶化	0.765		3.38	1.247
F3 文化认知发展		12.426		
增加对各地/各国的旅游文化知识	0.611		3.89	1.051
了解世博会的丰富旅游资源	0.683		3.92	1.007
体验各地/各国的不同风俗与文化	0.763		3.93	1.069
体验国外不同的旅游资源	0.741		3.84	1.036
享受新奇的旅游体验	0.721		3.86	1.062
有机会欣赏世博会中的各种表演	0.601		4.02	0.980
在各地旅游景区感受文化与旅游的魅力	0.663		4.04	1.038
F4 增加家庭情感		8.502		
增进家庭和睦	0.742		3.49	1.217
和家人共度快乐时光	0.806		3.71	1.131
培养家庭成员的共同爱好	0.783		3.52	1.148
和家人一起了解更多各地/各国旅游资源	0.671		3.78	1.163
F5 舒缓生活		8.324		
可以逃避日常琐碎生活	0.740		3.24	1.207

可以解除烦恼	0.824	3.37	1.182
可以调整日常生活的节奏	0.750	3.59	1.139
可以减轻日常生活的压力	0.745	3.63	1.167
F6 推动社区进步		7.230	
提高当地居民的生活水平	0.662	3.58	1.200
提供当地居民家庭参与的娱乐活动	0.613	3.68	1.027
有助于增进居民和参展者、旅游者的关系	0.591	3.75	1.034
对当地居民具有教育作用	0.499	3.75	1.130
总方差贡献率		66.522	

注：提取方法：主成分分析法（Principal Components Analysis）；

旋转方法：方差最大正交旋转（Varimax with Kaiser Normalization）

在因子分析之前，对 36 个 2010 年世博会影响感知项目进行巴特利球体检验和 KMO 测度，结果表明：Approx. Chi-Squar 值=11889.90， $P=0.000<0.001$ ，即相关矩阵不是一个单位矩阵，故考虑进行因子分析；KMO 值=0.941，意味着各因子之间具有明显的相关性，从而确定样本数据适合进行因子分析。研究采用主成分分析法提取初始因子，然后采用正交旋转中的方差最大法对初始因子进行旋转，保留特征值大于或等于 1、因子负荷大于 0.4 的因子，得到六个主成份影响因子的累计差异解释度达到 66.522%，内在一致性的信度系数（克隆巴赫 α 系数）在 0.8120-0.9208 之间，高于 Nunnally（1987）的 0.50 标准，说明研究结果具有较高的可信度。

因子一综合性较强，但在提升上海社会形象、增加商业机会等方面因子载荷较高，因此命名为“公共经济效益”影响因子。社区居民对世博会的公共经济效益因子项影响感知评价最高，皆超过了 3.9，其中“让世界更多了解中国”是所有世博会影响因子中感知程度最高的（ $M=4.37$ ），说明社区居民对通过 2010 年世博会让世界更多了解中国抱以最大期待，均值排序的第二位是“增加更多商业机会”（ $M=4.24$ ），说明社区居民认为 2010 年世博会对公共经济的拉动方面有明显贡献。此外，“提升社会形象”（ $M=4.21$ ）和“促进当地新的基础设施建设”（ $M=4.20$ ）的认同度也较高，说明上海社区居民对通过 2010 年世博会塑造上海的重要地位和提升上海城市硬件水平很有信心；

因子二考察 2010 年世博会给居民带来的消极影响程度，命名为“社会成本”影响因子。涉及 2010 年世博会社会成本的影响感知因素，被调查居民评价最低，对世博会召开给社会带来的消极影响感知较为明显。其中“不会增加交通拥挤度”均值只达到了 2.96，是所有因子中最低值，说明居民普遍认为 2010 年世博会造成的交通拥堵是必然影响。同时这项因子的标准差为所有因子中的最高值 1.318，说明被访者在此问题上的差异较大，原因可能是因为不同社区距离世博会场馆区的距离有差异，不同居民群体预计的交通状况有所不同。

因子三重点关注 2010 年世博会带给社区居民各地各国的文化体验和认知发展，称为“文化认知发展”影响因子。在增加文化知识方面，被访居民普遍表示赞同，比如对于“有机会欣赏世博会中的各种表演”（ $M=4.02$ ）和“可以在各地旅游景区感受文化与旅游的魅力”（ $M=4.04$ ）的认同度均较高，说明居民重视 2010 年世博会的知识性，希望在参与过程中得到各种文化体验。

因子四主要着眼于增进居民家庭紧密关系和享受在参与世博会中共度美好时光，因此命名为“增加家庭情感”影响因子；因子五在接触日常生活烦恼方面的因子载荷较高，称为“舒缓生活”影响因子。在增进家庭感情和放松身心方面，社区居民的评价一般，“和家人一起了解更多的各地/各国旅游资源”和“减轻日常生活压力”都是上海社区居民认为世博会给家庭关系和个人生活带来的有益影响。

因子五反映了社区居民认为 2010 年世博会将带来社区社会生活各方面的改善，称作“推动社区进步”影响因子。对于切身相关的推动社区进步各因子项，上海社区居民的感知程度趋于中等，“有助于增进居民和参展者、旅游者的关系”（ $M=3.75$ ）和“对当地居民具有教育作用”（ $M=3.75$ ）得到的感知度较高，但是上海社区居民对最为重要的“提高当地居民生活水平”一项认同度一般（ $M=3.58$ ）。

总之，因子结构维度的确定增加了本研究对上海社区居民的世博会影响感知系统的认识，可以

据此展开基于不同感知类型的社区居民细分研究，更好地理解群体特征。

（二）2010 年世博会影响的感知聚类

基于世博会影响感知的六个维度，本研究采用聚类分析法对上海社区居民对 2010 年世博会的影响感知进行划分，为进行有针对性的世博会推广和营销工作打下基础。本研究采用 K-mean 聚类法分析，通过计算欧几里得平方距离（即类群中心数至外延的平均距离），组合相似水平的数据得出四聚类的样本分组方法。在模型通过统计检验的情况下，聚类分析表示四聚类分组方法是对社区居民基于世博会影响感知划分而言最适合的方法。ANOVA 单因素方差分析结果显示，F 统计量的相伴概率均小于显著性水平 0.01，各聚类间存在着显著的差异。因此可以认为，六个因子全部有益于区分四类感知群体（表 2）。

表 2 上海社区居民对 2010 年世博会影响的感知类型--聚类分析

	类 1	类 2	类 3	类 4	F 值	显著值
F1: 公共经济效益	.19950(E)	.35775(D)	-1.46898(A)	.75786(B)	229.272	0.000
F2: 社会成本	.41546(C)	-.26116(E)	-.10171(F)	-.47887(C)	23.629	0.000
F3: 文化认知发展	.45588(B)	.53908(C)	-.43457(B)	-1.10310(A)	112.105	0.000
F4: 增加家庭情感	-.16285(F)	.72885(B)	-.28013(C)	-.16988(F)	26.947	0.000
F5: 舒缓生活	.48787(A)	-.94600(A)	-.19580(D)	.23650(E)	69.362	0.000
F6: 推动社区进步	.33519(D)	-.09446(F)	-.14095(E)	-.45322(D)	15.729	0.000

注：1. $p < 0.001$

2. A-E: 对因子的重视程度递减

值得注意的是，在六个主成份影响因子中，文化认知发展因子在第一个感知类群中排序第二（B），在第二个感知类群中排序第（C），在第三个感知类群中排序第二（B），在第四个感知类群中排序第一（A），可见文化认知发展因子在四个社区居民类群中的值较大，排序相对靠前，获得了较其他因子而言较高的关注度。这表明上海社区居民对世博会带来的认知提高的影响感知较为明显，文化认知发展是上海社区居民最希望通过 2010 年世博会得到的收获。

（三）基于 2010 年世博会影响的感知聚类的社区居民市场细分特征

聚类分析将六个感知维度聚合为四类不同的感知类型，按照因子值大小进行命名，依次为：多重关心型（各项因子值相差不大）、闲逸关心型（ $A = -.94600$ （F5））、效益关心型（ $A = -1.46898$ （F1））和知识关心型（ $A = -1.10310$ （F3））四类（表 3）。与聚类分析结果相对应，被访的上海社区居民分为多重关心者、闲逸关心者、效益关心者、知识关心者四类（表 3）。

表 3 社区居民对 2010 年世博会影响的感知类型

	类 1	类 2	类 3	类 4
类命名	多重关心者	闲逸关心者	效益关心者	知识关心者
最高得分	各项差别较小	-.94600	-1.46898	-1.10310
人数（占总数比例）	193（39.9%）	102（21.1%）	98（20.2%）	91（18.8%）

类 1：多重关心者。该类包括 193 个被访者，是被访者中最大的样本组（39.9%）。男性多于女性，主要年龄较为年轻化，大多受过大学教育，家庭人均月收入集中 4000-6000 之间。该类人群主要是教师、专业技术人员和销售/服务业人员。职业分布一定程度对应了对世博会影响感知的多元化；类 2：闲逸关心者。该类包含 102 个被访者，占样本总数的 21.1%。男性和女性比例相同，该类居民的收入同样集中在 1000-1999 元和 2000-2999 元两个水平上，多数拥有大学或大专学历。值得注意的是，此类居民大多是年龄在 36-45 岁之间、工作繁忙的政府公务员、销售/服务业职员和操持家务的家庭主妇，一定程度上对应了注重通过参加 2010 年世博会获得日常生活之外的闲逸和放松的感知；类 3：效益关心者。该类包括 98 个被访者，占总数的 20.2%。其中男性多于女性，多是年龄在 36-55 岁的中年居民，受教育程度以大专为主，家庭人均月收入较低，职业以销售/服务业人员为主，职业的属性基本对应该类世博会影响的感知类型；类 4：知识关心者。该类包含 91 个被访者，占样本总数的 18.8%。男性稍多于女性，年龄在 14-25 岁和 36-45 岁上分布较多，被访者中高中学

历和大学学历的拥有者较多，主要是学生为主，家庭人均月收入在 2000 元以下。

五、研究结论

本研究探索了社区居民对2010年世博会影响的相关感知特征，对如何引导居民的旅游影响感知，提高居民对旅游发展的支持态度意义重大。社区居民对2010年世博会影响的感知分为“公共经济效益”、“社会成本”、“文化认知发展”、“增加家庭情感”、“舒缓生活”和“推动社区进步”六个主要维度。各因子中“公共经济效益”因其最大的方差贡献率成为最重要的一个世博会影响感知因子项，也是被社区居民强烈感知的世博会影响；其次是“文化认知发展”；但是社区居民对与自身生活密切相关的“增加家庭情感”、“舒缓生活”和“推动社区进步”感知程度一般，对世博会社会成本影响的感知程度最低。因此，公共效益的加强和社会成本的避免，突出文化性和知识性，兼顾经济、社会和生活影响的提升，成为世博会有关部门在筹备工作中应该重视的方面；因子维度的基本结构的确立有助于世博会有关部门更好地认识和理解社区居民对2010年世博会影响感知的系统结构；六个感知因子聚合而成的四类感知类型分别称为“多重关心型”、“闲逸关心型”、“效益关心型”和“知识关心型”，其中文化认知发展在各类中的感知程度都较高，感知类型的建立为世博会有关部门在社区居民中进行有针对性的世博会推广和营销工作打下了基础；与聚类分析结果相对应，被访的上海社区居民分为多重关心者、闲逸关心者、效益关心者、知识关心者四类。世博会的有关部门应该加强对社区居民市场细分的认识，继续加强2010年世博会的宣传工作。结合社区居民中学生、教师、专业技术人员、政府职员和销售/服务业为主的职业特征，特别针对受教育程度高又对各世博会方面影响感知都较强烈的中青年受众，推出一个经济效益高、知识趣味多，又能轻松参与和体验的世博会形象，将高度的营销努力放在增强社区居民对2010年世博会的兴趣和信心上，才能最大限度地争取目的地社区居民的配合和支持，办好2010年世博会。社区居民作为区域内的重要组成部分以及会展业发展的主体，其对区域会展业的感知与态度直接关系着区域会展业的可持续发展。所以当地的管理者有必要充分考虑居民的感知相关和影响因素，作好引导、教育工作，充分发挥社区居民的参与机制，共同办好世博会，促进上海会展业持续不断的向前发展。

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致谢

本研究得到国家自然科学基金(批准号 70873025)、上海市哲学社会科学规划系列课题(批准号 2008XAH004)、复旦大学本科生学术研究计划“望道学者”和“君政学者”项目的资助，特表感谢。

上海节庆活动公众认知度评价研究

楼嘉军 王娟 徐爱萍
华东师范大学旅游系

摘要

本文以公众对上海节庆活动认知度为切入点,借助抽样调查和统计软件 SPSS,在定量研究基础上对上海旅游节、上海国际电影节、上海国际艺术节做定性分析,力图找出公众对节庆活动尤其是对三大节庆活动的认知度差异,总结不同细分市场对节庆活动的认知规律,从一个侧面分析上海节庆活动存在的问题。

关键词: 节庆活动; 认知度; 比较; 上海

A COGNITIVE DEGREE STUDY ON SHANGHAI FESTIVAL ACTIVITIES

Jiajun LOU Juan WANG Aiping XU
Dept. of Tourism, East China Normal University

ABSTRACT:

The paper, relying on the participants' cognitive degrees of Shanghai festival activities and with the aid of sample investigation and the software SPSS, performs a qualitative as well as quantitative analysis of the top three festivals in Shanghai. The aim of such an analysis is to find out their differences and sum up participants' cognitive patterns in specific subfields, and therefore to figure out the existent problems.

Keyword: festival activities; cognitive degree; comparison; Shanghai

一、研究背景与样本概况

(一) 研究背景

第一, 节庆活动提出了新的旅游发展模式。伴随着我国旅游业的兴起, 各地政府都认识到举办节庆活动既能在旅游淡季吸引更多游客, 又能为举办地树立形象, 提高知名度。节庆活动是进行区域促销、带动区域发展的新手段。但纵观近年来各地举办的各种各样的节庆活动, 真正成功的却为数不多, 既浪费了人力、物力和财力, 又在一定程度上破坏了当地的有形和无形的旅游资源。如何发挥出节庆的最大效应, 维持节庆活动长久的活力, 是摆在举办方面前的首要问题。

第二, 本文选择上海旅游节、上海国际电影节、上海国际艺术节作为研究对象, 既具有广泛的代表性, 又能在纵深层面上进行相互之间的比较, 这对发现公众对节庆活动认知特征, 对现阶段上海节庆活动的发展和上海都市旅游的研究都具有一定的借鉴意义。作为上海市的核心节庆品牌, 三大节庆以级别高、参与人数众多和影响广泛而广为人知, 分别代表了上海都市节庆活动娱乐休闲类、文化艺术类和民俗风情类三大主题。上海旅游节是上海节庆活动的航母, 以其逐年丰富的活动内容、中西合璧的节庆风格而深受公众的喜爱。上海国际电影节以世界 A 类电影节著称, 承载着中国人的电影之梦。上海国际艺术节是中国唯一综合类国际艺术节, 开办之初就以其气势磅礴、海纳百川之势享誉国内外。

正是基于此背景, 本文力图从上海三大节庆活动的形成、发展及公众认知的角度出发, 寻找节庆活动公众认知层面规律性的特征, 并且分析和解释其影响因素, 进而从一个侧面勾勒出上海三大节庆活动的发展模式, 以便能更好地指导上海节庆旅游发展, 同时也能为国内其它城市的节庆活动提供借鉴。

（二）研究方法和样本构成

1. 问卷的设计及发放

为了切实地了解公众对上海节庆活动的认知情况，笔者通过查阅相关文献资料，了解认知研究方法有关问题设计的基本要求，设计出“上海市节庆活动公众认知度调查问卷”，并采用问卷调查法获取资料，调查对象是指在上海居住的普通群众，也即是本文中所指的公众，包括上海市民及在上海长期工作的公司员工和在读大学生。课题组于 2007 年 9 月、10 月两个月期间在上海的企事业单位、学校、公园、社区发放了主题为“上海节庆活动公众认知度调查问卷”的问卷共计 450 份，回收有效问卷 396 份，有效问卷率为 88%。

2. 样本构成

此次问卷调查的有效问卷共回收 396 份，调查样本的构成情况见表 1。

表 1 上海节庆活动认知度样本构成 单位：%

样本特征	特征值	人数	百分比
性别构成	男	198	50
	女	198	50
年龄构成	18 岁以下	28	7.1
	18-25 岁	166	41.9
	26-35 岁	73	18.4
	36-45 岁	100	25.3
	46-60 岁	23	5.8
	60 岁以上	6	2.8
婚姻状况	未婚	235	59.3
	已婚	161	40.7
个人或家庭 月收入	1000 元以下	114	28.8
	1000-3000 元	142	35.9
	3000-5000 元	82	20.7
	5000-8000 元	28	7.1
	8000 元以上	30	7.6
文化程度	初中及以下	29	7.3
	高中及中专、职校	116	29.3
	本科及大专	183	56.2
职业构成	硕士（包括双学位）及以上	68	17.2
	企、事业管理人员	40	10.1
	政府工作人员、公务员	11	2.8
	企、事业普通员工	100	25.3
	军人	2	0.5
	个体经营者	8	2.0
	专业人士或技术人员	28	7.1
	教师	6	1.5
	学生	133	33.6
	自由职业者	22	5.6
离退休人员	9	2.3	
其他从业人员	37	9.3	

从上述统计结果来看，本次调查在于的样本中，年龄在 18-45 岁的青年及中年人，企事业管理者、企事业员工及教育科研人员占了大半。这部分人是社会的中坚力量，他们思想活跃，文化程度较高，生活独立且收入稳定，是社会的主要消费群体，这就为研究上海节庆活动公众认知度的真实性和普遍性提供了有利的基础条件。

二、公众对上海节庆活动的总体认知度分析

普通心理学认为认知是个人心理过程的起始阶段，既是心理活动的基础也是行为和情感的产生的基础，既是行为产生的起点也是行为最终结果的检验。目前，上海已形成数十个知名的节庆活动品牌，公众对这些节庆活动的参与行为和喜爱程度，是由已经形成的认知形象（既心理知觉世界）所引发。为对上海节庆活动总体认知情况进行研究，笔者从公众对上海市众多成熟的节庆品牌总体知名度、上海市节庆市场的评价与三大节庆活动中主要的子活动入手调查，进而为三大节庆活动认知度的研究做好铺垫。

（一）上海节庆品牌知名度分析

为了对上海市节庆品牌进行公众认知度进行研究，作者选取了目前上海市发展较为成熟，并具有一定知名度的十一个节庆活动：上海国际艺术节、上海国际电影节、上海电视节、上海旅游节、上海国际服装文化节、上海国际音乐烟花节、上海国际魔术节、上海之春国际音乐节、上海南汇桃花节和上海国际茶文化节。这些节庆以文化艺术类、综合类和自然生态类节庆活动为主。调查结果详见图1。

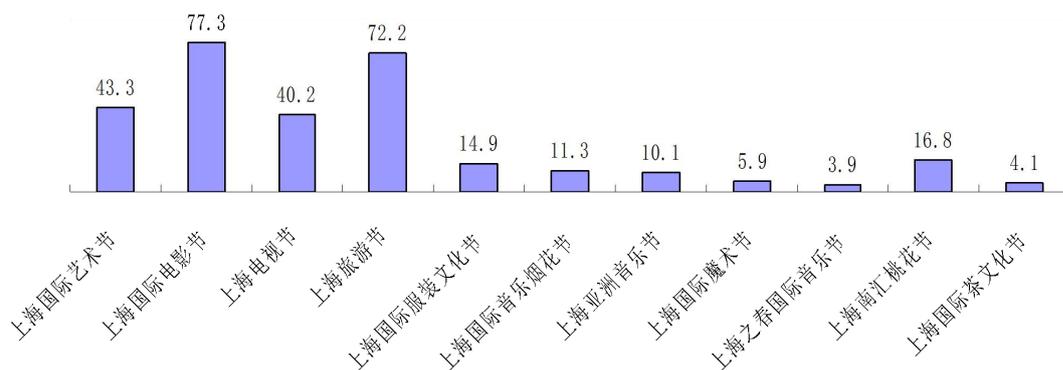


图1 上海市主要节庆品牌知名度情况 单位 %

从统计结果中我们发现，首先，在上海市众多节庆品牌中，排名在前三位的是上海国际电影节、上海旅游节和上海国际艺术节。这三大节庆活动是上海市节庆市场打出去的三个著名品牌，举办的时间长，级别高，投入大，公众的知晓率也较高。从排名来看，排在第一位的是上海国际电影节，而不是公众参与程度较高的上海旅游节。这主要是因为：第一，看电影一直人们喜闻乐见的休闲项目，参与门槛较低外；第二，与节庆活动的媒体效应有关。电影节期间，娱乐节目、报纸、广播等多方面媒体都在关注它，而其他一些节庆活动期间，媒体的广告投入比较小；第三，与此次问卷的调查时间有很大关系。本次问卷调查主要在07年9月份初，刚好是电影节刚刚结束（第10届上海国际电影节在07年6月中下旬举办），而旅游节（第18届上海旅游节于07年9月15日举办）和艺术节（第9届上海国际艺术节在07年10月中旬举办）都刚刚开始。因此，大众媒体对电影节的报道还没有完全退潮，公众对电影节仍保留有深刻的记忆。另一方面，上海国际艺术节的举办时间靠后，公众的知晓率相对较低，这主要适应为艺术节受到其专业性的限制。而且，众所周知，对高雅艺术的欣赏不仅需要较高的专业素养，而且还需要较高费用的支出，导致公众参与的门槛较高，从一定意义上讲，使得上海国际艺术节的知名度最低。

其次，节庆活动的知名度与公众的参与程度和有无吸引公众注意力的焦点有关。在上海旅游节上，开幕式花车大巡游、南京路大狂欢以新、奇和刺激而牢牢的抓住了公众的视线，美食节、农家乐和休闲观光游等等也是上海市民喜爱参与的节目。众多明星的到场吸引了市民对上海国际电影节的关注，国内外优秀电影展播的饕餮盛宴和逐渐趋于合理的票价让观众们从中得到了实惠。春季踏青的民俗以及对自然美景的喜好和对健康休闲生活的追求，让上海南汇桃花节每年都能吸引来大批的市民。上海是中国时尚的前沿，对服饰的喜爱自然也就吸引了广大女性对上海国际服装文化节的关注。

再次，上海节庆品牌的公众知晓度呈现两个极端分布。从上图可以看出，上海国际电影节和上海旅游节分别以77.3%和72.2%位居前列，而相比之下，其余的节庆活动则大部分只具有10%左右的知晓度。排名靠前的节庆活动无一不是影响大，综合性强，节庆举办地较广，宣传到位而且级别较高的节庆。而排名在后的节庆活动专业性较强，影响范围也较小，如上海国际魔术节、上海国际茶文化节和上海之春国际音乐节的知名度均低于10%。

（二）三大节庆活动主要子项目熟悉程度分析

上海国际电影节、上海旅游节和上海国际艺术节均属级别高、综合性较强的大型都市节庆活动，旗下都有各具特色的节庆子项目。为综合考察公众对三大节庆活动的认知程度，本文选取每个节庆活动的下属主要节庆子项目进行对比研究。其中，国际烟花节、旅游形象大使评选、南京路开幕大狂欢与淮海路彩车大巡游是上海旅游节的子项目，金爵奖国际影片评选、电影节国际影片展映与金爵电影论坛属于上海国际电影节，艺术节舞台艺术演出、“天天演”群众文化活动与艺术节文化艺术展属于上海国际艺术节。调查结果见图2所示。

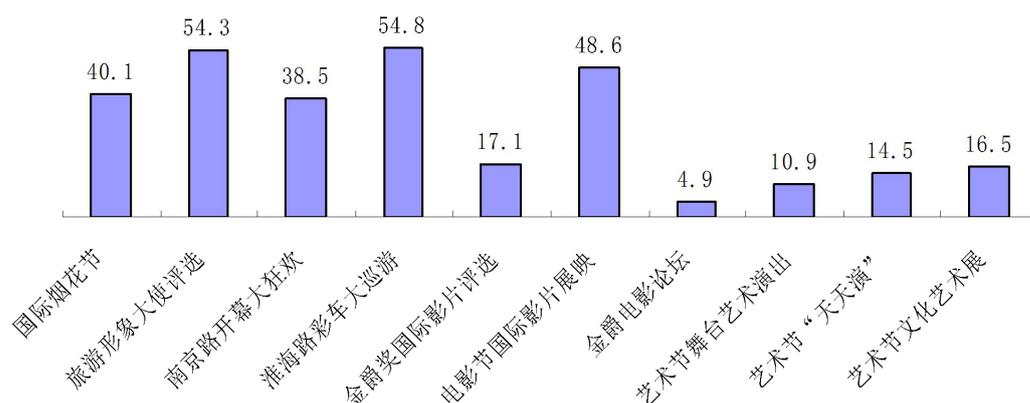


图2 三大节庆活动主要子项目熟悉程度 单位 %

第一，总体上来看，三大节庆活动中，以旅游节的子项目公众熟悉程度最高，平均47%，也就是说有尽半数的上海市民都对旅游节的活动项目熟悉，电影节其次，平均23.5%，而上海国际艺术节子项目的公众熟悉程度最低，平均为14%。究其原因我们可以发现，旅游节的四个节庆子项目都是公众较易参与而且是喜闻乐见的节庆活动，举办地也较为集中。彩车巡游和狂欢活动主要分布在黄浦区徐汇区等上海市最为繁华，人口也最为集中的地区，如南京路、淮海路、四川路、世纪大道等著名繁华街市。相比之下艺术节的参与对公众要求较高，主要演出地分布虽然广泛但比较分散，而且节目多以舞台演出为主，普通百姓的参与性不高。

第二，三大节庆活动的子项目熟悉程度各具特点。旅游节的子项目公众熟悉度较高而且较为平均，以彩车大巡游和旅游形象大使评选为最高。绚丽、奇幻、美妙的各国花车巡游每年都能吸引近300万市民与游客的参与。能担当旅游节形象大使的都是新一代上海优秀青年的代表。选手们不仅外表出众、亲和力强，并且热爱上海，能充分代表上海旅游形象，向世界展示上海的风采。当前，各种真人选秀节目正进行的如火如荼，因此，每届旅游节表象大使的评选自然也就吸引广大市民，尤其是年轻人的关注。上海国际电影节子项目的公众熟悉度差异性明显，其中电影节国际影片展映高达48.6%，而金爵电影论坛的熟悉度只有4.9%。如今，看电影又逐渐回归到人们喜爱的休闲方式中，由于主办方宣传到位，保证售票体系的方便快捷，票价也较合理，因此，每年6月的大批国际优秀电影的展映自然会吸引广大上海市民尤其是青年人的参与。相比之下，金爵电影论坛只限于业内人士参加，普通观众的知晓率不高。艺术节三大子项目的公众熟悉程度分布平均，但分值都不高。

（三）公众对上海三大节庆活动的认知渠道

认知渠道是公众获取信息的途径，对它的调查既可了解公众对三大节庆活动的认知渠道，也反映出节庆主办方的主要宣传方式与宣传效果。见图3。

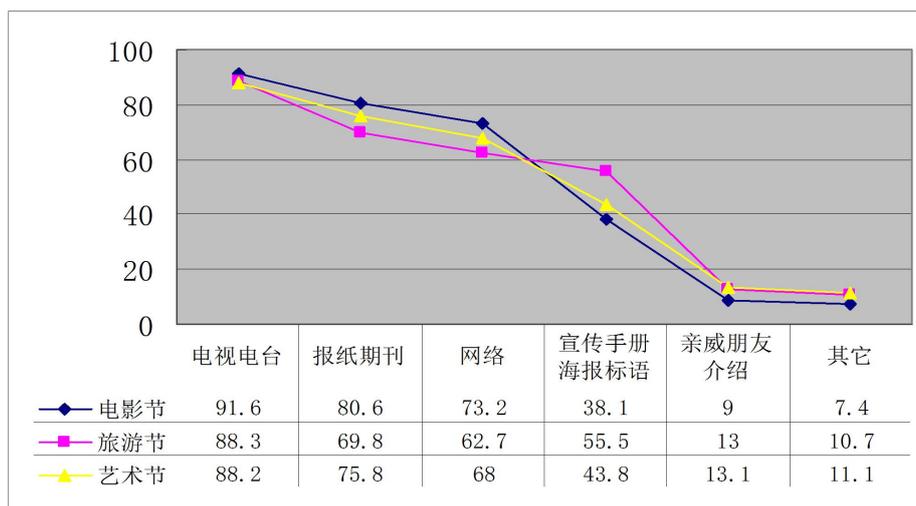


图3 上海市三大节庆活动公众认知渠道情况 单位 %

一方面，总体上看，公众对三大节庆活动认知渠道由主到次的顺序相同，依次是电视台、报纸期刊、网络、宣传手册和海报标语、亲戚朋友介绍及其它认知渠道。数据显示，传统媒体是公众获取节庆信息的主要渠道。据零点公司的调查，看电视是中国人的首要休闲方式，为60%以上的人所采用。由此，电视作为宣传方式的老大地位无可争峰，公众的信息获取率高达90%。而通过口碑渠道认知的比例低，这与节庆活动的参与深度和满意度较低有关。此外，网络在我国日益普及，据中国互联网络信息中心（CNNIC）在北京发布的《第21次中国互联网络发展状况统计报告》显示，截至2007年12月31日，我国网民总人数已达到2.1亿人，仅以500万人之差次于美国，居世界第二位。CNNIC预计在2008年初，我国将成为全球网民规模最大的国家，而且我国网民以年轻人为主。可见，网络已成为公众尤其是年轻人重要的认知渠道，以70%左右的比例位居第三位。

另一方面，从认知渠道的分层上来看，三节之中的电影节，无论是在电视报纸等传统媒体，还是在网络等现代媒体中的认知渠道率都是最高的。相对于电影节和艺术节的信息获取渠道，人们更倾向于通过宣传手册和海报标语获取旅游节的信息，这与旅游节主办方积极使用这种宣传媒介是分不开的。

三、公众对上海节庆活动总体发展状况认知评价

本文对上海市公众对节庆活动的总体发展状况的认知评价作了调查。从统计结果来看，上海市居民对本市节庆活动总体发展状况的评价不是很高。具体情况见表2。

首先，从总体的算术平均数值来看，公众对上海市节庆活动发展状况评价由高到低的顺序依次是：节庆活动丰富多样、节庆活动时尚性走在全国前列、节庆气氛浓厚、节庆活动秩序良好、环境安全、节庆活动接待服务设施完善和节庆产业发达。除传统的民俗节庆活动外，目前上海已拥有上海旅游节、上海国际艺术节、上海国际电影节、迎新年撞“龙华晚钟”、豫园“三会九节”、上海南汇桃花节等一大批做成品牌的相对固定的大型旅游节庆，还有长兴岛的柑桔节、奉贤风筝节、静安迎春民俗文化节、食品节、上海啤酒节等一些行政区和行业举办的节庆活动，同时也有很多各种未被固定下来的临时性娱乐游艺活动事件。如2003环球嘉年华（夏秋版）、2004赛车嘉年华等。可见从整体上来看上海的节庆活动可谓是丰富多样，有50.5%的公众基本认同该选项。上海有“中国时尚之都”的美誉，举办一些具有时尚性的节庆活动是其优势所在。同时在一些传统节庆活动中，举办方也较注重在保持传统特色的同时注入新的因子，使其得以创新和发展。如豫园新春民俗灯会就生动地实现了时尚与传统的完美融合，故有31.1%的公众完全认同“节庆活动时尚性走在全国前列”，同时有42.2%基本同意此选项。目前，上海许多节庆行动都是由政府直接操办，企业参与远远不够，其结果是节庆活动不能充分地进行市场化经营动作，导致很多节庆活动投入与产出严重失衡，所以公众对“节庆产业发达”的认同程度较低。

表2 上海节庆活动总体发展状况评价 单位：%

节庆活动发展状况评价	完全同意	基本同意	不能确定	不太同意	完全不同意	平均数
	5	4	3	2	1	
节庆活动丰富多样	29.8	50.5	15.7	3.8	0.8	4.04
节庆活动接待服务设施完善	20.2	42.9	28.5	6.6	1.8	3.73
节庆活动时尚性走在全国前列	31.1	42.2	21.2	4.5	1.0	3.98
节庆气氛浓厚	29.3	37.6	23.0	7.8	2.3	3.84
节庆产业发达	23.5	36.9	27.3	9.6	2.8	3.69
节庆活动秩序良好、环境安全	25.0	38.6	26.3	6.6	3.5	3.75

其次，总体评价偏低，即便是算术平均数最高的“节庆活动丰富多样”也仅为4.04，公众基本认同，而分值最低的“节庆产业发达”仅为3.69，介于“基本认同”和“不能确定”之间。由此可见，今后上海市的节庆活动发展应由开发新活动上马新项目转到对现在节庆活动的营运与管理上，整合现有资源，完善节庆服务接待设施，提升市场化动作水平，使上海的节庆活动真正走上产业化发展之路，做大做强。

四、三大节庆活动认知度因素分析

通过从所收集到的相关认知度信息资料及节庆研究入手，听取了相关方面意见后，最终设计出15条上海三大节庆活动的认知影响因素。根据调查所得到的数据，使用SPSS11.0统计软件，以因子分析方法重建认知度的构成体系。这样既可以避免由于评价题目多而造成的混乱，又能简化本文的研究。另外，还将使用SPSS中的信度分析（Reliability Analysis）对各主因子层面的可靠性系数进行检验。具体得到以下结论。

（一）三大节庆的认知度体系

通过因子分析，对三大节庆活动的具体认知因素体系进行筛选、提纯和归类后，剔除了一个影响因素，最终形成由4个主因子，14个具体认知因素组成的三节认知体系。如图4所示。

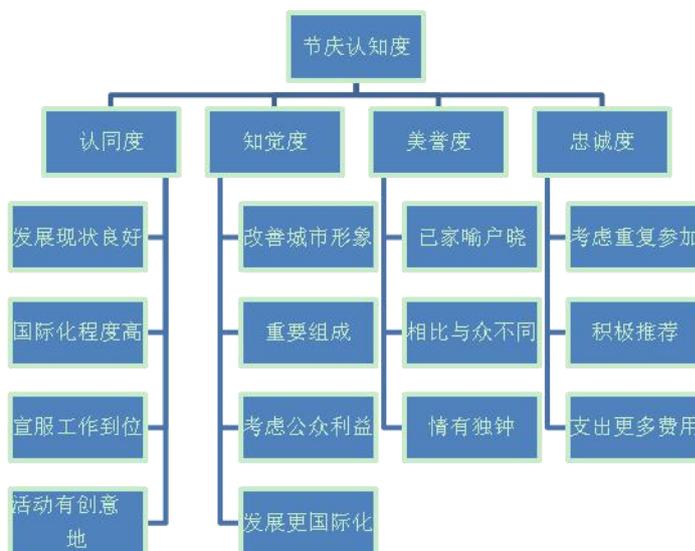


图4 三大节庆活动公众认知度体系

（二）三大节庆的认知度因素分析

第一，从三节的总体认知度上来看，公众对上海国际电影节认知度最高，上海旅游节其次，对上海国际艺术节认知度最低。本次研究显示，在诸多的影响因素中，决定公众认知度高低的最主要

因素是忠诚度。因此，费用因素或说节庆的价格因素决定着公众认知和参与的程度。相对而言，上海电影节的参与费用最低，上海旅游节其次，而上海国际艺术节最高。可见，参与费用的多少是决定节庆认知度高低的最重要因素

第二，在4个节庆活动认知因子上，公众对三大节庆活动知觉度最高，认同度其次，美誉度第三，忠诚度最低。可见，相对来说，公众已基本上认同三大节庆活动对城市所起到积极作用，以及三大节庆活动的更专业更国际化的发展前景。但高知觉度高认同度并不表示更高的节庆活动忠诚度，故而普通老百姓重复参加的意愿不高，也不太愿意为三大节庆活动支出更多费用。

第三，从三节认知因子比较上来看，对于认知度因子，公众对三节良好的发展现状都最为认同，对活动的创意性认知度最低，但对艺术节的国际化程度和到位的宣传服务工作已达到普遍认同，对旅游节宣传服务工作认知度也较高。在知觉度因子上，公众对上海旅游节知觉度最高，电影节其次，艺术节依然是最低；公众普遍认同三节对上海城市发展所起的作用，但对组织者考虑公众利益认同度不高。公众对三节美誉度与忠诚度认知规律相似，公众向他人积极推荐三节的可能性最高，而对支出更多费用的意愿最低；电影节和旅游节在各项分值上相近，艺术节最低。

（三）三节总体认知度决定因素

第一，三大节庆活动整体认知度的决定性因素各不相同，电影节知觉度对整体认知度贡献最大，旅游节忠诚度是整体认知度的决定因素，艺术节的认同度是整体认知度的决定因素。三节认知度的标准回归方程如下所示。

$$\begin{aligned} \text{电影节认知度} &= 0.471 \times \text{认同度} + 0.537 \times \text{知觉度} + 0.482 \times \text{美誉度} + 0.508 \times \text{忠诚度} \\ \text{旅游节认知度} &= 0.464 \times \text{认同度} + 0.480 \times \text{知觉度} + 0.428 \times \text{美誉度} + 0.609 \times \text{忠诚度} \\ \text{艺术节认知度} &= 0.542 \times \text{认同度} + 0.510 \times \text{知觉度} + 0.412 \times \text{美誉度} + 0.526 \times \text{忠诚度} \end{aligned}$$

第二，从4个因子与总体认知度的相关系数上来看，虽然四个因子决定因素各不相同，但相对来说忠诚度对三大节庆活动认知度的贡献率较高，而且从总体上来看，4个认知因子的贡献率相差不是很大。

五、研究展望

作为上海市重点发展的都市旅游项目，节庆活动必将对城市休闲和都市旅游业产生积极的影响。鉴于能力以及研究资源上的制约，本文仅是对该研究领域的一个初步成果，未来的研究仍存在很大的空间。第一，进一步综合运用多学科知识探讨公众对节庆活动的关注因素与认知度；第二，完善样本的抽样标准、增加样本数量和丰富样本的地域性。第三，进行公众对节庆活动满意度、参与度，以及参与度与满意度和认知度之间的交叉研究；第四，加强对企业节庆活动参与模式和参与绩效的研究。

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2008年北京奥运会的对旅游者社会影响与参与动机关联度的实证研究

叶云霞 郭英之 耿晓鑫 吴洛容 邓倩
复旦大学旅游学系

摘要

2008年第29届奥运会这一体育盛事在东方古都北京的举办,对举办国经济和社会发展起到了巨大的推动作用,同时也对潜在的旅游者产生了深远的影响,极大地刺激旅游者的参与动机。本研究首先对旅游者参加北京奥运会进行动机方面探讨,其次探讨了北京奥运会产生的影响感知及参与动机关联度,再次探讨具不同动机的奥运会参加者接收刺激的不同方面的影响,以便能够有针对性地进行营销宣传。

关键词: 参与者; 关联度; 2008年北京奥运会

A STUDY ON THE CORRELATION BETWEEN IMPACT PERCEPTION AND MOTIVATION OF 2008 BEIJING OLYMPIC GAMES

Yunxia YE Yingzhi GUO Xiaoxin GENG Luorong WU Qian DENG
Department of Tourism, Fudan University

ABSTRACT

The 2008 Beijing Olympic Games has brought out a certain extent of impact on the society, which refers to the various perspectives in society. Through the publicity of the Games, its impact has gained attention with the public. At the same time, the variety of influences are relative to public motivation under the perception of the people. This study is research on the motivation in the participation of the Olympic Games. Furthermore, the present study attempts to analyze the correlation between the perception impact and the motivation in the participation of the Olympic Games. This is to find out the specific aspects of impact stimulation which is accepted by the Olympic Game participators who all hold different motivations. These can help the aimed public impact in the marketing of the Olympic Games.

Keywords: Participants; correlation; 2008 Beijing Olympic Games

一、引言

奥运会作为一项主要的体育赛事,引起的是全球的关注。2008年第29届奥运会,将在中国首都北京举办。对这样一场体育盛事在东方古都的举办,意义重大而深远——奥运会对举办国经济和社会发展起到了巨大的推动作用(屠铭德,2007),同时也得到了中国国内各界充分的支持。奥运会因其重要意义,其主办方都力图吸引足够多的旅游者前往参加。对奥运会的预期感知在奥运会筹备期间将会对潜在的旅游者产生影响,刺激旅游者的参与动机。就2008年北京奥运会而言,它在社会已经产生了一定程度的影响,这些影响涉及到了社会的各个方面。本研究对奥运会对于刺激旅游者的动机方面进行了研究,分别从八个方面(社会交往、增加文化知识、增进社会成员情感、追求新奇感、逃避日常生活/恢复身心健康/放松、奥运会的吸引力以及奥运会的纪念品)对旅游者参加北京奥运会进行动机方面探讨。进一步的,本研究试图从对北京奥运会产生的影响感知及参与动机关联度的分析中,探讨具不同动机的奥运会参加者接收刺激的不同方面的影响,以便在奥运会的营销过程中能够有针对性地进行影响宣传。

二、文献综述

有关旅游者的出游动机,学术界已有较为多的探讨。旅游者的出游动机作为旅游者行为决策中重要的个环节,受到了许多专家和学者的关注(Chulwon Kim, 1998; Iso-Ahola, 1982; Choong-Ki

Lee, Yong-Ki Lee, Bruce E. Wicks, 2004; SooCheong (Shawn) Jang, Chi-Mei Emily Wub, 2006; Nancy G. McGehee, Kyungmi Kim, Gayle R. Jennings, 2007)。旅游者的出游动机受多重因素的影响,目前的相关文献主要从以下两方面予以关注。

第一,人口特征对出游动机的影响。人口特征作为市场细分的重要因素,长期以来一直是学术界关注的重点,这部分的研究在国内比较集中。赵华、马耀峰、许聪聪(2006)认为旅游动机尽管受到各种因素的影响,但总是存在着一定的趋向性和规律性,并通过实证调查证实人口特征中年龄、性别等要素对旅游动机产生的不同影响。有大量的论据支持人们的体育旅游动机随着性别、年龄、职业、学历、居住地、收入水平的不同而有一定差异(于素梅,2007)。

第二,预期感知对出游动机的影响。旅游者的动机能否形成,受外部影响刺激的程度也很重要。在旅游业中,人们对旅游的选择决策会受多方面因素的影响。在旅游者尚未将旅游付诸行动之前,这些影响就让旅游者产生一定程度的感知。相关文献可以分为以下方面:(1)环境感知对出游动机的影响。旅游目的地环境要素是与旅游者出行动机相关的要素之一,许多学者在这方面进行了探讨。在这个方向的研究中,态度—行为的心理学认知模式被使用,以分析环境态度与旅游者出游动机之间的联系(Matthew J. Kotchen, Stephen D. Reiling, 2000)。Roy Ballantyne, Jan Packer, Karen Hughes(2000), Hyounggon Kim, Marcos C. Borgesa, Jinhyung Chon(2006)和Gerard T. Kyle, Andrew J. Mowen, Michael Tarrant(2004)都就环境感知对旅游动机的影响进行了相关研究,强调了目的地环境友好的重要性。(2)文化感知对出游动机的影响。文化作为与个人紧密关联的因素,对旅游者的出游动机形成产生着重要的推动作用,因此,从文化感知的角度来研究影响感知对动机的影响也就显得十分必要(Chulwon Kim, 1998; Daniel C. Funk, Tennille J. Bruun, 2007; Darya Maoz, 2007)在对文化感知的研究中,一方面,异域文化的新奇感知是刺激旅游者出游动机形成的原因之一(Janet Chang, Geoffrey Wall, Shi-Ting (Tim) Chu, 2006);另一方面,文化的认同也是出游动机形成的可能原因,只是在这方面学术研究较少。(3)形象感知对出游动机的影响。旅游目的地的形象推广是市场营销的一个关键环节,也是影响旅游者的关键。将旅游目的地形象与出游动机联系起来作分析,可以发现二者之间的正相关关系(Asuncio'n Beerli, Josefa D. Marti'n, 2004)。Denver Severt, Youcheng Wang, Po-Ju Chen, Deborah Breiter(2007)以会议旅游为切入点,研究了参与动机与感知形象之间的关系。

第三,还有一些研究专注于体育赛事的参与动机分析,这些研究中包括对不同规模的赛事参与动机的分析,如Heather J. Gibson, Cynthia Willming, Andrew Holdnak(2003)对小规模体育赛事研究, Nam-Su Kim, Laurence Chalip(2004)对具体赛事如世界杯相关方面的探讨和研究。

综上所述,可以知道的是旅游者的影响感知对其出游动机会产生相应的作用,即影响感知与参与动机间是存在关联度的。只是关联的程度大小,随影响感知的改变和参与动机的不同而变化。

三、研究方法

第一,调查问卷设计。问卷包括影响感知及参与动机调查两部分,其中,影响感知包括37个细分项目,采用里克特7分法进行测量(如,1表示“很不同意”,7表示“非常同意”,从1至7同意程度递增)。问卷采用无记名填写。

第二,市场抽样调查。问卷采用随机分层调查抽样,在全国范围内进行,包括东、中、西部各区域,同时也囊括大中小城市及乡村居民,力图保证问卷抽样的代表性。问卷预期发出800份,以保证样本容量的充分性。问卷调查实施由访问人员随机街头或入户访问,最大程度上确保问卷的回收和填写的有效性。

第三,问卷数据分析。经问卷获得的信息数据采用SPSS统计方法进行分析。本研究采用主因子分析法以及关联度分析法。其中,主因子分析用于对2008年北京奥运会的影响感知做进一步的主因子提取,以更明确影响感知的主要方面。关联度分析用做对影响感知和参与动机间关联度的分析,以确定两者之间各因素的相关关系的正负及关系强度的大小。

四、研究结果

(一) 北京奥运会参与动机特征分析

北京奥运会吸引了众多的关注,对于参与奥运会的动机,本研究从不同的角度考虑进行了分析。问卷调查将列举了 33 项动机以供被访者进行选择,对于搜集到的数据,首先利用 KMO 测度和巴特利球形检验来检测数据是否适合进行因子分析。根据结果可知:检验变量间偏相关性的 KMO 数值为 0.91,超过 0.9,因此各变量之间的相关程度无太大差异,数据非常适合做因子分析;球形假设检验的结果显示各个指标间并非独立,其取值是有关系的,这也是数据适合进行因子分析的一个表现。

表 1 北京奥运会参与动机分析

动机因子	均值	因子载荷	特征根	差异解释度%	累计差异解释度%	可信度检验
探新求异动机	3.45		10.11	30.64	30.64	0.847
追求体育新奇感	3.40	0.756				
喜欢体育探险	3.20	0.703				
好奇心驱使	3.44	0.692				
获得兴奋感	3.56	0.652				
个人需求得到满足	3.54	0.560				
感受新奇事物	3.68	0.489				
参与赛事活动	3.33	0.445				
文化体验动机	3.72		2.07	6.28	36.92	0.838
体验各国的风俗、文化资源	3.73	0.784				
体验国外不同的体育与旅游资源	3.71	0.736				
了解奥运会的文化与体育资源	3.75	0.690				
增加对各地/各国的体育和文化知识	3.69	0.669				
体验新奇的体育旅游	3.59	0.567				
在当地感受体育、文化与旅游的魅力	3.84	0.496				
放松暂避动机	3.36		1.79	5.43	42.35	0.841
解除烦恼	3.32	0.821				
调整日常生活的节奏	3.47	0.761				
逃避日常琐碎的生活	3.10	0.758				
减轻日常生活的压力	3.57	0.721				
家庭情感动机	3.49		1.57	4.75	47.10	0.70
和家人共度快乐时光	3.64	0.751				
增进家庭和睦	3.23	0.723				
认为这是家庭成员的共同爱好	3.33	0.707				
帮助家人更了解各地体育与旅游资源	3.74	0.631				
体育参与动机	3.81		1.37	4.15	51.25	0.691
和朋友一起参加奥运会	3.84	0.621				
欣赏体育运动表演	4.00	0.589				
希望见到来自世界各地的运动员	3.73	0.578				
希望和有共同爱好的人交往	3.66	0.513				
福娃吸引动机	3.34		1.25	3.79	55.04	0.855
喜欢福娃	3.30	0.859				
纪念品福娃有特色	3.38	0.855				
奥运体验动机	3.68		1.13	3.43	58.47	0.637
纪念品对中国是重要的经济收入	3.65	0.702				
北京奥运会的意义特殊	3.94	0.512				
纪念品的意义	3.49	0.483				
感受独特的赛事气氛	3.65	0.458				
结识朋友动机	3.33		1.02	3.10	61.57	0.444
跟随旅游团参观 2008 年北京奥运会	3.24	0.672				
希望和兴趣不同的人交往	3.42	0.445				

作为涉及社会文化、体育以及旅游多方面的一项赛事,奥运会的举办给参与者提供了多种多样

的机会。不同的参与者有着不同的奥运会参与动机，经过因子分析中的主因子成分提取，八个主因子成分被选择（探新求异动机、文化体验动机、放松暂避动机、家庭情感动机、体育参与动机、福娃吸引动机、奥运体验动机以及结识朋友动机）（表 1）。其中，探新求异动机因子项的特征根为 10.11，接下来是文化体验动机值为 2.07 的特征根，其余六项主因子动机的特征根也都大于 1，说明了这八项主因子对于游客参与北京奥运会的动机能够进行足够充分的阐述。从总体差异解释度来看，八项主因子动机能够解释 61.57% 的参与动机，就这个数值而言对所搜集的数据对于奥运会动机的分析还是较充分和可信的（其中，仅探新求异一项动机就占了 30.64% 的解释度。）

在各项动机中，体育参与动机均值最高（3.81），其次是文化体验动机（3.68）和奥运体验动机（3.68），家庭关系动机也受到了较高等度的关注（均值为 3.49），其余四项动机所受关注均值也都高于 3。从相关分析可知，一方面，人们参与奥运会是带着多动机的，并不只是要求单一地满足某个需要（各个动机的均值都在 3-4 之间，说明被访者对这几个动机项的选择差异不大）；另一方面，北京奥运会作为体育方面的盛事，其对体育爱好者有着强烈的吸引力（体育参与动机），提供了体验文化和体育的机会。

从具体的动机来看，在探新求异动机中，奥运会的参与是为了满足个人的好奇心，奥运会四年一届，有其独特的一面，能够激起新奇感。文化体验对于游客已经成为其出游的重要动机之一（表 5），参加北京奥运会使得其不仅是有机会了解举办地北京的文化，而且能够接触到来自世界各国各地的文化，完成一次丰富的文化体验。放松暂避动机也成为参加奥运会的理由之一，在人们的观念中，奥运会能够让他们逃避日常琐碎的生活、调整日常生活的节奏以及减轻日常生活的压力。奥运会也被人们认为是增加家人情感联系的好机会，可以在让家人了解更多体育资源（均值为 3.74）的同时，和家人共度快乐时光（均值为 3.64）。当然，奥运会的实质仍是体育竞技的赛事，参加者最受吸引的是能够欣赏体育运动表演（均值为 4.00），且能够遇到志同道合的对体育感兴趣的人。北京奥运会的一大亮点就是其非常具有中国特色的纪念品——福娃，这也成为了人们前往奥运会的动机之一。北京奥运会在被感知成有特色的赛事，使人产生了奥运体验的动机，期望前去感受北京奥运会独特的赛事气氛和特殊的举办意义。此外，奥运会也将为参加者提供结交认识新的友人的机会，刺激潜在参与人群“结识朋友动机”的形成。

（二）北京奥运会的影响感知与参与动机的关联分析

北京奥运会的影响奥运会感知与参与动机之间的相关程度如何，也是本研究的重点之一。根据以上部分对影响感知和参与动机分别所进行的因子分析，6 个影响感知主因子成分以及 8 个参与动机主因子被提取，且已知这些主因子都具备足够的解释度（6 个影响感知主因子成分的累计解释度为 61.28%，8 个参与动机主因子成分的累计解释度为 61.57%）。本研究采用 Brivariate 过程的 Pearson 系数对北京奥运会的影响感知和参与动机进行相关关系的检验（表 2）。

表 2 影响感知与参与动机的关联分析

		探新求异 动机	文化体验 动机	放松暂避 动机	家庭情感 动机	体育参与 动机	福娃吸引 动机	奥运体验 动机	结识朋友 动机
社会促进	Pearson 系数	0.060	0.273**	0.035	0.064	0.366**	0.063	0.152	-0.162
	Sig. (双侧检验)	0.125	0.000	0.370	0.101	0.000	0.103	0.000	0.000
社会成本	Pearson 系数	0.170*	0.060	0.117**	0.128**	-0.043	0.143**	0.145**	0.208**
	Sig. (双侧检验)	0.000	0.124	0.003	0.001	0.264	0.000	0.000	0.000
宣传影响	Pearson 系数	0.076*	0.136**	0.021	0.099*	0.140**	0.197**	0.025	0.087*
	Sig. (双侧检验)	0.050	0.000	0.585	0.011	0.000	0.000	0.527	0.025
对民众的影响	Pearson 系数	0.147**	0.210**	0.085*	0.202**	0.147**	0.033	0.037	0.012
	Sig. (双侧检验)	0.000	0.000	0.030	0.000	0.000	0.402	0.345	0.767
环境印象	Pearson 系数	0.101**	0.199**	-0.023	0.148**	0.078*	0.119**	0.188**	-0.019
	Sig. (双侧检验)	0.010	0.000	0.560	0.000	0.045	0.002	0.000	0.634
生活就业影响	Pearson 系数	0.144**	0.144**	0.123**	-0.056	-0.011	0.061	0.120**	0.045
	Sig. (双侧检验)	0.000	0.000	0.002	0.147	0.776	0.114	0.002	0.247

注：（1）** 相关性在 0.01 水平上显著（双侧检验）

（2）* 相关性在 0.05 水平上显著（双侧检验）

根据以上分析,北京奥运会的影响感知因子与参与动机因子间存在着程度各不相同的相关关系,除极个别几个呈负相关,其余皆为正相关。剔除个别显著性检验不合格的因子项,可以得到以下研究相关研究结果。

第一,社会促进影响因子对文化体验动机和体育参与动机都有较为显著的影响。以文化体验和体育参与为动机的奥运会参加人员关注北京奥运会能够带来的社会效益。文化以及体育资源作为社会的组成部分,将因北京奥运会的举办而可能得到积极的促进,而北京奥运会的举办本身也为文化和体育体验需求提供了机会。

第二,除了对与体育参与动机的负相关关系,社会成本因子的考虑与其他动机都呈正相关关系,但相关程度都不太显著。这说明社会成本因子作为北京奥运会可能产生的负面影响,对赛事参加者而言并不是他们所关注的奥运会主要方面,但也有可能成为阻碍奥运会参加的因素。

第三,与宣传影响因子联系最为紧密的是受福娃吸引而可能前往参加北京奥运会的人群。福娃作为颇具中国特色的2008年北京奥运会吉祥物,在宣传时也是重点。宣传的影响使得更广泛的人群会了解到福娃,且受之吸引。

第四,对民众影响因子对家庭情感动机、文化体验动机、探新求异和体育参与动机都有所影响。对民众的影响与其他影响因素相比,涉及到了更为个人化的信息,因此对于与个人紧密相连的家庭情感、文化体验、体育参与也有相应的刺激效果,并留下能够满足个人探新求异动机需求的印象。

第五,环境印象对于参与者动机而言也是重要的影响因素,尤其是对于有着探新求异动机和家庭情感动机的参与者。奥运会举办地别样的环境氛围和良好的印象有助于刺激探新求异动机,同时家庭情感动机的持有者也更需要与家人在较为良好的环境中共度愉快时光。

第六,生活就业因素的感知虽然对各项动机都有一定的相关影响,但影响力度都不大,奥运会作为一项并非日常的活动,与生活水平和就业机会的联系对于参与者而言显得并不是很重要。

五、研究结论与局限性

根据本研究所做的调查和分析,可得出如下研究结论。

第一,北京奥运会的影响感知和参与动机间存在着相关性,但具体的相关强度随影响感知因子项和参与动机项的不同而各有差异。因此,在北京奥运会的对外营销过程中,为保证吸引足够数量的旅游者,应该在宣传上对那些与参与动机关联性较强的影响感知方面加强力度。

第二,人们因不同的动机而参加奥运会,这些动机可归纳为八类:探新求异动机、文化体验动机、放松暂避动机、家庭情感动机、体育参与动机、福娃吸引动机、奥运体验动机以及结识朋友动机。这说明北京奥运会的举办给人们提供了多种多样的机会,满足了人们不同方面的需求。

第三,北京奥运会的潜在参与人群根据影响感知来划分可分作三个类型——生活关注型、社会责任型和接受参与型。此三类潜在参与者的人口特征。不尽相同,且对北京奥运会的感知态度也各不相同

本研究针对北京奥运会的影响感知和参与动机关联度进行了研究分析,但只是从数据分析的角度作了探讨。参与动机所受的影响面较为多样,本研究所考察的影响感知面还有待完善,且可以从心理层面再作进一步的原因分析。

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致谢

本研究得到国家自然科学基金(批准号70873025)、上海市哲学社会科学规划系列课题(批准号2008XAH004)、复旦大学本科生学术研究计划“望道学者”和“曦源项目”的资助, 特表感谢。

作者简介

叶云霞: 复旦大学旅游学系硕士研究生; 郭英之: 复旦大学旅游学系硕士生导师; 耿晓鑫: 复旦大学旅游学系本科生; 吴洛容: 复旦大学旅游学系本科生; 邓倩: 复旦大学旅游学系本科生。

基于模糊综合评价法的节事旅游游客满意度评价 ——以北京植物园桃花节为例

施德群
北京林业大学

摘要

目前,国内举办的节事旅游活动数量众多,主题各异,各节事活动都希望通过自己的活动来吸引更多的游客参与,以达到促进本地旅游业发展的目的,但是能形成较大范围影响力的节事活动却屈指可数。那么,一项节事活动成功与否应该从哪些方面来判断呢?本文所探讨的游客满意程度就是节事活动成功与否的一个重要指标。游客满意可以树立良好的旅游形象,提升游客的忠诚度,因此游客满意程度对于一个节事活动来说,具有十分重要的意义。本文运用模糊综合评价法为主要的研究方法,以北京市植物园桃花节为研究对象,提炼影响节事活动游客满意度的主要因素,构建游客满意度层次结构指标体系,建立评价游客满意度的数学模型,验证该评价法对节事活动游客满意度评价的适用性,为节事旅游的管理者探索一个掌握游客满意度水平的决策辅助工具。

关键词: 节事旅游; 模糊综合评价; 游客满意度评价

EVALUATION OF TOURIST SATISFACTION DEGREE IN FESTIVAL & SPECIAL EVENTS TOURISM BASED ON FUZZY COMPREHENSIVE EVALUATION: TAKING PEACH BLOSSOM FESTIVAL IN BEIJING PLANT GARDEN FOR EXAMPLE

Dequn SHI
Beijing Forestry University

ABSTRACT

At present, many festivals have been organized with its own theme, and organizers all want to have more tourists to join in their activities in order to accelerate the development of tourism, but few is successful. How do we know whether an event is performing well? A term called "Tourists Satisfaction Index" which is discussed in this paper can answer this question very well. The satisfaction of tourists can build up tourism image and upgrade the loyalty of tourists, so it is very important to an event. This paper takes Fuzzy Comprehensive Evaluation as main study method, abstracted the key factors which have impact on the tourist satisfaction, and then established the evaluation indicator system of tourist satisfaction. Finally, the evaluation model of tourist satisfaction is built in terms of fuzzy comprehensive evaluation so as to offer the managers a decision-making assistant to grasp the circumstances of tourist satisfaction in festival & special events tourism.

Key Words: Festival & Events Tourism; Fuzzy Comprehensive Evaluation; Tourist Satisfaction Degree Evaluation

一、研究背景

人们对保护地的游客管理和规划的认识经历了从旅游环境容量到游客人数和利用强度再到游客活动和游客影响控制,最后逐步成熟形成游客管理规范 and 框架的过程。加拿大滑铁卢大学的 Eagles 教授对 21 世纪国家公园游客管理的新理念及其趋势作了阐述,他认为 21 世纪游客管理的完善将体现在引入服务管理原则,把游客视为客户(甚至有人认为是主人),以及由过去的“以管理人员为中心”向“以游客为中心”整个管理的中心的转移。Eagles 在他和 Kenneth Homback 共同出版的《保护区公众使用管理指南》中将消费领域的顾客满意度的概念引入了国家公园和保护区管理,形成了游客服务管理、游客满意度管理和游客满意度等概念,并在加拿大的几个国家公园的规划和管理实践中得到应用(符全胜,2004)。游客满意在旅游研究中的作用是很重大的,主要体现在减少和解

决游客的不满行为、提高景区服务管理质量、提升旅游地形象。

北京植物园桃花节自 1989 年以来于每年春季举办。桃花节充分展示植物园的建设成果，通过突出优美的自然景观、人文景观与科普知识、丰富有趣的文化活动相结合的特点，向广大游客展示品种丰富的花卉植物，利用科普展览及专家讲座进行科普知识宣传，从而突出植物园文化内涵。桃花节期间在整个园区游人可以欣赏到十多个品种的花卉。

游客满意度 (Tourist Satisfaction, TS) 指游客通过旅游活动过程的感知和事先预期的对比，两者之间产生的心理差距。如果实际感知超过活动前预期，即差距为正值时，游客就会感觉到满意，差距越大游客就越满意；反之，负向差距越大表明游客满意度越低。游客对旅游环境的满意程度受诸多因素影响，并由此产生一系列连锁反应。一般来说，游客的旅游环境感知主要包括自然景观质量和社会服务质量感知两部分，并通过与价格感知的对比形成对旅游地游览价值的感知，由此形成的实际值与期望值的差异将影响旅游者的满意程度 (杨强, 2006)。游客满意可提高游客忠诚度，树立旅游地形象；游客不满可能会抱怨或投诉，损害旅游地名誉，旅游地通过积极处理游客抱怨可将抱怨的游客转化为忠诚的游客。游客满意度理论主要有差距分析理论 (Zeithaml et al., 1990) 或者说是奥里弗预期——假证理论 (Anderson and Fornell, 1994; Oliver, 1997) 和“容忍区间”理论 (Christine Williams、John Buswell, 2004)。

游客满意度指标体系可以定义为一系列相互联系的能敏感地反映游客满意状态及存在问题的指标有机构成整体。为了准确地测量游客满意度，从景区业务流程的关键环节中筛选反映游客满意度的因子时必须遵循因子的敏感性、内容的代表性、范围的全面性、指标的可测量性、数据的效用性、体系的稳定性等原则 (Paul F. Eagles, Stephen F. McCool and Christopher D. Haynes.)。游客满意度评价指标体系主要是根据游客的分类需求结构及其在景区的活动内容建立起来的 (董观志、杨凤影, 2005)。对以往研究顾客满意度的文献进行总结分析,从价值方面看,顾客满意度的影响因素主要包括产品、服务、人员、形象等 4 个方面。在这一因素框架上,结合景区业务流程的原理,从景区规划开发过程、一线运营服务过程、后台支持系统等三大模块作业流程单元中,按照全面性、代表性、可测量性、效用性的原则确定项目层指标,再根据各项目层指标分别确定评价因子层指标。这样,旅游景区游客满意度评价指标体系就由 3 个层次的指标项目构成:第一层次 (I) 即游客总体满意度指标;第二层次 (II) 即项目层指标,包括食、宿、行、游、购、娱、服务、设施、形象等指标;第三层次 (III) 为评价因子层指标,是第二层次指标进行分解后的满意度指标。

人们对保护地的游客管理和规划的认识经历了从旅游环境容量到游客人数和利用强度再到游客活动和游客影响控制,最后逐步成熟形成游客管理规范 and 框架的过程。加拿大滑铁卢大学的 Eagles 教授对 21 世纪国家公园游客管理的新理念及其趋势作了阐述,他认为 21 世纪游客管理的完善将体现在引入服务管理原则,把游客视为客户 (甚至有人认为是主人),以及由过去的“以管理人员为中心”向“以游客为中心”整个管理的中心的转移。Eagles 在他和 Kenneth Homback 共同出版的《保护区公众使用管理指南》中将消费领域的顾客满意度的概念引入了国家公园和保护区管理,形成了游客服务管理、游客满意管理和游客满意度等概念,并在加拿大的几个国家公园的规划和管理实践中得到应用。

游客满意对游客管理的作用和意义体现在三个方面:(1) 减少和控制游客的不满行为。游客的不满意是通过对管理措施的不理会、设施的不当使用和破坏风景等方式来表达的,提高游客满意度可以被看作是一种对游客不满行为后果的解决方法 (Paul Eagles 和 Kenneth Homback),也可以通过游客进行教育和培训来扩大保护地的游客承载力 (J.A.迪克逊等, 2001),进而既解决了游客人数上升的冲击也能提高游客满意度;(2) 提高服务管理质量。为了实现游客满意,将迫使管理人员改进解说和服务的技巧和质量;(3) 提升旅游地形象。尽管一些景区在一定的地域范围内具有较高的知名度和形象,但游客满意度高的旅游景区会获得更多的宣传机会,树立更好的旅游地形象。

二、基于模糊综合评价法的游客满意度评价

根据游客满意度评价指标体系的理论原理,构建下图2的游客满意度层次结构指标体系:

U_i 表示项目层指标, U_{ij} 表示第*i*个项目层指标的第*j*个因子指标, W_i 表示第*i*个项目层指标的重要

性权数,且

$$\sum_{i=1}^n W_i = 1 (i=1, 2, \dots, n)$$

W_{ij} 表示第*i*个项目指标的第*j*个测评因子指标对该项目指标的重要性权数,且

$$\sum_{j=1}^n W_{ij} = 1 (i=1, 2, 3, 4, 5)$$

在游客满意指标的衡量中,使用精确方法有一定的局限性,适宜采用模糊综合评价法,计算出各个满意度等级的模糊隶属度,从而进行评价和求解。

1、一级模糊综合评价

采用模糊综合评价时,将项目层指标作为第一层指标,因子层指标作为第二层指标,一级模糊综合评价应按第二层次诸因素进行。设评价对象是第二层次中的因素 U_{ij} ,对该因素的评价值隶属度为 R_{ijk} (例如,在抽样调查 50 人中,评价值为 5 分的有 10 人,则很满意的隶属度为 0.2); 以图 1 中项目层的旅游景观的评价因子层为例,构建第二层次因素评价矩阵:

$$R_1 = \begin{pmatrix} R_{111} & R_{112} & R_{113} & R_{114} & R_{115} \\ R_{121} & R_{122} & R_{123} & R_{124} & R_{125} \\ R_{131} & R_{132} & R_{133} & R_{134} & R_{135} \\ R_{141} & R_{142} & R_{143} & R_{144} & R_{145} \end{pmatrix}$$

则如该矩阵中第一行的值表示第一层次因素(旅游景观)的评价因子(观赏价值)的评价隶属度。于是因子 U_1 的一级模糊综合评价矩阵为: $B_1 = W_1 \cdot R_1$

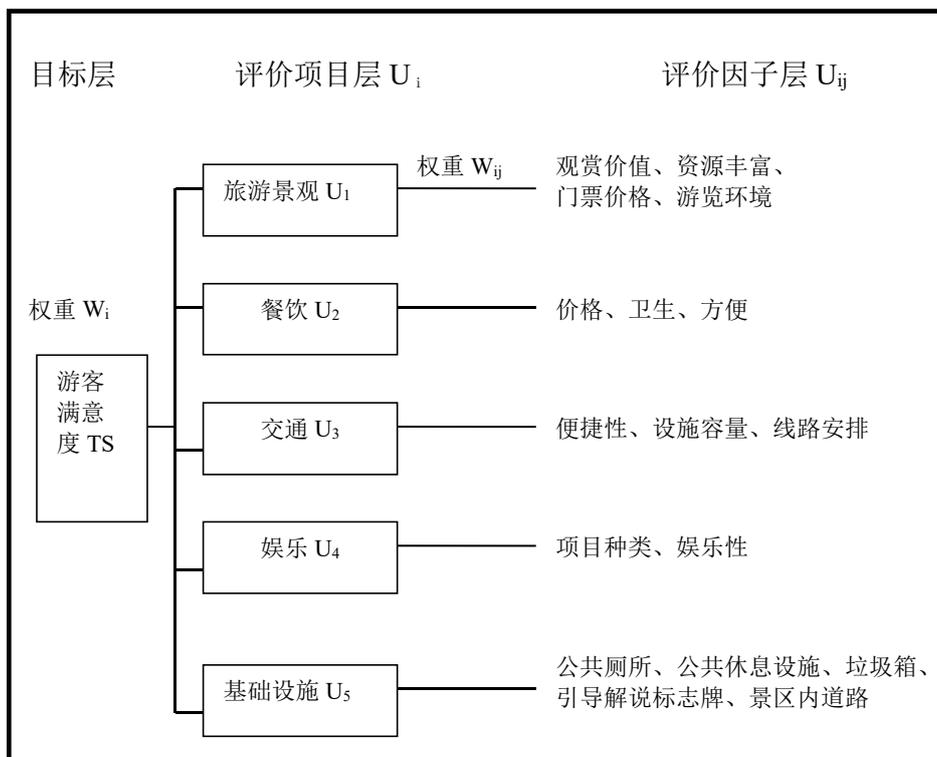


图1 旅游满意度指标体系

其中 $W_1 = (W_{11}, W_{12}, W_{13}, W_{14})$, W_{11} 、 W_{12} 、 W_{13} 、 W_{14} 分别表示观赏价值、资源丰富性、门票价格、游览环境等因子在旅游景观的满意度评价中的重要性程度,且它们的加权和为1。依此类推,建立在测评体系上的一级模糊综合评价集为: $B_i = W_i \cdot R_i$

由以上的计算程序可得此次桃花节游客满意度调查的一级模糊综合评价结果，见表1：

表 1 一级模糊综合评价结果

评价指标及权重		评价值隶属度 (R _{ijk})						
项目层U _i	W _i	因子层U _{ij}	W _{ij}	好 10	较好 8	中 6	较差 4	差 2
旅游景观 U ₁	0.44	观赏价值	0.44	0.31	0.50	0.19	0.00	0.00
		资源丰富	0.26	0.36	0.60	0.14	0.00	0.00
		门票价格	0.12	0.08	0.80	0.12	0.00	0.00
		游览环境	0.18	0.24	0.54	0.22	0.00	0.00
	U ₁ 一级综合评价 B ₁			0.2828	0.5692	0.0174	0.0000	0.0000
餐 饮 U ₂	0.06	卫生状况	0.70	0.12	0.51	0.33	0.02	0.02
		价 格	0.20	0.16	0.37	0.43	0.04	0.00
		服务态度	0.10	0.12	0.47	0.39	0.02	0.00
	U ₂ 一级综合评价 B ₂			0.1280	0.4780	0.3560	0.0240	0.0140
交 通 U ₃	0.21	便捷性	0.64	0.14	0.26	0.33	0.24	0.03
		设施容量	0.26	0.10	0.17	0.28	0.38	0.07
		线路安排	0.10	0.20	0.35	0.27	0.18	0.00
	U ₃ 一级综合评价 B ₃			0.1356	0.2456	0.3110	0.2704	0.0374
娱 乐 U ₄	0.08	项目种类	0.17	0.00	0.10	0.21	0.50	0.19
		娱乐性	0.83	0.00	0.13	0.30	0.40	0.11
	U ₄ 一级综合评价 B ₄			0.0000	0.1249	0.2847	0.4170	0.1236
基础设施 U ₅	0.21	座椅	0.17	0.09	0.31	0.19	0.30	0.11
		卫生间	0.31	0.04	0.33	0.27	0.27	0.09
		垃圾箱	0.19	0.30	0.15	0.20	0.00	0.00
		解说标志牌	0.19	0.34	0.49	0.13	0.04	0.00
		景区内道路	0.14	0.16	0.59	0.20	0.04	0.01
U ₅ 一级综合评价 B ₅			0.1717	0.6707	0.2067	0.1479	0.0480	

2、二级模糊综合评价

将每一个因素U_i作为一个元素，B_i作为它的单因素评判隶属度值矩阵，则

$$B_i = (B_{i1}, B_{i2}, B_{i3}, B_{i4}, B_{i5}) \quad \text{其中 } i = 1, 2, 3, \dots, 5$$

构建第一层次因素评价矩阵R，

$$R = (B_1, B_2, B_3, B_4, B_5)^T$$

R就是集合U = { U₁, U₂, U₃, U₄, U₅ } 的单因素评判矩阵，每个U_i 作为构成U 的指标，其权重集为

$$W = (W_1, W_2, W_3, W_4, W_5)$$

于是第二级综合评判Y = W · R，Y = (Y₁, Y₂, Y₃, Y₄, Y₅)，其中，Y_i (i = 1, 2, 3, 4, 5) 表示游客满意度为V_i 的隶属度，则S = H · Y，即可算出游客满意度的综合得分，H为游客满意度的评价集(好，较好，中，较差，差) 相对应的标度向量(10, 8, 6, 4, 2)。

由表1中的B_i 和W_i的数值，由二级综合评判Y = W · R，计算得：

$$Y = (Y_1, Y_2, Y_3, Y_4) = (0.197, 0.482, 0.161, 0.123, 0.029)$$

其中W = (0.44, 0.06, 0.21, 0.08, 0.21)，R = (B₁, B₂, B₃, B₄, B₅)^T

则游客满意度的综合得分S = H · Y = 7.342。

3、模糊评价结果分析

从表 1 可以发现，按最大隶属度原则，一级评价中除 B₃的综合评价等级为“中”、B₄的综合评价等级为“较差”外，其余三项均为“较满意”，桃花节的游客满意度综合得分 S 为 7.342，这说明游客对桃花节的总体游客满意度处于“较满意”的水平。

为使各项目指标满意度水平的比较变得直观化,计算各级项目层指标的满意度均值。由 $V_i = B_i \cdot H$,其中 $H = (10, 8, 6, 4, 2)$,计算得到 $V_1、V_2、V_3、V_4、V_5$ 分别为7.4860、7.3640、6.3432、4.6226、9.0104。比较排列有: $V_5 > V_1 > V_2 > V_3 > V_4$ 。以横轴表示项目层因子的权重系数,纵轴表示满意度的得分,如图3所示的项目层指标评判结果在矩阵图上的相对位置反映了该景区游客满意度需要改进的具体内容以及先后顺序。

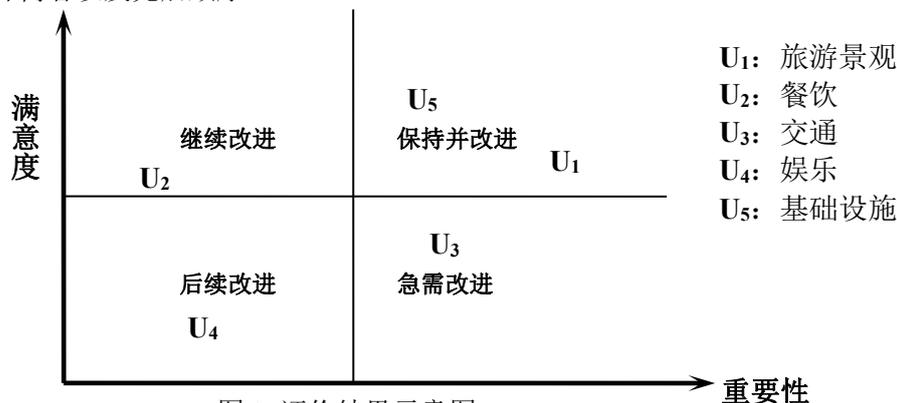


图2 评价结果示意图

三、运用模糊综合评价法研究节事活动游客满意度测评的意义

作为定性分析和定量分析综合集成的一种常用方法,是对受多种因素影响的事物做出全面评价的一种十分有效的多因素决策方法。模糊综合评价已经在经济管理、社会活动各行业中得到应用。

目前,游客满意度评价的方法多种多样,为了避免过多的主观描述影响测评的科学性和客观性,本文采用模糊综合评价法,提炼影响节事活动游客满意度的主要因素,构建游客满意度层次结构指标体系,建立评价游客满意度的数学模型,通过两层模糊评价,得出游客满意度的综合得分。并根据项目层指标评判结果和该项目的重要性在评价结果矩阵图上的相对位置表示出来,反映了该节事活动需要改进的具体内容以及先后顺序。该方法能较好地对节事活动的游客满意度进行定量评价和分析

本文所研究的游客满意度评价虽然无法将游客的个人因素以及天气等其他不可控制的外在因素考虑在内,但在理论上具有一定的合理性和科学性,在实践中具有可操作性。当然,具体到特定的某一个节事活动时,可根据该活动的性质和特点,重新建立符合实际的游客满意度层次结构指标体系,有针对性地突出节事活动主要特色方面的评价,获得具体活动适合自身举办特点客源市场特征等具有针对性的游客满意度测评结果,从而更有效地指导不同类型的节事旅游经营管理活动。

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作者简介:

施德群 (1986-), 浙江温州人, 北京林业大学园林学院 07 级硕士研究生, 研究方向为生态旅游。

**RESEARCH ON PARTICIPANTS' BEHAVIOR IN THE EXHIBITION AND
METROPOLITAN TOURISM UNDER GOVERNMENT COORDINATION
- A CASE STUDY OF ATE, AUSTRALIA**

Wei ZHANG, & Biao ZHANG,
School of Economics and Management, Wuhan University

&

Yuzhu ZHANG
Organization, Personal and Innovation, Muenster University

ABSTRACT

The Theory of Government Coordination refers to the Government intervention on the basis of market coordination. It stresses that market alone can not narrow the gap between the regions. It is necessary to achieve the inter-regional development through the effective government intervention. However, the Organization Theory thinks that varies of organizations have their own boundaries. Government can not also exceed the boundary of its own. Otherwise, it will lead to such phenomenon as monopoly, externalities and policy failures, etc. On the contrary, the Theory of Dissipation Structure encourages corporate continuously exchange material, energy and information with the outside world in order to produce the flow of negative entropy to maintain the development. But government can not substitute for the market.

In the debate of market and government, it gradually forms two distinct tools of the “theory of spontaneous coordination of the market” and the “theory of government intervention”, which expresses the organic evolution of corporate behavior in the pursuit of cost, benefit and efficiency, as well as the position for the government in the “public goods and services”.

Through the analysis of the participant's behavior of government, corporate (buyers & sellers), metropolitan tourism (regional cities in Australia) in the experience of Australia Tourism Exchange ATE, the article hopes to refine some value that the government-oriented tourism policy of China should learn from.

Key Words: participants behavior; government coordination; ATE

INTRODUCTION

Lewis summed up the role of government in economic development at the paradox: if there isn't a wise government to actively promote, no country can have economic progress.....On the other hand, perhaps there are many examples in which government has brought economic life into disaster, it is also so easy to write few pages of warnings in government's intervention in economic life. More specifically, government's failure might be its doing too little or too much.

However, government's act essentially is also an economic activity of costs and benefits, and only when earnings exceed the cost it is economically reasonable. Otherwise, it is a non-rational behavior. Therefore, government will also be engaged in economic analysis of costs and benefits before he implements a policy. So, government's behavior in the market should focus on “social public article and service”, and recuperate for the possible malfunction of macro market monopoly (in particular the natural monopoly), externality of economy and welfare redistribution..

Under the theoretical perspective of economics, corporate research and behavior has long been focusing on the optima allocation of resources, and the full development of productivity. However, the economic development of corporate still emerges large number of phenomenon of diseconomy including inner or external diseconomy and scale diseconomy.

Adam Smith's theory of "Invisible Hand" is the respect for the laws of market economy. In the 1970s and 1980s, the evolutionary economics has re-orientated the neo-classical paradigm of equilibrium and the mathematical formalism, and implied the metaphor in biology of "concluding and applying in the general theory of all opened evolutionary complex systems". Therefore, from classical to neo-classical and evolutionary economics, and from the paradigm of equilibrium to the general theory of opened evolutionary complex systems, we have seen the evolutionary of industry in the competition. Meantime, varied kinds of organization theory and systems theory also seek to explain the development of corporate and market.

Obviously, as Australia's premier tourism trade event and the largest international travel trade show of its kind in the southern hemisphere and the platform of government, corporate and different regional metropolitan cities, ATE has comprehensively performed an excellent symphony for government, corporate and regional development. And from the participants' behavior, we can also ascertain that the module of ATE can be of some value to the experience of tourism exhibition and metropolitan Tourism.

LITERATURE REVIEW

The definition to government behavior in western economic theory is based on the premise of free market, which means that the flow of resources between the regions has no obstacles. The main bodies' behavior in market economy has security under the rule of freedom, equality and competition.

However, the economic thinking and methodology of analysis are the most direct expression of corporate. The competition perspective of economics in corporate is very easy to weaken the relationship for cooperation and expand the competitive situation for all stakeholders, thus not conducive to corporate by these means. In 1944, the book of "Theory of Games and Economic Behavior" by John Von Neuman and Oskar Morgenstem, thus laid a foundation for the construction and improvement of economic game in their first illustration for the general thinking of game theory "the majority of economic behavior should be analyzed by game". Especially today with the regional cooperation and development as well as the scale in business expanded, the gap of regional economy is now intensifying the imbalance over the stakeholders, inter-regional conflicts, and even slowing down the pace of development to stagnation and regression, namely the diseconomy consequences leading to the inefficiency and failure of economic development. And the basic characteristics of the market mechanism is if the economical activity of an economic entity makes the economic changes of benefits to the other entity, the late entity should ask payment or loss in the form of price from the previous entity. But it has been the practice that the external diseconomy of an enterprise does not have to pay the price. Under such circumstances, government intervention usually pays an important role in the achieving the balance in the market.

Government Intervention and Market Coordination

Regional economics is the outcome of long-term labor development in the geographical division. As within a country's institutional arrangements varied, any country with rich resources will also be different in aspects of economic development, per capita income and comprehensive strength. If all in the balanced state, the resources should be flowing in mutual ways inter-regionally. However, the differences in institutional arrangements will make the resources one-way flow into the system of more reasonable arrangements, thus affecting the macro-economic performance of regional economic system. For example, the flow of resources to the strong during the test of barrier-free tourism in the early 21st century resulted in the hurt against the regional economic interests to the weak.

So, how to narrow the gap between economic development? Since the birth of regional economics, the debate of coordination between government and market has never been terminated. Theoretically, the dispute of the role of government and market finally formed the "theory of

spontaneous coordination of the market” and “theory of government intervention”.

Peter Robson’s “policy coordination is the key element to achieve economic integration” stressed the essential coordination role government plays in economic development. No matter how government’s role is, to run the market economy for the problems and interpretation of the objects is the key point, and no people stand for market with government.

However, in the practice of corporate competition, due to the difficulty to grasp the intensity and border between government and market, the offside situation of government often leads to the ultimate loss of economic and social benefits.

Theory of Government Coordination argues that monotonous and spontaneous market forces alone can not narrow the gap between regions. Government must intervene to achieve the effective and coordinated regional development. Swedish well-known economist Gunnar Myrdal (1957) proposed his circular cumulative model and initially questioned the views the reverse flow of the elements of capital and labor in neo-classical model. He believes that in the real economic life, although the law of marginal profit decreasing leads some capital flows from the developed areas to the less developed regions, owing to the high quality labor, more mature market mechanism, sound economic legal system and stable political situation, all these will increase the elements output rate and improve the developed areas to have the regional advantage to attract capital. “The role of market forces tends to expand rather than narrow the differences between regions.” Therefore, in the role of market mechanism, regions in good conditions and rapid development will continue to accumulate for their own development so as to further curb the economic development of backward areas and worsen their situation. He proposed developing countries to implement the “unbalanced development strategy”, thus the theory also known as “unbalanced regional coordination theory”. Gunnar Myrdal calls this phenomenon “doubling effect”. Moreover, as the “doubling effect” is often greater than the “diffusion effect”, thus the circular cumulative effect makes “the developed regions more developed and the poor areas poorer”. Therefore, based on Myrdal’s view it is necessary to avoid the negative role in regional development, and in the initial stage of economic development government should encourage social investment, concentrate on the developed areas and with the “spillover effects” drive the relevant poor regions. At the same time, in order to prevent the response of the “circular cumulative effect”, government is necessary to implement policy measures to stimulate regional development in the less developed areas and to prevent further disparities of regional economy.

Another American Planning Scientist John Friedman proposed the Core-Periphery Geographical Theory. He clearly describes the association of the characteristics of the regional growth and the stage of economic development, and points out the reason of the core economic area with its original and more active innovation activities and therefore the area becomes the source of regional development and makes the edge areas affiliated and dependent. Hirschman, the representative of Government Coordination in his masterpiece “Strategy for Economic Development”, more explicitly states government intervention in regional economy and non-equilibrium road. He thinks that regional imbalance in growth can stimulate innovation and is full of vigor in catching up with each other. In order to break through the restrictions of various external conditions, Hirschman advocates corresponding government intervention. In the long run, regional economy has a distant way to go in achieving effectiveness on the core and marginal space, or the developed areas spurring the less developed regions.

On the other hand, the well-known U.S. economist J.G. Williamson more stands for the theory of market spontaneous coordination. The theory is based on the neo-classical economics which hopes the characteristics for the country’s economic development from the unbalanced growth to the equilibrium. Its premise is on three basic assumptions of fully competitive market, full use of factors of production and free flow of capital and labor. In 1965, he proposed that regional gap gradually expands at the early stages, while economic development enters the period of mature period, and with the formation of the unified capital market, the decreasing of the investment income from developed areas and other factors of capital back flow to the less developed regions, regional disparities will

become small.

Organization Boundary

With the new forms of organization, such as virtual organizations, strategic alliance, etc., the organization border has shown an increasingly significant ambiguity and variability, which corresponds to the definition of the concept of the organization border also divided. According to the mainstream of the basic principle of organization theory, organizational boundary is often portrayed as an end and start place in the environment.

Boundary can be seen as a border existing between “diversity” and “identity”. This distinction provides the characteristics and criteria of acts for the people in the internal organization. Fiol once pointed out that the characteristics of an organization describe the unique and lasting identity people of the organization think. Meanwhile, Alvesson advocated a strong sense of identity was able to narrow the gap in the work and the relationship within the organization. On the sense of identity and how people’s behavior has been linked, many scholars such as Castells, Elias and Giddens pointed out “sense of identity is for the maintenance of social relations, modification and transformation”.

The Ability Theory of Modern Corporate thinks that corporate is the particular combination of a set of specific resources and organizational capacity. It can make use of these resources and capacity to engage in production and management activities and in their own way to deal effectively with the reality of production and difficulties.

Coase, the representative of Transaction Cost Theory, thinks the emergence and development of corporate is to reduce transaction costs. But with the expansion of the size of the organization, the cost of management and organization will be increased to such an extent that brings more cost than the lower transaction cost. When the organization expands the size of its marginal cost of the organization equal to its marginal cost of the transition, the optimal limits of the corporate organization to the business and market is determined, then the corporate boundary is set.

As the marginal income of corporate is large, each corporate has the possibility and motive to expand its boundaries to the outside, so corporate will normally regard itself as the core business and export capital, management and surpass the original boundaries of the organization to intervene in the transaction’s production process. The expanding and reduction of the external boundaries of corporate will depend on the boundaries of the possible boundaries of production and organization.

In other words, the restrictions and adjustment of organization is a double-edged sword. The boundary can ensure the stability and predictability for organization, meanwhile the ability for the group and organization to act to the outside environment, which may change the initial formation of the boundary. Once the boundary formed, it will lead to conduct energy.

In economics research, people usually follow such a routine government intervention is in need for socio-economic activities when the market is deficient, namely, the market failure is regarded as a sufficient condition for government intervention. It seems that government only do those market can not do or do wrong. The Theories of Welfare (Pigou) and State Intervention (Cairns) are permeated with this logic.

Theory of Dissipative Structure

Systems thinking the term first appeared in the 1960s, which was clearly defined by P.B. Checkland in his famous book <Systems Thinking, System Practice>. He explained that, as a way of thinking, systems thinking is a concept or discourse system....., as a special way of thinking, systems thinking is personalized with the word “system” to grasp the overall concept to organize our thinking

and stresses the unity and systematic results.

In the 1950s, Norbert Wiener summed up Control Theory whose general laws span engineering and biology. Since then, ideas of systems engineering and methodology of Control Theory has been used in automatic control, project management, social-economic and many other fields. But in socio-economic field, the utility of Control Theory is not so successful.

In 1970s, the rise of Theory of Dissipative Structure and Synergistic Theory is the concept of second generation systems. The theory states when the number of elements are as huge as 10 to the power of 20 or above, it will be impossible at this point with the control and management of “I push you move”. Meanwhile, the elements’ automatic and another independent level of movement will inevitably make the whole systems in statistics and randomness. However, the second generation systems of thinking applied to economic and social systems were still not satisfied. The reason is that, although the individual (or elements) have “their” own movements which under certain conditions, the evolution of the systems as a whole play a positive and constructive role, there are not true “live” bodies as these movements are still blind and random. The individuals have no purpose and direction, not learning and accumulating experience and not changing their patterns of behavior. Illustrating the status quo of the disorder and diseconomy in

Corporate competition with the concept of Theory of Dissipative Structure, it is very persuasive. But the difference is the “living” body in systems untrue, and in corporate and market, the “living” each has very clear purpose and direction to maximize its own interests with changeable patterns of behavior, flexible attitude of market competition and cooperation in the game.

CONTEXT OF STUDY

The business events sector in Australia is an important and under researched area of domestic and inbound tourism. Within the broad area of business events, perhaps the least well understood component is the exhibition and metropolitan market which is defined as “travel and entertainment provided to employees, distributors or customers as a reward for high productivity or sales”.

In 2003, the National Business Events Study (Deery, Jago, Fredline and Dwyer, 2005) Australia, attempted a comprehensive evaluation of the Australian Business Events Sector, which included studies of business event venues, meeting and conference delegates, organizers, exhibitions and incentives. This study constituted the most comprehensive to date to size and scope the sector.

ATE is one of the studies. The Australian Tourism Exchange (ATE) is Australia's premier tourism trade event and the largest international travel trade show of its kind in the southern hemisphere. The business-to-business event provides a forum for Australian tourism businesses to showcase their products, meet overseas contacts and negotiate business deals. It also provides the international travel trade the opportunity to experience Australia first hand. Up to 100,000 networking and business appointments are conducted during the event.

ATE brings Australian tourism businesses together with airlines, tourism wholesalers and retailers from around the world. It provides a forum for Australian tourism Sellers to showcase their products, meet with overseas contacts and negotiate deals.

International buyers are selected by Tourism Australia to ensure the most influential people meet with Australian tourism businesses. ATE is open to Australian travel exhibitors only and represents a unique opportunity for attendees to increase their share of the inbound travel market.

Around 1700 Australian seller delegates from approximately 630 companies will meet with nearly 600 key overseas buyer companies from over 40 countries. Approximately 40 international and 20 Australian media attend the event, reporting to millions of people worldwide on what is new in the Australian travel and tourism industry. International journalists will also participate in pre and post

tours to experience other areas of Australia first hand.

ATE is a seven day program and is divided into two separate modules, Eastern and Western, allowing Australian exhibitors to target the markets appropriate for their product. International buyers attend the module according to where their company is based and Australian exhibitors can apply to attend one or both modules.

PROPOSED MODEL AND THE ANALYTICAL FRAMEWORK

From the foregoing discussion it is apparent that there are numerous aspects which can reflect the effective relation and behavior of government intervention, corporate involvement and metropolitan participation through ATE.

Government Overall Organization

It is evident that Tourism Australia, established on 1 July 2004, is the Federal Government statutory authority responsible for international and domestic tourism marketing as well as the delivery of research and forecasts for the sector. She brings together the collective skills and knowledge of four separate organizations: the Australian Tourist Commission; See Australia; the Bureau of Tourism Research and Tourism Forecasting Council together to implement government responsibility in tourism. Definitely, her role is to make the corporate (seller & buyer) satisfied and regional economic development within Australia. See below Figure 1: (Source: Australian Bureau of Statistics; Tourism Australia)

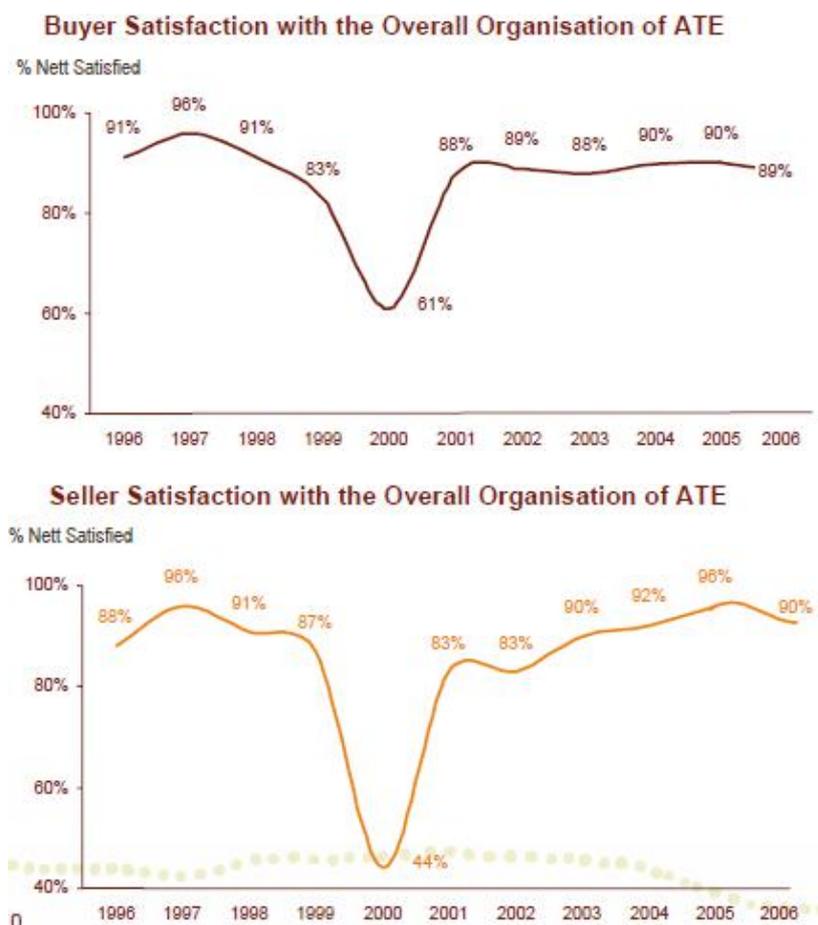


Figure 1

Summary: Overall organization remains extremely positive; Slightly down from high in 2005; Glitch in 2000 was technology (business matching).

Meanwhile, in order to stimulate the regional economic development, ATE specially surveyed to the participants for the idea destination. In Figure 2 (Source: Australian Bureau of Statistics; Tourism Australia), it shows that participant's behavior is the strong support for ATE to move to a new destination.

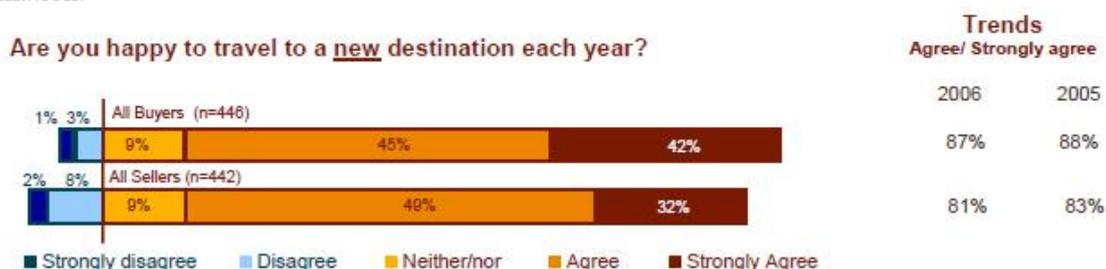


Figure 2

The same goes to the choice of Seasonality and Destination by government representative the Tourism Australia. As shown in Figure 3 and 4. The off-season June is most of the time the opening occasion for ATE welcoming thousands of professionals of buyers and sellers from all over the world to Australia attending ATE during these years. And the Destination for ATE and post-meeting or pre-meeting familiar tours covers those remote areas such as South Australia, Western Australia and Tasmania, etc. as in Perth (2008). This tendency simply implies government's initiative to stimulate the regional economic developments in those areas.

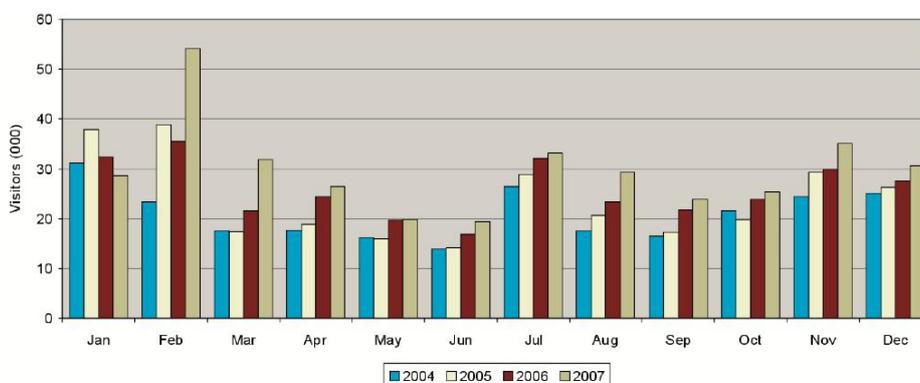


Figure 3 Seasonality

Source: Australian Bureau of Statistics, Overseas Arrivals and Departures Data [Cat. 3401.0]
Base: All international visitors

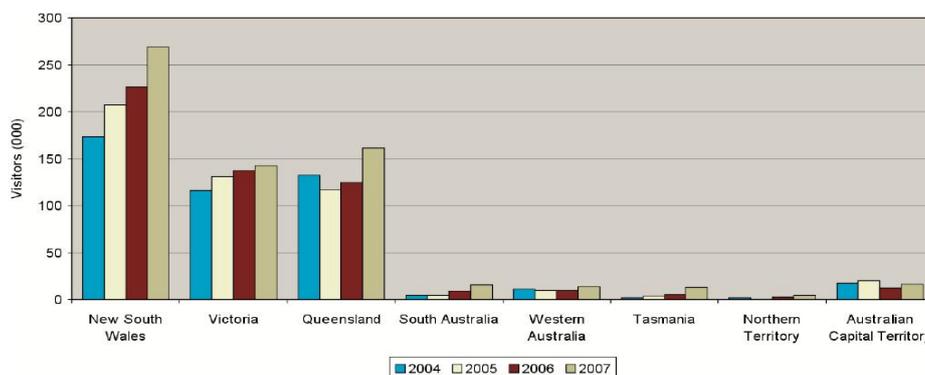


Figure 4 Destination

Source: Tourism Research Australia, International Visitor Survey
Base: All International visitors aged 15 years and over

Corporate and Market Impacts

The pursuit for economic benefit is understandable as it is the most direct expression and requirements from the industry and corporate. Therefore, participant's behavior at ATE expresses the attitude to the economic impacts on Australia extremely positive. Without any prompting in the question, by far the most commonly mentioned advantages of international tourism to Australia were economic benefits.

But one phenomenon can't be neglected that the Commercial benefit of Buyers and Sellers are slightly decreasing from the year 2003 to 2006 as shown in Figure 5. The data seems to tell us that corporate behavior follows the law of Diminishing Marginal Utility.

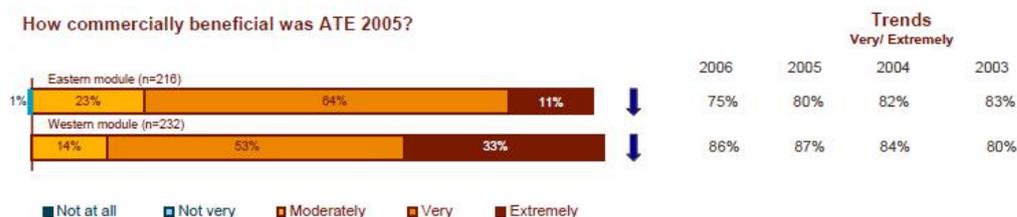


Figure 5

Metropolitan Reactions:

No data can deny a fact that international tourism is important to Australia's economy.

People who live in Tasmania or the Northern Territory, those with higher socioeconomic status: ie. older (those aged 30 to 59), employed (particularly white collar), higher income, and people with greater exposure to tourists and more overseas holiday experience are especially have a stronger sense of the economic benefits to the regional development.



Figure 6

*Source: Tourism Research Australia, International Visitor Survey

But it shows people living in Western Australia rates mining higher than international tourism. However, people in capital cities, particularly people living in Sydney and Brisbane with greater exposure to tourists in their usual activities rate international tourism higher than mining.

We can't tell ATE 2008 in Perth, whether it is for the purpose to raise regional interests for international tourism or balance the economic development from government intervention of Tourism Australia. But it is clear the behavior of metropolitan participation increases the fame and potential opportunity of Perth. All metropolitan cities express very high enthusiasm to host buyers and sellers of familiar tours. This exchange behavior of business and image build a firm connection among government, corporate and metropolitan cities.

RESULTS AND DISCUSSION

ATE has been performing a successful platform for government coordination (Tourism Australia) in metropolitan tourism development. Its behavior seems a macro economic investment to

the different metropolitan cities each year, and brings huge economic benefit to the non-equilibrium regional economy in metropolitan areas. It is the same as in Australia that natural endowment and difference in different metropolitan cities result that the government intervention is necessary to coordinate the operation in the natural division of labor, exchange of goods and mobility of elements.

Meanwhile, ATE in its detailed and professional service to the corporate (buyers & sellers) all over the world has firmly strengthen the business relation on the benefit of its metropolitan cities. The strict invitation of participants (buyers & sellers), careful selection of familiar tours (metropolitan cities) and exquisite arrangement of different functions (government coordination) are the excellent example for other similar exhibitions and meetings. And the position for the government (Tourism Australia) in the “public goods and services” is particularly praiseworthy and worth noting. Few participants can easily find the on-the-spot coordination of Tourism Australia, but on the contrary given the performance of corporate and market. The “Lost Coordination” is actually the real coordination.

Among the behavior of intercourse of government, corporate (buyers & sellers) and metropolitan cities, the internet matching for business and post-meeting or pre-meeting familiar tours plays the important bridge for the comprehensive connection. And it does prove the efficiency for ATE and cost of manpower. It is this additional technical intervention tool that enable Tourism Australia successfully penetrate into the activity and behavior of corporate and metropolitan cities.

Also, the corporate participants largely rely on the use of the internet for information before coming to Australia. Of those participants who did use the internet to gather information prior to their trip to ATE, the most common reason was to find out more about Australia business matching and familiar tour information of different metropolitan cities. The internet plays a greater role in travel planning once the decision has been made on a destination rather than influencing the choice of which destination to visit.

LIMITATIONS AND FUTURE RESEARCH

One of the main findings of the study is the government behavior and its boundary. Should its coordination be exceeded to the boundary of corporate and metropolitan, and how big is the scale and degree to be administrated?

However, this article hasn't given a general solution for the degree and scale of the coordination and intervention, compared to the market force expressed by “invisible hand” universally in economics.

One of the limitations of this study is that ATE may be different from other exhibitions, and therefore the behaviors among the participants are also varied. This article hopes to offer the above commonplace remarks by way of introduction so that others may come up with valuable opinions.

Since ATE has been undergoing for a long time as a perfect exhibition, future research on the efficiency for the behaviors and performance of the three parts (government, corporate and metropolitan cities) will be the focus to further improve the development and perfection of ATE.

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Acknowledgement

The author would like to acknowledge the following: The ATE Team led by May TANG and Jenny YANG who assisted in the invitation to ATE and data collection; Miss. Zhang Yuzhu, Ph.D of Organization, Personal and Innovation in Muenster University, Germany, for her contribution of organization theory and insights to this article;

Authors

Zhang Wei: Female, born in 1953, Ph.D. of Chinese History, Professor , School of Economics and Management., Wuhan University; **Zhang Biao:** Male, born in 1967, Ph.D. student of Business Management, School of Economics and Management, Wuhan University; **Zhang Yuzhu:** Female, born in 1981, Ph.D. of Organization, Personal and Innovation, Muenster University, Germany

第四部分 城市旅游与城市节事活动

Part 4 Urban Tourism and Urban Events

都市热游动机诠释——兼论旅游动机中的“围城效应”

刘啸

北京石油化工学院人文社科学院旅游系

摘要

大量的农民进城观光就造成了都市热游。这是富裕起来的农民再也耐不住家乡的寂寞，逐渐走出家乡形成的巨大旅游者队伍。农民出游完全是自己钱的旅游，它才是中国真正意义上的旅游，研究其动机才可以触及到旅游真正的动机。他们是去放松自己、释放心理压力？还是求知，寻找合作机会？好像都很难粘上边。中国农民其真正的压力主要来自于体力，而并非来自精神。文章借用了《围城》中揭示的人们普遍心理，即城里人想下乡，而乡下人想进城，也就是说不论社会如何进步旅游总会有两个方向。这两种趋势规定了未来旅游规划、产品设计的方向。同时利用《围城理论》也可以很好地解释现代旅游过程中的种种怪癖，比如监狱、偷渡、荒漠等等荒诞游。

关键词：农民出游 旅游动机 围城效应

THE MOTIVE OF CAPITAL TOUR: "ROUND A CITY EFFECT" IN THE THEORY TOUR

Xiao LIU

Beijing Institute of Petrochemical Technology

ABSTRACT:

A warm capital tour from the great deal of farmer. When The Chinese farmer become wealthy, he cans not bear home town's lonesome, and then come to Capital for sightseeing. What is their tour motive? relax or psychological stress or look for a cooperation opportunity? Maybe they are all wrong. Chinese farmer its real pressure mainly comes from physical strength, but comes from spirit. It is round city effect.

Keyword: The farmer goes on a tour; tour motive; rounds a city effect

最近几年，大城市的乡村游抢尽了风头，在北京、上海、广州、成都等发展的异常火爆。据统计，2006年北京、上海城镇居民出游率达到200%以上，其中北京是215%，上海370%，广州、重庆、西安也接近两次，当然这种出游包括到国外、到其它大城市，虽然没有再进一步细分的数字，但是可以肯定地说到乡下去，吃农家饭、睡农家炕、干农家活，占了不小的部分，好像到农村旅游是一件非常时髦的事。好多业内人士也认为乡村旅游成了旅游业的主流，写文章、规划都围绕这方面展开。

然而大城市的旅游景点纷纷爆满，都市游也十分抢眼。2005年的5月1日当天的故宫客流量已有近7万人，5月2日接待9.8万人次，超过最佳容量290%。2006年10月2号当天故宫接待7.1万人次，超过最大接待量。石景山游乐园接待3.85万人，同比增长1.3%。北京欢乐谷接待2.3万人。

2007年十一黄金周第一天，北京21个主要旅游景点共接待游客30.27万人次，故宫当天超过最大接待容量，接待6.01万人次。故宫加开两部临时售票车，天安门12万人雨中看升旗。通过对故宫游客的来源调查，有12.7%是北京人，另外87.3%外省市131人，其中有近60%的是农民，因此说都市游的主要对象是来自中国的农民。据统计2006年全国农村出游人数达到了8.18亿人次，是城镇居民人数的1.5倍。

大量的农民出游再用过去的旅游动机理论进行解释，也就是所谓休闲、度假、探亲、访友、修学等等很难自圆其说。因此有必要对其出游的动机进行探讨。

1 国内旅游发展趋势

国内游客增长速度快于入境旅游。2006年入境旅游人数13187万人次，比上年增长5.5%。其中，外国人2611万人次，增长17.6%；香港、澳门和台湾同胞10576万人次，增长2.9%。国内旅游总人次为13.94亿人次，比上年增长15.0%；国内旅游总收入为6230亿元，比上年增长17.9%。2006年，国内旅游增长幅度高于全年水平9.98%五个百分点以上。

城乡游共同发展。2006年全年城镇居民的出游人次5.76亿人次，出游率为156.7%，比2005年提升21.6个百分点，人均花费为766.4元，增加29.3元。而农村居民的出游人次8.18亿人次，出游率为86.4%，同期提高14.2个百分点，人均花费为221.9元，减少5.7元。07年农村居民出游率更达到105.4%，创历史新高。国内游出现城乡共同发展的局面。详见表1。

表1 2006年全国国内旅游基本情况

	总人次(亿人次)	出游率(%)	总花费(亿元)	人均花费(元)
全国合计	13.94 (11.02)	105.5 (84.8)	6229.74	446.90 (427.5)
城镇居民	5.76 (4.59)	156.7 (126.6)	4414.74	766.45 (731.8)
农村农民	8.18 (6.43)	86.4 (68.7)	1815.00	221.88 (210.2)

注：括号中的数字为05年的数据。资料来源：国家旅游统计年鉴2006年。

大都市旅游呈较强的增长态势。从04年开始，北京、上海、天津三大城市入境过夜游客增长幅度均在两位数以上，表现较强的增长势头。北京四年的平均增长幅度为11.34%，上海为10.5%，天津则更高，四年平均增幅达到了18.78%。

表2 2004—2007年全国三大都市旅游统计表 单位：万人次，%

	2004年		2005年		2006年		2007年		4年平均
	入境过夜	增幅	入境过夜	增幅	入境过夜	增幅	入境过夜	增幅	
北京市	315.5	66.9	362.9	15	390.3	7.5	435.5	11.6	11.34
上海市	385.45	57.5	444.54	15.3	464.63	4.52	520.1	11.94	10.5
天津市	61.59	25.9	74.00	20.2	88.06	19.0	103.22	17.2	18.78

2 传统的理论解释农民出游动机遇到的难题

由于长期以来人们对这一块关注不够，因此有关农村人出游的统计数字极不完善，有很多资料很难拿到。关于农村人出游的动机的研究更是少之又少。中国的农民出游：一是不享受或很少享受公费旅游的待遇，因此这才是真正意义上的旅游消费，不再具有二元结构，也就是再没有买单和享受者的分离，因此研究其动机可以帮助人们真正接触到旅游动机的本质；二是中国是一个农业大国，农民将逐渐成为旅游的主体，如何把握这一趋势，对于未来旅游产品的设计和旅游服务的提供有较强的参考价值。

旅游动机由于它是一种人类纯心理活动，因此人们根本无法进行直接观测和试验，有人通过统计，从旅游现象的统计中提出很多结论性和阶段性的解释。关于旅游动机的探讨已经有很长的历史了，也形成了一些比较现成的理论，如①日本学者田中喜一提出的四种旅游动机：即心情的动机、身体的动机、精神的动机、经济的动机；②美国罗伯特·麦金托什和沙西肯特·格普特提出的四种旅游的基本动机：身体健康的动机、文化的动机、交际的动机和地位与声望的动机；③利奥得提出的健康、好奇心、运动、娱乐、宗教、公务商务、探亲访友及寻根、自我显耀等八大动机等等。

不难看出这些解释对于城里人还是比较适用的，可以说现在城市生活压力大了，人们要寻求释放是对的，所以去农村体验休闲生活；或者是去一些名胜古迹参观显示一下身份，甚至是寻找一些合作机会等等。但是对于大量的农村人出游就不好用这些理论解释了。比如用田中喜一的理论，农村人出游是心情的动机吗？很显然不是。是身体的动机吗？很显然也不是。是精神的动机吗？也很难说。当然也不是经济的动机了。如果用美国罗伯特·麦金托什和沙西肯特·格普特提出的四种旅游的基本动机：身体健康的动机、文化的动机、交际的动机和地位与声望的动机等到去解释，很显然也者行不通，除了文化能勉强挂上一点外，恐怕也不能很好地解释。在利奥得的八大动机中，也许

也只有好奇心这一条有一点关系，但是好奇什么，也是解释不清楚的。

其实用马斯洛的层次理论也解释不清楚。因为按照层次理论，目前我国农民的生活只能达到温饱，最多也只能达到小康，因此把大批农民出游只能放在自我实现的需要一个层次，很显然是不行的，因为他们还没有达到这个层次。

因此必须有一种新的理论来解释农村人出游的真正动机。笔者曾经做过一次调查，找了30多位农村旅游者，询问过他们的旅游动机，他们认为就是想出来看看，看看外边的人如何生活。“到外边看看”我觉得这很具有普遍性。那么这究竟是一种什么样的动机呢？

3 基于人本理论的解释和“围城效应”

3.1 人本理论对出游的动机解释

人类作为动物的本性，总是喜欢把自己生存空间扩大。总有一种站在此山看见那山高的感觉。人类总是喜欢，了解自己生存圈以外还有什么。最开始南极、北极探险，到人类奔月，直到现在总想了解太阳系以外的世界。这连“从前有座山，山上有座庙，庙里有个和尚讲故事……”也是一个永远讲不完的故事，但是你每次听别人说时总想驻足听听。因为山里很少有人，庙里很少有人这就给人一种神秘感，更何况还有一个老和尚，所以任何的荒漠、高山、低地将来都可以开发成为旅游资源，只是要打扮和粉饰而已。

笔者经过研究发现旅游是人类作为动物的一大潜质，爱好旅游是人类作为动物的一种生活习性，喜欢探索、求知是人类本性的回归。人类不仅要知道自己生活的环境，还想知道自己生活以外的环境，所以外星人、外太空肯定也是人们永远探讨不完的话题。然而人本理论只是揭示了人作为动物有一种天然旅游冲动，但是要去什么地方旅游并没有解释清楚。

3.2 围城效应

著名作家钱中书在1937年写的《围城》中有一段非常经典的话：“人生是围城，婚姻是围城，冲进去了，就被生存的种种烦愁包围。……城里的人想出来，外边的人想进去”。这个观点揭示一种人生真谛，这与本人提出的旅游动机是人类作为动物本性的一种回归，有异曲同工之妙。人类作为动物不论处于什么样的经济状态，都有一种旅游的冲动，所不同的只是有没有实现这种冲动的前提和条件。这种城里人想下乡，乡下人想进城心理就构成了旅游动机中的“围城效应”。研究这种效应对掌握旅游动机有很大的帮助。

也就是说不论社会如何进步，只要社会是稳定的旅游总会有两个方向，即城里人要下乡，而乡下人要进城。城里人要体验一下乡下人恬淡、幽静的生活，乡下人则要体验一下城市人的奢侈和繁荣的生活。这就构成了当今旅游流动的两个主要方向。对于目前的中国来说城市人生活水平相对较高，收入相对更多，所以出游的机会相对较多一些。但是中国是一个拥有8亿农民的大国，富裕起来的中国农民拥有更多的时间和自由，会逐渐成为国内旅游的主体。由于向往城市生活，因此都市旅游仍然是他们的首选，因此中国的都市热游还会持续很长时间。同时由于中国农民收入不高，消费全靠自己，也将是全国人民逐渐开始理性旅游的中坚力量。

4 围城效应的作用

旅游实际上就是在增加人们的体验和阅历。因此与自己的生活差异越大越具有吸引力。弄清楚了旅游动机这种特点，对于人们设计旅游产品、价格的确定、服务标准的制定都十分重要。这也是人们在旅游产品设计中喜欢用登峰造极的原则的理论依据所在，因为人们总是对自己生活以外的事情有一种好奇，也总是想把自己的生活环境全面掌握，因此不论那一种世界之最，总会吸引很多人，这就是围城效应。用此效应人们就可以很好地解释为什么荒漠、海滩、沙滩等等人迹罕到的地方与繁华美丽的都市，风景优雅的自然风光，对游客具有同样的吸引力。具体地讲认识旅游动机中的围城效应应有以下几方面的作用：

一是便于更加深入地掌握人类的旅游动机。农民出游在很大程度上才是中国真正意义上的旅游。没有公费、商务或者其它显示地位性的会议性旅游。他们的出游，绝大部分是自己在掏自己的腰包，因此它的消费、需求是比较客观。他们才会真正考虑旅游值得和不值得，因此这样的数字才比较可信，当然不排除统计方面的局限性。

二是便于掌握游客的发展趋势。知道了旅游动机中的围城效应，在我们进行市场调研时就可以有目的、有针对性地进行。中国是一个农村和农民占绝大部分的国家，即使最近几年城市化过程有所加快，但是这些刚离开农村的城里人都不会对农村旅游产生太多的兴趣，因此都市游仍然会在很长时间内是国内游的主流。

三是便于在旅游产品定价时掌握尺度。中国的农民收入低，生活水平不高，不要让农民感觉到住一晚上就可化去半年的收入。看一下故宫就等于打四天临时工。因此在今后旅游发展中一要建设经济型酒店；二要组织经济型旅游线路，既要信息含量高，也就是景点多，收费还不能太高；景点门票等的定价也要充分考虑农民的承受能力；旅游纪念品的也有针对性，要符合农民的喜好，要符合中国传统式的审美标准。要真正体现：把游客的钱当作自己的钱化。针对农村朋友开发的旅游产品或者旅游纪念品必须价格适中、还要适用，有纪念意义。

四是便于规划时把握重点。围城效应告诉人们：城里人到乡下一定是要真正体会乡下人的生活，对于乡村旅游产品来说越民俗化越具有吸引力；都市游，则更要注意展示城里生活现代化的一面，越体现现代城市人的生活，越具有吸引力，一些现代化的居住场所，购物中心、街道、交通都会成为其观测的重点。

5 结论

围城效应告诉人们，任何情况下旅游增长都是两个方向的，所以片面和单纯地注意城市人的旅游需求是不对的。目前城市人由于生活水平高，生活压力大，希望出游的人也多，喜欢散淡的田园生活；但是随着我国农村经济的发展，农民也可能成为今后国内旅游的主体，农村人又喜欢现代，现代化的城市建筑、现代化的交通、甚至是现代化的购物场所，都是吸引游客的基本点。

旅游动机是人类固有的本性之一，故而有不可捉摸的一方面。但是爱好旅游是人类作为动物本性的一种回归，因此旅游一定会长盛不衰；然而正因为有围城效应的存在，就会有人喜欢繁华，那么一定有人喜欢荒凉；有人喜欢登高，那么就一定有人喜欢潜水；有人喜欢参与，则一定有人喜欢安静、休闲。只要有针对性地做出各自的特色，就会吸引游客。吉尼斯纪录永远是吸引人的一种动力。旅游规划和旅游产品的设计中登峰造极也一定是一种长期的指导思想。

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作者简介

刘啸, 男, 博士, 北京石油化工学院旅游系主任、副教授。主要从事旅游规划、环境经济评价研究, 发表核心期刊文章三十余篇。出版专著两部、参著五部。主持和参与过国家自然科学基金、省部级项目、国际合作项目等十余项。

后奥运城市青岛的商业街区文化竞争力评价研究——以青岛市台东商业步行街为例

郝小斐

北京大学旅游研究与规划中心

摘要

青岛作为第 29 届北京奥运会帆船赛举办城市，在奥运会前及奥运会中吸引了世界关注的目光。随着北京奥运会的圆满落幕，青岛成为后奥运城市，青岛的城市文化竞争力由于“奥运效应”得到了提升。文章通过 AHP 层次分析法对奥运会结束后青岛市台东商业步行街的城市文化竞争力进行评价与分析，对这一城市街区在后奥运时代的发展定位给出了可供参考的相关策略。

关键词：后奥运城市；文化竞争力评价；层次分析法

EVALUATION OF CULTURAL COMPETITIVENESS OF BUSINESS STREET IN THE POST-OLYMPIC CITY OF QINGDAO - TAKING QINGDAO TAIDONG BUSINESS STREET AS AN EXAMPLE

Xiaofei HAO

Center for Recreation and Tourism Research, Peking University

ABSTRACT

As the XXIX Olympiad Regatta host city, Qingdao has attracted the eyes of the world. After the successful close of 2008 Beijing Olympics, Qingdao is becoming one of the Post-Olympic Cities, and the cultural competitiveness in Qingdao has been improved by the Olympic effect. This paper has employed the AHP method to evaluate the cultural competitiveness of Qingdao Taidong Business Street after the 2008 Olympics. Besides, this paper offers some suggestions of development orientation for this Business Street in post-Olympic-epoch.

Keywords: Post-Olympic City; Evaluation of Culture Competitiveness; Analytic Hierarchy Process

1 研究背景

伴随着全球化进程逐步深入，国家和区域的界限不断模糊，城市作为最有效和关键的竞争主体越来越受到重视。有研究者指出，未来的城市竞争将是城市环境、城市效率、城市文化的竞争。城市文化既综合反映了一个城市的品质和发展水平，又是一个城市市民认同、凝聚的内在磁力，可以说，它是一个城市的灵魂(王静，2003)。文化竞争力不仅是城市竞争力的重要组成部分，还是城市旅游与游憩休闲活动孕育的土壤。

作为大型节事活动的奥运会，影响巨大，是对举办城市有长期效果的短期事件(李健，罗芬，邓金阳，2007)。奥运会对于主办城市的意义从时间维度上来说更多的是借由奥运展现该城市文化风貌，并将奥运文化与当地文化进行融合，使该城市在后奥运时代展现出独特的奥运城市文化，以文化为土壤孕育更多游憩活动，吸引更多的旅游者。因此，后奥运城市所具有的奥运城市文化能够使该城市的文化竞争力得到提升，从而提升城市竞争力和旅游吸引力。

目前学界对城市文化竞争力的评价研究多采用定性方法，采用定量与定性方法相结合作为研究方法的有李凡等人的《城市文化竞争力的定量评价方法及实证研究——以珠江三角洲城市群为例》(李凡等，2008)，以及赵德兴等人的《城市文化竞争力指标体系研究》(赵德兴等，2006)。

青岛作为 2008 年北京奥运会帆船项目比赛城市，近五年的城市发展与奥运会筹办工作紧密结合。青岛因奥运获得了世界关注的目光，奥运文化也将潜移默化且持续的影响着这座城市的城市文

化。因此,本文选择“后奥运城市”作为研究对象的时空纬度,通过对后奥运城市青岛台东商业街文化竞争力的评价,对该城市商业街区在后奥运时代的发展定位进行分析。根据城市文化和竞争力的相关理论构造城市文化竞争力评价模型,采用 AHP 层次分析法对该街区的文化竞争力进行评价和分析。层次分析法作为一种定量与定性分析相结合的方法,较适合文化竞争力这一比较复杂的目标系统,而且对于城市文化的某些无法量化的方面,层次分析法的经验判断打分更具有操作性;同时层次分析法对权重的定量计算又能够确保定性判断的准确性和一致性。

2 案例地概况

青岛市台东商业步行街位于青岛市市北区,东起延安三路,西至威海路,全长 1000 余米,是市北区特色街区的中心街,以台东三路为步行街主轴。2006 该商业街区被青岛市政府正式命名为“青岛市台东商业步行街”,并于 2007 年初成为国家 AAA 级旅游景区,每天的人流量达 20 万人次,最高达 50 万人次(青岛市市北区政务网,2007)。台东商业步行街在 2008 年 8 月青岛奥运会帆船赛举办期间对外地游客的满意度调查中,台东步行街作为市北区特色商贸旅游区中心街成为游客来青后满意度最高的开放式景点(孙静芳,2008)。台东商业步行街的历史可以追溯到德国侵占青岛时期,市内被拆除村庄的华人被强迁至贮水山以东,划地而治,称为台东镇,台东三路因此而建。华人陆续在此开店铺,台东三路与芙蓉路、威海路贯通成形式较为简陋的华人居住区商业街。解放后,继续经营的商户按行业成立了联营社;公私合营后,分别归国营专业公司领导管理(何喆,李旭光,2004)。台东商业步行街一直以一种与时俱进的自然生长的方式发展,期间实施的旧城改造项目并没有改变老台东商业街的主要布局。在 2001 年之后,对台东商业步行街的环境景观、基础设施进行了比较大规模的整治,但在整治和改造过程中,采取了以人为本的指导原则,并没强制迁出步行街周边居民,而是保留了众多居民楼,使台东步行街商业和住区紧密结合的特点一直贯穿至今。

台东商业步行街目前已经形成了“朝观壁画夜观灯,购物休闲在台东”的文化品牌(佚名,2005)——购物文化、旅游文化、聚会文化、美食文化、商业文化、公共艺术文化相互融合,“台东”这一名词成为代表青岛文化一支的具有特殊文化含义的地标街区的代名词。青岛市民已把到台东商业步行街购物当作一种休闲的方式;而每年的黄金周期间,外地来青游客也把台东商业步行街选作必不可少的旅游行程(佚名,2005)。

为展现奥运城市氛围,在青岛奥运会帆船赛举办之前,台东商业步行街以奥运为主题,对商业街建筑外墙公共壁画进行了更新,多栋建筑外表面绘制了与奥运相关的主题壁画,使奥运文化在这条商业街区得到凸显,也相应的将该街区的文化特征增添了奥运元素。这些奥运主题公共壁画在奥运会结束后依然保留,使得该街区的文化风貌反映出青岛后奥运城市的特征。

3 奥运后台东商业步行街文化竞争力评价

北京奥运会结束后,本文对青岛台东商业步行街的文化竞争力进行了评价。通过文献研究,选择 AHP 层次分析法对“城市文化竞争力”这一目标进行逐层分析,而后进行定量与定性相结合的评价。“城市文化”所包含的诸多内容难以用定量指标清晰表示,尤其是涉及到精神文化层面和制度层面的文化内容,因此,层次分析法能够保证在判别标准一致(通过一致性检验)的前提下,尽可能利用经验准确评判文化竞争力的各个方面,从而使最终的评价结果具有可借鉴性。

3.1 构建评价模型

根据张泽群所提出的城市文化四层论(张泽群,2006),结合对城市街区评价这一具体尺度,本文将城市文化竞争力的评价模型做如下设置:

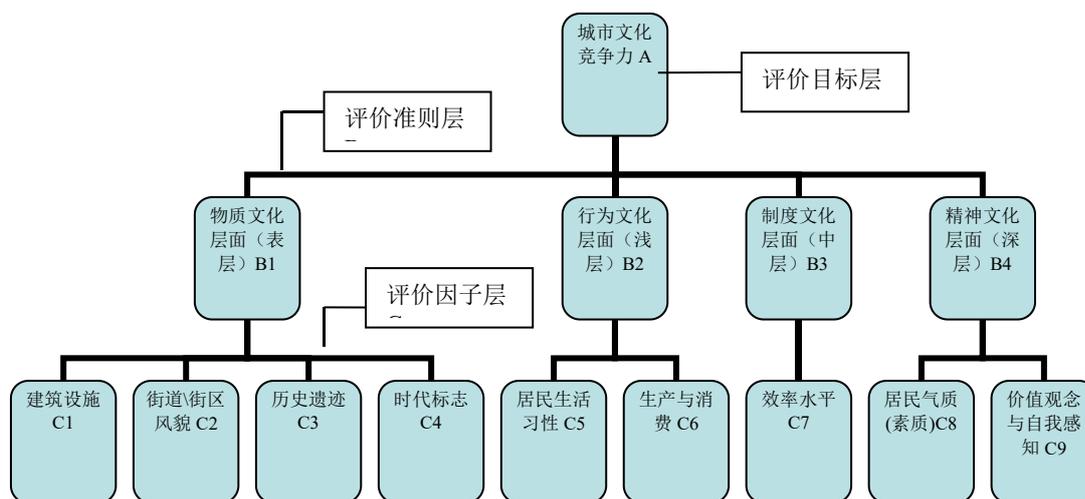


图 1 评价模型结构图

对评价因子层各因子解释如下：

C1 建筑设施：主要指评价区域内建筑形式、各设施外立面与该区域环境契合程度，建筑设施对该区域功能、特色的体现程度。

C2 街道\街区风貌：主要指街道、街区所反映出来的风貌特色度，是否能体现该区域文化特色。

C3 历史遗迹：主要指该区域能够体现出传统文化的物质表现的多寡，且被保存、展示、传承的历史机理完善程度，还包括一条街道的历史布局与构造，街道与建筑的历史关系。

C4 时代标志：主要指体现当下时代文化的地标或其他形式的标志物的优劣程度。

C5 居民生活习性：主要指生活在该区域的居民（local）生活习性所表现出来的区域文化的特色度，可以通过与其他相似区域比较后得到评判结果。

C6 生产与消费：主要指该区域的生产方式月消费模式所以体现出来的文化特色度。

C7 效率水平：制度层面还应包括政策管理等因子，但在对街区尺度的评价中，忽略大环境相同下的政策管理等因子，而是突出效率水平这一因子，主要指该区域基于区域文化特色的各种事项效率的高低表现。

C8 居民气质（素质）：主要指该区域居民（local）所反映的精神面貌和文化素质，也包括对居民文化知识水平的考量。

C9 价值观念与自我感知：主要指该区域居民（local）和区域整体所反映出来的价值观（特色），以及居民（local）对自身价值的感知、对该区域整体的感知。

3.2 计算确定评价层次权重

设评价目标层权重：1.0, 评价准则层权重采取九度标度定义、两两比较的方法确定。对于本文所设立的评价模型而言，评价准则层的四个准则都是构成城市文化竞争力的重要方面。但根据文献研究，这四准则本身具有从表层、浅层到中层、深层这样一个递进的关系，对于“文化”这一理论而言，从物质文化层面到精神文化层面的递进关系也是不言而喻的。因此，在进行准则层的重要性判断上，行为文化层面、制度文化层面、精神文化层面都比物质文化层面的重要性要高，而由于模型设置的制度层面的因子只有一项，所以在衡量浅层行为层面和中层制度层面时，可认为这两个评价准则的重要性基本一致。精神文化层面准则的重要性在四个准则中明显重要，因此在判断中赋给最高值。基于上述分析，得到判断矩阵：

$$A = \begin{pmatrix} 1 & 1/3 & 1/3 & 1/5 \\ 3 & 1 & 1 & 1/2 \\ 3 & 1 & 1 & 1/2 \\ 5 & 2 & 2 & 1 \end{pmatrix}$$

将矩阵 A 按列进行列向量归一化, 并采用和法求出特征向量

$$W = \begin{pmatrix} 0.082 \\ 0.2347 \\ 0.2347 \\ 0.4486 \end{pmatrix} \quad AW = \begin{pmatrix} 0.32822 \\ 0.9397 \\ 0.9397 \\ 1.7974 \end{pmatrix}$$

由于

且有 $AW = \lambda W$, λ 为最大特征根, 得到

$$\lambda = 1/4(0.32822/0.082 + 0.9397/0.2347 + 0.9397/0.2347 + 1.7974/0.4486) = 4.00425$$

为确保判断思维的一致性, 进行一致性检验, 引入判断矩阵偏离一致性 CI 与判断矩阵评卷随机一致性指标 RI 的比值 CR 来检验判断思维的一致性。若 $CR < 0.1$, 则判断矩阵具有满意的一致性。

$$\text{一致性比率 } CR = \frac{\lambda - n}{(n - 1) \cdot RI} \approx 0.0016 < 0.1$$

式中, 随机一致性指标 $RI = 0.9$ (查文后附 1 表得到)。所以, 经过一致性检验, 判断矩阵具有满意的一致性, 计算所得的 W 权重是可信的。

对四个评价准则下属的评价因子分别采用上文所述方法建立判断矩阵、计算因子的相对权重和绝对权重, 并分别通过一致性检验 ($CR_{1-4} = 0$; $CR_{5-6} = 0$; $CR_{8-9} = 0$; $CR_{\text{总}} = 0$)。最终得到下图所示权重结果: 其中, 评价因子层的最终权重 = 其对应的评价准则层权重 * 其相对于准则层的权重;

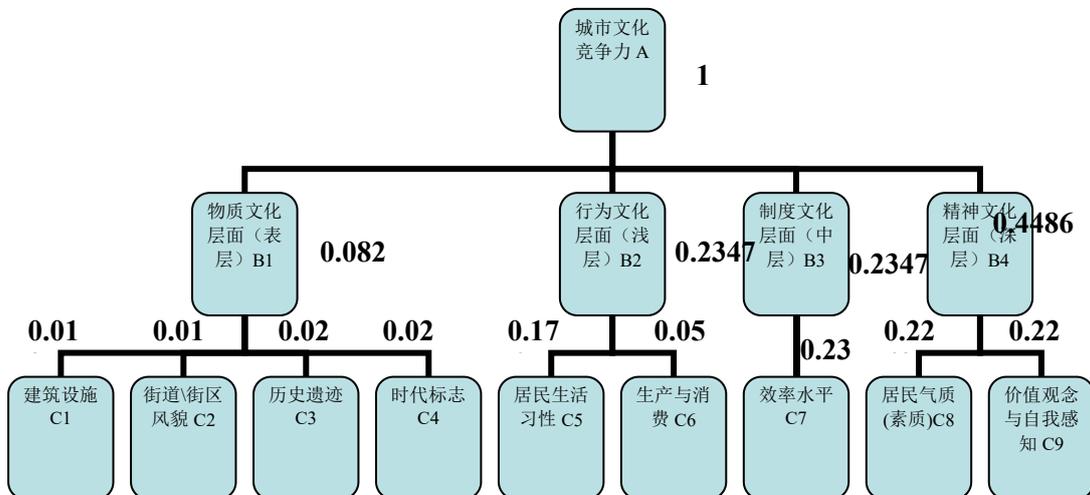


图 2 评价各层次权重分布

3.3 德尔斐打分

使用德尔斐法对评价因子分别进行打分——具有相关专业背景, 并进行过实地考察的专家进行打分 (百分制)。同时, 为更清晰的体现台东商业步行街的文化竞争力, 而竞争力往往是由于比较产生的, 所谓本文选择青岛另一处与台东商业步行街在年代、规模上具有可比性的中山路商业街 (见

文后附 2 注释)作为对比案例,同时对这两个商业街街区进行德尔斐打分。计算最终得分 $I = \sum S_k \cdot W_k$

表 1 德尔斐打分表

评价因子	权重	专家打分-台东商业步行街	台东商业步行街得分	专家打分-中山路商业街	中山路商业街得分
建筑设施	0.0137	85	1.1645	95	1.3015
街道\街区风貌	0.0137	90	1.233	95	1.3015
历史遗迹	0.0273	60	1.638	95	2.6208
时代标志	0.0273	90	2.457	85	2.3205
居民生活习性	0.176	85	14.96	75	13.2
生产与消费	0.059	95	5.605	75	4.425
效率水平	0.2347	90	21.123	75	17.6025
居民气质(素质)	0.2243	85	19.0655	85	19.0655
价值观念与自我感知	0.2243	75	16.8225	70	15.701
总分	1	-	84.0685	-	77.5383

3.4 评价结果解读

通过德尔斐打分过程可以看出,台东商业步行街在四大评价准则上的得分比较均匀,总体来说在物质文化层面的得分较低,尤其是在“历史遗迹”这一评价因子上得分最低;而在行为文化层面和制度文化层面得分较高,尤其在生产与消费这一项因子上得分最高。对照中山商业街的得分可以看出,由中山商业街古建筑较多,且多为百年欧式建筑并保存较好,所以在物质文化层面的得分中山路商业街远远高于台东商业步行街。但在行为文化层面和制度文化层面,由于中山路商业街近年来人气跌落,周边居民迁出,不断大规模进行街区改造,所以在居民生活习性、生产消费、效率水平上都无法体现该街区的文化竞争力,因此的得分都低于台东商业步行街。因为同城缘故,所以在居民气质和价值观念与自我感知这些方面两条商业街区得分差距不大。最终,台东商业步行街由于在权重高的评价因子上得分较高,而在文化竞争力的总分评价中领先于中山路商业街。

4 从文化竞争力评价看台东商业步行街后奥运时代发展定位

通过文化竞争力评价,台东商业步行街所具有的文化竞争力优势可以总结为“尺度宜人、物质丰富的现代公共艺术休闲文化”、“自由亲切、轻松多彩的市井休闲文化”、“开放包容、热烈蓬勃的商贸文化”这三种类型,基本上能够囊括台东商业步行街的文化竞争优势。基于以上对台东商业步行街街区文化竞争力的评价,可以更有针对性地对街区未来的发展进行定位。基于前文对街区文化竞争力的评价与分析,本文认为台东商业步行街的街区后奥运时代的发展定位可以参考以下几个策略:

4.1 提升街区物质文化竞争力,营造休闲购物文化与公共艺术展示文化相结合的特色街区

台东商业步行街的公共艺术(公共壁画)目前在青岛市是具有独特性的文化景观,由于这一部分公共艺术展示与台东商业步行街的休闲购物功能相得益彰,成为该街区文化竞争力提升的一个重要因素,使该街区摆脱了“千街一面”的步行街形象,同时与青岛的另一处中山路商业街的欧陆风情相区别,使台东商业步行街在物质文化层面独具竞争力。

在后奥运时代,外来旅游者以及青岛本地居民对游憩休闲场所的要求都具有与奥运同期一致的特点,甚至心理期望更高,因此基于目前情况,台东商业步行街区应抓住自己作为青岛市公共艺术展示开放场所第一街区的特色,将公共艺术展示文化充分挖掘并不断发展,以公共艺术展示文化为提升该街区物质文化竞争力的重点,在街区的公共广场等公共休闲场所设置与公共艺术展示相关展品,将街区的物质文化空间风格凸显,并且可通过地灯、休憩长椅、垃圾箱等公共基础设施来进行改造。以此弥补台东商业步行街在物质空间传统文化的缺失,强化该街区现代文化的丰富。

4.2 强化行为文化竞争力，将聚会文化与旅游文化作为该街区休闲购物文化的重要补充

聚会和旅游是会聚于台东商业步行街的人群除休闲购物外最主要的行为方式。聚会人群主要为青岛本地市民构成，旅游人群为外地来青游客构成。这两种行为，是休闲、购物之外最具有竞争力的突破点。依靠台东目前积聚的旺盛人气和众多各种类型的娱乐休闲场所，台东商业步行街具有很强的形成聚会文化的潜力，只要充分发挥美食店铺、书吧、水吧、KTV 等娱乐场所的接待能力，台东的聚会文化将成为该街区行为文化层面的又一优势。同时，进一步重视该街区在外地来青游客中的推广，将旅游地标的旅游文化优势充分发挥。

4.3 重视精神文化竞争力的作用，让街区体现自由亲切的市民文化场所精神

台东商业步行街由于居住区与商贸区的犬牙交错、密不可分而使得该街区具有独特的基于市民文化的蓬勃生机和源源不竭的竞争力。因此，要重视该街区精神文化竞争力的作用，注重街区居民素质的提升，并充分继承发扬街区居民自由亲切、健康向上的文化精神，并将这种市民文化以街区场所精神的形式体现出来。这样，将提升该街区文化竞争力深层的精神层面竞争力，使该城市街区成为独具青岛风貌场所精神的商业步行街。

5 结论与讨论

5.1 结论

本文通过文献研究，构建了城市文化竞争力模型，采用层次分析法对后奥运城市商业街区的文化竞争力进行了评价与分析，最终，基于对文化竞争力的评析对城市街区未来发展定位给出可供参考的策略。

针对本文选择的案例地——青岛台东商业步行街，通过层次分析法对城市文化竞争力的评价，发现台东商业步行街在行为文化、制度文化层面都具有比较高的竞争优势，同时物质文化层面和精神文化层面又具有很大的发展潜力，因此，本文认为台东商业步行街应在后奥运时代发展中发挥自己“尺度宜人、物质丰富的现代公共艺术休闲文化”、“自由亲切、轻松多彩的市井休闲文化”、“开放包容、热烈蓬勃的商贸文化”这些特色，不断提升街区物质文化竞争力，营造休闲购物文化与公共艺术展示文化相结合的特色街区；强化行为文化竞争力，将聚会文化与旅游文化作为该街区休闲购物文化的重要补充；同时重视精神文化竞争力的作用，让街区体现自由亲切的市民文化场所精神，是该街区在奥运会举办期间给游客留下的良好形象得以提升，增加街区文化吸引力。

5.2 研究局限及需进一步讨论的问题

城市文化是一个比较复杂的概念，其中包含较多的主观理解成分。本文认为城市文化竞争力绝对不是单纯由“区域内有多少大中小学校”这样的指标来衡量的，而是由这些指标之上的，由区域中的物质表现、人的行为表现、精神表现等所体现的。所以，本文选择了层次分析法来进行文化竞争力的评价，而且多采用了主观性较强的经验判断、德尔斐打分等方法来进行研究，也许这对于研究的科学性有一定影响，但本文更希望进行一种研究方法的尝试。对城市街区这一尺度进行研究，与研究整个城市尺度不同，更多的指标和数据都比较具象；后奥运城市的竞争力研究应更加结合奥运会效应，但由于本文研究尺度所限，有待将来在稍大尺度的研究中加以修正。

未来可在以下几个方面进行探讨：层次分析法中判断矩阵的得到，可采用多位专家多轮判断的形式得到，这样，必将更加准确；同样，德尔斐打分这一步骤也许要采取多位专家多轮打分的形式；对比街区可选择更多同城、或城市相异但街区具有可比性的样本，丰富对比街区后，将对案例研究街区的竞争力水平更加全面更加可观的进行评述。

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附:

1. 随机一致性指标值表

随机一致性指标 RI 的值

阶数 n	1	2	3	4	5	6	7	8	9
RI	0	0	0.58	0.90	1.12	1.24	1.32	1.41	1.45

2. 中山路商业街位于青岛市市南区, 德国占领青岛期间, 在城市规划中将与前海相对的斐迭里街(今中山路南段)则成为联结青岛区(欧人居住区)与大鲍岛区(华人居住区)的商业街。1922年2月叶春樾著的《青岛概要》中记述为“中央之山东街(即中山路旧称), 在青岛最为繁盛, 与上海之黄浦江畔、济南之西门大街同占重要之位置”。30年代青岛的经济文化进入繁荣时期, 步入鼎盛的中山路成为青岛金融中心。中国银行青岛分行、交通银行、实业银行、大陆银行等各类官办、私营银行、钱庄在中山路上建起高楼大厦。据统计, 1933年青岛有银行21家, 有13家位于中山路及周边区域, 有7家在中山路商业区的延伸范围即馆陶路、堂邑路一线。中山路自上世纪初成为青岛的购物、休闲、娱乐的商业中心, 一直延续至今。

(引自 http://www.qingdaonews.com/content/2008-07/17/content_7882276.htm。)

作者简介:

郝小斐(1984-), 女, 汉族, 山东青岛人, 北京大学城市与规划系07级硕士研究生、北京大学旅游研究与规划中心成员, 研究方向为旅游规划与游憩空间设计。E-mail: haoxiaofei@gmail.com

WALLS THAT TALK: OPPORTUNITIES AND CHALLENGES PROVIDING MULTI-LINGUAL MUSEUM INTERPRETATION OF ORAL TRADITIONS TO DIVERSE AUDIENCES

Curtis Ashton

Department of Folklore & Ethnomusicology, Indiana University, Bloomington

ABSTRACT

This paper presents ongoing research on institutional autonomy among Beijing's cultural institutions. In assessing the social and cultural impact of the 2008 Olympics on the city of Beijing, I describe the attitudes of professional museum staff towards state-mandated English language translation requirements at the Beijing Folk Custom Museum, a state-run ethnographic museum dedicated to interpreting cultural heritage to diverse audiences. The results indicate that while compliance to top-down directives is ultimately unavoidable, implementation can trigger unexpected challenges and benefits, thus giving credence to a "fragmented-authoritarian" view of Chinese policy-making.

Keywords: ethnographic museum interpretation, cross-cultural translation, institutional autonomy, cultural impact of Beijing Olympics.

INTRODUCTION

As part of their bid for the Olympics, the Beijing Organizing Committee for the Olympic Games (BOCOG) drafted an Olympic Action Plan (OAP) that describes the preparations China will make over the next seven years to meet their international guests' expectations. Section V of the OAP is devoted to cultural programming, including cultural heritage preservation and presentation "to demonstrate Beijing's history and traditional culture as well as to provide an Eastern ambience to the 2008 Olympic Games" (2001: V.4.1). To aid in accomplishing their goals, the OAP describes a network of museums cooperating with the municipal government and the public^①. This large-scale networking effort has implications not only for prestigious World Heritage sites such as the Forbidden City or the Temple of Heaven; many smaller operations eagerly took advantage of the museum-friendly environment of the Olympics to improve their collections, upgrade their facilities, and rework their exhibits. A 2003 report indicated that the number of museums in the city had increased from 96 to 118 over a seven year period, and the municipal government had pledged an increase of RMB120 million (\$14.6 million) for museum construction and maintenance during each of the next five years leading up to the Olympics. Currently Beijing boasts more than 150 museums and exhibit halls, including new facilities for the Capital Museum and the National Museum of Science and Technology.

But not every museum's dreams were realized thanks to the Olympics. This paper focuses on the efforts of a particular museum to continue developing along its own unique path despite the pressure to succumb to Olympic fever. Specifically, this paper discusses the translation of museum interpretation efforts into English at the museum as a way of broadening potential audiences. The work presented here is part of a larger study investigating the degree of autonomy ethnographic museums in Beijing experience in setting policies and serving multiple publics.

LITERATURE REVIEW

Clifford (1997) uses "ethnographic museum" to refer to institutions committed to the preservation and display of "authentic" artifacts from "collective, traditional" cultures in contrast to art museums, which display individual creations of art. Collections may be created and stored in a variety of contexts, but they usually can be approached as social scientific evidence meant to support theories of human being in society rather than as collections of artistic works. They offer a material counterpart to the ethnographic narrative—what the ethnography records in words and pictures, the

ethnographic museum displays in artifact and performance.

Ethnographic museums have long been sites for displaying ideas about self and other (Bennett 1988; Simpson 1996; Bouquet 2001). Benedict Anderson's (1983) legacy of "imagined community" casts museums as nationalistic "maps" through which powerful majorities help to locate and establish boundaries of self and other (see also Watson 1995; Gladney 2004). And yet, however explicit national agendas appear in the architecture, collections, and policies of parks and museums, people engage in activities to co-opt these spaces of national hegemony for their own use (Broudehoux 2004; Kraus 2000).

In addition, since "The Age of Deconstruction" (Ames 1992) ethnographic museums are caught up in "an emergent discourse in the museum world, concerned with advocating community-focused museums that are representative of the pluralistic and multicultural society they serve" (Ross 2004; see also Perins 1992; Kahn 2000). Recognizing how embedded in political discourse are the identities they display to various publics, museums can see themselves as passively reflecting the public opinions of their surroundings, or they can actively shape policy through attention to multiple and conflicting aspects of the political discourse around them, giving their audiences clues not only about the content of the cultures they display, but also the contextual processes of performance that inform those displays (Kirshenblatt-Gimblett 1998; Longhurst et. al, 2004; Black 2005).

Ross (2004) argues that this new reflexivity may relate to "the changing social role of professional intellectuals" as interpreters rather than legislators of culture. As museums around the world are accepting the role of popular educational institutions and tourist attractions, their new role allows them to empower people by demonstrating the value of culture—as a commodity in the world tourist market, as a means of economic development, as a way to characterize a place, as a way to produce a national citizenry with a united history. Museum interpretation through exhibits, guided tours, educational outreach, and public relations work (e.g. news releases, websites) aims to raise awareness of the value of cultural heritage among ordinary citizens. While a number of Beijing's current museums qualify as "ethnographic," this paper focuses on the Beijing Folk Custom Museum (Beijing Minsu Bowuguan) housed within the recently restored Dongyue Temple.

RESEARCH SITE

Founded in the Yuan dynasty (1319), Dongyue Miao is located just east of Chaoyang Gate in the middle of Beijing's Central Business District. At the height of its popularity in the early nineteenth century, the Dongyue temple complex included 376 rooms and covered 71 mu (4.6 hectares), making it the largest orthodox Daoist temple in Northern China. It was known for having the most deities (nearly 3000), the most stone steles (at least 160), and the most poetic inscriptions of any temple in the area. Throughout its nearly 700 year history the temple has experienced periods of destruction and neglect followed by restoration (Naquin 2000). In the latest iteration of that cycle, Chaoyang District government oversaw restoration of the main courtyards of the temple from 1995-1998, and the building opened to the public in 1999 as the Beijing Folk Custom Museum. Still a working temple for devout patrons, the museum complex once again houses hundreds of stone steles, traditional signboards, and figures representing Daoist deities. In addition, exhibit space near the rear of the temple showcases up to four temporary exhibits of Chinese folk arts and material culture.

The museum sees itself as an academic research institution, a classroom for patriotic education, a center for community celebration, a place of worship, a site for cultural tourism. The museum's former director Han Xiu Zhen explained the museum's guiding philosophy as one integrating multiple stakeholders from the community:

Since its founding in 1997, the museum collection has with great difficulty made a break with conventional wisdom to integrate the Dongyue Temple's own unique characteristics and take in-depth research as a guiding management policy—continuously unearthing,

abundant exhibiting, and vigorously promoting social interaction through incorporating activities that correspond with exhibits. From 1999-2004, the museum visitor audience exceeded one million—the integrated theme of welcoming all those who come to the temple to pray for good fortune and to the museum to remember the past has been well received by people from all walks of life.

Even before the temple's current restoration, its complex array of tacit, local knowledge associated with its collection of ancient poetry and religious artifacts has warranted interpretation. Often this was accomplished orally as local citizens participated in traditional, regularly occurring temple fairs surrounding major holidays. In 1911 the first written explanations of temple objects and customs were published and displayed within the temple grounds, but these were quickly lost or removed (Goodrich 1964). After its transformation into a state-sponsored folklore museum with an academic mission, the newly-reconstructed, centuries-old temple has opened its doors to new audiences, including international scholars and tourists less familiar with the temple's history and traditions. The temple now provides not only written labels as guideposts, but also guided tours, newsletters, annual publications, and a website.

RESEARCH DESIGN

When Beijing posted its regulations for increased patron accessibility, credit card ticketing, and additional, standardized English-language signage at key tourist sites in October 2007², the Beijing Folk Custom Museum had recently changed directors and was in the middle of large-scale restoration of several key shrines to the West of the main temple courtyard. Nevertheless, the museum moved forward and constructed accessibility ramps, installed credit card readers, and hired two English language specialists to proofread and retranslate all English language materials.

I arrived in Beijing in November 2007, and after a preliminary assessment of my English language editing abilities, I received a formal commission from Peking University to work with the museum's English language interpreters during 2008 as an editor of English language materials, including exhibit scripts, publications, tour presentations, and web content. This kind of "ethnographic apprenticeship" allowed me to trade my native English language skills and training in editing and folklore could for an insider's view of the workings of this state-run cultural institution.

Twice a week for ten months I visited with my colleagues at the museum and discussed the progress toward more comprehensive, standardized, and accurate translations throughout the temple complex. I also met with foreign visitors to the temple and solicited their suggestions for improvement. I ate lunch with custodians, security guards, and other non-professional staff to hear their perspectives on our work. Under the direction of the museum's vice-director, I designed a bilingual patron feedback form and a new English-language homepage for the website. I translated a two-hour tour script and received permission to conduct English language tours for foreign visitors during the Olympic season.

Despite these efforts, the Olympics came and went before any of our translations were implemented. When I arrived ready to give my first tours on August 5, I was told my services would not be needed. The patron feedback form was never used; the website has yet to be published. Aside from a few directional signs, no corrections were made to standardize the English language in the museum. I spent the next month reflecting on my experience, asking, "What happened?"

RESULTS AND DISCUSSION

Although much of the task of translating and proofreading existing translation was seen as "business as usual" among museum staff during the Spring and Summer, an underlying conflict between "unnecessary" translation work and "necessary" museum construction and other operations was ever present. Whenever I would suggest something of my own initiative, I was often confronted by the question, "Who asked you to do that?" If I didn't give a name, then it was immediately

dismissed as unnecessary. Sometimes even invoking the name of the vice-director who served as my supervisor was not enough. I came to learn that while the temple employs historians, folklorists, artists, and museum professionals, all work is still supervised by both local and national government and party leaders. Sometimes that has meant extra work for museum professional staff to meet outside expectations. For example, after touring this year's exhibits on jewelry and Chinese Zodiac figures, officials complained that the current offerings were not Olympic enough. The result was the opening of a temporary exhibit of a private collection of matchbox covers with Olympic themes. The entire exhibit had to be prepared and installed in just a few weeks to open by August 7. It quickly closed on September 10 to make room for exhibits and activities for Mid-Autumn Festival.

Given these pressures, many on staff felt that the existing English signage was adequate and my services were simply extra. They argued that foreign visitors account for less than five percent of overall museum traffic, and that many of those did not even bother to read the existing signs. Supporting these sentiments from staff were comments I heard from foreign tourists themselves, who told me that they admired what the museum was doing, but that they themselves didn't have the time or the inclination to read much about what they were seeing. Some said that the explanations they had already read in published travel guides were sufficient to "get the gist" of a Daoist temple. One man advised us to design self-directed audio tours such as could be found in the Summer Palace and Confucian Temple, but then he admitted that he probably wouldn't pay the extra six to eight dollars it would cost to purchase a tour.

The cost of retranslation was seen as outweighing the benefit. Not only did the museum have to create two new positions for translators, but they would have to incur the production costs of remaking hundreds of bilingual, wood, stone, and stainless steel signs, republishing bilingual books and pamphlets, and maintaining twice as much material online. One typographical error in a prominent sign showed a date followed by BC instead of AD. After numerous attempts to report the error, it took physically walking another staff member over to the sign and pointing out the error before the long, tedious process of resubmitting text to the exhibit specialists could begin. After six weeks, there was still no change to the sign.

During the Olympic season, the temple hosted a small number of dignitaries, including a special visit from former US Secretary of State Henry Kissinger. Rather than rely on signs, however, my English-speaking colleagues from the education department led them personally through the temple grounds. While such personal attention to high-profile visitors was certainly appropriate, it further undermined efforts at improving bilingual signage and publication by simply avoiding it.

The translation itself was an entirely different challenge. Words and phrases from the temple's past have long histories within the local Beijing linguistic repertoire, but even many Chinese could not understand cultural references without explanatory glossing. For example, a large wooden abacus hangs on the wall of the temple's inner gate with two signs reading, "accurate to the 1000th hair" (hao li bu shuang) and "May multiplication and division be distinct" (chen chu fen ming). The story involves a nineteenth-century scholar-official's revenge against a court minister for injustices he received. For Chinese visitors unfamiliar with the cultural references, such poetic signs require some unpacking, but they are recognizable proverbial phrases (cheng yu) all the same. To a non-Chinese speaking foreign audience, however, a great deal more has to be explained. Simply translating the Chinese story is not enough, but providing all the necessary background information becomes too much for one sign, or even for a two-hour tour script.

Even more complicated is interpreting terms and phrases with religious significance. The three characters zhongxiaosi "Loyalty and Filial Piety Department," for example, are introduced in Chinese with another 120 characters to explain their meaning and significance to religious Daoism. The characters used in the interpretation effectively recast the Daoist terms zhong and xiao into Confucian virtues related to ren "benevolence" and li "righteousness." The entire sign reads:

Chinese Interpretation:

忠孝司：“忠”是对民族，对人民的公忠；“孝”即孝亲。忠孝是仁、义的根本，善推之有益于天下之爱，即由爱亲人推及到爱国家、爱民族、爱人民。这是道教基本教戒之一。

Existing translation:

Department for Upholding Loyalty & Filial Piety: “Loyalty” is to the nation, to the citizens, while “Filial Piety” is to one’s kin. These form one of the pillars of Taoist doctrine. According to Taoism, loyalty and filial piety are the basis of benevolence and righteousness, which will lead to universal love ranging from love for one’s kin, to love for one’s country, one’s race, and one’s people.

When I pointed out the Confucian connection to the translation team and speculated that perhaps we should talk about the ways in which Daoism, Buddhism, and Confucianism are all represented in the temple, I was told that it was more important to stress the daoist origins of the temple and not mention the connections to other religions^③. It would just make the entire presentation more awkward. What I didn’t know at the time was that the temple was currently in the process of negotiating with the National Daoist Association, the State Administration of Cultural Heritage, and the Bureau of Religious Affairs to reintroduce orthodox daoists to the temple complex. Perhaps even English-language attempts at blurring the distinctiveness of the temple as a daoist site might be seen as trying to undermine a long, painstaking negotiation. In the end, my final re-translation stays fairly close to the original sign:

Department for Upholding Loyalty & Filial Piety: *zhong* “loyalty” is being true to one’s nationality and fellow citizens, while *xiao* “filial piety” is being true to one’s own kin. These form one of the pillars of Taoist doctrine. According to Taoism, loyalty and filial piety are the basis of benevolence and righteousness since love for one’s kin leads to love for one’s country, one’s race, one’s people, and eventually to universal love.

CONCLUSION

In observing how this state-run museum accomplished (and avoided) translation and interpretation during the Olympics, I saw how the institution, by grudgingly complying with minimum requirements for English-language translation, accessibility, and Olympic-themed exhibits, was able to avoid government censure and still move forward according to its own sense of mission and purpose. While not an autonomous unit from national and city planning, I nevertheless saw evidence of what Kenneth Lieberthal has described as “fragmented authoritarianism” (Lieberthal and Oksenberg 1988), or an uneven compliance with mandates from top-level officials. Thus the state-run museum becomes a site for negotiating state power and authority rather than just an established icon of that authority.

In reflecting on the decisions not to include nearly ten months of work in the final workflow of the museum, I have tried to understand ethnographically the institution’s point of view. Kahn (2000) reminds her anthropologist colleagues that the emerging museum trend of listening to communities inevitably leads to compromise. The state-sponsored Beijing Folk Custom Museum represents the restoration and reinstatement of a key Daoist national historic site after total denouncement of religion and destruction of the temple during Mao’s 1960s Cultural Revolution. Largely patronized by local Chinese, the museum plays a role in the patriotic education of Chinese school children as to the quaintness of folk religion, yet it also opens its doors to devout believers. The Olympic catalyst to museum development did not result in better English signs, but orthodox daoists once again perform sacred rituals at its altars, while festive temple fairs simultaneously preserve intangible cultural heritage and generate community cohesion. In exchange for my unpublished translation work, I have still been able to become a welcomed member of the museum community. That is its own reward.

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Note:

①The full text regarding museums from the Olympic Action Plan reads: Many Central Government agencies in Beijing are enthusiastic about setting up theme museums. Beijing shall try to give full play to, and take full advantage of, such enthusiasm. Whenever possible, Beijing will offer its help in the museum projects. An elaborate and extensive museum network can be created by integrating the resources of the over 100 museums that already exist in the city, which together have more than two million exhibits on display. The museums in this network are of different levels and focus on different categories. Non-governmental organizations and individual citizens are encouraged to establish small-scale special-purpose museums, help improve the technological content in museums, and make efforts to protect and utilize ancient buildings. (Beijing Olympic Action Plan 2001: V.4.3)

② "Beijing 2007 Municipal Plan for Implementing Standardized English at Tourist Destinations" is cited in, "关于规范旅游景区英语标识等工作综合检查的通知发布," ("Notice Regarding Comprehensive Inspection of English Signage and Other Work at Tourist Destinations") [Online]. Posted by Beijing Tourist Administration, October 26, 2007. Retrieved October 10, 2008 from <http://www.bjta.gov.cn/zwgg/118387.htm>

③In fact there are some additional questions I raised regarding this sign, including the use of the terms "国家 guo jia," "民族 minzu," and "人民 ren min," all fairly recent political terms. This effectively incorporates the Daoist/Confucian ideals of loyalty and filial piety into modern ideas of patriotism.

CREATIVE CLUSTERS IN URBAN TOURISM: A CASE OF SHANGHAI

Jun ZHOU, Ning DANG, & Xuegang FENG

Tourism Department, School of Business, East China Normal University

ABSTRACT

With the rapid development of creative industries, creativity is gaining increasing concern from academic, business and government aspects all around the world. With its continued escalation of city's industrial structure, creative industries have gained the new industries strong support from the government of different levels. After years' development of the creative industries, creative cluster outstands itself and becomes an indispensable component. This paper, taking the creative clusters in Shanghai, as an example, is an attempt to discuss what kind of role the creative cluster could play in the tourism industry in a city and what should it offer the tourists to become a tourism attraction as well as how could it promote the development of urban tourism.

Keywords: Creative cluster; Urban tourism; Classification; Function; Shanghai

INTRODUCTION

Increasing competition in the urban tourism market means that 'goods and services are no longer enough' (Amin & Thrift, 2002; Pine & Gilmore, 1999), new strategy must be adopted by cities to achieve their further development. Culture has been claimed by many scholars as an essential element of the tourism system. It has also been argued that culture is the source of urban attraction (Fainstein, Hoffman, & Judd, 2003). Cities resort to transforming their culture into experience expecting to differentiate themselves from others. Talking about "developing distinction in tourism", Richards and Wilson (2006) categorize under four major headings the multiple different strategies used by cities. First, is the construction of major new landmarks or flagship developments that aim to become symbolic icons for a city's identity (Evans, 2003). Second, is the attraction of mega-events or expositions, which is now a standard strategy that many cities compete fiercely to employ (Garcia, 2004; Kurtzman, 2005; Richards and Wilson, 2006), "Thematisation" is regarded as the third kind of strategies for urban regeneration and involves cities seeking to distinguish themselves by focusing on a specific theme, such as culture, sport, arts or entertainment and marketing themselves variously as "cultural capital" or "24 hour cities" (Law, 1992; McCarthy, 2002). The final category is that of "heritage mining" through which cities attempt "to re-develop themselves through the exploitation of cultural heritage, usually with an emphasis on the built heritage" (Richards and Wilson, 2006).

The success of these various different approaches towards tourism-led urban regeneration has been observed to be both spatially and temporally uneven, with some cities enjoying periods of revitalization, which are often followed, however, by a need for further reinvention or refreshment through the development of newer tourism products. At the heart of the difficulty of applying tourism-led regeneration strategies is that "nothing succeeds like success" (Richards and Wilson, 2006). Hence, as more and more cities compete in producing and reproducing themselves as spaces for tourism consumption, tourism-led strategies of regeneration tend to employ "the same formulaic mechanisms" which in turn leads to the serial reproduction of culture (Richards and Wilson, 2006). In addressing this dilemma of the serial reproduction of culture and of the need for developing new urban tourism products, one of the most fashionable approaches is "creativity", "creative industries" and "creative tourism" in cities (Richards & Wilson, 2006). Creative cluster, where creative thoughts from home and abroad come across and hybrid provides an ideal place for creative talents to get inspired and have their idea exchanged and perfected. Creative industries are used increasingly as tools for the regeneration and transfiguration of urban spaces of consumption.

Creative industries have gained the new industries strong support from the government of

different levels. After years' development of the creative industries, creative cluster outstands itself and becomes an indispensable component. Creative cluster is featured with creative appearance and a high concentration of creative entities, which provides a perfect platform for tourists to satisfy their curiosity about creative industries. From this perspective, creative cluster matches the "seeking for the new" purpose of tourism activities very well. Shanghai, as a metropolitan in Asia, devotes great efforts to develop its creative industries and has approved 75 creative clusters in four groups till now. This paper, taking the creative clusters in Shanghai, as an example, is an attempt to discuss what kind of role the creative cluster could play in the tourism industry in a city and what should it offer the tourists to become a tourism attraction as well as how could it promote the development of urban tourism.

METHOD

Shanghai was taken as an example to explore the creative industries' functions and their contribution to urban tourism. As one of global economic, trade and financial centre, Shanghai has paid great attention to the development of creative industries, which has been written into the <Shanghai Cultural Development Program 2004-2010>.

The basic information of the creative clusters is mainly obtained from the official website of Shanghai Creative Industries Center (noted as SCIC) and many other online resources. Field investigation including interviewing some of the tourists on spot is also conducted to get more detailed information.

75 creative clusters have been approved in four groups consequently during the past five years. Hundreds of creative entities such as galleries, studios of artists, advertising companies, and animation companies gather in these clusters with their excellent creative talents from different countries and regions namely Swiss land, Canada, France, Norway, Italy, Israel, UK, Hong Kong and the Mainland China. Due to the lack of information of all the 4th group clusters and some of them are still under construction, only the first three groups are taken as the research subjects.

Varying in the mode of companies' gathering determine the difference in their function in tourism. Creative clusters could be categorized into three kinds according to the entered enterprises' or organizations' business scope and operational objectives. All categories are analyzed to find out what a creative cluster can offer urban tourists and then the three different types of clusters are compared horizontally to make each kind more distinguished from the others. Suggestions are made correspondently to promote its progress of becoming a good tourist attraction given different kinds of creative clusters and better accommodate the need of the urban tourists.

FUNCTIONS AND CLASSIFICATION OF CREATIVE CLUSTERS IN URBAN TOURISM

What can creative clusters offer urban tourism?

Satisfying tourists' increasing demand for creative consumption

Some cities have placed an emphasis on innovators to propel creativity forwards, contributing to the emergence of a creative, vibrant atmosphere. This is most evident in the case of creative clusters. Groups and classes of creative consumers are beginning to emerge along with these creative spaces (Richards and Wilson, 2006).

Florida (2002) points out the emergence of a "creative class" in the USA which could be described as a group of people who are often dependent on imported creative capital. Zukin (2004) agrees that "as cities grapple with the potentially explosive nature of their societies, the must remember to nurture creativity". Creativity is supposed crucial for the competitiveness of a city. Creativity is also becoming important to individuals and groups across many different sectors of society. One of the major drivers of creative consumption is the need for self-development. This has

already been studied in the context of skilled consumption, a notion derived from Scitovsky's (1976) study of The Joyless Economy. He identified a problem with the rise of unskilled consumption activities such as watching TV, which are based on external stimuli. This he contrasted with skilled consumption, which is based on internal stimuli and the development of capabilities and skills of the consumers themselves (Richards, 1996). The argument put forward by Scitovsky is that skilled consumption will grow as consumers become increasingly dissatisfied with short term, unskilled experiences.

The "compulsory" demand from the professional creative class and the "voluntary" demand from other amateur individual are booming and need to be satisfied. Creative clusters are often visually and emotionally seductive spaces which are attracting an increasing number of tourists with their vibrant atmosphere.

New approach for urban regeneration to create a better image

Facing the fierce competition, a better image is quite needed for the city to impress its tourists. Urban regeneration is imperatively necessary to realize this. While dealing with the dated buildings, pulling down and rebuilding is a feasible way only costs a lot and is not beneficial for heritage protection. Turning it into a creative cluster is the most convenient way that would balance the benefits of almost all stakeholders. This way utilize the heritage to the largest extent while not damaging its historical or cultural value and have almost all kinds of benefits considered. Creative clusters transformed from old buildings could be found full of historical sense mingled with strong sense of modern. It is a place where the past and the present meet, and the future be created. Its vibrant atmosphere attracts a wide range of tourist.

This process is more than just restoring the building which is relatively superficial. Turning the ugly shabby old buildings into creative cluster is an inside-out work which retains the original value while adding new. With the restored old buildings, the city gains a brand new image without bringing any damage to the cultural assets. Tourists are more likely to be attracted there and get more satisfied.

Distinguishing the city with others as a unique tourism destination

One of the major problems that cities face in a competitive global environment is how to maintain, develop and utilize their distinctiveness. The development of distinctiveness is now often is a process that is managed to produce distinctive experiences for tourists.

Creative clusters, as creative space, are often empty of fixed ideas, they are more often dynamic and flexible. This implies adaptability to different needs, and as such, these spaces are less sensitive to the fleeting fashions and postmodern distractions of tourists' experience hunger. In this way the experience can be modified in time and some of them can be modified in space as well (Richards and Wilson, 2006).

In this way, the serial reproduction problem that obstructing the further development of the cities could be soundly resolved. Tourists get their unique tourism experience, and one city can be distinguished from another.

Factors influencing the functions of creative clusters in urban tourism

In order to play a role in urban tourism, satisfying tourists' need for "seeking for the new" is essential but still far from enough, it's quite necessary for creative cluster to accommodate some other basic demand such as shopping and entertaining. The business scope or operation objectives of the entered enterprises or organizations vary widely, which directly determines the main functions.

Besides the creative atmosphere in the park which all should possess, there are mainly

four criteria based on which to determine whether or to what extent a creative cluster could function as a tourist attraction: openness, interactivity, leisure function and creative appearance.

Openness

To what extent a creative cluster could open to the public is an essential element determining whether it could become a good attraction in urban tourism. The higher the openness is, the more possibility it could gain. It is creative culture that connects tourism industry and creative clusters, and this connection is made even closer by the high openness. As a special existence in a city, creative clusters play basically the same role as museum and art gallery which is providing a space for tourists to see only the former one is more casual.

The lack of openness of a creative cluster could be made up for by the creation of “functional space” referring to the space where events such as meeting, forum and exhibition held. Functional space is essentially a “man-made” open space providing tourists an opportunity to participate more in touring around the creative cluster.

Interactivity

The vital reason a creative cluster could become a tourism attraction is that it could satisfy tourists' needs for relieving their curiosity about creative industries. Just “opening the door” and letting them see is far from enough. By seeing they just know “what”, by interacting they could learn “how”. Just knowing what is easily forgettable, but learned how could form its unique, memorable tourism experience. By touring in these kinds of creative clusters and communicating with the artist there they get enriched, inspired and improve their ability. Workshop can be established to enhance the interactivity. By taking courses, tourists get further understanding while achieving self-development.

Leisure Function

With the development of urban tourism, recreational facilities are increasingly crucial for urban tourists since they are looking forward to experiencing rather than just touring and seeing. Leisure function is an important component of a creative cluster as a tourism attraction in urban area. The recreational facilities in creative clusters serve the creative talents while providing service to the tourist coming to the cluster, meeting their demands for touring, shopping, and entertaining. In addition, recreational facilities themselves could be a tourism attraction, and a creative cluster with an appropriate percentage of leisure function is certainly possible to be a good tourism attraction.

Creative Appearance

Although creative appearance is not of significant necessity for a creative cluster, still a creative one could gain itself some popularity. The exterior appearance, the architectural style is what gives the tourists first impression, and it would become a component of tourists' experience. Creative appearance forms creative space, it is more easily to create creative atmosphere. The appearance itself could be a selling point for a creative cluster to become a tourist attraction in urban tourism.

Classification of creative cluster

Different creative clusters vary in their elements which determine their ability to meet different demands and further determine their role in urban tourism. Creative clusters could be categorized into three different types according to the entered enterprises' or organizations' business scope and operation objectives which directly determine the main functions, namely Creativity-oriented, Business-oriented, and Leisure-oriented creative clusters.

Creativity-oriented creative cluster

This kind of cluster focuses on artistic creation gathering numerous artists. They conduct their creation of art as well as exhibit their work of art. It is a studio but also an exhibiting place for them. The artists exchange thoughts, learn from each other and get inspired in the creative atmosphere. Creative-oriented creative cluster is best represented by M50, the largest park for artists in Shanghai. M50 attracts artists and designers from different countries and regions including some world-famous one. A lot of art galleries gather there providing a good platform for artist to show their work of art. 798 Art Zone could be regarded as a creativity-oriented creative cluster too.

Business-oriented creative cluster

Business-oriented creative cluster is featured with its commerciality. It is basically a park of companies of creative industries. Enterprises in the cluster could be competitors for each other or in a cooperation relation and even have no common interest commercially. The creative atmosphere is the only connection between them. The Bridge 8 in Shanghai and Z-Park in Beijing well represent this kind of cluster.

Leisure-oriented creative cluster

As the most easily accessed type, leisure-oriented creative cluster distinguishes itself with its high percentage of consume service it offers mostly demonstrated as could be seen with a lot of recreational facilities such as bars, book store, café, gallery etc. The creative atmosphere is the core content which supplies the tourist a creative space to get unique experience. Recreational facilities along with both artistic studios and commercial entities or just one kind constitute the leisure-oriented creative cluster. Tonglefang, the emerging “The New Factory” and “Hi-Shanghai” fall into this category.

There is no clear boundary between different kinds of creative clusters. The classification is only based on the leading elements of the cluster. Recreational facility is necessary for both business-oriented and creativity-oriented creative clusters only the percentage is not that high. Individual artist could also be spotted in business-oriented clusters. Besides, one kind of cluster, with the increasingly introduction of one specific element, could change its original orientation and become the other kind. The Taikang Road in Shanghai is actually transformed from a creativity-oriented cluster to a leisure-oriented one.

Creativity-oriented is featured with high openness since most of the “residents” there are individually working artists who are willing to have their work of art showed and visited. This attribute granted this kind of cluster a high level of interactiveness. Business-oriented creative cluster is in the right opposite position. Due to the high demand of privacy during the business operation, the entered business entities are not willing to or allow their working space been regarded as a visiting spot. Additionally, the working space is nothing but an office with creative design for tourist who maybe not willing to visit. Hence, business-oriented clusters only get the lowest level of openness and interactiveness among the three kind of clusters. Leisure-oriented significantly distinguish itself with its high percentage of recreational facilities and leisure function. It meets tourist demand in a different way which tourists gain a unique experience by paying for the final product or byproduct of creative industry instead of viewing and participating in creation process as in creativity-oriented and business-oriented clusters.

Comparing the three kinds of cluster on the four criterions, it is easy to conclude the following ideas: Creativity-oriented creative cluster boosts the highest level of interactiveness and business-oriented one only gets the lowest level, and it is just the same situation with the criterion “openness”. Considering the leisure function, leisure-oriented cluster, as can be implied from the name, take the leading place without a doubt, and the other two kinds do not show a obvious differences. As for the “creative appearance”, no significant difference can be concluded. Usually, business-oriented ones are more like to be look more creative since the companies there a more

willing to distinguish themselves using creative decorations. However that depends.

Creativity-oriented creative cluster is the most suitable kind for becoming a tourist attraction in urban tourism, while leisure-oriented one is its strongest competitor since the trend of urban tourism is moving toward relaxation and experiencing. Still, both kinds have their monopolistic asset which can not be replaced by each other. Business-oriented creative clusters have congenital defect due to the high demand privacy caused low level of openness and interactiveness. However, by the creation of functional space, this kind of barrier obstructing on its way to a good tourist attraction in urban tourism could be conveniently removed.

CASE OF CREATIVE INDUSTRIES CLUSTERING PARKS IN SHANGHAI

Classifications of creative industries Clustering Parks in Shanghai

As an international economic, trade and financial centre, Shanghai government has paid great attention to the development of creative industries. Considering its present state of economic development and the need for further development, creative industries in Shanghai mainly have five departments: IT R&D, Architecture, Art, Fashion Design, Consulting and Planning. Among all the creative clusters, some just accommodate companies of the same industry like Leshan Software Park where software companies in a completely dominating place. It is the same situation with Fashion Industry Park located on Tianshan Road known as the “Silicon Valley” of clothing industry where many clothing companies gather. Some other clusters attract companies of different industries such as “The New Factories”. In The New Factories, there are companies providing advertising, designing, planning and consulting services and some recreational facilities such as bar and dining places. “1933”, “Hi-Shanghai” are both this kind of cluster. According to the mode of classification, the creative Industries Clustering Parks in Shanghai are categorized and the first three groups are listed in Table 1 in terms of their type respectively.

Table 1
Classification of Creative Industries Clustering Parks in Shanghai

Category	Number	Creative Industries Clustering Park
Creativity-oriented	2	M50, Tianzifang
Business-oriented	36	Tianshan Software Park, Fashion Industry Park, Media Cultural Park, Leshan Software Park, Jingan Modern Industry Park, Shanghai Tourism Souvenir Industry Development Centre, Hongqiao Software Park, Industrial Design Park, Zhoujiaqiao, E-warehouse, Husizhan, Creative Warehouse, Zhangjiang Culture and Technology Creative Industry Base, Design Factory, Angli Design Creative Park, Excellent Pioneer700, Creative Union, Creative Garden 2577, X2 Digital Xuhui, Chebohui, Architecture Design Creative Workshop, Tiandi Software Garden, Wisdom Bridge Creativity Industrial Park, Alloy Factory, Tongli Garden, Space188, Shangjian Garden, Tourism Souvenir Design Building, Creation River, Creation Root, JD Manufact, Shuyu Building, Out of the Box, Greenland Sunshine Garden, UDC innovation Plaza, 98 Creative Garden
Leisure-oriented	7	Youzu 173, High Street LOFT, Delin Apartment, Yifei Creative Avenue, Dongfanggu Creative Park, 1933, Hi-Shanghai

Creative clusters in Shanghai could be categorized into three different types according to the entered enterprises’ or organizations’ business scope and operation objectives, namely creativity-oriented ones like M50, business-oriented ones like Bridge 8, and leisure-oriented ones such as The New Factories, which takes up 5%, 80%, 15% respectively of all the three groups creative clusters. Figure1 shows the locations of the 3 types of creative clusters in Shanghai(only the first three group).

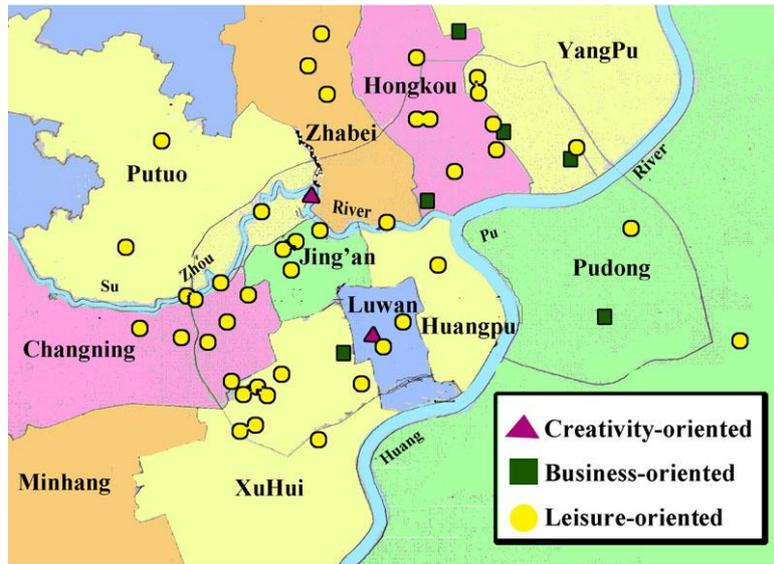


Figure1
Distributions of the three types of creative clusters in Shanghai

As stated above and can be seen in Figure1, creativity-oriented creative cluster which only takes a tiny part of Shanghai Creative Industries Clustering Park, enjoy the highest competitive strength. M50 and Tianzifang are the most famous creative clusters in Shanghai and attracted the highest number of tourists. The emerging leisure-oriented clusters also performed well in Shanghai urban tourism. The New Factory, 1933 and many others are attracting an increasing number of tourists while gaining their widely spreading fame. Although with the congenital defect, some of the business-oriented creative industries clustering park do a well job. The Bridge 8, one of the most popular creative industries clustering parks is famous for its attractive and unique architectural style, besides, “Creative Carnival” it held gained the Bridge 8 more popularity. Some other business-oriented ones such like Creative Warehouse, Media Cultural Park and another nine parks resort to industrial tourism expecting to enhance their openness and interactiveness.

Functions of Creative Industries Clustering Parks for urban tourism in Shanghai

Enriching the tourism products

The city itself is what urban tourism relies on; it is also what makes the brand. Urban tourism in Shanghai focuses on the urban landscape, the local culture and its dynamic business atmosphere. Different kinds of social resources are utilized to nurture the tourism product. Besides some conventional tourism namely the historical relics like The Bund, Yu Garden and landmark buildings like Jinmao Building, The Oriental Pearl TV Tower, creative industries clustering parks are also regarded as a new tourism product mostly in the name of industrial tourism.

Creative clusters have long been listed as tourist attractions in Shanghai. The Bridge 8, M50 could be found in the brochure for Shanghai’s urban tourism promotion. Besides the Bridge 8 is rewarded with the “National Industrial and Agricultural Site”(second group). The emergence of the tourism product like “a tour to creative clusters” enriches the content of the cities urban tourism. While satisfying the needs of different tourists, the meaning of urban tourism is more delicately elaborated. Creative clusters provide tourists more chance to get themselves relax, what’s more, it offers a sound opportunity for tourist to truly fit in to the life of the city rather than just passively viewing or spectating. It is a sign that Shanghai’s urban tourism has step in a new stage where it is how the resource be developed rather than what the resource is truly matters. It is a new era features individuation and diversity.

Developing the industrial heritage

The “industrial golden age” of Shanghai leaves the city a great number of abandoned buildings of the old factories. It represent the glorious past of modern Shanghai. However, nothing but a shabby, ugly building could be found in these buildings, leaving us no willing to feel its spectacular history. The culture cannot be felt, even worse, the building would possibly sabotage the graceful appearance of the city. Luckily, by transforming them into creative clusters, both of the problems can be resolved. After a delicate plan, old abandoned factories’ buildings and deserted warehouse gain another life. They have become distinctive tourist spots attracting a wide range of tourist. Tourists from home and abroad show their great enthusiasm in wandering between the rich historical atmosphere and the sense of modern.

It was until 1999 that the old factory buildings along Suzhou River got any attention when a group of designers and artists decided to set their studio there; otherwise they would still be standing there lonely and shabbily. Nowadays, the river side area where E-warehouse, Creative Factory and many other creative industries clustering parks locate has become a charming place filled with creative atmosphere. Wandering along the Suzhou River, one can see the 100 year old house, while feeling the creation of modern art. It is a place where the time and space intersect, the past and the present meet. That’s how the old shanghai should be felt. Take the New No.10 Steel Factory as another example. It locates on Huaihai Road and was transform from the old No. 10 Steel Factory. Nowadays, it includes Shanghai Sculpture Space, the rebuilt business area and support facilities of creative industries. And it is developing to be a brand new culture landmark in Shanghai for its reasonable business modalities and large-scale international and domestic cultural and creative events.

Some creative clusters like M50, The Bridge 8, Tianzifang, Creative Warehouse, Media Cultural Park and another 9 parks are all listed as industrial tourism scenic spot .Presently, more than 10 creative clusters transformed from abandoned old factory building have been listed as protection units with another 10 plus clusters of this kind following by. The industrial heritage of Shanghai needs to be developed and utilized in a reasonable and effective way which will finally benefit both the cultural protection and the develop of urban tourism.

CONCLUSION

With the highest openness and interactiveness, creativity-oriented creative cluster is the most suitable one to bring its tourism function into play while business-oriented creative cluster is the least. Leisure-oriented creative cluster owns the most leisure function which endows it a valuable resource to “bring in” tourism industry. Creativity-oriented and leisure-oriented creative clusters boost the “initial asset” to become a good tourist attraction but business-oriented ones don’t. For the creative cluster s intending to incorporate tourism into its business scope and gain more, the above listed 4 element must be assured and strengthened. There are basically two ways to follow: first, leisure function and creative appearance could be improved through infrastructure construction; second, holding events, such like shows of different kinds, performances etc., is an effective and convenient way to enhance the openness and interactiveness.

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SHAPING OF AN URBAN RIVERBANK SCENIC SITES ---KAOHSIUNG CITY'S LOVE RIVER

Chin-Yin HU

Tourism Management Department, Diwan University, Taiwan

ABSTRACT

In the past, we observed the phenomena that Kaohsiung City Government develop Kaohsiung City into "Taiwan's Ocean Capital City" and the landscape along the Love River changes beautifully." Besides, Kaohsiung City Government will host the World Games in 2009. The main purposes of this research are to find out: 1. What's the distribution of the urban river waterfront tourism landscape at Love River Area in Kaohsiung city? What's the spatial pattern of it? 2. How to shape the urban river waterfront scenic sites landscape at Love River Area in Kaohsiung city? We will try to answer the above questions from the perspectives of cultural landscape concept and stakeholder theory. First, we can divide the study region into some areas. Next, we will separate its development into some stages. Then we will inquiry the molding processes and factors of the sightseeing landscapes by quotation the stakeholder theory. The techniques of collecting data are by literature study, in-depth interview and fieldwork. The outputs are: The spatial distribution of scenic sites of at this area can be divided into Love River Water Way, Parks and Greenland along the banks, and scattered scenic sites along the banks. The development of Water Way can be categorized into natural river stage before 1971, pollution treatment stage from 1971 to 2001, and water recreation stage after 2001 according to its function and landscape feature. The affected factors of these scenic sites landscape are cultural landscape and stakeholders. "cultural landscape" concept has more broader and indirect influence on the shaping of this area. The influence includes three aspects: material, social, and spirit. "Stakeholder" has more direct influence on the shaping of landscape of this area, in particular, stakeholders from the public sector who has the influence on material and social aspects. In general, the policy of the public office plays the key role in the shaping of its landscape. This research results may provide the landscape system planning, narration system planning, the place history, and the teaching materials for the nearby hotel.

Keywords: Cultural landscape; Stakeholder; Tourism landscape; Love River

INTRODUCTION

The competition among cities as tourist destinations in the future will be decided by cultural characteristics and personalities of the city that are presented in the city landscape and environment. Tourism development shall combine with unique local resources and therefore, there shall be no regional discrepancy in Taiwan's tourism development. In the past, we observed the phenomena that Kaohsiung City Government develop Kaohsiung City into "Taiwan's Ocean Capital City" and the landscape along the Love River changes beautifully." Besides, Kaohsiung City Government will host the World Games in 2009. An Ocean Capital City" shall consist of both "water space" and "urban space." If Kaohsiung City would like to coordinate its tourism development characteristics with the policy goal of building an "Ocean Capital City," it is essential to discuss and study every type of local water space. As a result, it deserves an in-depth investigation of the interesting and meaningful questions of the shaping process of the water tourism landscape of the Love River and its future development strategy. This paper will look for answers. According to above-mentioned motive and concept, this study has two research purposes: to discuss the distribution and the characteristics of riverbank tourism landscapes along the Love River in Kaohsiung City as well as the shaping process and factors that trigger key functions.

RESEARCH METHOD

A. Literature review

Hung (2003) used the Love River as the example to discuss the concepts of traditional cultural tourism and the development of a cultural industry. Fang (2004) adopted importance-performance analysis and SWOT analysis to identify items that require immediate improvement along the Love River. Cheng (2004) used the Love River as a subject to discover the influential factors of the Love River's environmental image. Kuo (2005) showed the potential tourism and recreational resources of the Love River with a GIS. Wang (2005) discussed the tourism industry of the Love River in Kaohsiung, interviewed experts, and reviewed industrial growth to examine the effectiveness of a media marketing policy used for the promotion of the Love River's tourism industry. In summary, there is lack of study on "landscaping process of scenic sites" and this study makes the contribution in this regard.

B. Research design

The British biologist Julian Huxley (1887-1975) identified the three components of culture as mentifacts, sociofacts, and artifacts. Over a long period of time, humans developed unique cultural landscapes in different regions. Landscapes can be classified into natural landscape and cultural landscape. C. O Sauer proposed that the cultural landscape is a representation of a geographical region and the subject of a cultural landscape is the certain cultural group in the format of "the power of cultural person versus the change of natural landscape." Groups with different attributes interact with the natural and cultural landscapes through activities (Hsieh, 2004). The tourism landscape is one type of cultural landscape and its shaping process can be explained through that of a cultural landscape. Ansoff quoted from Abrams and Cyert and March and defined stakeholders as the key to the existence of an organization and without their support, the organization no longer exists. The formation of any public policy or important landscape involves this type of relationship and those who are involved with the policy are so called stakeholders.

In regards to landscape research, this paper adopts the concept of "cultural landscape" and assumes the concept has a comprehensive and indirect impact on the shaping of the regional landscape. In addition, "stakeholder theory" is also introduced to assume its more direct impact on the shaping of the regional landscape. That is, this study examines the development experience of the Love River waterfront landscape from the regional characteristic prospect of historical and geographical context and discusses its landscape shaping process.

This study will firstly use tourism resources as an indicator to define the spatial distribution of waterfront scenic sites. Secondly, landscape development stages are clearly identified. Through literature review, in-depth interviews with key persons from both the public and private sectors, the researcher developing an understanding of the tourism landscape's development process and major tourism activities as well as introduced "stakeholder theory" to analyze the landscape shaping process and key force in each stage. The spatial cope of this study mainly centers along the middle part and downstream area of the Love River. The research period is from 1979 when Kaohsiung was upgraded to a municipal city to the end of 2008.

This study collected first-hand data via fieldwork and in-depth interview as well as second-hand data via literature review. In-depth interviews were conducted from September 2007 to March 2008. In order to collect sufficient data and understand the process and nature of landscape shaping, this study is primarily based on qualitative analysis.

DATA ANALYSIS

This study divides the regional landscape into three districts. District 1 is the Love River Water Way; District 2 is the green land along the river banks; District 3 is the scattered landscape along the two river banks, within the distance of 100m.

A. Love River water way

1. Love River: This study classifies the development of the Love River into several stages according to its function and landscape features: natural river stage before 1971; treatment stage from 1971 to 2001 when the water was too polluted to be the location of dragon boat races and treatment construction started; water recreational stage after 2001 when landscape re-construction began.

a. Natural river stage: The Love River originates from Renwu Township, Kaohsiung County and connects the irrigation waters of the Cao Gong Canal to flow in Kaohsiung Harbor. The middle stream lies between Jianguo Bridge to Mingchen Bridge and downstream lies between the Steel Bridge of Kaohsiung Harbor and Jianguo Bridge. The characteristic of this stage is from zero pollution to gradual pollution due to irrigation water and use for marine transportation.

b. Treatment stage: After the 1960s, due to industrialization and urbanization, the air in Kaohsiung was very polluted. The treatment of the Love River began in 1977 when the “Ren Ai River Pollution Treatment and Stage I Drainage System Construction” project was begun by the Taiwan Provincial Government and planned by former director of Public Works Bureau, Mr. Chen Ji-chi. On July 1, 1979, Kaohsiung City was upgraded to a municipal city and began the “Ren Ai River Pollution Treatment and Stage I Construction of Drainage System,” project. In 1980, treatment of the Love River and drainage system were actively processed. This project was carried out under the leadership of four city mayors, Wang Yu-yun, Yang Jin-cung, Hsu Shui-der, and Su Nan-che. Test operations were started in December 1986 and formally operations in January 1987. The construction project included the Chihping Interceptor Station to stop waste water from the upper part of the Love River running downstream. In addition, along the sides of the Chihping Bridge, ten interceptor stations such as Chiuju were installed to stop waste water from the entire Love River and treat it in the Central District Wastewater Treatment Plant before discharging it into the ocean. During Stage II, the Love River Treatment Project was featured six year periods per stage to gradually construct a rainwater and waste water diversion project. Stage I Phase II of the Drainage System Project was coordinated with the six-year national development project from 1992 to 1997 in order to reach 11% of the drainage connection rate in Kaohsiung area (Kaohsiung City Government, 2008). From 1999 to 2003, Phase III of the Drainage System Project was conducted to coordinate with the household connection policy promoted by the Central Government to include the “Phase IV Project of Central District Waste Water Treatment Plant in Kaohsiung City.” When Mayor Frank Hsieh took over the leadership, drainage and household connection policy were continuously promoted. Around 1994, the director of the Love River Cultural Association, Fan Fang-lin, promoted private sector involvement. At the “Appointment Time with Kaohsiung City Residents,” Director Fan was there every week to persuade City Mayor Wu Tung-yi. (Shi, 2004).

c. Water recreation stage: By 2000, the Department of Maintenance Construction begun landscape construction based on the theme of “Water and Green Recreational Space” in five phases. In 2001, Kaohsiung City started to hold a Lantern Festival Celebration along the riverside. In addition, bridges and road lamp decorations made the Love River a more comfortable environment. The Riverside Café and Love River cruises attracted more visitors thereby starting the water recreation stage.

From the above analysis, we found that the landscape treatment strategy for the Love River mainly focused on the building of interceptor stations to solve the pollution problem and then coordinated with the drainage system project to clean the river following the construction of water recreational landscape. It took about 30 years to complete the project and is a monument to the achievement of both the public and private sector, in particular, the contributions of some key persons.

2. The Heart of Love River: In 2001, Typhoon Trami hit Taiwan and brought flood to Kaohsiung. Kaohsiung City Government, thus, entrusted National Cheng Kung University Disaster Prevention Research Center to analysis the flooding and found Po Ai Bridge is the bottleneck to the problem. Suggestion to build retention ponds were proposed including the district nearby Po Ai Bridge. From 2003, Department of Drain Construction of Kaohsiung City Government started “Flood

Control Project of Middle and Upstream of Love River” invited bidding for design project. Under fierce competition, Malone Chang Architects won over the bidding. In March, 2003, during the council meeting, Deputy Secretary-General Yao Wen-chi proposed “to build an artificial lake nearby the Rainbow Bridge of Po-Ai and Tung-mung Road to allow turning space of tourism cruise boat of Love River and flood control function” for the reference of Public Works Bureau. Finally, at the evaluation meeting of detail project planning, Public Works Bureau suggested designers to take the whole Love River area into consideration and designers agreed this flood control engineering should combine with landscape improvement and the need of turning space of the final destination of Love River cruise. Therefore, the park and green land in the south was converted into water space and to connect and extend bike routes of Love River, and that of Po-Ai Road was improved to add two crossing bridges over East and West Lake. The whole scenic site was then designed with lighting and water fountain to increase attractiveness. The construction began in February, 2006 and completed in November, 2007 and the total construction expense is NT\$170 million.

3. Bridge and lighting: This research area has bridges with tourism value from Kaohsiung Bridge to Jianguo Bridge. The shaping mechanism initiated from the public suggestion to the Mayor Office and Frank Hsieh, the former Mayor of Kaohsiung instructed Public Works Bureau to study the feasibility and implement the initiative. Mr. Lin Jung-chin, the director of Public Works Bureau during that time, invited Yao Ren-gung, the lighting expert to come down from the northern Taiwan and asked for suggestion. Details were discussed in several meetings convened by Department of Maintenance Construction and then subcontracted to lighting engineering companies.

B. Park and green land along river banks

In 1963, Japanese planned banks of Love River as a flood control park(Wu, 1988). In the early 1980s, treatment project of Love River included the dismantle of squatters and the plantation on reclaimed land along banks at the same time. Before the development, #1 Sanming Park was occupied by squatters and cemeteries. Since 1993, Kaohsiung City Government continuously dismantle squatters and in the end of June, 1996, the park was established.

1. Love River Landscape and Water Recreational Park: The project of Love River Landscape and Water Recreational Park was constructed in five phases with the aim to improve landscape and water accessibility of park and green land along river banks. The budget came from “Expanding Domestic Demand-Creating Urban and Rural Landscape Project.” Phase I distributed from Wu-Fu Road to Jhung-jheng Road, the core area of Love River tourism and recreation landscape, designed by Yo-Wha Engineering Consulate Cooperation. This project started in September, 2000 and completed in February, 2002 at the cost about 58 million. The design concept is the creation of recreational space of water and green to allow Kaohsiung residents to have their memories of Love River back, shape unique river side and green recreational space, build accessible waterfront protection pipes and wooden walk stair path to replace vertical inaccessible pipes, construct pedestrian walkway on green land and Ren-Ai Park along river banks. Among them, “the Leaping Carp into Soaring Dragon” was the public selected main lantern of the first Taiwan Lantern Festival held by Kaohsiung City. Café along riverside was operated under BOT project with each period of three and half years to provide tourism and recreational services for this district. Phase II construction planned river district from Jhung-Jheng Road to Ci-Sian Road with landscape feature of waterfront stairs and public art of love theme. Phase III is the project along Ci-Sian Road to Jianguo Bridge, designed by Chen Ming-chuan Architects at the construction cost of 35.4 million. The design concept was to convert banks of Love River into an exceptional accessible and friendly recreational environment. Phase IV construction proposed ecological engineering concept to enable the connection of water accessible facilities of banks of Love River with sustainable life of Kaohsiung City residents. Phase V construction ranged from Jhungdu Bridge to Jhung-Hua road designed by Gu Ji Cooperation. The shaping mechanism concept was an introduction to the flowing area of Love River and the re-building of wetland landscape before the existing concrete banks. After several rounds of brainstorming of senior directors of Department of Maintenance Construction and designers, “bank adjustment” concept was proposed and opinion of Department of Drainage Construction was

consulted. Director of Public Works, Mr. Lin Jung-chin, during that time gave the support and final approval. The construction removed all the pipes and restored river banks to a nature one and the design of Jhungdu Wetland. Before public sector began the improvement project of Love River landscape, community planning group took the initiative. An academic unit composed by members mostly from National University of Kaohsiung proposed “Measuring Love River,” a project of community building activities(Tseng, 2002). With the participation of city residents, opinions of the feature installation were given to existing landscape facilities and themes of each flowing area. The community participation model ended with the completion of research project. The phase 1-5 construction projects of Love River were the measures under former mayor, Frank Hsieh and carried out by Public Works Bureau. Due to the success of Phase I construction, a series of projects were implemented to improve recreation space of Ren-Ai Park. The construction of each phase was subcontracted and planned respectively: design agency proposed the concept and then contract was granted for a bid winner. The shaping procedure was conducted in accordance with the life cycle of general construction project: Budget allocation by public administration department→ approval by Kaohsiung City Council→ Bidding invitation through administrative procedure→ Bid granting→ Construction design→ Subcontracting→ Construction→ Construction Acceptance→ Open to the public and management.

2. Tower of Light: The shaping background is that TaiPower would like to improve public life standard and conducts underground HV cable project. HV cable and tower dismantling started from August, 2002 to return the comfortable living space to the residents of Kaohsiung City. In order to preserve the railway memories, the director of the Department of Public Works began several re-building projects. Sanmin District Architect Studio took over the case without knowing the exact funding and communicated with district heads and all representatives to propose “Landscape Rebuilding Project-Tower of Light of Kaohsiung.” The shaping concept is “collective memory” and it is hoped that this landscape transformation represents the process of urbanization of Kaohsiung and with the adoption of modern technology and art, power resources can be re-utilized and public art can be brought into community to give more vigor to overall urban landscape environment. With this consensus and design concept, the former Director of Public Works Bureau led the team to promote this project to “Management Committee of Power Resource Development and Assistance Foundation” and gained the approval of TaiPower and the Committee to give the power to residents of Kaohsiung City residents with 11 million construction expense for assistance. The project began in February, 2003, and commencement ceremony was held in June. In short, landscape and water accessible parks along banks of Love River can be re-divided into two districts according to landscape and function: Phase I, II, III of Kaohsiung Bridge to Jianguo Bridge, cultural art district and Phase IV and V as well as Sanmin #1 Park, community ecological district.

C. Scenic sites along banks

Famous scenic sites of this district include Holy Rosary Cathedral, Kaohsiung Film Archive, 228 Memorial Park, Music Hall, Kaohsiung Museum of History, Industrial and Business Exhibition Center, Yan Chen Pu Civic Square, Jhungdu Brick Plant, and Hakka Cultural Museum. Due to page constrains, here selects only special scenic sites for the analysis.

1. Kaohsiung Film Archive: Since 2000, Kaohsiung City Government actively prepared the establishment of “Kaohsiung Film Archive.” Before using as the practice site of Chinese orchestra, this building belonged to Yan Cheng Junior High School. Once it served as the office of Nationalist Party and was idled after Chinese orchestra moved there. After the site was decided, the City Mayor and staff actively looked for funding and in addition to budgets given to Information Office, Department of Maintenance Construction, Department of Education, and Yan Cheng Junior High School, supports from the Central Government including Ministry of Interior Affairs, Ministry of Education and the Council for Cultural Affairs were received. Architects worked from the structural reinforcement, planning to design, this idled building was transformed into film archive(Kaohsiung Film Archive, 2008).

2. Taiwan Medical Museum: This museum was established in 2003 according to the suggestion of the Director of the Department of Health, Chen Yung-hsin. In 2004, the Department of Health coordinated with “Project of Local Cultural Museum” promoted by the Council for Cultural Affairs, the Executive Yuan and proposed “Medical Museum Beginning in Kaohsiung” project that received grants for support(Taiwan Medical Museum, 2008).

3. Jhungdu Brick Plant: Jhungdu Brick Plant was built in 1917, specialized in the manufacturing of red brick in Taiwan. After the recovery of Taiwan, in 1945, Taiwan Industrial Mining Cooperation took over the plant and in 1957, Tang Eng Iron Works Cooperation purchased the plant and continued the operation. Around 1999, it was reported that residents of Jhungdu hope that the industrial heritage can be preserved. Tang Eng entrusted Graduate Institute of Art of National Chung Kung University to conduct initial study from “preservation and development” and “structure and safety” to evaluate the preservation value and feasibility of brick furnace and two chimneys(Graduate Institute of Art of National Chung Kung University, 1999). Jhungdu Brick Plant stopped operation in 1992 and Tang Eng hoped that through urban re-planning, the plant site can be changed for the use of “specially designated economic and trading area.” In 2002, the re-planning project was sent to Committee on Urban Planning for evaluation. Reporter of Taiwan Daily News, Hsieh Yi-cheng, told Director Hsu of Love River Cultural Association. Director Hsu work with the Director of Taiwan Wetlands, Tseng Lung-yun and submitted their appeal to Director of Public Works Bureau, Lin Jung-chin, requesting the preservation of brick plant. With the news report, Director Lin gave his support and instructed Director of Urban Planning Department to adjust development direction. Director Hsu actively negotiated with Tang Eng and village directors and with the allocated budget to enhance safety of brick factory buildings supported by Director Lin, community residents also gave their support to the project. By the end of 2002, Urban Planning Bureau was established to be in charge of urban planning projects. Director Hsu, thus, appealed to Committee of National Enterprise Development, the Ministry of Economic Affairs. In the beginning of 2003, Bureau of Cultural Affairs was established to take charge of historical heritage preservation. Kuan Bi-ling served as the first term of director. Director Hsu worked with more than 30 local associations that aim for the preservation and conservation of cultural heritage and ecological nature to appeal for the preservation of Jhungdu Brick Plant as the historical site. Ling Jung-chin and Kuan Bi-ling visited the site and asked for the support of the President of Tang Eng, Liu Hsian-tung. In February, 2003, the site was evaluated by Evaluation Committee of Historical Sites of Bureau of Cultural Affairs and rated as a historical site of Kaohsiung City. In June, 2004, the Ministry of Interior rated it as a national heritage site.

D. Festival activities and landscape

Large scale and famous festival activities in this area include Kaohsiung Lantern Festival and Dragon Boat Racing. In the past, island wide lantern festivals were held in Chiang Kai-shek Memorial Hall, Taipei and in order to change “focus on the Northern Taiwan development only” policy and balance the development of both northern and southern Taiwan, Chen Shui-bian during his presidential campaign in 2000 promised to have island wide lantern festival held in Kaohsiung. Chen Shui-bian was elected as the President in 2001 and the first island wide lantern festival was moved to be held in Kaohsiung, laying the foundation of Kaohsiung Lantern Festival. In 2001, for the first time, island wide lantern festival was held in Kaohsiung. Tourism Bureau, the Ministry of Transportation and Communications arranged activities in Love River Lantern area; Kaohsiung City Government was in charge of activities around Ocean Star area. Due to the success model of 2001 Kaohsiung Lantern Festival, in 2002 Tourism Bureau, the Ministry of Transportation and Communications continued holding island wide lantern festival in Kaohsiung. With the support and coordination of Kaohsiung City Government, Kaohsiung Lantern Festival has been continuously held from 2003. The shaping mechanism ties very much with political agenda during election, policy concept of mayors, the public demand for recreation. Due to the large budget expense, public sector takes charge of the planning and then sub-contracts the activity execution to the private sector.

RESULTS

The stakeholder in the shaping of scenic sites of Love River Water Way is mainly the public sector and other important influential factors include natural environment, architect office, and the public. The citizen suggestion to the Mayor Office plays an special role in the shaping mechanism of bridge and lighting. Public sector has a more obvious role to play because of the requirement of huge expense of urban water channel pollution treatment. The important stakeholders of the shaping of scenic site of parks and green land along the banks of Love River include the public sector, engineering consulting and architect offices. The main stakeholder of the shaping of scattered scenic sites along the banks is the public sector and NGOs from private sector. The major stakeholder of festival and tourism activities is still the public sector.

Although landscape may be different in each scenic site, yet it has received common impact, “the policy of the public sector.” That is to say, as a whole, the policy of public sector plays the key role in the shaping process of scenic sites of Love River area. Fig. 1 shows the shaping of scenic sites of this area and it proves the truth of the hypothesis proposed by this study: “cultural landscape” concept has more broader and indirect influence on the shaping of this area. The influence includes three aspects: material, social, and spirit. “Stakeholder” has more direct influence on the shaping of landscape of this area, in particular, stakeholders from the public sector who has the influence on material and social aspects.

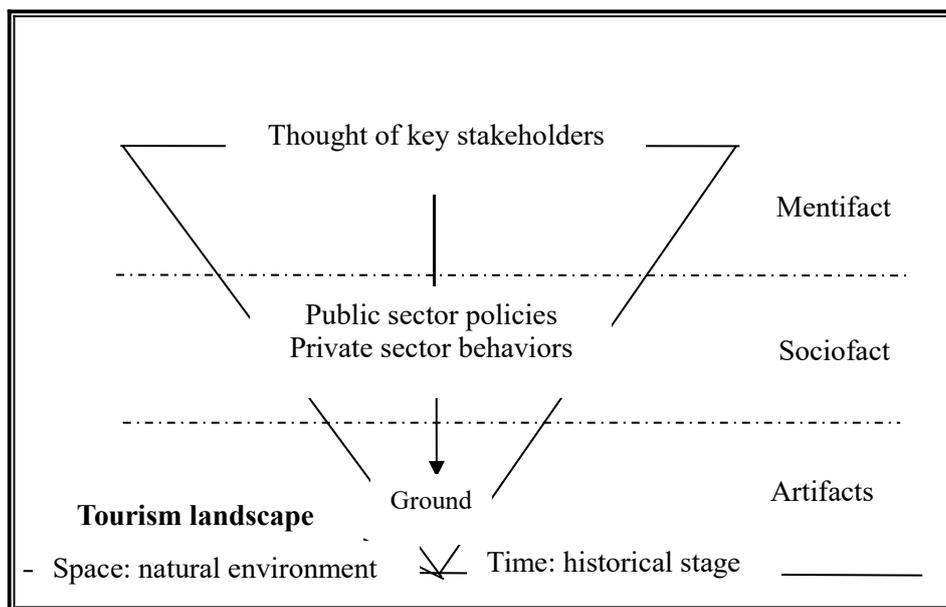


Figure 1
The Schema of Tourism Landscape Shaping at Love River Area

CONCLUSION

1. The spatial distribution of scenic sites of Love River area in Kaohsiung can be divided into Love River Water Way, Parks and Greenland along the banks, and scattered scenic sites along the banks. Parks and green land along the banks can be categorized into cultural type, from Kaohsiung Bridge-Jianguo Bridge, as well as community ecological type, from Jianguo Bridge to Po-Ai Bridge. Love River Water Way is the core of tourism resource and development of the area.

2. The development of Love River Water Way can be categorized into natural river stage before 1971, pollution treatment stage from 1971 to 2001, and water recreation stage after 2001 according to its function and landscape feature. Each stage reflected economic and cultural

development of the big environment in Kaohsiung City.

3. The major stakeholder in the shaping of scenic sites of Love River Water Way is mainly the public sector and other important influential factors include natural environment, architect office, and the public. The public suggestion to the Mayor Office plays an special role in the shaping mechanism of bridge and lighting. Public sector has a more obvious role to play because of the requirement of huge expense of urban water channel pollution treatment.

4. The important stakeholders of the shaping of scenic site of parks and green land along the banks of Love River include the public sector, engineering consulting and architect offices.

5. The main stakeholder of the shaping of scattered scenic sites along the banks is the public sector and NGOs from private sector. The major stakeholder of festival and tourism activities is still the public sector.

6. Although landscape may be different in each scenic site, yet it has received common impact, “the policy of the public sector.” That is to say, as a whole, the policy of public sector plays the key role in the shaping process of scenic sites of Love River area. “Stakeholder” has more direct influence on the shaping of landscape of this area, in particular, stakeholders from the public sector who has the influence on material and social aspects. The shaping mechanism of scenic sites of the area is shown as in Fig. 1.

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基于都市旅游的中国传统节事活动的可持续发展

柯涌晖
福建师范大学地理科学学院

摘要

中国传统节事活动存在诸多不足。借用都市具备的多方面的优势，以市场运作方式，实现传统节事与都市旅游的相结合。既达到筹办传统节事所预期的传统文化宣导效应，也为都市带来可观的社会、经济效益。

关键词：传统节事；都市旅游；创新；市场运作

THE SUSTAINABLE DEVELOPMENT OF CHINESE TRADITIONAL FESTIVAL &SPECIAL EVENT BASED ON URBAN TOURISM

Yonghui KE
College of Geographical Sciences, Fujian Normal University

ABSTRACT

Chinese traditional festival &special event should make full use of urban area's multi-advantages, with market-oriented method of operation, to integrate effectively with urban tourism in order to overcome its flaws. The rational integration not only achieves expected advising result for rational culture, but also yields handsome economical and social profit.

Key words: traditional festival &special event; urban tourism; innovation; market operation

0. 引言

目前中国的传统节事活动存在诸多现状与不足，笔者认为要保持传统节事活动的健康发展并持续扩大影响，传统节事活动与都市旅游的有机结合是积极尝试。传统节事活动可充分利用都市的品牌和配套设施、区位、消费群等方面的有利条件，以符合市场规律的操作方式，获得更大吸引力。都市也可借传统节事活动的举办塑造新的旅游形象、提高旅游知名度，从而促进地方经济发展。这样既达到筹办传统节事活动所预期的文化宣导效应，也带来理想的社会效应和经济效益。

1. 鸡肋：中国传统节事活动在现代社会中的窘境

中国的传统节事活动，包括传统节庆和特殊事件庆典活动。作为传统节事内涵价值的体现和表达，中国传统节事活动有着悠久的历史，是通过世代相传的方式延续至今，有着广泛的群众基础。但是随着社会的深刻变革，社会生活多样、多元、多变的特征日趋明显，人们的交往方式和情感表达方式发生了很大变化。在都市生活中，外来节事愈发流行，如狂欢节、啤酒节等受到市民尤其是年轻人的喜欢。同时，地方政府从也更愿意筹划、举办具有很强的参与性、娱乐性外来节事活动，以吸引更多关注和更多群众参与。

与此相对，我国的传统节事活动无论在文化内涵的挖掘上，还是在内容和形式的创新上，都不能适应社会发展和人民群众的要求。目前民众参与传统节事活动大多受惯性思维的影响（如除夕夜包饺子）；政府部门更多顶着保护与宣扬传统精神的职责，草草举行，匆匆结束。中国传统节事活动在现代社会的生存空间日趋狭小，陷入一种“食之无味，弃之可惜”的尴尬境地。

2. 与市场的背离：传统节事活动的阿基琉斯之踵

传统节事活动在现代社会的影响力萎缩，是其固有的“致命伤”，主要表现为四个方面：

2.1 缺乏亮点：传统节事活动特色不鲜明。感恩节的烤火鸡是最地道美国传统节事活动，而同样是狂欢节游行，巴西狂欢节的游行以规模宏大、狂热桑巴舞和华丽服饰别具一格。前者蕴含无可替代的地域历史文化；后者则用不同的包装和表达在同质产品中显得与众不同。两者都因为“独特”吸引世界的眼球。相较之下，许多中国地方的传统节事活动都缺乏亮点：活动筹划匆忙，没有经过细心的市场分析，时常流于普遍化，如元宵灯会、端午包粽、中秋赏月；活动表现手法一层不变，各地的传统节事活动“千人一面”。所以许多传统节事活动给人以内容乏味、缺乏创意、固守成规的感觉，与社会的日新月异和人民群众求新求变的欣赏心理格格不入。

2.2 “包办婚姻”：政府主办为主，缺乏民间力量参与。目前大多数的传统节事活动还是由地方政府一手包揽，政府既是活动的主办者，又是具体事务的操办者。依靠行政命令、缺乏市场运作导致了节事活动缺乏现代化的管理、营销观念。从项目策划到招商，从搭台布景到拉赞助广告，来自各个部门的组委会成员亲自参与节事活动的业务活动，较少考虑引入社会力量和民间资本来承办。结果政府部门疲惫不堪，但并没有调动民间积极性，社会资源没有充分利用，而这种情况的存在反过来又进一步伤害地方政府举办传统节事的热情。

2.3 闭门造车：管理主观臆断，缺少科学规划。举办节事活动不仅图热闹，更是要留下印象，留下口碑，留下市场。许多地方的传统节事活动由于缺乏统一规划和管理机制，所选取的具体内容杂乱无章，与主题相去甚远。节事组织者对节事定位不准，对举办条件和方法不作市场信息调查和可行性预测，缺乏科学的决策依据。

2.4 收益微薄：缺乏有效运作，没有“造血”功能。曾有一段时间，全国掀起一阵传统节庆的热潮，但是各地在投入数以百万甚至千万计的财政后，却没有收到应有效果：节事活动投入与产出不成比例，企业不感兴趣，市民反应冷淡。究其原因，单一的行政手段排斥了多元的市场操作，造成节事活动的运作成本过高，财政负担过重，效益不明显；节事活动没有把市场需求放在重要位置，节事活动方面的专家缺乏，节事活动的专业策划运作能力薄弱。所以，多年来传统节事活动只能简单依赖于政府财政投入、相关社团和热心人士的捐赠，就如同白血病人，没有自身“造血”功能，只能靠“输血”过活。一旦停止“输血”，则无法继续生存。

综合以上分析，中国传统节事活动从策划、布局到宣传、销售，违背市场运行规律，无法实现投入与产出的平衡。诚然，根本上讲，举办传统节事的目的并不必然是获得经济效益，但鉴于市场在经济、社会生活中的主导地位，传统节事也必须以市场认可的方式运作，才能保持生命力。换言之，传统节事一方面要坚持其代表的核心价值和丰富内涵，另一方面，要积极主动地向市场靠拢：在不违背大原则前提下，传统节事要充分利用市场的各种特性，实现“华丽转身”。要知道只有“活下去”，才可能“活得好”。

3. 顺势而为：传统节事活动有效借用都市资源

目前许多地方下大力度筹办各种大型节事活动，并借用节事活动的“轰动效应”吸引游客，进一步发展旅游业，借此拉动消费，带动相关产业发展。可惜的是，传统节事活动由被关注度低，不但为受青睐，反而逐渐被其他节事活动取代，尤其是在都市更是乏人问津。但是我们应当看到，中国的传统节事活动具有悠久历史和深厚的地域文化内涵，为广大区域内乃至区域间不同人群共同接受的行为方式，所以传统节事活动蕴含的巨大经济价值。因此实现都市旅游与中国传统节事的巧妙联合，进行都市传统节事旅游的推广有其可行性，而且从保护传统文化、促进传统节事活动的可持续发展看，也有其必要性。节事活动的组织者只要能充分把握都市在举办传统节事活动上的有利条件，并配以正确市场运作，是可以收到经济、社会和政治的多重效益。

3.1 经济条件

3.1.1 相当的经济水平。按照马斯洛的五层次需要理论，人们只有满足底层次的生理、安全需求后，才会考虑较高层次的精神需求。参与传统节事显然属于后者。考虑节事活动的受众群大多

是当地的居民和近区域居民，也就是说只有当他们的人均收入达到一定的水平，有相当的消费能力时，才有可能形成对节事产品大量的有效需求。都市居民的收入水平和精神产品的需求明显高于其他区域的居民，就为都市传统节事旅游提供充足的消费群体。

3.1.2 市场开放，运作有效。传统节事与都市旅游的结合，需要采用市场化运作。但如果所在区域是封闭的经济体系，则会制约资源要素的流动，进而影响传统节事旅游的招商引资、人才引进。同时如果传统节事旅游的市场化运作不成熟，资源无法优化配置和整合利用，部分设施可能闲置，达不到效益最大化。都市作为一个区域的“增长极”，对外开放层度高，在市场的商业化运作上也具备丰富经验。

3.1.3 设施条件良好。节事旅游活动的开展对基础设施有极大的依赖性，如果没有较为完整的基础设施条件，节事特别是大型节事活动根本没有展开的空间。都市一般拥有较完善的基础设施：包括住宿、交通和通讯、餐饮、购物等，同时还包括完备的服务网络。这些为都市传统节事旅游活动的开展提供必要条件。

3.2 制度条件

3.2.1 稳定、合理、灵活的经济制度。都市的经济制度稳定有序，政府对经济活动中产生一系列问题等都有相应的合理规定，又由于灵活的市场运作观念为多方接受，制度修订与政策反应灵活，传统节事旅游的各方参与者可以在高效的制度下，放心地组织活动。

3.2.2 社会制度对节事活动的保障。里约热内卢的狂欢节上，女性着装火辣性感，这已成为当地狂欢活动的独特风景，但此活动在伊斯兰世界却很难得到许可。同样地，日本性祭祀节在许多国家和地区被视为淫乱之极。任何一类节事活动，如果得不到社会制度许可，则无开展和推广可能。当然中国传统节事活动少有引起类似的激烈争议，但是一个好的制度环境对于传统节事的举办无疑有推动作用。由于都市经济发展带来社会有序化，能够为都市传统节事旅游开展提供更为稳定的法律、法规和制度保障。

3.3 文化环境的包容。开放、包容的文化环境是传统节事活动发展不可缺少的条件。都市具有更为开放的意识，往往能随着时代的进步，开展反映各种风格、不同文化传统的节事活动。这就为传统节事旅游的比较与借鉴，提供极好的平台。都市传统节事旅游可以吸收优秀文明，在不断创新的文化环境中，顺利实现节事活动的再创新发展。

4. 发展都市传统节事旅游的原则

4.1 体验性：满足游客的体验需求，使节事旅游更具生动性和参与性是节事成功的关键所在。都市传统节事旅游活动要避免以往传统节事活动“神圣”、“高高在上”的味道，其内容与形式要从游客体验需求出发，力求丰富和满足游客的各种体验需求。

4.2 创新性：创新性是节事成功的基石，别开生面和创新思维是节事活动的吸引力、生命力之所在。创新乃是节事之魂。以往造成传统节事活动因为缺乏创新，显得雷同和低层次重复，没有自己的品牌和风格，不能以当地的地脉、文脉及社会经济条件为依托，缺乏永久性、垄断性、制度化的旅游识别标志。所以都市传统节事旅游活动的举办要以前车为鉴。

4.3 整体性：都市传统节事旅游活动的内容组合形式要严谨，环环相扣，围绕主题开展；节事活动社会与经济效益并重；要吸引本地居民和外来游客一起参加；要吸引多方力量开发节事。

4.4 大众化：民众的广泛参与是任何节事活动蓬勃开展的基础，脱离了这个基础则一事无成。广泛的民众性是旅游节事赖以成功的魅力所在。所以都市传统节事旅游成功的关键动力是首先必须得到本地居民的广泛认可、支持和喜爱。如果本地居民不喜欢，那么这种情感很快会波及到外域游客。

4.5 个性化：个性化是旅游节事的生命力。“旅游节事必须强调区域的特殊性和个体性，有自己的特色，才能吸引全球更多的观众”。目前国内一些城市传统节事活动的举办远远达不到预期目的，原因之一是“节事”缺乏独特的魅力，缺少吸引力。

5. 筹划与运作都市传统节事活动的具体建议

5.1 挖掘文化内涵，力求中西融合。文化是旅游产品追求差异与个性的基础，都市旅游也是如此。文化性是传统节事最重要的特征：传统节事活动具有丰富的文化内涵，体现着深厚的文化特色，这是传统节事活动真正吸引民众的深层次因素，可以说，有了文化内涵，传统节事活动才有它的生命力。所以，演绎文化内涵、追求文化特色是都市传统节事旅游保持永久魅力的必然选择。要摒弃以往“生搬硬套”的做法，真正把一个传统节事及活动所代表的内涵挖深、挖透，这既是对事实的尊重，更是该节事旅游活动得以推广的品质保证。但仅挖掘自身的历史文化积淀是不够。要想区别于广大城乡地区的传统节事旅游活动，组织者就必须利用都市开放和包容环境的优势，吸收外来先进文化的养分，从而创造出既显示浓厚本土韵味，又展现时代个性与创新精神的都市传统节事旅游活动的优质产品，既区别于一般的传统节事活动，也不同于都市其他形式的节事旅游活动。这样的错位很大程度上符合游客求新求变的心理需求，无疑会扩大节事的影响，形成核心竞争力，从而获得节事活动的生存空间和发展可能。

5.2 找准市场定位，实现传统节事与都市旅游的互利

5.2.1 寻找合适的传统节事旅游品牌。旅游目的地对节事活动举办的浓厚兴趣和高度重视主要源于节事广泛而深入的影响与作用。因此，任何节事活动的举行，对于旅游目的地来说，其实质是相当的。中国地域面积广阔，民族众多，各种传统节事活动众多。传统节事活动要想在都市旅游中脱颖而出，不能仅考虑反映传统文化与地域特色，而是要结合现实，优先选择参与性、观赏性、娱乐性高的传统节事活动。由于这类节事活动的大众化，民众易于接受，民众喜欢必市场认可，市场反应良好则必获得政府大力支持。所以这类带大众化性质的传统节事旅游活动在都市中先发展起来，可更快吸引外部目光聚焦，迅速提升都市的知名度，有利于都市旅游整体竞争力加强，基于此，地方政府也会大力扶持，这就为都市传统节事旅游的循序发展提供强有力的保障。

5.2.2 适时培育传统节事旅游新品牌。在都市以市场易于接受的传统节事活动为窗口和桥梁，打开知名度、提升整体竞争力后，随着更多人流、物流、商流到来，要保持传统节事旅游既有的吸引力并继续扩大影响，则必须不断用旅游的产业眼光和运作方式审视都市中其它传统节事活动的亮点。通过挖掘这些传统节事的内涵与文化特色，把握它们的市场切入点和可操作性，培育出新的品牌。从而真正实现传统节事活动与都市旅游互惠互利。此时，由于整体上传统节事活动已经基本具备“造血”功能，要用资金反哺形式资助部分市场一时无法接纳的节事活动，其一因为某些传统节事活动本非着眼于经济效益而是教化宣导；其二这类节事活动同样是特定地域文化的凸显，如此可以把都市所代表的精神风貌和核心价值体现更为充分，这反过来又为都市的整体形象和旅游吸引力加分。

5.3 更新宣传观念。旅游经济是典型的“眼球经济”，旅游宣传是旅游业持续发展的重要动力。都市传统节事旅游也不例外。宣传不仅涉及广播、电视、报纸、杂志、网络等多元媒体，还有大篷车现场促销、旅游交易会、主题节事活动、节事表演等多种形式，形成出新、出彩、出特色的全新推介模式，这些方式正是宣扬传统节事旅游品牌的重要手段。与以往不同，宣传都市传统节事旅游产品特别注意打破以往宣传旅游产品的观念，把传统节事活动紧密联系都市整体形象。要有意识突出强化对都市整体的宣传，这样既借助都市相对的知名度为传统节事旅游活动引来更多人气，也利用传统节事旅游活动的新意给群众不同以往的都市亮点和特色，为都市旅游注入新的活力和客源。

5.4 节事旅游的市场化运作。组织者在传统节事旅游的筹办过程中应积极转变观念，用可持续发展的思路，把单纯举办活动变为经营节事产业，促进都市传统节事旅游全面协调发展：政府部门努力推行节事活动的市场化和产业化运作，建立多元的筹资机制，完善投资回报机制。在具体执行时，政府可以只是名义上的主办者，通过专营权转让等形式使社会资本进入，不仅减少行政成本，也增加财政收入。同时政府要加强监控，一方面加强对活动筹办者市场行为的监控，保证传统节事

旅游沿着既定路线前行,达到繁荣经济、弘扬文化、活跃生活目的。另一方面也要加强对其他市场主体的监控,防止不法手段对筹办者的利益损害;民间力量作为真正传统节事活动筹办者,享有活动的绝大部分收益,并承担可能的投资风险。

5.5 新颖的包装方式。都市的传统节事旅游活动不应仅停留在表面的气氛渲染和公式化表演,而应走向深度开发和组织。根据都市游客需求心理的不同与兴趣点变换快特性,不断推陈出新。不仅强调内容的丰富性和创造性,更着力于采用新颖的表达方式和包装手法。对于已初成规模的都市传统节事活动更是如此,因为“知名度的保持或巩固同样必须用优质来强化,否则知名度将消退甚至走向反面”。

5.6 侧重游客对传统节事的体验享受。走马观花式的游览方式已不满足于现代旅游者的心理感知需求,于是现在游客易于参与、可亲身体验的节事活动有着更广的市场认可。许多传统节事自身浓厚文化底蕴、繁杂的仪式程序都要求参与者对节事本身有较深刻理解,这直接大大提高外地游客甚至是本地人的参与节事的门槛,常给参与者“近在眼前,远在天边”的错觉。所以在都市传统节事旅游的项目设计上,应当依据传统节事活动的内涵,挖掘乃至增加普通群众与游客易于参与、在体验过程中又能获得精神愉悦和文化享受的环节。如以传统节事的文化内涵为背景,举行体育竞赛、知识问答、互动游戏等形式活动并辅以一定物质奖励,都可以激发游客的强烈参与热情和兴趣,获得了更多的体验享受,留下美好难忘的回忆。

5.7 开发都市传统节事旅游活动的纪念商品。都市传统节事活动起到的“轰动效应”,只能暂时的留在社区居民和游客脑海中。要想让传统节事活动深入人心,不仅要当下热烈的氛围,更要有让游客时刻会“惦念”的纪念商品。有个性的旅游纪念品,既具有延长审美体验过程、升华体验价值的作用,又有助于宣传节事旅游的效果。应当强调,都市传统节事旅游的纪念商品不是追求奢侈与豪华,但要有特色,其设计方案要根据经久性“回忆”的美学效应。一件体现传统节事内涵的手工艺品,一条印有特殊标志的领带,甚至一封明信片,都可以为都市传统节事旅游增色不少,甚至还有意想不到的广告效应。

5.8 活动安排合理,加强安全管理。与其它任何节事活动一样,都市传统节事旅游的也要合理安排,并注意安全风险的控制。特别由于都市人口周密,基础设施容积率高,如不合理规划,出现安全隐患的几率很大。所以在节事活动举办之前,组织者应该把节事活动的内容、活动安排的日程和时间、节目单、举办活动的地点、行走的路线等具体的信息以及各种安全注意事项,通过各种媒体公布于众(可在嘉宾的邀请函中附上相关信息),使外来游客有一定的事前准备。在活动举办期间,旅游地要加强安全管理,规范游览秩序;在重要区段实施系统的整体的交通管理政策,保证活动场地的畅通和活动的顺利进行;制定并严格执行相应法律法规,做好市场规范保障工作等等。

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作者简介:

柯涌晖(1981-),男,福建师范大学地理科学学院2006级研究生,研究方向:旅游开发、规划。

福州市“三坊七巷”历史文化事件旅游开发创新及其推广价值

王艳辉 袁书琪 彭俊芳
福建师范大学

摘要

中国历史文化名城福州要成为名副其实的中国优秀旅游城市,必须对“三坊七巷”历史街区的历史文化进行显化、活化和外化,为此必须以历史文化事件的旅游开发作为主要方式。选择和创新历史事件文化旅游开发是我国历史文化旅游发展的当务之急,值得大力推广。

关键词: 福州市;“三坊七巷”; 历史文化; 事件旅游; 推广

INNOVATIVE EXPLORATION AND PUBLICITY VALUE OF HISTORICAL AND CULTURAL EVENTS TOURISM IN FUZHOU'S "THREE LANES AND SEVEN ALLEYS"

Yanhui WANG Shuqi YUAN Junfang PENG
Fujian Normal University

ABSTRACT

As one of Chinese Historical and Cultural Cities, FuZhou should become a truly outstanding tourist city. To accomplish this task, we must make the historical culture of "Three Lanes and Seven Aalleys" historical and cultural blocks explicit, activating and alienated.,so developing the historical and cultural events is the main way to improve the tourism , in the meanwhile, to choose and innovate historical and cultural events is the urgent affairs for the development of our country's history and culture tourism ,it is worth of spreading.

Key words: FuZhou, "Three Lanes and Seven Aalleys", Historical Culture, Events Tourism, Publicity

一、问题的提出

福州市作为中国历史文化名城的独特价值在于中国中原文化的“活化石”,中国近代化和海洋文化的发祥地,这是福州市也作为中国优秀旅游城市的旅游文化内涵,如此重大的旅游文化价值迄今鲜为人知。

“三坊七巷”是福州历史名城的核心历史街区,是上述旅游文化的核心载体,是我国南方保存最完整的传统坊巷结构历史街区^[1],迄今未作市场化产业化开发,是福州市历史文化旅游知名度远低于固有价值的主要原因之一。当前,政府投入巨资,全面修复“三坊七巷”,如何开发、建设,为业内所关注,一些静态展示为主的构想令人担忧。如何走出一条历史街区文化旅游热销的路子,其实践与理论意义已超越“三坊七巷”、福州市,具有全国性乃至世界性。在我国新近规划的12个重点旅游区中,福州市是居首位的海峡西岸旅游区的唯一省会城市,建成世界级旅游目的地以适应2020年我国成为全球最大旅游目的地国家的形势,已时不我待。

以静态展示为主的历史文化旅游产品,旅游吸引力正有下降,市场供给量已经超过需求量。“三坊七巷”是生活着的历史街区与现代社区,如果都是变成博物馆式的展示区则索然无味,社会生态将不复存在。“三坊七巷”古建筑众多,功能多样,如果都用作静态展馆,则旅游产品单一,重复开发的重复次数多到令人望而却步的可怕地步。“三坊七巷”历史街区并非以商业为主要功能,旅游开发过程中若过度商业化,则无疑于对可能成为“世界文化遗产”的聚落的大规模破坏。及此种种,都要求“三坊七巷”旅游开发遵循保护生活的原则,用历史事件的再现为旅游活动对象,以保存完好的建筑环境为历史事件的空间,走出一条历史文化街区活动体验的新路。

二、问题的解决

解决“三坊七巷”历史文化旅游价值高而静态展示旅游吸引力低的问题，必须借助发生在“三坊七巷”内，或发展在“三坊七巷”外但与“三坊七巷”名人密切相关的历史事件，“三坊七巷”的历史文化显化、活化、外化，成为能够转化为深度体验旅游产品的被盘活的旅游资源存量。

1. 显化“三坊七巷”历史文化的历史事件的选择

(1) 重大历史的重见天日

“三坊七巷”中的“杨桥巷”、“双抛桥”仍存，而“水流湾”作为重要的“水都福州”历史见证早已不见潺潺水流。历史上的东街口附近的福州最大商业中心的内河商埠已被历史岁月湮灭，杨桥巷也已被拓宽改造成车水马龙的杨桥路。结合当前福州市内河大规模整治和“水上游福州”的旅游开发，恢复水流湾、双抛桥流水潺潺的历史景观，让游客乘福州传统商船到东街口，参加曾文明于海内外的东街口茶庄开业典礼，再现这一历史事件，恢复历史上的福州“水都”繁荣景象。让双抛桥的古河道、古榕树、古桥亭重新见证隐没的历史情景。

(2) 史籍史料的情景再现

“三坊七巷”中的黄巷名士辈出，一代名臣梁章钜，丰功伟绩，但遮蔽在左海伟人林则徐的光辉下，当代鲜为人知，轰轰烈烈的抗英禁烟运动，并不是林则徐一个人所能力挽狂澜的，梁章钜与林则徐政见相同，功绩卓著，其故居是黄巷中的重点古建筑，规模宏大，气势恢宏，必须加以有效利用，凭借林则徐为梁章钜祝寿的历史事件，让游客参加盛大寿典和寿宴，从中深刻体验梁、林二人的情谊和历史功勋，发掘出隐藏在史书中的珍贵历史文化。

(二) 活化“三坊七巷”历史文化的历史事件的选择

1. 影视幕后情节复活

《船政风云》中的船政大臣沈葆楨不辱使命，开创了造船水平与德国汉堡相媲美的世界造船中心马尾船政的辉煌历史。今人虽从影视艺术审美中获得船政辉煌的意象，却不知辉煌背后兴办船政的辛酸，其中最大的难题便是资金短缺。沈葆楨故居在“三坊七巷”中的宫巷，在沈宅中重演沈葆楨与各种社会关系共商筹款事宜的历史事件，让游客参加观摩乃至讨论，深刻领略波澜壮阔的历史大事件的幕后情节，将史实的展示由说教改为活动，更富有教育意义和旅游吸引力。

2. 世界街市的重新搞活

“南后街”是“三坊七巷”对称轴，是历史名城核心社区的商业街，可恢复的商业活动很多，但是如果急功近利，主要恢复地方美食、特色工艺之类的商业活动，则其档次偏低，商业气息过于浓厚而会冲淡其固有的文化气息。历史上的南后街是文化商业街，以文化产业为主，对于当今正在倡导的文化产业化很有借鉴意义。国内外名人曾在这里买到我国著名古籍，这里曾是世界级的书市，仅次于北京琉璃厂。发掘历史，依托来这里买过书的国内外名人，以及这里曾经经营过的国内外名著（如最早的茶花女），开发“追随”国内外名人淘书的活动，用历史上的名人买名书事件重新搞活世界书市，补充大量国内外名著，尤其是集聚古籍及藏本，重建一个可与琉璃厂媲美的世界文化街市。

(三) 外化三坊七巷历史文化的历史事件的选择

1. 外地史实的本地表现

世界独一无二的工艺脱胎漆器的地理标志地是“三坊七巷”中的“杨桥坊”，这里有脱胎漆器

创始人沈氏的故居和生产作坊，虽被道路改造和房地产开发所湮没，但遗址位置尚存，可以小范围恢复沈氏旧居。脱胎漆器创始早期就获得世界博览会金奖，这对我国当今举办世博会是有意义的的文化底蕴，可以采取当年脱胎漆器在世博会获金奖后沈氏向家族、工人说明获奖景观和工艺特色优势的形势，让游客参与这一历史事件，深入了解这项旷世工艺的原理和地位，进而开发学习、制作和购物等旅游活动。

2. 本地事情的外地活动

“三坊七巷”旅游空间十分有限，这是“三坊七巷”按常规开发历史文化旅游的一大瓶颈。“三坊七巷”丰富多彩的历史事件需要充分的开发，就要借助“三坊七巷”外的广阔空间。“水榭戏台”是国内罕见的坊巷精致戏台，文化价值极高，但周围空间狭小，舞台空间有限，难以策划旅游活动，可以在“水榭戏台”上演精致的各种折子戏片断，缩短观看时间，提高流转率，而在福州西湖仿造“水榭戏台”的放大建筑，上演“三坊七巷”达官贵人和名人雅士曾经欣赏过的各种戏曲名目，重现历史事件。历史上，“三坊七巷”内每年都有具有福州特色的民俗节事，如正月初一依托“线面”、“糖粿（非今糖果）”、“肉丸（非今肉丸）”的拜年，元宵依托橘灯、玉灯的赛灯，正月二十九依托“拗九粥”的孝母敬母，二月二依托咸粥的集体走亲，清明依托“光饼”（戚继光军粮）、“菠波粿”的祭祖，端午依托肚兜、香袋的午时茶会，七月七相亲乞巧的瓜果会，中秋依托礼饼（孙权赔了夫人又折兵时送刘备的礼品）的赏月，重阳依托重阳糕、风筝的登高，十二月初八依托腊八粥的浴佛，十二月二十四依托“花面壳”、“灶糖灶饼”的祭灶等等，外移西湖，成为历史名城城市旅游的一道风景线，充分体现“三坊七巷”文化的博大精深。

三、问题的反思

限于篇幅，本文只列举乐借助历史事件显化、活化、外化“三坊七巷”丰富的历史文化，生动活泼的开发典型的历史文化名城福州中原遗风和近代重大历史事件等旅游资源的“沧海一粟”，通过此类实践，队历史文化事件旅游开发创新及推广有以下反思。

（一）历史文化旅游开发应以活动体验为主

历史文化旅游世我国成为旅游强国的一大支柱，但历史文化旅游的开发方式和开发层次多，千篇一律的以静态展示为主，难以吸引国内外现代游客，深度旅游体验必须让游客参与活动。游客的活动体验还有被动于主动之分，历史文化旅游的开发应当多层次多形式，坚持以主动体验为主，例见表 1。

表 1 历史文化旅游开发体验的不同形式与层次

旅游资源	静态展示	动态参与	
		被动参与	主动参与
林觉民故居	林觉民生平展	《与妻书》讲解	林觉民创办的女学修学
田都元帅庙	林则徐题匾观光	林则徐庙旁读书演示	林则徐献匾典礼参与
严复故居	严复晚年生平展	严复思想解说	严复思想今用讨论
林旭故居	林旭生平展	林旭与戊戌变法讲堂	戊戌六君子议政参与
电光刘旧址	中国最早电灯公司博览	早期电灯观光操作	刘氏家族创办电灯公司董事会参与讨论
《闽川名士》	著作与作者简介	查索闽川名士生卒	闽川名士群英会参加
宛平县长故居	宛平县长生平展	宛平县长办公演艺	宛平县长回乡会亲参与
郭化若祖居	郭化若作品欣赏	我军儒将业绩讲座	我军儒将作品研讨
新四军办事处旧址	福建新四军博物馆	听张云逸、闻一多的报告	做一天“新办”工作人员
刘崇佑故居	刘崇佑博物馆	刘崇佑为五四、一二九运动、抗日七君子辩护演艺	模拟记者采访“刘崇佑”
郑芝龙官邸旧址	一代梟雄郑芝龙生平展	郑芝龙与郑成功议事演艺	郑芝龙功过辩论

（二）历史文化旅游应依托历史事件

历史文化旅游的深度体验必须通过参与历史事件才能实现。简单、笼统的说教、消极地观看演绎，印象不可能深刻。重大历史事件或节庆不可能作为日常性旅游产品，必须遵循以“小见大”的原则，从重大历史事件中截取游客可以参加、历史街区和古建筑空间可以容纳的片段，让游客在事件参与中全方位、多层次的体验历史文化。例见表 2。

表 2 重大历史事件中旅游产品开发的事件片段

重大历史事件	旅游开发事件与片段
黄巢起义军进入“三坊七巷”	在安民巷书写张贴起义军安民告示
近代工商业曾氏在安民巷建设“曾半街”民宅聚落	参与曾氏家族于建筑商商讨建筑风格
打入敌营的吴石将军策动国内革命战争、抗日战争、解放战争中的重大事变	与吴石将军后人谈吴石将军的家庭生活
清末民初海军建设	近代中国海军舰模制作和舰模比赛
士族科举同科高中	士族家庭传统修学研讨
“光禄吟台”诗社赛诗会	“光禄吟台”射诗比赛

(三) 历史事件对历史街区与古建筑保护的作用

历史街区于古建筑的历史以静态展示的方式开发，则坊巷和古建筑内部都以修建固定的展示设施，破坏乐原生态的生活气息。往往需要迁出原住居民，使坊巷古建筑不再是“生活着的”而成为商业表演的场所。历史事件需要活着的古建筑，不需要装修外加的东西，尤其是需要原住居民的配合，保持生活着的“三坊七巷”社区。而且片段历史事件世可以变换的，一项重大历史事件可以化解为众多的片段历史事件，而场景不必有很大的变换。因此，历史事件的旅游开发可保证历史街区、历史文化名城旅游开发的持续性、永久性。

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***项目支持:** 国家软科学研究计划项目 (2003DGQ3D112); 福建省社会科学规划重大项目; 福建省自然地理重点学科研究项目

作者简介

王艳辉, 男, 河南省周口市人, 福建师范大学地理科学学院 07 级硕士研究生, 福建师范大学旅游研究所助理研究员; 袁书琪, 男, 上海市人, 福建师范大学旅游研究所 (国家旅游规划资质) 所长, 福建师范大学地理科学学院教授、博士生导师; 彭俊芳, 女, 福建省莆田市人, 福建师范大学旅游研究所助理研究员。

论中国“文化遗产日”活动的策划运作——基于对重庆市的综合性调研

吴辉

重庆师范大学历史文博学院

摘要

“欧洲遗产日”活动、成都“非遗节”等国内外“遗产日”活动迅猛发展的经验启示,“中国文化遗产日”(以下简称CHD)活动有很强的发展潜力,并能推动旅游业、文化遗产、博物馆的可持续发展。但,这一大型节事活动的策划运作和相关的学术研究,均尚处于起步阶段。本文基于对重庆市CHD活动的调研,提出对政府、旅游业、城乡社区等中国CHD利益相关者的公关拓展和市场营销计划,以将遗产的公众传播、公众参与和城乡社区生活、游客体验相结合,为遗产申报奠定基础。笔者提出,CHD主办方应该重视与中国各地已有节事活动的资源整合与科学规划;CHD可以作为都市旅游的营销工具,但应针对不同类型的城市采取不同的模式,“因城制宜”。成都“非遗节”模式只适用于少数都市,而重庆CHD可以被视为2006-2008年中国CHD的典型模式。笔者从游憩理论、消费者决策理论、旅游容量理论角度,对2005年、2006年河南CHD游客数量的巨大落差现象进行解释,并由此提出CHD的产品开发应注重以游客体验为核心。

关键词: 中国“文化遗产日”活动(CHD);“欧洲遗产日”活动(EHD);遗产申报;传承保护;节事旅游;都市旅游

THE SUSTAINABLE DEVELOPMENT OF CHINA CULTURAL HERITAGE DAY - BASED ON CHONGQING INVESTIGATION

Hui WU

History and museum faculty, Chongqing Normal University

ABSTRACT

Initiative launched in France since 1984 ,the European heritage day(the EHD) has been developed fast and constantly since 1991. For instance, the number of tourists who participated French events in 2005 was beyond 18% of French population. Also, The EHD has enhanced the sustainable development of European tourism, museums and heritage sites. Each province of China celebrated China's first Cultural Heritage Day (the CHD) in 2006. Thus , CHD is facing challenges and opportunities. This paper is based on a public investigation in Chongqing City .The CHD in Chongqing is typical in China. So the paper is also valuable for CHD in other areas .The author put forward a series of advice in public associations and marketing, aimed at the stakeholders of the CHD. She wants to combine the community participation, tourists experience, the public cultural spreading and the application of heritage. She advocates, conformity local events resources and scientific planning are important to CHD. When we regard CHD as a marketing tool of urban tourism; we need to adopt different models in different types cities. Furthermore, she tries to explained why the tourists number of CHD in Henan province decreased so rapidly in 2005 and 2006. At last, she discusses the production of CHD should focus on tourists' experience.

Keywords: the European heritage day(the EHD) ; China's Cultural Heritage Day(the CHD) ; Events tourism; urban tourism; the application of heritage; the preservation of heritage

一、引言

1. “欧洲遗产日”活动概述

一年一度的“欧洲遗产日”活动(“The European Heritage Days”, 以下简称EHD)项目,由一国主办,以一个城市为中心,其他参与国也在国内各地举行系列活动。项目内容包括免费开放各类历

史建筑、纪念性建筑、文化遗产地和举办系列相关的教育活动。自 1991 年欧盟理事会正式设立 EHD, 迄今已有 49 个《欧盟文化协议》缔约国参加这一活动。每年九月的第三个周末, 异彩纷呈的 EHD 活动在各国层出不穷。EHD 已经成为欧洲建筑、文化和遗产方面最大的盛事之一, 且对博物馆、文化遗产地、旅游业的发展, 对公共关系、社会教育的提升均有显著的推动作用。每年参加 EHD 活动的洲内外游客超过 2 千万人。参与每年法国“文化遗产日”活动的国内外游客数量庞大, 如 2005 年、2006 年都超过 1200 万 (超过法国总人口的 18%)。(表 1)。EHD 活动的策划运作已趋于成熟。

表 1 法国“文化遗产日”活动情况

年度	2002	2003	2004	2005	2006
免费开放景点数量 (处))	13472	13271	14000	超过 15000	超过 15000
活动数量 (项)	19230	19201	19000	20000	23000
游客数量 (万)	1150	1150	1200	超过 1200	超过 1200

数据来源: 法国“遗产日”活动网站 <http://www.journeesdupatrimoine.culture.fr/>, 由人民文学出版社法语编辑翻译相关信息。

2. 中国 CHD 活动总貌

2006 年, 中国正式设立“文化遗产日”。自此, 每年的 CHD, 中国各地都会举办主题性的系列宣传活动。2006-2008 年, 中国 CHD 活动的策划运作已在趋于模式化的同时开始呈现出地域差异。

除北京、成都等少数地区, 中国大多数省市 CHD 活动集中在 1-2 天内进行。根据国务院、文化部、国家文物局 2006-2008 年的相关规划、文件、通知对组织 C A D 活动的要求和激励办法, 中国各地文化文物部门举办的 CHD 活动形式多为专家讲座、非物质文化遗产展演、博物馆遗产地的免费或优惠开放、学术研讨会 (或论坛)、讲座、文物工作汇报表彰、文物法规宣传、邀请领导出席、组织媒体报道与学校活动、专家文物咨询鉴定、专题讲座、文物保护单位与非物质文化遗产名录发布等。

表 2 中国部分省市 CHD 情况统计表

	举办时长 (天)	免费或优惠开放 的景点数量 (处)	举办活动数量 (项)	游客数量 (万)
2005 年“河南文化遗产日”	2	73	10 项	460. 3
2006 年河南 CHD	2	150	5 大类超过 20 项	149. 2
2007 年河南 CHD	2	120 多处	5 大类 30 余项	无统计数字
2007 年成都“非遗节”	20	无统计数字	11 大类 270 项	400

数据来源: 中国期刊远程网, GOOGLE、BAIDU 搜索 (因信息公布限制, 部分数据缺项)

CHD 及其衍生的成都“中国非物质文化遗产节”(以下简称“非遗节”), 都已显示出很强的发展潜力。如参加 2005 年“河南文化遗产日”和 2007 年成都“非遗节”的国内外游客数量均超过 400 万。(表 2)

虽然文物景点免费、优惠开放的情况大同小异, 但, 2005 年“河南文化遗产日”游客超过 460 万, 而 2006 年河南 CHD 游客数量却仅为 2005 年的三分之一, 不少景点的游客数量大幅下降。这一游客数量落差现象的原因何在? 对 CHD 是否有借鉴意义?

如何将国际公约、国家政策所倡议的向公众传播遗产的方式, 长期有效的融入中国城乡社区生活, 为遗产申报奠定基础, 推动遗产的可持续发展; 如何切合中国尤其是西部的国情, 如何针对职能不同、旅游业发展水平不同的城市, 针对需求不同的公众策划活动, 使 CHD 获得可持续发展, 得到各利益主体的长期支持, 从而带动主办省市的经济、文化、社会的发展, 的确都是值得文博、旅游等业界、学术界共同思考与努力探索的问题。

二、研究述评

笔者借助 GOOGLE 搜索引擎,在中国知网、维普、Elsevier Science 等数据库,以“遗产日”、“文化遗产日”、“文化遗产日活动”等作为关键词检索后发现,除大量报道、呼吁外,国内外对“遗产日”活动的学术性论文极少,仅 11 篇。这一检索结果与多篇研究述评所呈现的信息均一致。而针对“遗产日”活动的研究中,仅有 6 篇针对活动的策划运作。

曹新向等调研了游客和旅游专业学生对 2006 年河南 CHD 和 2005 年“河南省文化遗产日”的认知、参与、期望和评论;比较分析了在上述活动中,政府的主导作用、媒体的关注。他们针对活动引发的庞大客流及其对文化遗产保护、游客体验方面的负面影响,从经济发展全局、文化遗产普及与保护等角度对活动的策划运作、组织管理提出了系列建议。但文章缺少对河南以外的国内外遗产日活动的述评,对 CHD 活动的组织方的充分调研。

郭立珍认为,遗产地的高门票制长期抑制了公众对文化遗产的需求;而河南 2005 年“免费游”向人们展示了转变旅游业经营思路(由“门票经济”向“产业经济”转换)的可行性与必要性。针对 2006 年 CHD 与 2005 年“河南文化遗产日”游客数量的落差,杨军提出,影响文化遗产旅游大发展的深层次原因并非门票,而是文化遗产的大众化问题。他从遗产旅游产品开发设计、大旅游思路方面提出建议。但,郭、杨的观点缺乏量化依据。

三、重庆 CHD 调研简介

2006 年,重庆市委、市人民政府举行了重庆市非物质文化遗产展演、文化遗产保护大型图片展、专家现场文物鉴定与咨询、文化遗产知识讲座、博物馆遗产地免费或优惠开放等形式的 CHD 活动。活动主办者还以市内外各大媒体的新闻报道、红岩连线车载公益广告、移动通讯的短信发送等渠道进行活动信息的传播。

2006 年 CHD,笔者在重庆市展开 CHD 活动综合性调研,本次调研结果显示:参与重庆市 2006 年首届 CHD 活动的观众主要为重庆市当地居民,少量来自外省和国外。受访者的自身特征(年龄、文化程度、经济收入、工作状态、日常休闲方式)和参与活动的目的都有较明显的差异。而文化程度与经济收入处于中、低层次的人群所占比重较大,是受访者的一个明显特点。这也与曹新向对 2005 年“河南文化遗产日”游客构成情况的调研结果相吻合。

受访者对文化遗产的态度、对当日活动与综合服务的评价的统计结果充分说明:公众很重视文化遗产,很欢迎 CHD 活动,绝大多数受访者愿意或比较愿意向熟悉的人主动推荐本次活动。活动在社会教育与公共关系方面效果明显,必将促进遗产的保护、传承工作。绝对多数受访者对当日举办、今后可能举办的 CHD 活动的形式、现场服务、活动氛围与心理体验有综合性的需求,其中尤以对文化遗产的深入理解、对活动的参与性与互动性、对非物质文化遗产与城乡社区、学校生活的结合的需求最为突出。

四、对 CHD 活动策划、运作的建议

(一) CHD 与当地节事活动的规划与整合

节事旅游是世界旅游行业和学术研究中重要且发展迅速的领域。旅游目的地把节事活动作为旅游营销的重要工具,保护传统文化的重要手段。

中国各类传统节日、现代节庆活动总数已逾 5000。但中国多数城市的节事活动存在着举办届数短、影响力低;主题重复、文化含量不足、特色不明显;公众参与不足等局限。

文化是节事旅游的灵魂。CHD 将每年在中国各省市举办,该活动强调对地方传统文化的彰显、

传承、保护，因此可能与中国各地丰富的节事活动资源存在较大的整合空间。

重庆“中国三峡国际旅游节”连续举办了11届，规模较大、规格较高、持续时间较长、影响较大。第十一届旅游节活动的开幕式日期就在2006年6月下旬，距离重庆CHD不到半月时间。2007年6月18日—6月28日举办的首届“中国重庆文化艺术节”，以“庆直辖十年，展巴渝风采”为主题，将每两年举办一届。这两“节”与重庆CHD在举办时间、活动内容（文化旅游、民间文化展演、文化场馆开放、民间工艺美术品展销等）等许多方面有相近之处，因此重庆市政府可以考虑从举办时间与地点、活动内容、游客组织接待、公关活动、营销推广等角度，将两“节”和一“日”尽可能结合。

我们由重庆的情况大胆推测，中国各地CHD活动的主办方可以考虑如何与当地节事活动进行深度结合，且努力推动当地政府以科学规划、资源整合避免前述国内节事活动的常见局限，彰显城市特色，传承地方文脉，推动旅游发展。

（二）CHD与都市旅游

1. 将CHD作为都市旅游的营销工具

由历史沉淀形成的人文资源是都市的灵魂与特色，是与其他都市的差异与优势所在。独具一格的人文资源、与众不同的游憩体验，是都市吸聚游客的魅力所在。因此，国内外城市规划界、旅游学界均视都市旅游为实现都市复兴、解决都市问题的重要途径。

博物馆、遗产地既是同时面向本地和外地游客的城市公共游憩空间，也是汇聚都市历史人文资源最集中的场所。博物馆旅游、遗产旅游，一直是欧美很多国家都市旅游的重要内容，收效显著的文化旅游项目。从市场营销的角度，我们可以将CHD这一展示历史人文资源的节事活动视为都市旅游的营销工具。如，参与“非遗节”的市内外游客超过400万。“非遗节”在举办时长、规模、规格、策划运作水准等方面都超越了中国多数省市的CHD，这一差异的深层背景就与都市旅游直接相关。

“非遗节”的主会场——非物质文化遗产公园，是成都市和金牛区按照“传承历史文脉、保护文化遗产、融入生活方式、守望精神家园”的原则建设的主题公园，是产业发展与节会互动的专业节会公园，也是成都市和金牛区重点培育的都市旅游重点项目，还是带动所在区域房地产开发、就业发展，寻求生态、社会、经济的多重效益的大型公共设施。而“非遗节”这一与都市旅游、文化地产同步策划的大型文化活动，正是力图实现上述目标的重要营销工具。这一策划根源于成都的城市职能、成都市的旅游发展战略及其在国内领先的旅游业发展水平、成都市的旅游总体规划、四川省的旅游发展战略。

2. 对CHD的不同模式的探讨

“非遗节”的经验值得中国其他城市认真思考。但，不同的城市有不同的职能，且在旅游城市中心性等级体系中处于不同的等级地位。旅游对城市发展的联动效应，“旅游城市化”的程度，都不能一概而论。发展城市旅游必须因城制宜。我们再以成都“非遗节”和重庆CHD进行探讨。

何调霞依据旅游流强度模型，将重庆市和成都市划属于全国的三级旅游中心地，共同作为西南区域的两大旅游中心。但，成都市近年成功创建为“全国最佳旅游城市”，其旅游城市化水平显然超过仅属“全国优秀旅游城市”行列的重庆市。更重要的是，都市深度开发文化旅游需要一些与开发其他旅游产品不同的条件，如文化资源、历史沉淀、人文氛围等。从城市历史和现状看，成都市显然比重庆市更具备将当地CHD塑造为“非遗节”这类国际性节事活动的综合条件。

调研结果显示，89.8%的受访者为重庆市当地居民。因此，目前重庆市CHD的主要市场是国内游客，尤其是本地游客。调研结果表明，92.9%的受访者愿意或较愿意向熟悉的人主动推荐本次活

动。因此，重庆 CHD 应该成为区域性的文化节事活动，都市旅游的重要项目。重庆 CHD 活动的主办方应该重视本市游客，拓展市外游客，以国际营销吸引国外游客。

“非遗节”是特例，只适用于北京、成都等少数在旅游中心性体系中等级高、适合深度开发文化旅游的都市。从活动内容、举办时长、运作模式等方面看来，重庆市CHD可视为2006-2008年中国CHD的典型模式。而在都市旅游的事件活动的策划、开展方面，无论类型、规模、强度、效益，中国西部地区都明显弱于东部地区。因此，CHD的策划需要与大多数中国城市的旅游规划、城市规划、城市营销做好统筹协调，推动都市旅游和相关产业的发展，需要考虑地区差异，更需要因城制宜。

（三） CHD 融入城乡社区生活的方式

借各种渠道进行遗产的公众传播，鼓励城乡社区公众参与遗产保护和传承，是国际、国家对遗产申报的要求，也是切合国情、实现可持续发展的需要。

社区协作、公众参与是国内外节事旅游研究所倡导的。旅游者对各类旅游产品“参与性”的需求日益增长。而尊重当地社区的社会-文化真实性，保护建筑遗产、活文化遗产与传统价值，为不同文化间的理解、宽容做出贡献，是世界旅游组织、联合国教科文组织所倡导的可持续发展旅游的重要特征。

本次调研结果也显示，CHD 游客对参与性、互动性的活动形式都有较强的需求，其中“对展览或表演的免费现场讲解”、“自己参与现场活动，在现场或者在网上与专家、他人自由交流自己的收获、想法和心情”、“在自己的社区、乡村参与一些与非物质文化遗产相关的文艺/健身活动”，“能够在自己的学校、社区、乡村观看展览和现场表演”是最受欢迎的五种，分别占 50%、45.7%、40.8%、34.5%。

2007 年成都“非遗节”、“中国重庆文化艺术节”专门设立了“群众文化活动”版块，其中不少内容与当地非遗相关。而重庆市秀山区中学生课间做秀山花灯操则是另一例尝试。

（四） CHD 产品开发:以游客体验为核心

从“游憩”（“大旅游”）的概念及连续的游憩图谱角度，从国际博物馆协会对“博物馆”的定义及其广义的范畴角度，我们可以充分理解：博物馆、遗产地既是同时面向本地和外地游客的城市公共游憩空间，也是汇聚都市历史人文资源的教育机构；CHD 活动是公众可以在闲暇时间选择参与的活动之一。

价格下降通常会导致人们对旅游产品消费需求的增长，但，门票免费不等于游客的 CHD 出游成本为零，单一的低价策略不能确保 CHD 对大多数人具有持久的吸引力。

消费者对闲暇时间所从事的活动的选择和决策是多因素作用的复杂过程。包括博物馆、遗产地在内的各种旅游目的地,包括“遗产日”活动在内的各种节事活动所面对的是来自文化、休闲、教育领域的多层次、多类型的竞争者。本次调研所显示的受访者多样的日常休闲方式、参与活动的多重目的都充分说明了这一点。

在进行游览博物馆、遗产地，观看非物质文化遗产展演等以使用者为基础的游憩活动过程中，当游客数量超过游憩心理容量的阈值后，场地的使用强度与游客满意度之间便呈现负相关。游客过多，导致游客体验品质下滑，游客满意度下降。曹新向等的研究已充分展现出，游客参与 2005 年“河南文化遗产日”时大量出现的这类现象。而游客体验的结果，将在很大程度上决定游客是否会再来及其是否会向熟人推荐。

在选择日益多样的环境中，消费者不会因为门票免费而反复购买出游成本高而游憩体验质量低、内容重复的产品，因此节事活动的吸引力通常随内容重复而下降。而 2005 年“河南遗产日活

动”与2006年河南CHD的游客数量的落差也可能根源于此。法国EHD活动及其文化旅游二十余年的蓬勃发展的经验则从另一侧面提示,仅仅门票免费绝非使“遗产日”活动获得可持续发展的灵丹妙药。

本次调研显示,游客对重庆CHD活动的形式、现场服务、活动氛围与心理体验有综合性的需求,尤以对文化遗产的深入理解、对活动的参与性与互动性、对非物质文化遗产与城乡社区文艺健身生活的结合的需求最为强烈。

因此,中国CHD活动的主办方应该注重营销调研,充分了解游客对该节事活动产品的购买成本、出游决策,游览与消费需求;注重以游客体验为核心的CHD产品的研发,为游客提供交通、游览、信息服务,调控游客数量,创造良好的活动氛围,适当组织相关的餐饮、社交、演出活动;将CHD活动的策划与博物馆、现场展演的解说系统的设计,与图书音像制品、纪念品的开发销售,与旅游业的游客接待和传媒业的文化传播活动相结合。

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致谢

感谢重庆市文化广电局、重庆中国三峡博物馆、重庆师范大学历史文博学院的热情支持!

城市节事活动的休闲视角

刘亮亮 袁书琪
福建师范大学

摘要:

随着经济社会的不断进步,涉及节日、会展、体育、商贸、文娱、旅游、休闲等多方面的事业迅速发展,已成为现代社会中第三产业的重要组成部分,尤其在带动城市发展和社会进步方面发挥着越来越重要的作用。同时,值得关注的是,节事活动的浪花在休闲时代的大潮中扮演着特殊角色,节事活动和旅游业密切相联,反映和创造着人们的休闲需求,以其组织性和开放性兼具影响着人类的休闲活动。因此,文章基于休闲视角探讨节事活动对城市休闲空间、人们休闲活动和休闲心理等三方面的影响,以期指导城市节事活动和休闲业的相互协调和促进,从而推动城市向符合人和社会全面发展的高级阶段——休闲城市的迈进。

关键字: 城市; 节事活动; 休闲

THE LEISURE PERSPECTIVE OF URBAN FESTIVAL & SPECIAL EVENT (FSE) ACTIVITIES

Liangliang LIU, Shuqi YUAN
College of Geographical Science, Fujian Normal University, Fuzhou 350007, China

ABSTRACT

With the continuous development of economy and society, the events industry involving festivals, exhibition, sports, business, entertainment, tourism and leisure have developed rapidly. It has become an important part of the tertiary industry and plays an increasingly important role in promoting urban development and social progress. At the same time, the FSE plays a special role in the leisure times. FSE is connected with tourism activities. It reflects and creates people's leisure needs. It impacts on leisure activities with its organization and openness. As a result, the article which based on the leisure perspective expresses the effects of on leisure space, recreational activities and leisure psychological. It can guide the mutual coordination between FSE activities and the leisure industry, and then promote the construction of leisure city.

Key words: city; festival & special event (FSE) activities; leisure

作者简介:

刘亮亮(1984—),女,河北保定人,硕士研究生,研究方向为文化与旅游地理, E-mail: liuliang710@126.com.

节事活动构成结构研究

张云耀
重庆师范大学

摘要

本文通过对组织及个人参与节事活动的目的与方式进行分析,构建起节事活动组成结构图,明确节事活动是由旅游者、中间机构及举办地三方构成,并以此对参与者进行了系统化的归类,这有利于对节事活动的宏观整体把握,明确参与节事活动各方所处地位,了解各方的意图,以利于更好地策划管理节事活动。

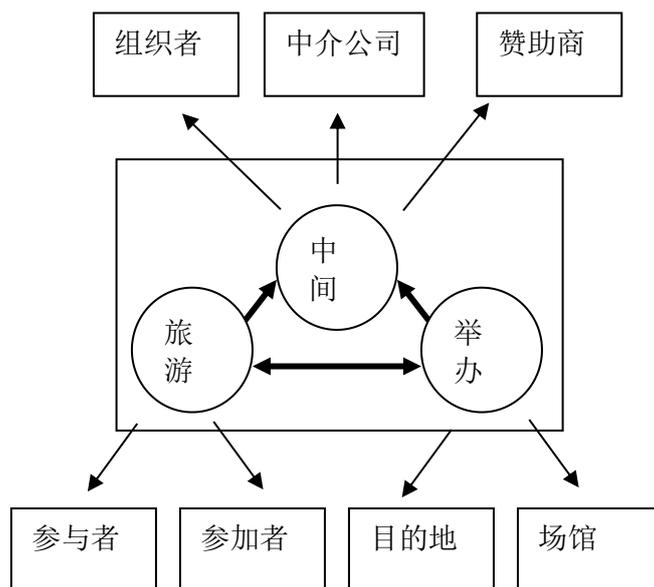


图1 节事活动组成结构图

关键词：节事活动；组成结构

A STUDY ON COMPONENT STRUCTURE OF FESTIVAL AND SPECIAL EVENT

Yun Yao ZHANG
Tourism College, Chongqing Normal University

ABSTRACT

This study through the analysis on the motivation and pattern of organization and privates to festival and special event (FSE), built a Component Structure Chart of FSE, which tells us a FES is composed by tourists, inter-organization and host, according to this, all the elements involved in the FES is classified, this is good to grasp a FSE from a wide aspect, make clear the situation of each element, understand the motivation, then plan and manage a FSE more effectively.

Key words: Festival and special event; component structure

第五部分 MICE教育与产业的创新发展

Part 5 Innovation of MICE Education and Industry

SHOW TIME FOR EVENTS! THE EVENT MANAGEMENT EDUCATION GAP IN MALAYSIA

Frederic Bouchon
School of Hospitality and Tourism, Taylor's University College

&

Kit Thong
Managing Director, Bravo Events

ABSTRACT

There have been a number of studies that examined the development of event management education in Western countries. However, few studies have covered the recent trends in South East Asia. Malaysia has experienced a fast increase in the number of affairs, especially in hosting mega events. Greater internationalization and recognition of the events as an industry is currently paving the way for a proper education field. It is generally accepted that event management education combines disciplines that come under the umbrella of business, communication or hospitality schools. Therefore its norms, standards and status as a discipline have yet to be fully established. Furthermore the effectiveness of current curricula in preparing students for a career in events management has yet to be assessed. This qualitative study aims at covering event management education in Malaysia, highlighting the gap between event management education and the needs of the industry specifically with regards to the standards for education in events management. This research involves comparing the views of industry professionals and events programmes, the discrepancy between the respective views of industry professionals and event management education providers. The methods of analysis firstly consist of content analysis of the existing degrees to determine the distance in knowledge transfers. Secondly, a human resource deployment survey was conducted with graduates to identify gaps between the classroom and their workplace experiences. Facts suggest that a gap exists between the current curricula of the emerging voice from the Malaysian events management and the needs of the events industry as a tool for tourism. They outline how the tourism industry can participate in acknowledging the importance of events education in the development of the qualified professionals needed both locally and abroad.

Keywords: Event Management, Tourism Education, Malaysia, Curriculum Development

INTRODUCTION

Think globally, act locally. If the motto was coined first to express the tremendous changes of 1960's, it has recently proven value with globalization and the standardization of procedures. Globalization of tourism destinations have resulted in the standardization of leisure packages. Indeed, events have come as way to add value to a destination. Corporate events are major communication tools for a company visibility. Easy communication and information access through technology have created tools to compare prices, products, and processes. The economic and social values of events for destinations, venues and company branding are today being recognized. With these developments, the Management of events and the connected activities are increasingly perceived as a demanding profession with requirements and professional codes that are more standardized (Allen *et al.*, 2008).

The term *event management* is frequently used with a variety of meanings. For the clarity of this paper, the larger definition that encompasses issues related to "temporary-based themed gatherings" will be used. Often, the definition of event management is restricted to the operational management of an event.

Recognizing the growing importance of event management, academia has now created tertiary education in this field. However, the curriculum of such academic programmes are still

evolving. Furthermore, recent technological changes have deeply impacted both the social needs and social practice of events. In Malaysia, event management is still a field little studied, despite being an important contributor to the economy. This is despite the fact that event management education through its various academic programmes from private and public institutions, is slowly being shaped. In western countries, numerous studies have covered the recent developments, notably in Australia and Scandinavia (Harris & Jago, 1999, Slaughter et al. 2003). The events industry in Malaysia since the mid-nineties has become a phenomenon. Even the idea of MICE (Meetings, Incentives, Conferences, Event) associating corporate tourism, leisure and hospitality sectors has been reviewed with the 'events' component evolving into a wider concept and becoming an umbrella covering a larger range of functions having few common denominators such as 'temporariness , plan, place'. On the other hand, events by definition are restricted by their volume, size, nature, professionalism. It ranges from a worldwide exhibition to a private wedding party. The term *Events* is straightforward and positive, although at times a glamorously misleading, connotation. In fact, the event management profession is still being defined as emerging, due to the lack of a recognised professional body (Getz, 2002). This may create confusion amongst the general public, with a perception that amateurs can provide an equivalent service to that of trained professionals. The nature of the relationship between educational providers and the events industry as a source of mutual recognition is a matter of debate. In the field of education there has been a concomitant interest to supply this emerging global industry with high quality programmes. Event management in this paper is related to the management process allowing an event to be planned, articulated, prepared, executed, controlled and assessed involving constraints of time, place, budget, quality, people, and other resources to achieve objectives. Event management education is the intellectual and practical training allowing students to develop skills and abilities encompassing an operational knowledge of the field.

This paper aims to look both at the local context, the current academic offer, and the perceptions of event management professional. It enables an assessment of the academic offer and the identification of gaps from the perspective the profession's needs and expectations. It also looks at how event management education contributes to addressing the challenges of building a professional image. Particularly, towards the view that education has a minimal role in contributing towards the events profession.

EMERGENCE OF EVENT INDUSTRY IN MALAYSIA

In Malaysia, the events sector has grown at a rapid pace. The Ministry of Tourism is the government body whose purview is to oversee the developments of the event industry. The growth of the events industry is measured by variables where events are categorized according to the number of participants and the revenue generated. Each variable is divided into the local and international origins (Table 1).

Table 1
Events in Malaysia (Source: Ministry of Tourism Malaysia)

	2001	2002	2003	2004	2005
Number of events					
<i>International</i>	925	2,956	2,294	2,875	3,230
<i>National</i>	2,775	8,868	6,882	8,625	9,321
Total	3,700	11,824	9,176	11,500	12,551
Number of participants					
<i>Foreign</i>	473,486	699,924	550,741	675,699	775,286
<i>Local</i>	3,189,360	3,288,000	3,390,000	3,494,000	3,602,000
Total	3,662,846	3,987,924	3,940,741	4,169,699	4,377,286
Revenue (RM Billion)					
<i>Foreign</i>	1.23	2.03	1.73	2.14	2.95
<i>Local</i>	1.98	2.04	2.1	2.17	2.24
Total	3.21	4.07	3.83	4.31	5.19

Event management is associated to tourism because of the volume of events it can generate. Therefore event tourism can be introduced by the function of the event: business (e.g. conferences, trade fairs), cultural events (e.g. festivals, exhibitions) and leisure events (e.g. F1 racing, concerts). An event like the *Borneo Rainforest Festival* in Kuching, contributes to the development of destination branding and to a broader extension to regional development. A destination brand can be thought of as the impression or feeling associated with a place. Events are an opportunity to (re)-shape a brand (Allen *et al.*, 2008). . It appears that statistics and choice of categorization for event management can be redefined under criteria allowing a sharper insight of the components of event industry. And they also contribute to refining the understanding of the profession and the organization of curriculum to teach it. Generally, education providers will choose a more structured approach with categories based on the type of event, and the operational skills to be learned (e.g. Fairs and exhibitions, conferences, hallmark events, meetings and banqueting). At diploma level students pursuing events management studies, acquire practical skills.

EVENT MANAGEMENT AND EDUCATION

Event management education, curriculum development, and methodologies of teaching in this field have only come recently attracted the interest of academic research. This new interest signals the increasing maturity of the global event management industry. The mere idea of having an event management education may generate surprise or debate amongst the public. Even event practitioners, who originally received their training in other fields may consider it possible to learn the rudiments of the job only at the stage of entering the work force. However, it is argued that without a solid foundation at the academic stage, “professional” status is suspect and subject to degradation by the actions of untrained and inexperienced practitioners. Such practitioners usually lack the awareness of the scope of knowledge for a qualified profession. More importantly, many may lack the legal and ethical responsibilities associated with such endeavours. Indeed, like all other service professions, the need for proper training and skills is crucial. Today, this need has come of age! Event management has become a mature industry, that is ready to become professionalized (Arcodia & Reid, 2002).

In any case, the growth and internationalization of the event industry has generated buzz in academia. Event management and its impact is the most recurrent area of focus by academics. Much of this is due to the career orientation of the academic programs and the economic and commercial interests driving event creation (Getz, 2002). Today, there is an increasing effort placed on classifying and categorizing event management into areas, thereby shaping of a theoretical structure. This includes developments in taxonomy and discussions on the perspectives of understanding that are quintessential to emerging fields. It also contributes to the expansion of the interpretation and vision of Events from the trivial to the unique. Furthermore, epistemological debate on event management participates of the foundation and the recognition of a new field. This knowledge is essential to a society based on information and knowledge.

Once there has been a development of a body of knowledge in this field, the scientific protocols and investigations of the event management field, can then be undertaken (Silvers, 2006). With new models and frameworks established academic research and institutions will be able to diversify and sharpen the event management education curriculum. An example where this was undertaken at tertiary level was the research conducted to test the participation of students in projects in various contexts and countries having different scene of event management industry (Mc Donald & Mc Donald, 2000, Robinson *et al.* 2008, Landey, J. 2004). There a model combining humanistic methodology of teaching and experiential education was studied and applied to an event management class. The learning objectives of the teaching combination were the ability to plan and manage an event. It involved both operational knowledge but also general knowledge to develop a broader understanding of the context, objectives and impacts of an event. Creating a festival, gave students opportunities to learn about the multidisciplinary processes pertaining to an event.

The viability of event management as an independent programme in the higher education is

still a pending question. As a multidisciplinary field, event management is located at the crossroad of several disciplines overlapping each other (Diagram 1). The comparison of the case of Malaysia against other scenarios illustrates it. Generally, event management appeared as a subject of tourism undergraduate programmes with a strong emphasis on the MICE. At the same time, a more operational training appeared under certificate courses to prepare students with the technical knowledge of running an event. With the technological changes and the impact of communication and knowledge, the communication dimension of events became influential in the attention given by business and communication programmes to event management. Large scale public events with the complex relationships generated and the number of stakeholders involved fostered reflections and questions that justify a proper field of study. Funding public events and persuading communities of the benefit of the event has become a main concern for policy makers. However, the responsibility for developing the skills associated for communicating the event, has traditionally been the responsibility of the Communications discipline.



Diagram 1
Event Management – A multidisciplinary field

Based on an Australian study of needs in event management education in 1996, Slaughter, Arcadia and Reid (2003) identified five key knowledge areas in Finland’s event management education system. The study encompassed an integrated event management programme covering the areas of legal/financial, management, public relations/marketing, economic/analytical and ethical/contextual. In short the study stressed on the type of institution and their objectives as well as the educational structure for event management. This current paper follows a similar approach. It assesses the relationship between curriculum design, governmental precognition, education system, but goes further to include graduates’ feedback at a human resources level. This study also differs from other studies of events that review impacts and knowledge transfers from large-scale hallmark events.

OFFICIAL FRAMEWORK FOR EDUCATION IN MALAYSIA

To attain a full professional status, the study of event management needs an established body of knowledge; with a clear scope of skill competencies necessary for one to be considered qualified to practice. This must be identified, with a reliable system of formal knowledge and diffusion. It also requires a consistent method of skills measurement and transparent and impartial accountability procedures. Only then will event management be legitimate through the warrant of an exclusive jurisdiction based on expert knowledge and experience (Silver et al., 2006). In Malaysia, the Malaysian Qualifications Agency (MQA) the higher education provides guidelines and requirements for institutions to create channels of education according to their specialization (MQA, 2008). It acts as a regulatory body, for private institutions by setting out guidelines, teaching requirements, and a framework for curriculum design and development.

Determining the fields of study taught at an educational institution is a process of negotiation between the institution and the regulatory authority (Malaysian Qualifications Agency,

MQA). Colleges usually are the franchisees of foreign programmes at the bachelor's degree level. They need to adjust foreign curricula to pass MQA requirements to obtain accreditation. University colleges are already a step ahead with the ability to develop their own curriculum after having satisfied numerous criteria for their status. Universities have an obligation to design their own curriculum and cannot be franchisees. However, many University colleges engage in students exchange programmes and twinning activities to ensure international exposure.

Table 2
Bachelors of Hospitality and Tourism Management (*based on MQA, 2004*)

Bachelor of Hospitality Management		Bachelor of Tourism Management	
Core Course (30-50%)	Food Production F & B Operation & Management Front Office Operation & Management Hospitality Studies Accommodation Operation and Management Events Management Purchasing & Cost Control Facilities Management	Core Courses (50 – 60%)	Sustainable Tourism Cultural Studies Tourism Research Destination Marketing Meetings, Conventions and Management Tourist Behavioral Studies Travel and Tours Operation
Business / Management (30-40%)	Economics Service Management Marketing MIS Financial and Management Accounting Business Strategy Quantitative techniques Legal & Legislation HRM Business Communication	Business / Management (30-40%)	Economics Organization Behavior MIS Financial and Management Accounting Strategic Management Quantitative Techniques Law HRM Customer Relations
Practicum (10-15%)	Practicum in the relevant industries Independent Study / Research Project	Practicum (20-30%)	Practicum in the relevant industries
Language (0-5%)	Foreign Languages	Language (0-5%)	Foreign Languages
Specialization (30- 40%)	Hotel Management Restaurant Operational Analysis Room Division Management & Analysis Hotel System & Management Professional Development & Resort Management Club and Resort Management Recreation & Leisure Management Event Management		

Generally, event management has been associated with tourism and incorporated into hospitality or tourism programmes. Malaysia offers a different scene from Finland, and most other European countries where as an event management independent course is generally absent from the institutions curricula (Slaughter et al. 2003). Due to the interdisciplinary nature of events, event management also appears in the curriculum of communication and business studies. Event management education doesn't come as a separate entity. It appears as a subject, or clusters under tourism studies and hospitality studies and follows the official recommendations (Table 2).

An event manager's job is to oversee and arrange every aspect of an event, including researching, planning, organizing, implementing, controlling, and evaluating an event's design, activities, and production. MQA inserts event management within the hospitality programme. Components of event management, such as MICE are taught as an individual subject within the hospitality program, The components represent less than 10% of the total course. It should be noted, however, that business and management clusters can be shared in the case of an independent programme in event management. To obtain the title of event management alone, the core subjects must constitute more than 50% of the total number of subjects. In a similar way, event management courses can also appear also under specialized minor of tourism programmes (Table 3).

Table 3
Requirements for qualifications denomination and contents (*based on MQA, 2004*)

Qualifications denomination and contents		
Diploma in Hospitality (Event Management) Tourism (Event Management) Business (Event Management) Communication (Event Management) Event Management	Bachelor of Hospitality (Event Management) Tourism (Event Management) Business (Event Management) Communication (Event Management) Event Management	Breakdown of Subjects Core 50 % (specialization 30%) Core 50%

This situation of integration of event management subjects within tourism courses is in line with the continental European configuration (Slaughter et al., 2003). Nevertheless, the case of Malaysia is the closest to that of the United Kingdom with a greater flexibility in curriculum design and combination of disciplines as shown by the recommendations from MQA (Table 3). Although the MQA guidelines don't offer detailed content for an independent diploma or bachelor of event management, the possibility remains to establish such as programme. Indeed, some institutions have started to offer a specialization in event management. Therefore the guidelines build a framework for event management education, but the courses gauged necessary to have a sound knowledge and practice of the field of study have yet to be drafted and agreed on.

EVENT MANAGEMENT COURSES

Malaysian event management education is quite diverse, most probably because of its relative recent character as a field of teaching. A brief background of higher education system helps to provide a context for event management education in Malaysia. Both public universities and private higher learning institutions are involved in event management courses. Because of a market-lead approach, private colleges are characterized by reaction to trends and anticipation of employment needs. Programmes are shaped in by curricula focusing on pragmatic and market oriented skills in preparation for future careers. The anticipation of industry needs, and a pull approach to the student market has resulted in an increased interest for event management education. It started with professional certificate courses introduced in the late 1990. Since then the offer has expanded fast in higher education to full-time courses. Some colleges offer diplomas, higher diplomas in event management. Recently, a step forward was made with the launch of independent bachelor's degree in two institutions. Public universities have developed event management education at two levels. A pragmatic one at diploma level focuses on the fundamentals of running events. At a bachelor's degree level, components involve broader issues such as event tourism and destination management. The scope of the programme is field-related with an interdisciplinary emphasis. The introduction of event management syllabus started under subjects added to a major (tourism or hospitality). Similarly with the UK, event management education appears under several declinations, from the integration as a minor into tourism programmes, hospitality programmes, communication programmes or business programmes to courses in event management standing on their own. Many of the institutions that develop event management in their curriculum emphasize the area(s) of Event that is related to their

core activities. For instance, colleges originally with strong foothold in communication would emphasize on the advertising, PR and branding because of this general impact of events. Likewise, hospitality institutions will stress on operations and catering. Business schools will offer a strong foundation in management and business. This is similar to the position in the United Kingdom, but differs from that of the rest of Europe. Generally, in Malaysia, event related subjects are found in areas such as tourism, hospitality, business and communication (Table 4). Harris and Jago (1999), in their Australian Universities study highlighted the same patterns, although areas such as sport management or humanities programs are unique.

Table 4
Event management core subjects generally offered

	List of Core Subjects	Hospitality	Tourism	Communication	Business
1	Introduction to MICE	1	1		
2	Meeting and Congresses		1	1	1
3	Project Management	1		1	2
4	Web Technology	1		1	1
5	Conventions and Sales				2
6	Exhibitions	1			1
7	Urban and Event Tourism		1		
8	Entrepreneurship	1		1	1
9	Entertainment Management	1			
10	Integrated Marketing Communications	1		1	1
11	Sporting events	1	1		
12	Festival & Special Events	1			1
13	Event Sponsorship & Fundraising			1	2
14	Tourism, Leisure, Hospitality: Principles	1	1		1
15	Asian Cultures & Events		1		1
16	Event Industry Operations	1			1
17	Event Facilities Management	1			1
18	Practicum	1	1	1	2
19	Tourism Planning and Development		1		
20	MICE IT Resource Management	1			1
21	Incentive Tours Management	1	1		
22	Event risk management				1
	Total	14	9	7	20

Few complete event management programmes at bachelor or diploma level have been listed and all of them are recent. A certificate in event management has been running for 10 years, but now the trend has caught on to offer higher qualifications. Event management subjects appear in many colleges but they are often designated under different names (Table 4). Components of event management, such as conference or congress management are taught within the tourism program, while communication, integrated marketing will come from school of communication. The expected scenario is that event management programmes tend to follow the major offered by the original faculty and its angle of interpretation. For instance, a business faculty would put more emphasis on business and management subjects while a hospitality faculty would lack on the communication subjects. While this illustrates the broad perspective, some institutions stress on specialist areas of event management, such as sports events or Asian cultures and events, as an opportunity for differentiation between institutions. In total there are over ten higher education institutions in Malaysia that offer event management subjects. Of these, only two private higher education

institutions and one public university offer a specialized event management course. The rest of the programmes in event management education comes under subjects incorporated within programmes from different disciplines.

Event management education doesn't come as a separate entity. It appears as a subject, or cluster under tourism studies and hospitality studies. Because of the interdisciplinary nature of events, event management education is articulated into various programmes either independent or as a minor or a subject within a wider domain. It depends on the college background and concentration. Diplomas in event management have a strong vocational component, whereas bachelor's degree curriculums have a stronger management and business percentage. Therefore event management education can appear under a diploma of communication or business with special interest courses. But generally the majority of tourism and hospitality courses incorporate event and meeting management subjects. Higher learning institutions have started developing ways to expand event management education. After designing curriculum and creating new programmes, universities are developing the academic interest for the area. It participates in delineating the field of study and opening the trail for research in event management.

THE RESEARCH

During June 2008, a focus group was formed with the aim of discussing the working practices, event culture, and event training from a panel of eight event management professionals currently working in Kuala Lumpur, Malaysia. This focus group interview was articulated to identify gaps in event education and to understand the educational processes to inform the structure and organisation of the event management curriculum in future years. The eight respondents were selected based on the work experience and the size of the company in which they were attached. The companies ranged from very small to large corporation with high division of tasks. Therefore, the sampling of the respondents was stratified from the larger to the smaller in order to represent various levels of perspective in event management. The events organized by the companies are varied and they include launches, gala dinners, road shows, private parties, festivals, fashion shows, conferences, exhibitions, family days, incentive trips, and entertainment and decoration provision. 80 percent of the respondents were from the age group of 20-30 years old with an education qualification that ranged from certificate to diploma level. Half of the respondents hold a Diploma in Conventions and Events Management (DCEM) and the other are graduates from Diploma in Hospitality and Tourism Management (DHTM), Diploma in Business Management (DBM) and Diploma in Communications (DC). The majority of the respondents have been working in the event industry for over three years.

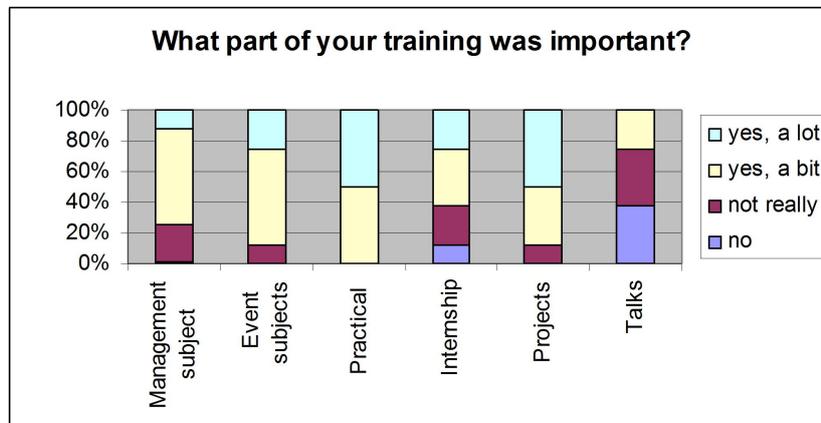
RESULTS AND IMPLICATIONS

All the respondents unanimously agreed that their training had adequately prepared them to deal with the event operations and administration work. However, 37.5 percent gave the opinion that they were less prepared to handle the marketing aspect and 62.8 percent indicated that they were not really prepared to handle risk management in event management. However, 67 percent of the respondents from DHTM and DBM training felt that they are able to cope with the demands of the event operation and marketing aspect in their job. Nevertheless, they also were of the opinion they are weak in the area of event risk management.

Respondents with DCEM training gave deferring opinions when asked if they think that their qualification in events management helped them to secure a better job package and competitive edge in the job market. While, 33 percent indicated that their training did not really help, others in contrast felt that their training was an important factor in giving them a competitive advantage, but did not secure a better job package (67 percent). The need for event management education is not obvious for all the respondents (Table 4). This perception comes especially from respondents trained in other disciplines and notably from business assuming that business skills and a can-do attitude would be sufficient to succeed in any business venture; "Event management training is not really necessary to become a successful professional" (Respondent 4), and "it very much depends on the person's ability"

(Respondent 5). As event management graduates are a new and recent addition to the event industry work force, this suggested that the industry has yet to recognize the value of their training. Majority of the respondents agreed that an event management training is essential to succeed in the events industry, even the street wise respondents being aware of it “As an event management graduate it is easier to adapt to any situation” (Respondent 4).

Table 4
Respondents’ appreciation of event management education



Respondents with DCEM training were further asked to reflect on which part of their training was most beneficial to them. The areas identified as the most beneficial include conducting projects, practicals and studying event subjects. Undergoing internship and management subjects are considered less beneficial yet still useful to the respondents. These students expressed reservations on the benefit of proper event qualifications for promotion in the workplace. The Respondents from the DHTM and DBM training rated management subjects, practical and networking as the most beneficial in their training. While doing internship and projects were regarded as having a positive impact. Both groups of respondents placed an emphasis on the advantages provided by practicum to network with industry people.

With respect to improvement of the event management training, the respondents with DCEM qualification stated that there should be more practical training with hands on experience scheduled in their programme. This illustrated the importance of experiential learning in this specialization. Others suggested that more professional and experienced lecturers are needed to push the standard of the event management training higher; “to have more professional and experienced lecturers” (Respondent 3). This reflects the only recent establishment of event education and trained educators are limited. Besides, professionals are not willing to go into events education due to lack of incentives from education institutions.

The respondents described the event management graduate as theoretically sound; “Event management graduate know more what is happening and the proper procedure of working. Non-specialist is less alert on what is happening” (Respondent 6), and informed about the current issues in the profession; processing more experience in running events, more knowledge and detail in their planning when compared to a non-specialist. The respondents also gave the opinion that the event industry can be more professionalize when employees in the event industry regularly update themselves by attending courses in event management; “An event management person should attend seminars in event management” (Respondent 7). Forming a professional body in Malaysia to unify the industry and standardize practices was also stated as one of the push factor in professionalizing the industry; “Need for a professional body or association in Malaysia to support the industry and the professionals” (Respondent 3). One respondent even suggested that event companies should aim to attain ISO status in order to be regarded as more professional (Respondent 8). Respondents from DCEM agreed that the choice of study was motivated by the excitement for events and they were not aware of the amount of work involved in events management.

IMPLICATIONS FOR THE EVENT MANAGEMENT EDUCATION AND RECOMMENDATIONS

At an undergraduate level a few institutions have a generic event management course that incorporates most types of events, while other institutions cover only one type of event. Malaysia has been active in integrating event management into their education curriculum. However, industry input although encouraging, is still ambivalent in providing concerted efforts with academia. Clearly opportunities exist for industry and educators to work together to bridge the gap offering a well rounded event management program. Many academics have entered the event management academic field from other disciplines. This group with various backgrounds participates in the making of multidisciplinary profession in a similar way with architecture with different levels, coordination and designing plans. The timeline for an event would be the main difference. Architects projects are for a longer period, while event manager's projects are a shorter term. And the intangibility of it must generate emotions to ensure a legacy. It was noted that few opportunities are given for independent event management courses due to the lack of confidence of the sustainability of such programmes. Areas such as risk management, event legacy, best and sustainable practices should be a fundamental component to understand event management in a holistic approach. In this way, an event management curriculum would qualify for a recognized discipline with added value for the development of the industry and the quality of the graduates. This scale of the research could be expanded to a wider population to give a more exhaustive data. Another angle to analyze event management education in Malaysia could encompass the industry, event's users and also from the educators. Demand for event management training is increasing, and the education system at least in the private sector has been quick in recognizing this need and developing curriculum. However, little has been done to assess the extent of appropriation of imported curricula with the local scene and what adjustments could be made to tap the latent needs that only research can unveil. The guidelines set by MQA allowed event management education to be organized through academic progression from diploma to master's degree. However, the required subjects should be designated to offer a more consistent content. Our education offers study and research findings indicated that there is a lack of a defined core curriculum for event management education in Malaysia.

CONCLUSION

Through standards and curriculum development, it appears that Malaysia's governmental agencies are fully integrating aware of the reality of event management education. Event management education has started to be more present in programmes, that are not only restricted to tourism education, but that rather includes all the range of possible entries of events: business, hospitality and communication notably for its branding part. Each of them is stressing its own strengths. For graduates it appears that event management education is becoming more important to master the full extent of the profession with a vision and a sound foundation. The challenge for educators is to translate event management global concepts and rhetoric into professional curriculum that will prepare future practitioners to conduct business, communities, and customers to a more professional approach of planning, organizing and implementing events. The trend is changing and now programmes can sustain themselves, although it is too soon to measure their viability for the long term. From the employers' view point, we can conclude that there are contradictory discourses. On one hand, professionals without event management education, generally based on their own experience, assume that a career in this industry is possible without proper event management education. On the other hand, most of them complain about the difficulty in finding competent employees that can handle all the areas of expertise required of a professional event manager. Too often, employees can only perform one part of the job, be it communications, marketing or operations. The gap can only be reduced with a new generation of qualified event professionals enforcing the recognition that the industry deserved and also the standards set by the authorities should encompass this new direction.

Events and meetings are forecasted to continue to grow in the future, and this growth will influence destination physical, social, cultural and natural environments. The development of event management and event management education in the context of South-East Asia is therefore a

promising field of education and research.

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会展旅游专业“分段式模块项目化”教学模式探讨

张跃西

金华职业技术学院旅游与酒店管理学院

摘要

针对会展旅游专业的高等职业人才培养问题,本文提出“分段式模块项目化”教学模式。该教学模式主要内容是采用循序渐进教学方式,坚持能力本位的教学原则,对特定专业所对应的职业能力进行模块化分解(基本能力、核心能力与拓展能力);围绕职业能力模块构建对应的课程体系(包含核心课程、主干课程及辅助课程),配备专兼结合的双师型师资队伍和实验实训基地,进行有效的课程项目开发,并健全与优化课程质量标准与考核方式,实施工学结合的课程项目化教学,确保实现专业(能力)培养目标。文章强调会展旅游专业的会展服务能力(基本能力)、会展策划与营销能力(核心能力)以及会展旅游经营管理能力(拓展能力)的渐进式序列化培养。

关键词: 会展策划; 能力模块; 课程项目化; 教学模式

ON THE EDUCATIONAL MODEL OF “SECTIONAL MODULE PROJECT” FOR THE MICE AND TOURISM MAJOR

Yuexi ZHANG

Tourism School of Jinhua Professional and Technological College

ABSTRACT

In view of the issues of training talented person for the MICE and Tourism Major, this paper proposes the “sectional module project” as the educational model. This educational model includes that adopts progressive teaching methods, adheres to capability standard teaching principles, carries out modularization on the professional ability corresponding to the specific professional (the basic ability, core ability and developmental ability); establishes corresponding curriculum to the professional ability (including core courses, major courses and supplementary courses), provides good teams of teachers on camp and experts in the companies who have two licenses of professional ability, and good bases for experiment and training courses; carries on the effective curriculum project development, improves and optimizes the quality of curriculum standards and assessment; implements the curriculum project teaching methods through the combination of working and teaching, ensures to get the goal of professional (ability) training. This paper emphasizes the sequence of training for the MICE and Tourism professionals, such as the service ability (basic ability), the exhibition planning ability (core ability) and the Convention and Exhibition tourism management ability (developmental ability).

Key words: Convention and Exhibition Plan; Ability Module; Curriculum Project; Educational Module

1. 会展旅游专业的高等职业人才培养问题

会展旅游业是正在兴起的朝阳产业,迫切需要会展策划师、会展营销师、会展设计师等大量适用型高技能人才。高职会展旅游专业在我国是新世纪新发展起来的新兴专业,该专业岗位能力分析 with 人才培养目标定位以及人才培养方案,特别是教学模式创新是值得深入研究的课题。

高职教育工学结合人才培养模式是以培养学生专业综合素质、职业能力和就业竞争力为核心,利用学校和企业两种既不同又紧密联系的教育环境和教育资源,培养适应生产、建设、管理、服务一线需要的高级技术应用性人才的一种教育教学模式。会展旅游专业工学结合教学模式创新是一项复杂的系统工程,我们在全面深入学习领会教育部[2006]16号文件精神基础上,结合会展旅游专业

人才培养的实际需要,运用高等职业教育教学基本规律和原理,积极探索大胆创新科学验证总结提升,初步提出了“分段式模块项目化”教学模式。

2. “分段式模块项目化”教学模式的理论创新与实践探索

2.1 “分段式模块项目化”教学模式

采用循序渐进教学方式,坚持能力本位的教学原则,对特定专业所对应的职业能力进行模块化分解(基本能力、核心能力与拓展能力);围绕职业能力模块构建对应的课程体系(包含核心课程、主干课程及辅助课程),配备专兼结合的双师型师资队伍和实验实训基地,进行有效的课程项目开发,通过分组分流结合模块可移动式教学形式,并健全与优化课程质量标准与考核方式,实施工学结合的课程项目化教学,确保实现专业(能力)培养目标。

表1 会展旅游专业“分段式模块项目化”设计方案设计一览表

岗位能力	模块分析	核心课程	主干课程	辅助课程	模块项目	技能证书
基本能力	会展接待能力	会展服务项目教程	商务礼仪	思想品德	旅游艺术团 会展礼仪队	酒店中级
			会展心理	大学英语	实验剧场 杭州会展接待 义乌会展接待	外语三级
核心能力	会展营销与策划能力	会展策划实务	旅游服务文化	职业意识 会展外语	魅力旅游展会 工业展示中心	会展策划师
		会展营销实务	参展商实务 沟通谈判技巧	旅游地理	金华会展策划 金华会展营销	会展营销师
拓展能力	会展管理与设计能力	会展管理信息系统	会议经营管理 会展现场管理	会展评估 电脑应用	会展管理沙盘 实验旅行社	会展管理师
		会展旅游设计	会展平面设计	美学基础	工业展示中心 会展旅游协会	会展设计师

我们认为,会展旅游专业的基本能力是会展接待能力,核心能力是会展营销策划能力,拓展能力是会展管理与会展旅游设计能力。会展接待能力所对应的核心课程是《会展服务项目教程》,主干课程是《酒店服务》《会展接待》;所对应的模块项目是艺术团、会展礼仪队、杭州会展接待服务、义乌会展接待服务等等。会展营销策划能力所对应的核心课程是《会展营销实务》《会展策划实务》,主干课程是《会展文案》《会展广告》《会展旅游》《会展招商》《参展商》等;所对应的模块项目是魅力旅游展会、工业展示中心、金华会展招商、金华会展策划与营销等等。会展旅游设计能力所对应的核心课程是《会展管理信息系统》《会展旅游设计》,主干课程是《会议经营》《会展现场管理》《会展平面设计》等;所对应的模块项目是会展管理沙盘、实验旅行社、工业展示中心以及会展旅游协会等等。会展旅游专业人才培养方案明确要求学生取得会展策划师、会展营销师等职业资格证书。

笔者认为,高职会展旅游专业三年制,第一年培养基本能力,第二年培养核心能力,第三年培养拓展能力。这样的安排遵循“循序渐进”的原则,同时也兼顾到学生个体发展的不平衡性,给能力强的学生以更大的发展空间,有利于“因材施教”目标的实现。

2.2 双师型师资队伍培养与高素质教学团队打造

通过工学结合教学方式,实现职业能力培养,必须深化校企合作。教师熟稔教学基本规律,了

解学生学习认知水平和心理特点,而拥有行业背景的企业技术专家掌握生产一线的新技术、新方法、新工艺、新标准和新规定以及操作流程,由这两类互补性的主体所组成的教学团队,共同承担课程开发教材建设与教学任务,保证了实现工学结合一体化。组建与培养双师型师资队伍,将企业专家作为兼职教师直接整合到课程项目开发与教学过程中,打造高素质课程教学团队。比如,义乌商城会展公司招商部经理(会展招商)、外联策划部经理(会展策划实务)、接待部经理(会展服务项目教程);义乌梅湖国际会展中心会展设计部经理(会展设计)。整合实习基地的需要与学校人才培养的需要,组织校企双方教师共同研讨制定“三年早知道,一年有计划”的《学习导航》,有效指导工学结合教学过程,有利于实现多层次双赢的目标。

2.3 会展旅游专业实训基地建设与校企合作模式创新

我们经过十多年的探索,先后创建了“定向招生、订单培养”、“弹性教学、目标培养”、“学费资助、协议就业”合作方式,实施“双向选择、三方协议”管理方式,拓展“院会协作、联合培养”运作机制等系统化校企合作模式。

定向招生、订单培养。运用知名企业辐射效应,以企业名义联合企业参与进行自主招生,在有效扩大宣传效果的同时确保录取新生的生源质量、校企双方共同制定于实施教学计划,以便培养适应行业需要专业人才。

弹性教学、目标培养。与杭州红星文化大酒店、青岛海景花园大酒店等企业合作,组织学生进行强化培训积极参与杭州中国第七届艺术节、中国电影节、国际动慢节、2008奥运会(青岛帆船比赛)等重大节会的接待服务工作。

学费资助、协议就业。针对部分学生经济困难和就业困难的现实问题,学院与企业共同研究制定工学结合的教学方案,由企业资助部分或全部学费,校企双方共同承担教学工作,结合学生自愿安排学生就业。

双向选择、三方协议。学院根据专业培养目标和人才培养方案的要求,制定实习基地标准,遴选符合条件的企业参与学院组织的企业与学生在自愿“双向选择”的基础上,签订包括实习课程项目教学内容的“三方协议”,通过制度和机制等方面的系统化创新,完善实习教学管理模式。

院会协作、联合培养。针对实习岗位量少分散的现实问题,结合会展旅游专业需要,与会展协会、旅行社协会等行业协会进行联合,构建企业与实习小组长期合作的良性互动机制,创建“学院协会联合培养”的新型校企合作模式。

2.4 会展旅游专业课程项目开发与工学结合教材开发

围绕专业能力模块设置课程目标确定教材选题。要充分发挥专业教师团队和专业建设指导委员会的作用,根据专业人才培养方案,构建专业基本能力、核心能力与拓展能力三大模块,进而根据能力模块分别构建对应的课程体系,包括核心课程、主干课程与辅助课程。在明确课程目标的基础上确定教材选题。深化校企合作组建双师教学团队成立教材编写组。确定教材选题后,要组织有关专业教师在深化校企合作的基础上有针对性地组建双师型教学团队成立教材编写组,根据课程标准设计策划教材编写方案,并进行任务分工与合作。

创新教学模式建设特色教材。教材开发过程中,全体编写人员要竭尽全力认真学习教育部[2006]16号文件精神要坚持贯彻“工学结合”积极探索教学模式创新,努力打造符合高职教育特点与地方产业实际的特色教材。工学结合教材建设是高职教学改革转变教学方式的一项具有系统性的基础工程,也是实现工学结合教学模式创新的必然选择。工学结合教材开发理论与实践探索还有许多工作需要拓展,任重道远。我们寄希望于所有的有识之士,特别是有志于高职教育工作广大教师,能够以“创新创业”精神满腔热情地投身到“工学结合”高职教学改革与课程教材建设的伟大事业中来,积极主动研究与探索创造成功经验,不断推进人才培养质量的全面提升。

教材的体例可以考虑：1.课程目标，2.工作任务（项目设计），3.学习情景（实训），4.问题探究（理论提升），5.知识拓展（自主学习），6.作业测评（考核评价）。

3. 会展旅游专业社会服务与辐射能力提升途径探讨

服务与辐射能力是专业建设水平的标志性展示，其主要内容包括专业建设、教育教学模式创新、校企课程教材开发建设、技术创新科研成果以及人才培养等方面在全国范围内的技术服务水平与影响力。因此，积极创新会展旅游专业教育教学模式，优化人才培养方案，坚持因地制宜不断深化课程项目开发，激发教师学生的学习积极性创造性，不断提升专业服务与辐射能力，是我们必须持之以恒的追求。

提升服务与辐射能力，根本在于提升双师教学团队和管理水平，关键在于创建良好的考核激励机制，核心在于校园文化建设。要健全校企合作机制，积极鼓励专业教师密切联系企业，注重解决实际问题，发展专业技术服务能力。重大会展项目与培训项目既是提升教师水平的绝好时机，也是提升服务辐射能力的重要平台，我们需要千方百计地主动参与并全力以赴争取有所作为。

我们积极参与举办全国性大型学术会议“中国第五届生态旅游论坛暨武义温泉养生生态产业学术研讨会”，从策划会议、起草方案、实施运作、会议接待到扩大效果等等，全方位参与，才能使我们的会议经营水平得到有效提高。我们积极参与与区域性会展策划设计与营销，比如金华市工业科技洽谈会、金华工业展示中心、金华火腿文化博物馆等重大会展项目，也只有这样才能确立我们会展旅游专业的区域地位。我们与义乌国际会展公司合作，积极开展切实有效的专业技术培训服务，为我国方兴未艾的会展旅游业培养一大批优秀的会展策划师、会展营销师、会展设计师。

4. 会展旅游专业教学质量管理与考核评价体系建设

教学质量管理系统设计必须符合工学结合教学模式改革创新的需要，教学管理工作的核心内容包括两个方面，即促进教师职业教学能力提升与学生职业技能培养。教师职业教学能力包括：教师教学团队组建、课程基地建设与项目开发、校本教材建设、教学模式创新、科研与教学成果；学生职业技能培养包括：课程项目教学参与程度、职业技能展示认证与教学成果。

笔者认为，教师考核评价体系共设计为3个一级指标19个二级指标。一级指标是专业建设、管理工程以及服务辐射。专业建设包括9个二级指标，分别是专业特色打造、教学模式创新、教学团队建设、实习基地建设、课程项目开发、教材建设创新、实践教学创新、教学质量提升、教育科研成果等等；管理工程包括5个二级指标，分别是班主任工作、学院文化建设、招生就业创新、社团工作指导、日常管理规范等等；服务辐射包括合作模式创建、接收培训进修、专业培训项目、创收项目拓展、创收贡献增长等等。

考核评价方法手段也是非常重要的，主要内容包括：教学规范、项目化教考分离、民主测评，此外还有加分项目申报与考核领导小组认证。坚持“外部认可”（奖励）加分确认与差错追究的原则，逐步拉开档次，奖优罚劣奖勤罚懒，确保“分段式模块项目化”教学模式顺利运行，全面推进教育教学质量提升。

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作者简介：张跃西（1964-），男，安徽省青阳县人，博士，教授，硕士研究生导师。浙江省专业带头人，浙江省新世纪151人才（第三层次），金华市专业技术拔尖人才。金华职业技术学院旅游学院院长。主要研究领域：生态旅游开发规划与会展策划。

中国展览业的时空特点研究——基于因特网资料的内容分析

戴光全 陈欣

华南理工大学经济与贸易学院

摘要

本文以 2006 年 11 月—2008 年 5 月一年半时间内连续的因特网关于中国“展览”的中文网页为研究文本,采用媒体研究的内容分析(Content Analysis)方法,通过 SPSS 统计分析,对中国展览业的时空特点进行研究,从主题、会期、效果、行业特点等方面,对中国各省(市、自治区)主要展览的时空特点进行研究,尝试总结中国展览业的时间分布和区域分布特点。

关键词 展览业; 特点; 内容分析; 中国

SPATIAL-TEMPORAL FEATURES OF CHINESE EXHIBITION INDUSTRY A STUDY BASED ON THE CONTENT ANALYSIS OF WEB PAGES

Guangquan DAI & Xin CHEN

School of Economics and Commerce, South China Uni. of Technology

ABSTRACT

This paper services to a study on the spatial-temporal features of Chinese Exhibition Industry (EI). Therefore, the Internet Chinese webpages with issues of Chinese “Exhibition” from Nov. 2006 to May 2008 are analyzed, by using Content Analysis Method (CAM), and statistically analyzed through SPSS. The spatial-temporal features of Chinese main provincial (and autonomous regions) exhibitions are studied, by focusing on aspects such as themes, time, effect, industry characteristics and so on. On this basis, the spatial-temporal distribution characteristics of Chinese EI are summarized.

Keywords Exhibition Industry (EI); Spatial-Temporal Features; Content Analysis Method (CAM); Chinese

根据 Getz (1997: 7) 的分类,展览是会展业的主要业态。由于会展、节庆活动和地理环境因素有着密不可分的天然联系,Getz (2007a: 114-119; 2007b) 提出了会展/节庆地理学(event geography) 的概念,并对其研究的基本内容和理论思想进行了概括,会展、节庆的时空模型分析是其中的重要内容之一(表 1)。本文以 2006 年 11 月—2008 年 5 月一年半时间内连续的因特网关于中国“展览”的中文网页为研究文本,采用媒体研究的内容分析方法,通过 SPSS 统计分析,从主题、会期、效果、行业特点等方面,对中国各省(市、自治区)主要展览的时空特点进行研究,尝试总结中国展览业的时间分布和区域分布特点。

表 1 人文地理学及其节庆/会展研究的框架

人文地理学	节庆/会展的本质和意义; 节庆/会展体验	参加节庆/会展的经历	节庆/会展的策划和举办	节庆/会展的产出和影响	节庆/会展的过程和模式
人-地关系研究,特别是人类活动及其环境影响的时空模式	把节庆/会展和资源、文化及人类活动(如:庆祝收获的节日、季节性因素)联系起来	需求的距离和可进入性影响分析	节庆/会展的环境(场所)分析	基于空间的环境影响分析	时空模型分析(乡村节庆/会展的分布;作为城市复兴计划一部分的城市节庆/会展的增长)

资料来源:引自: Getz, 2007a: 114-117; 2007b。

1 数据和方法

1.1 方法步骤 目前,除广州、深圳等城市统计局对展览进行行业统计之外,全国性的会展统计数据严重缺乏,而由于统计口径等问题,各省市、各城市的展览统计数据也缺乏可比性。在此情况下,本文选择“展览”网页的内容分析方法,研究中国展览业的时空分布特点。选择网络上的展览资料作为研究资料,基本步骤是:从2006年11月—2008年5月一年半时间内连续订阅的谷歌gmail“Google 快讯—展览”(共909封email)选取2000多网页,从中确定630个展览,并对这些展览的网页资料进行内容分析,并提取数据资料建立SPSS数据包进行统计分析。图1是SPSS数据包的统计变量界面。

	Name	Type	Width	Decimals	Label	Values	Missing	Columns	Align	Measure
1	展览名称	String	111	0	展览名称	None	None	64	Left	Nominal
2	展览举办地_东中西部	Numeric	8	0	东中西部	{1,东部}...	None	8	Right	Scale
3	展览举办地_省市区	String	8	0	省市区	None	None	6	Left	Nominal
4	展览举办地_城市	String	8	0	城市	None	None	11	Left	Nominal
5	展览的主题	String	200	0	主题	None	None	62	Left	Nominal
6	年份	Numeric	8	0	年份	{1,2006年}...	None	8	Right	Scale
7	季节	Numeric	8	0	气象划分法季节	{1,春季}...	None	8	Right	Scale
8	月份	Numeric	8	0	月份	{1,1月}...	None	6	Right	Scale
9	会期	Numeric	8	0	天	None	None	6	Right	Scale
10	会展举办场馆	String	60	0	场馆	None	None	15	Left	Nominal
11	展览所属行业	Numeric	18	0	行业	{1,农业}...	None	16	Right	Nominal
12	展览的性质分类	Numeric	8	0	性质划分	{1,贸易性质的展览}...	None	10	Right	Scale
13	展览的内容分类	Numeric	8	0	内容划分	{1,综合展览}...	None	8	Right	Scale
14	展览的规模分类	Numeric	8	0	规模划分	{1,国际}...	None	7	Right	Scale
15	展览的时间分类	Numeric	8	0	时间划分	{1,定期展览}...	None	8	Right	Scale
16	展览按场馆的性质分类	Numeric	8	0	展览场馆的性质划分	{1,室内展}...	None	8	Right	Scale
17	按展览的形式分类	Numeric	8	0	展览的形式划分	{1,传统展览}...	None	8	Right	Scale
18	参展单位	Numeric	8	0	家	None	None	4	Right	Scale
19	展位数	Numeric	8	0	个	None	None	5	Right	Scale
20	展览面积	Numeric	8	4	万平方米	None	None	29	Right	Scale
21	采购商家数	String	18	0	家	None	None	6	Left	Nominal
22	观众人数	Numeric	8	2	万人	None	None	23	Right	Scale
23	签约金额	Numeric	20	4	亿元	None	None	21	Right	Nominal

图1 SPSS数据包的统计变量界面

1.2 内容分析 内容分析(Content Analysis)是对定性资料进行定量分析的方法(Finn,etc., 2000; Bos & Tarnai, 1999),同时,“内容分析是一种对传播的明显内容进行客观、系统的定量描述的研究方法”(奥格尔斯等,2000)。图2是内容分析方法的基本框架(引自:Bos & Tarnai, 1999),与经典的内容分析方法稍有不同,本文仅从选定的630个展览的网页材料中按照内容分析方法的基本原则来提取各个展览的有关资料作为研究的数据进行系统研究,所以并未进行“问题——假设”的步骤。

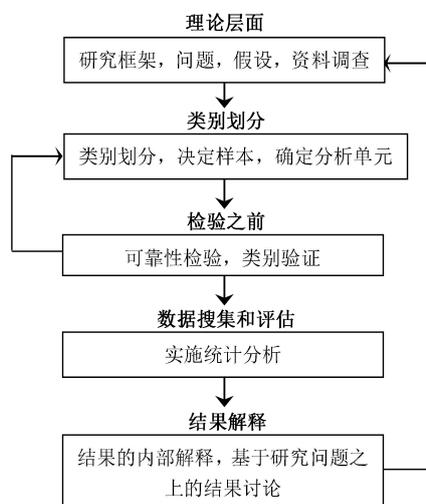


图2 内容分析方法的框架

2 研究发现

2.1 时间分布

按气象划分法季节来看,虽然 630 个展览平均来看,季节性不强,但是各省市区的展览则多集中于夏秋两季,同时不同省市区和东中西部不同地带呈现不同的季节分布特点。

表 2 东中西部不同地带展览数的季节分布

气象划分法季节	春季	夏季	秋季	冬季	夏秋两季	冬春两季	夏秋-冬春
东部	40.18%	19.17%	27.71%	12.93%	46.88%	53.12%	-6.24%
中部	29.75%	25.62%	32.23%	12.40%	57.85%	42.15%	15.70%
西部	27.63%	28.95%	34.21%	9.21%	63.16%	36.84%	26.32%
平均	36.67%	21.59%	29.37%	12.38%	50.95%	49.05%	1.90%

表 3 不同省市区展览数的季节性指数 (R)

省市区	R	省市区	R	省市区	R	省市区	R
西藏区	27.64	江苏省	12.56	海南省	8.74	广东省	6.07
新疆区	27.64	河南省	12.16	陕西省	8.20	上海市	5.78
甘肃省	27.64	广西区	12.13	湖北省	7.84	云南省	5.53
贵州省	27.64	重庆市	10.27	湖南省	7.56	福建省	5.03
宁夏区	27.64	天津市	9.86	黑龙江省	7.27	山东省	4.76
内蒙古	19.84	四川省	9.60	香港	7.17	北京市	4.13
澳门	18.63	吉林省	9.21	辽宁省	7.04	平均	3.76
江西省	15.96	安徽省	8.98	山西省	7.04		
青海省	14.43	河北省	8.98	浙江省	6.39		

季节性指数季节性强度指数 R 可以定量分析展览指标分布的时间集中性,其公式为式(1):

$$R = \sqrt{\frac{\sum_{i=1}^{12} (x_i - 8.33)^2}{12}} \quad (1)$$

式中, R 为展览指标的时间分布强度指数; x_i 为各月指标占全年的比重(如某月占全年 33.1% 则 x_i 为 33.1)。R 值越接近于零,指标的时间分配越均匀; R 值越大,时间变动越大,展览的淡旺季差异越大(参考:保继刚,楚义芳,1999: 52)。由表 3 可知:总体来看,全国的展览月份分布比较分散,但不同省市区则集中度不一,总体上表现为展览少的省市区集中度高、展览多的省市区集中度相对较低。

2.2 空间分布

空间分布上,各省市区及各城市展览数的分布均呈现出点状分布和集中分布相结合的特点,东部展览数远多于中部和西部,展览数量呈现从东部向西部逐渐递减的态势;从总体上来看,全国有 5 大展览集中的区域:东部的珠三角、长三角和环渤海地区是展览数和展馆分布最为集中的三个区域,郑(州)、(武)汉、长(沙)和西(安)、渝(重庆)、蓉(成都)、昆(明)则分别是中部和西部展览最为集中的两个会展区域(图 3)。我国展览业的这一分布特点与会展业分布的总体特点(过聚荣,2008: 3-4)、以及全国展馆分布的特点(图 4)是一致的。

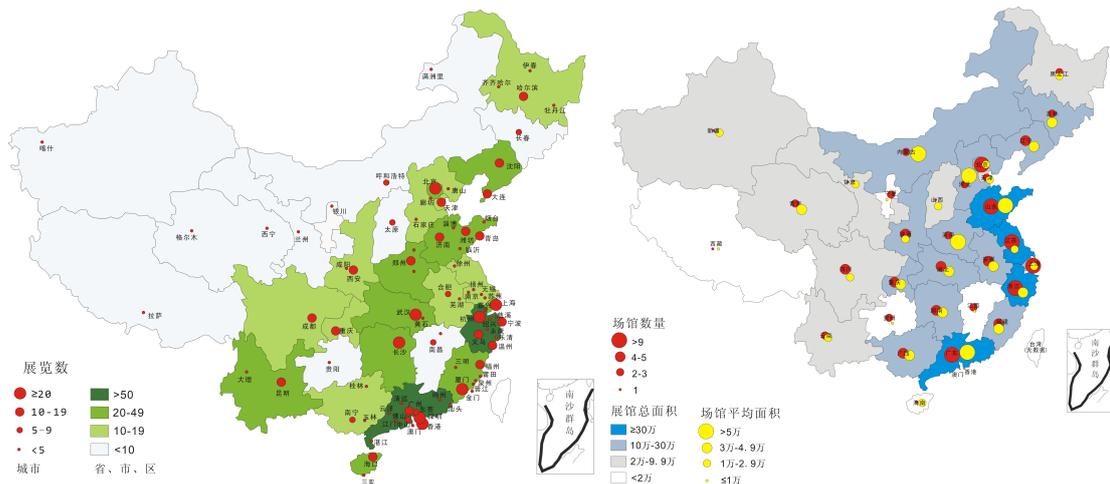


图3 展览的省市区和城市分布

图4 省市区展馆指标的分布

说明：图中国境线和行政区线不作划界之用。图4 各省市区展馆数和展馆面积数据转引自：胡平（2008）。

2.3 行业分布

从展览的行业分布来看，行业集中指数可以表示展览所属行业的集中度。该指标参考地理集中指数（保继刚，楚义芳，1999: 16-23）计算，其计算公式为式（2）：

$$G = 100 \times \sqrt{\sum_{i=1}^n \left(\frac{x_i}{T} \right)^2} \quad (2)$$

式中： X_i 为第*i*个行业展览数， T 为展览的总数， n 为行业总数（在此为52）。 G 值越接近100，展览的行业集中度越高； G 值越小，则集中度越低。由表5可知：总体来看，全国的展览行业分布比较均匀，但不同省市区则行业集中度不一，总体上表现为展览少的省市区集中度高、展览多的省市区集中度相对较低。

表4 不同省市区展览的行业集中度（G）

省市区	甘肃省	青海省	新疆区	贵州省	澳门	山西省	江苏省	安徽省	江西省	吉林省	香港
G	100.00	100.00	100.00	100.00	50.00	45.18	41.66	40.00	37.27	36.85	36.40
省市区	河北省	海南省	内蒙古	湖南省	辽宁省	河南省	四川省	天津市	云南省	湖北省	黑龙江省
G	34.64	34.28	33.33	32.30	31.34	31.23	30.30	30.00	29.58	28.75	27.85
省市区	上海市	北京市	广西区	广东省	山东省	陕西省	重庆市	浙江省	福建省	平均	
G	26.35	24.96	24.49	23.79	23.18	22.53	22.22	22.12	20.51	19.28	

从具体的行业分布来看，总体上各省市区展览所属的行业较多，但前10位的行业则相对集中（表5）。结合全国和各省市区的经济发展情况分析，展览的行业分布是全国和各省市区经济发展的重点密切联系的。

表5 不同省市区展览的行业集中度（G）

东部前10位行业		中部前10位行业		西部前10位行业		平均前10位行业	
所属行业	展览比例	所属行业	展览比例	所属行业	展览比例	所属行业	展览比例
文化艺术业	9.01%	房地产业	14.88%	交通运输设备制造业	9.59%	交通运输设备制造业	8.93%
交通运输设备制造业	8.31%	交通运输设备制造业	10.74%	农副产品加工业	8.22%	房地产业	8.77%
房地产业	7.16%	文化艺术业	7.44%	房地产业	8.22%	文化艺术业	7.97%
工艺品及其他制造业	6.70%	农副产品加工业	5.79%	食品制造业	5.48%	工艺品及其他制造业	5.26%
纺织服装、鞋、帽制造业	5.77%	农业	4.96%	房屋和土木工程建筑业	4.11%	农副产品加工业	5.10%
电信和其他信息传输服务业	5.08%	食品制造业	4.96%	林业	2.74%	纺织服装、鞋、帽制造业	4.15%
农副产品加工业	4.39%	商务服务业	4.96%	电气机械及器材制造业	2.74%	电信和其他信息传输服务业	3.83%
电气机械及器材制造业	4.16%	印刷业和记录媒介的复制	3.31%	工艺品及其他制造业	2.74%	电气机械及器材制造业	3.67%
商务服务业	3.23%	建筑装饰业	3.31%	建筑装饰业	2.74%	商务服务业	3.51%

2.4 相关分析

以各省市展览数和每个场馆平均每年举办展览数与场馆数量、场馆总面积、GDP 总额、进出口总额、展馆位序比、展馆经济比、每个场馆平均面积、展览的季节性指数进行相关分析，结果表明（表 6）：各省市展览业的发展主要与其国民经济总体发展情况、特别是与外贸发展情况密切相关，同时，也与场馆建设情况有着较为密切的关系。

表 6 展览数与经济指标等的相关分析

		展览数	每个场馆每年举办展览数	场馆数量(座)	场馆总面积(平方米)	展馆位序比(潜力指数)	GDP (亿元)	进出口总额(亿美元)	展馆经济比(开发指数)	每个场馆平均面积(平方米)	季节性指数
展览数	Pearson 相关系数	1	0.023	.993(**)	.986(**)	-.393(*)	.992(**)	.966(**)	0.239	0.13	-0.293
	显著度(双尾)		0.902	0	0	0.029	0	0	0.196	0.479	0.104
每个场馆每年举办展览数	Pearson 相关系数	0.023	1	-0.049	-0.032	0.047	-0.022	-0.051	-0.15	0.182	-0.449(*)
	显著度(双尾)	0.902		0.791	0.863	0.8	0.906	0.781	0.421	0.32	0.01
展览数(2年)	Kendall's tau_b	1	.450(**)	.629(**)	.602(**)	-.461(**)	.606(**)	.586(**)	.395(**)	.323(*)	-.720(**)
	Sig. (2-tailed)	.	0	0	0	0	0	0	0.002	0.011	0.000
每个场馆每年举办展览数	Kendall's tau_b	.450(**)	1	0.03	0.139	-0.05	0.245	0.164	0.041	0.233	-.449(**)
	Sig. (2-tailed)	0	.	0.818	0.269	0.695	0.051	0.193	0.746	0.064	0.000
展览数(2年)	Spearman's rho	1	.615(**)	.750(**)	.761(**)	-.573(**)	.765(**)	.732(**)	.509(**)	.449(*)	-.874(**)
	Sig. (2-tailed)	.	0	0	0	0.001	0	0	0.003	0.01	0.000
每个场馆每年举办展览数	Spearman's rho	.615(**)	1	0.036	0.216	-0.083	.350(*)	0.266	0.096	0.339	-.609(**)
	Sig. (2-tailed)	0	.	0.847	0.235	0.656	0.049	0.141	0.606	0.058	0.000

** . Correlation is significant at the 0.01 level (2-tailed).

* . Correlation is significant at the 0.05 level (2-tailed).

资料来源：相关分析的数据除展览数、每个场馆平均每年举办展览数、展览的季节性指数 3 个指标为本文据网络资料查询和计算所得外，其余数据均转引自：胡平（2008）。

2.5 可靠性检验

从表 5 的相关系数可知:表示相对位序的 Kendall's tau_b 和 Spearman's rho 相关系数远大于表示绝对额相关程度的 Pearson 相关系数,说明本研究的数据在各省市区展览相对位序方面的可靠性高于绝对数额的可靠性,研究结论主要体现了各指标的位序和比较的特点。

3 结论和讨论

本文主要利用有关展览的网页资料,对各省市区和全国展览业的时空分布特点进行了初步分析。研究表明:我国展览业无论在时间上,还是在空间上,都有着鲜明的季节性和突出的空间集聚的特征。这一特征与全国及各省市区经济发展、特别是与外贸经济发展状况紧密联系,也与场馆建设情况有着较为密切的关系。进一步的研究可集中在各省市区展览的主题比较、分类比较以及展览效果的比较研究等方面。

应当指出的是,本文的分析也有着明显的局限,这些缺陷和本文主要依据的网页资料内容分析方法的不足有着密切的关系(参考:张骁鸣,2005)。

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致谢

本文的研究得到广东省科学院优秀青年科技人才基金项目(2004年度)、广东省软科学研究项目(编号:2005B70101058)、广东省自然科学基金项目(编号:5301104)和华南理工大学2007~2008学年度“学生研究计划(SRP)”的支持,作者对这些机构的支持表示感谢。

MICE TOURISM DEVELOPMENT MODEL IN THE CENTRAL REGION OF CHINA: A CASE OF CHANGSHA-ZHUZHOU-XIANGTAN CITY CLUSTER

Yongde ZHONG
College of Tourism
Central South University of Forestry & Technology, P.R. China

Huaicai WANG
Landscape and Sustainable Development Research Center
Central South University of Forestry & Technology, P.R. China

and

Fen LUO
College of Tourism
Central South University of Forestry & Technology, P.R. China

ABSTRACT

As a research target of city cluster in the Central Region of China (Changsha-zhuzhou-xiangtan city cluster), the paper would analyze the current condition of MICE tourism in China, compared the difference of Hunan Province, the central region of China and the whole country, then used SWOT strategy (strength, weakness, threat and opportunity) of the MICE tourism industry, finally put forward the strategic thoughts based on geographic position, resource and characterized industries and tried to construct the MICE tourism industry model in Changsha-zhuzhou-xiangtan city cluster.

Keywords: City tourism; MICE tourism; Event Tourism; Central region of China; Changsha-Zhuzhou-Xiangtan City Cluster

INTRODUCTION

The MICE industry, named after “the touching world window” and “the urban bread”, causes the annual earning over 280 billions US dollars in the world, meanwhile, the development of the MICE industry has stepped in the related aspects of tourism industry, indicating that the MICE industry has provided a broader space for development of tourism industry. MICE, generally called “MICE” (Meetings, Incentive, Conventions and Exhibitions), refers to organize the team activities, meetings, exhibitions, sessions and festivals, etc, to cause the participant to carry on a series of consumption activities of tourism service, including business, academic exchanges, sports and cultural festivals, product transaction and expositions (Weber & Chon, 2002; Lee & Back, 2005).

With the development of tourist products from the sole sightseeing to the multiplex products, MICE tourism has being caused more and more focus in nations and regions in the world, and became an important development direction of the tourism industry, with great effects, strongly obtaining foreign exchange ability, long duration and rich profit compared with the traditional tourism industry (Kim, Chon & Chung, 2003).

MICE TOURISM IN CHINA

From the most visiting and government-organized MICE website (<http://www.chinaexhibit.net/>), the paper made a conclusion about professional exhibitions in 2006 and 2007 from organized province, number of exhibition (NOE), days, number of exhibition centers (NOEC), Number of exhibition places (NOEP), seeing in table 1 and table 2 (Peng & Wang, 2008).

Table 1
The Statistics of MICE in China in 2006

Province	XZ	SC	YN	HB ₁	GS	JX	GX	HL _J	SH	JL	HB ₂	TJ	SX ₁	BJ	LN	SD
NOE	0	33	7	14	0	3	13	14	22	7	9	11	1	189	51	80
Days	0	126	25	55	0	9	50	63	73	31	30	38	3	748	195	278
NOEC	0	5	2	4	0	2	4	3	10	6	6	2	1	8	6	11
NOEP	0	1	1	1	0	1	3	2	1	4	4	1	1	1	2	8
Province	NM _G	FJ	NX	GZ	QH	HN ₁	SX ₂	JS	AH	HN ₂	XJ	CQ	HN ₃	GD	ZJ	Sum
NOE	1	14	0	3	0	0	20	43	8	13	1	21	19	184	62	104
Days	3	52	0	12	0	0	95	144	24	41	3	67	64	602	214	371
NOEC	1	3	0	1	0	0	2	14	5	4	1	1	3	22	12	135
NOEP	1	3	0	1	0	0	1	11	3	1	1	1	1	6	6	64

Note: Data from (Peng & Wang, 2008)

NOE(Number of exhibition); NOEC(Number of exhibition centers); NOEP(Number of exhibition places); XZ(Xizang); SC(Sichuang); YN(Yunnan); HB¹(Hubei); GS(Gansu); JX(Jiangxi); GX(Guangxi); HLJ(Heilongjiang); SH(Shanghai); JL(Jilin); HB²(Hebei); TJ(Tianjin); SX¹(Shanxi); BJ(Beijing); LN(Liaoning); SD(Shandong); NMG(Neimenggu); FJ(Fujian); NX(Ningxia); GZ(Guizhou); QH(Qinghai); HN¹(Hainan); SX²(Shan'xi); JS(Jiangsu); AH(Anhui); HN²(Hunan); XJ(Xinjiang); CQ(Chongqing); HN³(Henan); GD(Guangdong); ZJ(Zhejiang); Sum.(Summary).

From the geographical location holding professional exhibitions in China, the paper found that the exhibition is not very balanced in various regions, showing more chances in the east, and little in the west. The eastern area is the centralized region of MICE, the nearly 3/4 exhibition is held in the coastal eastern area. Some provinces in the west did hold few exhibitions in two years. The northeastern part is at the exposition development phase with the central region of China. From the east to the west, exhibition distribution shows the dropping the trend greatly. Meanwhile, the internal distribution of exhibitions also presents unbalanced, especially in the western area and the northeast area. In the western area besides several cities, majority of provinces still maintained at the low level. The central region, especially in Hunan Province, gradually raises the numbers of holding exhibitions in every year, but there is great disparity between the eastern area in China, seeing table 3.

Table 2
The Statistics of MICE in China in 2007

Province	XZ	SC	YN	HB ¹	GS	JX	GX	HLJ	SH	JL	HB ²	TJ	SX ¹	BJ	LN	SD
NOE	1	31	10	19	2	4	14	16	300	5	21	24	0	191	52	114
Days	5	107	59	73	6	12	59	59	987	15	79	74	0	645	179	374
NOEC	1	4	3	3	2	2	7	1	10	1	7	2	0	12	5	19
NOEP	1	1	2	1	1	1	6	1	1	1	3	1	0	1	2	10
Province	NMG	FJ	NX	GZ	QH	HN ¹	SX ²	JS	AH	HN ²	XJ	CQ	HN ³	GD	ZJ	Sum.
NOE	5	23	0	3	0	1	23	43	6	17	8	18	36	214	81	1282
Days	14	94	0	13	0	4	78	144	18	52	30	62	136	769	271	4418
NOEC	2	7	0	2	0	1	4	11	3	3	3	1	5	25	12	158
NOEP	1	6	0	2	0	1	2	7	3	1	1	1	3	7	7	75

Note: Data from (Peng & Wang, 2008)

NOE(Number of exhibition); NOEC(Number of exhibition centers); NOEP(Number of exhibition places); XZ(Xizang); SC(Sichuang); YN(Yunnan); HB¹(Hubei); GS(Gansu); JX(Jiangxi); GX(Guangxi); HLJ(Heilongjiang); SH(Shanghai); JL(Jilin); HB²(Hebei); TJ(Tianjin); SX¹(Shanxi); BJ(Beijing); LN(Liaoning); SD(Shandong); NMG(Neimenggu); FJ(Fujian); NX(Ningxia); GZ(Guizhou); QH(Qinghai); HN¹(Hainan); SX²(Shan'xi); JS(Jiangsu); AH(Anhui); HN²(Hunan); XJ(Xinjiang); CQ(Chongqing); HN³(Henan); GD(Guangdong); ZJ(Zhejiang); Sum.(Summary).

Table 3
The Regional Distribution of MICE in China in 2006 and 2007

Year	The East of China			The North-East of China			The Central Region of China			The West of China		
	NOE	Percent	ANR	NOE	Percent	ANR	NOE	Percent	ANR	NOE	Percent	ANR
2006	813	78.02	81.30	72	6.91	24.00	58	5.57	9.67	99	9.50	8.25
2007	1012	78.94	101.20	73	5.69	24.33	82	6.40	13.67	115	8.97	9.58

Note: NOE(Number of exhibition); ANR(Average Number of the region).

Table 4
Percent of Professional Exhibition of Hunan Province and The Central Region of China

Year	Hunan Province				The Central Region of China			
	NOE	Days	NOEC	NOEP	NOE	Days	NOEC	NOEP
2006	22.41%	20.92%	21.05%	12.50%	5.57%	5.28%	14.07%	12.50%
2007	20.73%	17.87%	18.75%	11.11%	6.40%	6.59%	10.13%	12.00%

Note: NOE(Number of exhibition); NOEC(Number of exhibition centers); NOEP(Number of exhibition places).

From Table1 and Table2, it is very clear that NOE, days, NOEC and NOEP all rise in the whole country in 2006 and 2007. From Table4, four aspects of professional exhibition in Hunan Province all drop, and NOEC and NOEP of professional exhibition of the central region of China drop except that NOE and Days rise. The data of table3 and table 4 reflect that MICE tourism of Hunan Province and the central region of China have gradually risen since 2006, but the development speed of professional exhibition is slower that the whole country. At the same time, the average development speed of MICE tourism of the central region of china is faster than Hunan province. So, the MICE tourism of Hunan Province has meeting the great challenge not only from the eastern and western provinces of China, but also from the other provinces in the central region of China.

SWOT ANALYSIS

Strength Analysis

Changsha city was honored of first batch historical and cultural city in 1982, also named after the first batch of China outstanding tourist city in 1988 by the National Tourism Administration Bureau. Zhuzhou city and Xiangtan city were honored of China outstanding tourist city in 2006 and 2007. There is a diversity of natural and cultural attraction in this region in which 100 scenic attractions have been developed or developing, e.x. Chairman Mao's Fomer Dwelling, Yuelu Academy, Yuelu Mountain, Yan Emperor Tomb, Xiangjiang River, Liuyang fireworks, Changsha World Window, Changsha Ocean World, Hunan TV Station. In recent years, the tourism industry of the region has developed fast. According to the statistics report for Hunan Province, the whole region received tourists about 60 million people in 2007, compared in 2006 to grow 8. 1%; and receiving state the border tourists about 700 thousand, the ratio grew with 6.9%.

The new regional urban planning has promoted the whole urban image powerfully. In this region, there is an excellent transportation network in which Beijing-zhuhai expressway exists from the north to the south, Shanghai-ruli expressway from the west to the east, Beijing-guangzhou railway from the north to the south, Shanghai-guizhou railway from the west to the east. Airlines of Changsha Huanghua International Airport have been built at home and broad which has been the No.1 airport in the Central region of receiving international tourist beyond 1 millions. And Xiangjiang River scenic belt and Liuyang River scenic belt, new Furong South road, Hongyi expressway are being built, which will promote the fast unity of three cities and provide scenic corridor. Next year, the government will build the orbital transportation through which arrival from one city to the other

will be in 20 minutes. Finally, Changsha-zhuzhou-xiangtan urban cluster has gotten the honor of the society of resource-saving and environment-friendly in 2007. Therefore it obtained the World Bank CDS plan the subsidization and would promote Changsha-zhuzhou-xiangtan regional urban image powerfully without doubt.

Table 5
Comparison of Exhibition Scale in China

Rating	Name of exhibition hall	Scale(m ²)
1	Guangzhou Int'l Cnvention Center	300 000
2	Shanghai New Int'l Exhibition Center	230 000
3	China Export Product Conference Center	160 000
4	Nanjing Int'l Cnvention Center	100 000
5	Hunan Int'l Cnvention Center	97 600
6	China Int'l Cnvention Center	70 000
6	Guangdong Moden Int'l Cnvention Center	70 000
7	Chengdu Int'l Cnvention Center	62 000
8	Shandong Int'l Exhibition Center	60 000
9	Kunming Int'l Exhibition Center	50 000
9	Wuhan Int'l Cnvention Center	50 000

Note: Data from Ou & Zeng (2006).

Although other provinces surrounding Hunan Province, like Sichuan, Hubei and so on, have few several large-scale exhibition halls, they have not formed the brand competitive power. The newly built Hunan International Convention Center and Qingzhuhu International Convention Center's scale and the matching facilities is also in the front row, even the country.

First, the overall economic development tendency is good. The national economy has been growing continually, stably and swiftly realizing the GDP142.8 billion Yuan in 2007, according to might the price ratio computation, compare in 2006 to grow 12.1%. The commodity exchange market volume of business came to 54.5 billion Yuan in 2007, compared in 2006 to grow 30.1%. Secondly, the change of industry structure is advantageous to the regional economy development. three-industry structures of Hunan Province has been reformed from 40.7:40.7:18.6 in 1978 to 15.7:34.5:49.8 in 2007. And the third industry of the city cluster increased in value 75.2 billion Yuan, grew 12.9%. Thirdly, the government has provided the historical opportunity for the convention and exhibition industry development. In 2002, Hunan provincial party committee, the provincial government proposed "development culture industry, construction culture strong province" the strategic target, and had deployed "an area three belt" the regional development with "the four-wheel drive, two-wings fly".

Weakness analysis

Because changsha-zhuzhou-xiangtan has been considered as the interior regional cities, the information is relatively unenlightened, the popularity and the fine reputation is low, the urban image lacks the attraction, economical emissivity and the demonstration effect are weak. It will influence the exhibitors and participators to consider it an important destination of MICE.

Old convention facility and equipment is backward, the new facility is being operational in the process, has a period of running time with the market. Meanwhile with the convention and exhibition industry related upstream, the Downstream Enterprise like Traffic department and so on has the big disparity in the enterprise strength and in the quality with the convention profession service standard. Moreover the shortage of convention professional workers also will restrict the development of the regional convention and exhibition industry. It can be said that Changsha's MICE industry served chain's conformity still to be at the bottleneck condition --- specialization supplies to be restricted in short-term and the international trail connection difficulty is quite big.

There exist some serious problems as follows: the legislation is not lack, the administrative department is not clear, the operating process is complex, the government participation situation is quite serious, the market mechanism operation is not complete, etc.

Opportunity Analysis

According to the profession convention, one convention duration from the preparation, the exhibition to accomplishment is 7-15 days, and each exhibition hall (center) can undertake 50 - 60 times of exposition in one year. At present, some famous exposition cities in China, such as Shanghai, Beijing, Dalian, Shenzhen have crowded conventions day by day, so many of medium or small convention will be arranged in interior cities. Changsha-zhuzhou-xiangtan city cluster will face more convention opportunities as an important transition area from the east to the west of China.

Cultural art industry: Because of the unique Hunan culture bred the world-wide Hunan powers, e.x. “Hunan army of Publication”, “Hunan army of Television” and “Hunan army of Sports”, Hunan provincial party committee and the provincial government proposed the general goal ---“development culture industry, construction culture strong province”, and took Changsha-zhuzhou-xiangtan city cluster as “the central area” of the key cultural industry and tourism and MICE industry development as “two wings” of the cultural industry, will achieve the target in Television industry, the publication industry, the newspaper industry, the entertainment industry (Hunan Province Culture Industrial development Plan (2001 - 2010)). Without doubt, the city cluster has gotten the characteristic position of MICE.

Agricultural industry: Hunan is a big province in agriculture, and the agriculture industry is an big superiority in economy of the region, 8 counties of the region are Hunan Province's oil base county, three counties e.x. Changsha, Wangcheng, Ningxiang are the national pork-type pig base county. The successful holding of agricultural exposition is an outstanding example.

Technical industry: the improvement of people’s living standard depends on not only agricultural industry but also technical industry. As a decade development, the region has been famous for the technical industry, e.x. engineering machine, iron and steel industry, locomotive making industry, bio-medical industry. The development of these advantage industries has been considered as not only the industrial bases, but the centralized area in technology, business, and communication.

Changsha-zhuzhou-xiangtan city cluster as the national resource-saving and environment-friendly experiment area will open regional agglomeration effects in China, and has been included into seven of the national guiding and cultivation city clusters. The intensive city resources deployment will raise the high regional attraction of convention market.

Threat analysis

It is an old saying “the MICE industry is an auxiliary booster for the regional economy”. Each big city in the whole country made great efforts to build convention facilities to make the target of “the Convention Metropolis” into reality, meanwhile, it also could intensify the competence among big cities. At present, although the domestic convention profession competition level is imbalanced, one batch of convention superiority city has being bloomed, so that they would form the huge impulse for cultivates the convention market to Changsha.

There is much of competence among convention facilities, exhibition planning and service companies, Organizing units. It is one kind of drive, also one pressure. But because the Changsha convention market profession maturity is insufficient, the autonomy possibility is small and confused, these factors would influence the sound development of the MICE industry.

The development trend of MICE industry is to use more and more social service. It not only needs the highly conformity in the professional service chain, but also the necessary support from the

closed industries. Although there is a few support foundation in the city cluster, the supply ability and the supply are a little disparity among them.

STRATEGIES FOR MICE TOURISM DEVELOPMENT

Changsha is an old city, the typical personalized “mountain-water-island” famous city, also individual guiding-the-entertainment-trend and enjoying-leisure-life modern city. Zhuzhou is an industrial, transportation, clothes and historical city. Xiangtan is the hometown of Chairman Mao in China. Therefore, the urban image of Changsha-zhuzhou-xiangyan could be identified as “Charming Cities, Entertaining Cities”. The urban brand image of “Charming Cities, Entertaining Cities”, is rooted in the long-historical and deep Hunan culture, and manifests the unique charm of Hunan culture unique. The urban image of “charming Cities” summarizes the natural and cultural values of the region, e.x. Yan Emperor Tomb, Chairman Mao Former Dwelling, Liushaoqi Fomer Dwelling, Xiangjiang River, Liuyang River, Yuelushan Mountain, Juzi Island, which all reflect long history and deep culture in thirty million year of the region. The image of “Entertaining Cities” tries to manifest the region the delicious diet culture and the hot fervor's singsong house culture so that everyone coming to the region would feel the strong leisure atmosphere of the region. The MICE of the region should be rooted in the natural and cultural values, also in the modern industry development.

The tourism products covering the high market share in certain region must have the characteristic. MICE tourism of the region needs to begin from the MICE project, takes the superiority and the latent superiority industry of the region as the key point, makes the scientific and reasonable planning for MICE , cultivates regional MICE brand, and promotes the regional overall image in order to develop and regional and local characterized MICE industry.

Taking the Hunan Province agriculture exposition as an example, Hunan is a big province in agriculture, has successfully held 7 session of agricultural exposition, has developed into a famous brand in Hunan agriculture exhibition and gotten the eye of the nation-wide agents. The agriculture exposition began to establish international seats and attract overseas exhibitors set up the MICE brand of the region. The development of MICE of the region should depend on the natural and cultural superiority resources of the region, set up owned MICE brand, like clothing exhibition, the medical instrument exhibition, the engineering mechanics exhibition, agricultural exposition, auto exposition, the Liuyang fireworks festival, the golden eagle festival and so on, and screen and cultivate one batch to have the characteristic, the specialized and sound developing exhibitions, e.x. room purchase convention, cartoon festival, tourism cultural festival.

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A CONCEPTUAL FRAMEWORK FOR MONITORING PLANNING STAGE OF A SPORTS MEGA-EVENT

Shang-Chun Ma
Sheffield Hallam University, UK

Tien-Hsiu Liu
Shu-Te University, Taiwan

Ian D. Rotherham & David J. Egan
Sheffield Hallam University, UK

And

Shang-Min Ma
National University of Kaohsiung, Taiwan

ABSTRACT

The purpose of this paper is to propose a framework for the planning stage of sports mega-event management. This paper identified the lack of review during the development stage in sports mega-event studies, and importantly, the void of research truly evaluating an event systematically by including perspectives of host residents and event planners from the outset. Based on the philosophical approach of pragmatism and integrating the concept of a sustainable development perspective, the framework was developed and applied to a case study, the Kaohsiung 2009 World Games. The survey of 606 host residents' views about potential impacts of the event revealed that the respondents tended to show a higher level of agreement on the host benefits. The results of 38 interviews with stakeholders indicated that there are big gaps not only between the city's long-term development and the Games itself, but also within the event strategies adopted. Using this information, the key sustainability issues can be recognized and monitored during event planning stage so that the outcomes of events can be enhanced and then sustained for a longer term.

Keywords: Sports mega-event; Sustainable Development (SD); Triple Bottom Line (TBL)

INTRODUCTION

It has become commonplace for governments and event organizers to pursue events in order to develop or regenerate their cities, regions, or even countries. Essentially, events, such as a sports mega-event, can bring huge impacts, both positive and negative to host areas. However, as a consequence of the proliferation of these events, there is an increasing need to justify whether such a strategy is necessary. Yet research investigating impacts has frequently been restricted to the economic dimension (Masterman, 2004; Sherwood et al., 2005), with limited attention to social and environmental dimensions. As recently noted (Fredline, 2006), research on events and their 'sustainable management' in a region or area has been seen a rise in use of the concept of the "triple bottom line" (TBL). This concept was developed by John Elkington in the 1980s when it was treated as a way that organizations can either create or destroy value in the economic, social and environmental spheres (Elkington, 1999a). Later, it has been broadened to summarize TBL reporting or sustainability reporting (Sherwood et al., 2005), which is linked to the concept of sustainable development (Elkington, 1999b). Chernushenko et al. (2001) maintain that the organization adopting TBL as strategies can benefit from their mutually reinforcing by meeting business, social and environmental goals. Thus, taking such a view requires an analysis of broad issues within economic, social, and environmental dimensions. In terms of research philosophies or methodologies adopted in the reviewed literature, most researchers prefer either purely quantitative (i.e., positivism) or purely qualitative (i.e., interpretivism) approaches. Consequently, this discipline has hardly been explored by through the methodological alternative of a mixed methods approach. Creswell (2003) suggests that

“pragmatism” has been regarded as leading to mixed methods research. This approach differing from the traditional philosophies of qualitative research and quantitative research is termed as the “third research paradigm” (i.e., the methodological paradigm) (Johnson & Onwuegbuzie, 2004, p. 14). This gap, as recognized in the examination of planning of sports mega-events by Leonardsen (2007), may be bridged “only by combining ‘soft’ (qualitative) and ‘hard’ (quantitative) approaches, and by combining a bottom-up and a top-down perspective (e.g., event organizers)” (p. 26).

This research conducted at the mid-point two years prior to the Games clearly addressed underlying areas in relation to sustainability issues which were already identified in previous case studies, i.e. Sheffield 1991 World Student Games, Lillehammer 1994 Winter Olympic Games, Sydney 2000 Olympic Games and London 2012 Games. By examining the views of host residents about impacts of the Games, the negative impacts of the Kaohsiung 2009 World Games could possibly be well recognized from the outset. The exploration of views of key stakeholders can develop a clearer generic understanding of how the planning process of the Games impacts host areas and how these impacts will be managed. Ultimately, this research is likely to appreciate whether the hosting of the World Games is truly a catalyst for the sustainable development of the Kaohsiung City. The primary research covered the timeline of hosting the 2009 World Games from bidding and decision-making processes in 2003, through the establishment both of the Kaohsiung Organizing Committee (KOC) and policies in 2005, to the research point in 2007. Understanding the planning process of the Kaohsiung 2009 World Games at the early stage is extremely timely given opportunity for event managers and policy makers to review the process and after the Games. This could well inform the future Games during and after as well as the planning and promotion of future events. The purpose of this paper is to identify the lack of review during the development stage in mega event studies, and importantly, to suggest an approach that may be new to this discipline, by applying a framework to a current case to review the development process prior to the mega event. Research on impact studies of events, especially sports mega-events, has recently focused on sustainability issues covering three dimensions. Use of indicators, such as those established in the Olympic Games Global Impact project (OGGI), is being encouraged to inspect such hosting processes and results. But to create a comparable benchmark is relatively difficult due to the complex and differing nature of each host area. In this sense, they are often addressed in terms of meeting localized needs. For an event to be sustainable, it should be evaluated “from the outset in relation to the concept of sustainable development, with key indicators of sustainability being identified and then monitored over a long period” (Bramwell, 1997, p. 18). The current study was compiled on the basis of this argument and approached the challenge by assessing a case study, the 2009 Kaohsiung World Games.

This study was framed within a conceptual framework developed by this research. Selected cases studies, as mentioned above, have been reviewed in order to determine the key issues that need to be addressed. Based on this, the framework (Figure 1) was presented to illustrate the process of how a sustainable sports mega-event is formulated. The identified potential pre-event impacts in the column in Figure 1 were assessed with a self-completion questionnaire (VTIAS), which aimed to examine host residents' perceptions of the potential impacts. On the other hand, useful criteria were developed with reference to the Olympic Movement's Agenda 21 (IOC, 1999) and the Taiwan Agenda 21 (CEPD, 2004). This is important since there is no appropriate instrument available to evaluate a sustainable sports mega-event. Simultaneously, the chosen instruments were to be applied to evaluating the sustainability issues. However, it is notable that each criterion has been established with several specific items which cannot be illustrated here due to limited space.

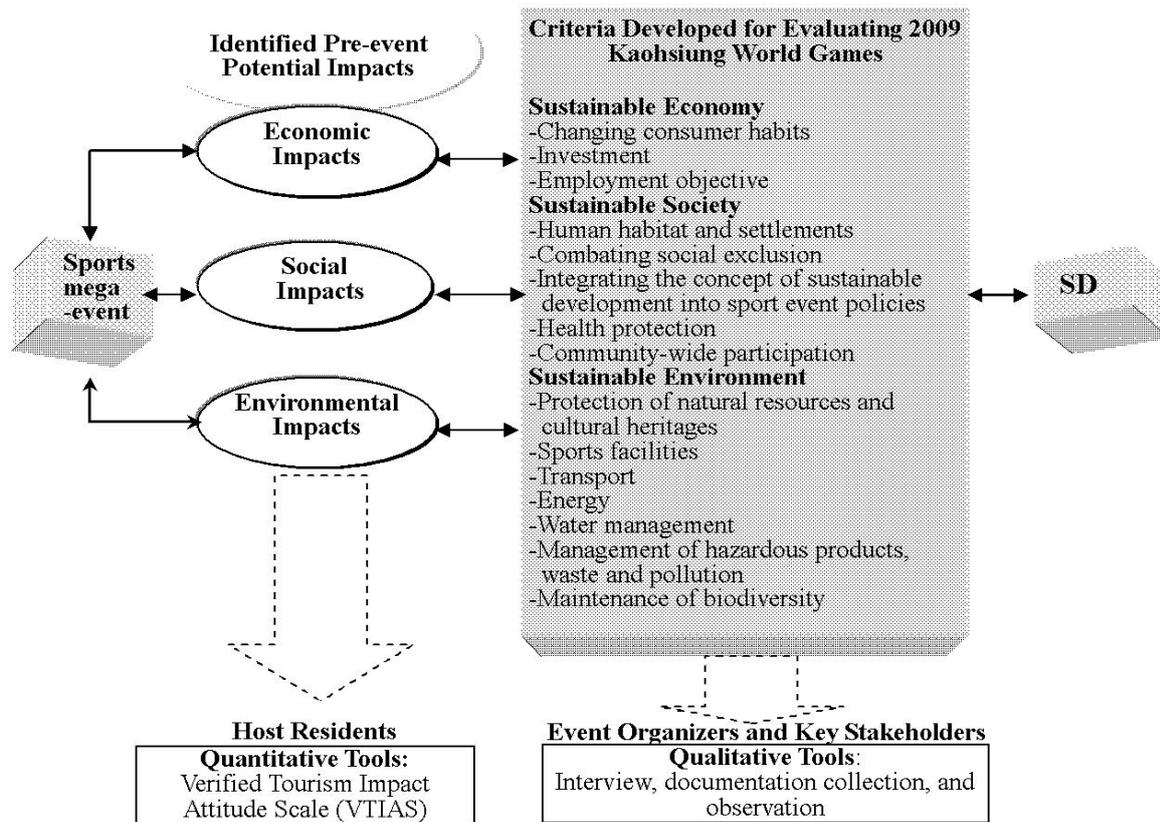


Figure 1
Framework of formulating sustainable sports mega-event

METHODS

The mixed-methods approach was considered appropriate for this research. On the one hand, quantitative inquiry was necessary for assessing the significance of a sports mega-event (i.e., impacts inquiry). At the same time the phenomenon of organizing this mega-event in terms of sustainable development issues merited a qualitative approach. With respect to qualitative approach, semi-structured interviews, documentation collection and observation were used as methods of data collection. Purposive sampling, as noted Bryman (2004), entails an attempt to build up a good correspondence between research questions and sampling. Through this interviewees are relevant to the research questions. This technique was utilized in this study and it was believed that the logic and power of it lie in selecting information-rich cases (Patton, 2002). A purposive sample of thirty-eight people from a wide range of categories, including Kaohsiung City Government (KCG), KOC, individuals, non-government associations, and host community leaders, served as participants. Through the use of an interview guide, within which a list of topics was explored and questions asked, it ensured that “same basic lines of inquiry were pursued with each person interviewed” (Patton, 2002). Therefore, interview guides and questions were then fit for the experiences and duties of the targeted interviewees. Data were collected two separate times, with the primary fieldtrip (thirty-two participants) from January 2007 through March 2007. Twenty-six interviews were conducted face-to-face, and four via telephone. Two participants provided an e-mail response and investigation reports and conference papers relevant to 2009 Kaohsiung World Games and 2001 Akita World Games. Notes were made during interviews without digital recording. The researcher had six telephone interviews with host community leaders during August 2007 when more attention was given to community participation. Interviews conducted face-to-face were undertaken mostly in the offices of the interviewees and typically lasted from twenty minutes to an hour and a half. All data collection procedures and materials were reviewed and confirmed either by the supervisory team or

the University Research Degrees Sub-Committee (RDSC). Documents were collected including official documents, minutes of meetings, proposals, progress reports, formal studies, and local and national newspapers articles. Most were obtained during the period of fieldwork, with an enquiry made during the interviews for access to additional data. A further useful official website (i.e., Official Publications Echo Network, OPEN) was provided with abundant observations completed by those who received governmental funds. Daily news sources were also searched with respect to the latest progress of the World Games. Observational evidence was obtained through direct observation during the field visit. Though this wasn't the principle technique for collecting data, it did help provide visual evidence, issues and activities being studied. Observations of the Lantern Festival and the others were undertaken. For the Lantern Festival period, visits to observe were at three different times: daytime and nighttime and progress of the festival. Other fieldwork involved in taking photographs at Games sites and the routes constructed for the Games (e.g., Zhongshan Road, Formosa Boulevard and Bo-ai World Games Boulevard). With respect to quantitative approach, purposive sampling was also selected to be the technique for the survey since an accurate sampling frame was unavailable largely due to ambiguous boundaries between host and non-host zones. Data were collected from host communities nearby four competition venues in the Kaohsiung City where they are regarded to be more exposed to impacts during preparatory work as well as the events taking place during the Games. In total, 700 face-to-face surveys were undertaken in late January and early February 2007, with 606 useable questionnaires.

The interview questions were posed principally on the basis of specific criteria of sustainable development in sports mega-events. They served to explore diverse sustainability issues with specific respect to economy (i.e., changing consumer habits, attracting investment, and employment objective), society (i.e., human habitat and settlement, combating social exclusion, integrating the concept of sustainable development into sport event policies, health protection, and community-wide participation) and environment (i.e., protection of natural resources and cultural heritages, sports facilities, transport, energy, water management, management of hazardous products, waste and pollution, and maintenance of biodiversity). The total number of questions was finalised at forty-six. Two forms of generic and specific questions were designed into the interview question list to achieve breadth and depth. Considering the above, there were eight questions pertaining to three economic themes, fourteen questions linking to five social themes, and twenty questions concerning eight environmental themes. Besides, to distinguish issues concerned between different levels from policy-makers to event executive and from central officials to local ones as well as to generate relevant data, some slight variability of the questions was needed to ensure that all of the interviewees are comprehensible and that are in conjunction with their duties. However, answers to each question provided by interviewees whose duties cover the same issue in part or completely were also served for comparisons between the results. As a consequence, the necessary of similarities for these questions was pursued. Two introductory questions were also developed to yield information about interviewees' background regarding their involvement with the host of the World Games. Since this study was conducted in Taiwan, careful attention was also paid to ensuring that the translation into Chinese was able to accurately represent the original meaning when they are initially developed in English. Assistance was sought from two bilinguals of Chinese and English to double-check the translation. In terms of the questionnaire being used, it was designed to explore residents' attitudes of the perceived potential impacts of the 2009 Kaohsiung World Games. A twenty-seven-item questionnaire, the verified tourism impact attitude scale (VTIAS), was designed from previous research (refer to paper presented in this conference). In addition, basic demographic items measured gender, marital status, age, occupation, the highest education, and annual personal income.

The approaches of qualitative data analysis involved with a series of procedures were intended to adopt content analysis and thematic analysis. Based on Ezzy (2002), the use of content analysis enables data analysis according to the predefined categories, while thematic analysis, in contrast, the categories into which themes will be identified are not predetermined before coding the data. When the categories are placed into the analytical units (i.e., sustainability issues addressed within the three dimensions of economy, society, and environment) which are defined before analysis, the researcher is able to review each unit of analysis and further to categorize it. The following stage

is to interpret results and to draw a conclusion. On the other hand, thematic analysis involves a series of steps and finishes when the researcher finds no new information in the data. The coding procedures were adapted from techniques suggested by Strauss and Corbin (1990). The first stage usually described as 'open coding' (Ezzy, 2002, p. 88), involves thorough examining and then manually categorizes important themes. The following step is to check and compare those general codes so as to identify any potential of them that could be differentiated or merged together. The next step called 'axial coding' involves with the integration of codes on the basis of the axes of central categories. In this stage, the relationships between codes were checked and entailed re-visiting data to reorganize the previous codes and to rename them where necessary. The last step called 'selective coding' needs to identify the core category. Validation strategies (Creswell, 2007; Creswell & Miller, 2000) were employed to ensure the research trustworthiness, including (1) the use of triangulation which involves corroborating evidence from multiple sources between interviews, field notes, observations, and document to elucidate a theme or perspective, (2) member checking with participants, and (3) peer debriefing by other key stakeholders and researchers. Regarding the approach to quantitative analysis, techniques employed including Independent-Samples T Test, exploratory factor analysis (construct validity) and reliability analysis (Cronbach alpha coefficient), were performed to test and refine VTIAS, resulting in the final twenty-four items. The Cronbach alpha coefficient on the total scale was .887. Data were analyzed using SPSS with descriptive statistics to provide a more full insight into each potential impact the residents expected and concerned prior to the Games.

FINDINGS

Descriptive analysis indicated that respondents tended to be in agreement with positive statement while less agreement with negative statement. An analysis of qualitative data revealed that there were big gaps not only between the city's long-term development and the Games itself, but also within the event strategies adopted. The main findings were presented as follows (see also Table 1):

(1) Main findings relating to the economic issues

a. Changing consumer habits: The promotion of green labels and the integration of green procurement system in the planning process of the Games can encourage sustainable consumer habits after the Games, both in public and private sectors (e.g., Torino 2006 Winter Olympics). This research highlighted, however, that the issue of changing consumer habits has not been well recognized from the outset in organizing the 2009 World Games.

b. Investment: a) Hosting sports mega-event possibly attracts tourists to future events and boost local economy which in particular benefits the hospitality and tourism industries. Also there will be a predicted 400,000 person-time visit during the 2009 World Games. Although this is expected to benefit the tourism and hospitality industries, some are worried that it might only be a temporary phenomenon. Furthermore, the strategy to retain regular visitors in dealing with the shortage of hotel rooms has been overlooked. This could possibly cause a leakage of income out of the Kaohsiung City. b) Business leveraging effect is also regarded as a long-term benefit to hosting sports mega-events. This research indicated that local enterprises are not fully involved in the planning process of the Games or connected to potential international business opportunities. This is the evidence of little emphasis placed by the event planners on long-term economic integrity in addressing event strategies.

c. Employment objectives: A proportion of Games-related jobs distributed to host residents before and after the Games can meet the expectation of job opportunities of host residents. It is also important to the sustainability of an event. A predicted 20,000 short- and long-term jobs and many jobs related to out-sourced projects are likely to create because of the Games. However, it is evidenced that neither event organizers nor urban planners made any commitments to providing full-time and part-time jobs for host residents.

(2) Main findings relating to the social issues

a. Human habitat and settlements: a) The creation of new sports infrastructure may fulfill social needs of host communities (e.g. Sheffield 1991 World Student Games and London 2012 Olympic Games) (Bramwell, 1997; LOCOG & ODA, 2007). It is evidenced that the city government was measured in a relatively low mean score (3.59) in listening to residents about their concerns with the World Games. The main considerations for constructing new facilities are meeting the requirements of International Federations (Ifs) standard, the development transportation, and available land for use. b) Relocation issue is regarded as a reoccurring phenomenon which usually concerns socially disadvantaged groups of the population. This is relevant to social equality and inclusion. It is often due to the tight schedule in the preparation of the Games that gives urban planners a robust excuse to evacuate or relocate the people living close to construction sites or competition venues. Likewise, smaller scale relocation is identified in the preparation for the pre-events of the 2009 World Games nearby one competition site, the Lotus Lake. Ideally, the negotiation and careful communication should be undertaken before bidding for hosting the Games.

b. Combating social exclusion: a) Sports mega-event can contribute to socially sustainable by including potentially disadvantaged groups in sports participation (IOC, 1999; Bramwell, 1997). This research indicated that there is a neglect of consideration for this aspect by including women, the aboriginal, and the disabled in the Games-themed projects. b) The selection of competition sites is important in catalyzing marginalized areas and thus helps combating social exclusion (e.g. Sheffield 1991 World Student Games and the London 2012 Olympics). However, Kaohsiung Games' strategy did not relate to this issue.

c. Integrating the concept of sustainable development into sports event policies: It is suggested the integration of the concept of sustainable development into event policies can establish a more sustainable operation of an event (IOC, 1999). The Kaohsiung 2009 World Games associated actions have not been governed by a holistic policy related to the concept of sustainable development more specifically. This research suggested that the Kaohsiung City Sustainable Development Network (KCS DN) is a ready platform to bridge the gap between policy-making and implementation stages.

d. Health protection: The protection of health is closely connected with sustainable development of a society which needs to encourage the people of the host city to engage in sport activity (Frey et al., 2007; LOCOG & ODA, 2007). However, this research indicated that the Games-related health protection strategy did not well develop during planning process. The scope is likely to focus on young people and athletics participants specifically. Most importantly, the 'trickle down effect' is also an unknown factor at the present time. It is noteworthy that event and government authorities should track the changes of residents' responses after participating in the Games-themed health facilitation activities.

e. Community-wide participation as a key aspect of socially sustainable: The inclusion of 'host communities' in the planning process has become an essential criterion for the success and sustainability of staging a mega event (Frey et al., 2007; Leonardsen, 2007). a) In the planning process of the Kaohsiung Games, there was a limited host residents' empowerment in the decision-making process and consultation with people potentially affected by Games-related projects; b) 'Cultural festivals' are an effective approach towards community-wide involvement. However, the Kaohsiung Games did not represent host community in the culture programs. As noted in the literature (Masterman, 2004), to represent host community in the culture programs will be catalyzing more long-lasting sociocultural legacy; c) Actions taken to involve wider community participation did not cover host communities deliberately. Furthermore, this research suggested that Games-themed community participation projects can be connected to the Integrated Community Development Project (ICDP). As such, their implementation may be more consistent; d) Recruitment of volunteer in hosting major sporting event is itself beneficial to community development. For example, engagement of volunteers from host community is beneficial to long-lasting management of sports facilities and a quality of environment. The Kaohsiung Games did not fully recognize this point from the outset.

(3) Main findings relating to the environmental issues

a. The protection of natural resources and cultural heritage: Sports mega-events can play an active role in protection of natural resources and cultural heritage. In terms of the National Sports Park and the Main Stadium, it is not clearly whether the long-term plan is set to ensure the quality of its practice for a longer-term.

b. Sports facility: To create a successful legacy, the surrounding natural or man-made scenery should be considered (IOC, 1999). In terms of the Kaohsiung Games, there is a less consideration in the aesthetic issue due to a lack of robust regulation and historical context (e.g., the Main Stadium).

c. Transport: Sports mega-events frequently face transport challenges which have been recognized as a massive impact on environment (Chernushenko et al., 2001). Amongst possible solutions identified, the Kaohsiung Games have not drawn enough attention to reducing the number of private vehicles access to entering the event zones during the Games and to coming up with strategy which encourages people using public transit .

d. Water management: To achieve a more sustainable water management in sports mega-event, key areas planners can involve are to ensure the quality of natural waters, avoidance of contaminating water and treatment of waste water generated (IOC, 1999). The most concern about this respect in hosting the Kaohsiung 2009 World Games will be the refurbishing work on the Lotus Lake. A lack of monitoring information will not allow the overall evaluation of how it will be affected or affect the environs around.

e. Waste management: Hosting sports mega-events can engender a great amount of waste and pollutants whilst hazardous products may be adopted. Measures taken to avoid such negative consequences are necessary which can be detrimental to wider environment within host city for long term (IOC, 1999). This research suggested that relevant waste management solution from pre-events to Games period has not been clearly demonstrated. Event contractors get used to collecting all rubbish in bulk, which is regarded as no education value. This research suggested that sustainable sourcing plan applied at London 2012 could be an efficient solution to waste management.

f. Biodiversity: Issues regarding the quality of biosphere and maintenance of biodiversity have become necessary aspects in staging a so called 'Green Games' (e.g., Sydney 2000 and London 2012 Olympic Games). However, the Kaohsiung Games did not come up with Games-related biodiversity action plan, such as venue-based biodiversity and environment management plans which is to ensure the quality of biodiversity to be maintained before, during and after the Games.

Table 1
Findings as developed from the research framework

Economy Issue¹	Achievements	Challenges
<ul style="list-style-type: none"> •Short-term boost to economy (4.06)² •Tourism benefits (4.02) •Job opportunities (3.76) •Long-term boost to economy (3.13) 	<ul style="list-style-type: none"> •2360 long-term jobs at Kaohsiung Dome; a predicted 20, 000 job opportunities in total (short and long-term) •Out-sourced projects •Accommodation revenue •A predicted 400,000 person-time visit; 50,000 foreign tourists •Predicted output value: NT\$26 billion (≈ US\$ 0.866 billion) 	<ul style="list-style-type: none"> •Promotion of green labels and green procurement system in planning process •Plan for retention of regular visitors •Leveraging effect: to involve local enterprises in the Games and to enhance potential international business opportunities •To offer host residents jobs during construction and after the Games
Society Issue	Achievements	Challenges
<ul style="list-style-type: none"> •Draw attention to host area (4.10) •Enhancement of resident's 	<ul style="list-style-type: none"> •To avoid the risk of low use in living accommodation after the Games •The construction project of new 	<ul style="list-style-type: none"> •Consultation in host areas •Relocation issues •To involve women, the aboriginal, and

<p>pride(4.03)</p> <ul style="list-style-type: none"> •Recognized as tourist destination (3.98) •Actively support the Games (3.95) •More recreational opportunities (3.89) •As a vital role in local community (3.81) •Will not leave negative image (3.79) •Increase interest in sports (3.76) •Participate in decision-making process (3.59) •Listens to residents' concerns (3.59) •Increase the crime rate in local area (3.39) •Cause a political turmoil (3.03) 	<p>sports facilities accords with urban development proposals in host areas</p> <ul style="list-style-type: none"> •The concept of SD is embedded in the design and refurbishment of sports facilities •To involve young people in sports as an strategy to prevent social problems •The importance of cultural festivals were identified and connected to warm-up events •To engage widespread citizens in the planning process •Via recruitment of volunteers from local community as strategy to enhance citizens' pride and confidence, and interests in the Games 	<p>the disabled in sports specifically</p> <ul style="list-style-type: none"> •To promote sport activities •To involve marginalized regions in planning schedule •To make good use of the KCSDN (Kaohsiung City Sustainable Development Network) into planning process •A clear framework to integrate the concept of SD in overall event policy •To address health protection project in event strategy, aim at wider participants, trace 'trickle down effect' •Empowerment of community in decision-making process; to represent 'host' community in the planning of cultural festivals; to connect event strategy to ICDP (the Integrated Community Development Project); to adjust strategy of recruitment of volunteers
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Environment Issue	Achievements	Challenges
<ul style="list-style-type: none"> •Enhance city beauty (3.93) •Enhance the efforts of preserving heritage tourism resource (3.86) •Will negatively impact the environment (2.98) 	<ul style="list-style-type: none"> •Protection of natural resource and cultural heritage: protective development and implementation of Environment Impact Assessment •Sports facilities: followed Green Building Indices (GBI); its creation is necessary and to achieve multi-purpose functionality •Transport: 70 per cent rely on Kaohsiung Mass Rapid Transit; encourage clean transport, e.g. walking and cycling •Energy: new buildings are efficient in ventilation, air conditioning, lighting, and the utility of renewable energy (e.g. the erection of photovoltaic system in the Main Stadium can minimize 500 tonnes of CO₂ emission per year and supply 80 per cent of electricity needed during the Games) •Water management: new buildings followed water resources indicator of GBI; efforts to avoid contaminating water, preserve the quality of natural water, enhance flood storage, and create waterfront leisure space •Waste management: 'Cut-Fill balance' approach was undertaken at the Main Stadium construction site to retain onsite soil •Biodiversity: certain trees were retained on site and animals (e.g., the magpies) were monitored 	<ul style="list-style-type: none"> •Protection of natural resource and cultural heritage: to clarify long-term monitoring plan on the quality of its practice for a long period within the National Sport Park •Sports facilities: to consider fitting the design in surrounding scenery •Transport: need an additional traffic plan for areas around the Main Stadium; to reduce the number of private vehicles entering the event zones; to address the strategy to encourage participants to use public transit •Water management: to keep on monitoring how the refurbishing work will affect the Lotus Lake •Waste management: to ensure event contractors carry out three-bin policy (bins for recyclables, compostables and residuals); to come up with overall waste management solution for pre-events and Games time •Biodiversity: need to come up with 'Games Biodiversity Action Plan'

Note: 1.The first column presents the results of questionnaire survey. 2. The number in () stands for mean score.

DISCUSSION AND CONCLUSIONS

In terms of the employment objective, it has been addressed as one of long-term economic issues and with highly expectation by host residents. This is largely due to the high unemployment rate in the Kaohsiung City (Ma et al., 2006). In this context, the authorities should well understand that similar to other types of festivals and mega-events, residents are more concerned about how much extra income and how many jobs they will obtain from the capital contributed by visitors and participants (Crompton et al., 1998, in Kim et al., 2006: 94). A further analysis combining quantitative and qualitative results showed that from point of view of a sustainable economy, it is clear that the majority of temporary job opportunities are not committed to host residents during construction period. Then they may expect many anticipated job vacancies from long-term and out-sourced projects at several Games-related sports facilities. Next, experience suggests that the hospitality industry certainly benefits the most from the staging of the Games in the short-term, and this is also highly anticipated by host residents (e.g., shopkeepers). However, this study argued that the expected benefits for the tourism industry might be affected negatively through loss of regular visitors. The results also indicated that stakeholders are not aware of this nor do they envisage an action plan in response to such a potential impact. Besides, the 'investment attraction' has been addressed in the hosting of sports mega-events (e.g., Barcelona 1992, Atlanta 1996 and Sydney 2000) and is important given that business leveraging has increasingly become recognized critical for long-term development of host cities. This study found that the event planners for the 2009 World Games haven't fully embedded its importance into the planning process. This may partly explain host residents' uncertain attitudes towards long-term economic benefits. This further suggested that city planners put relatively little emphasis on long-term economic integrity, with most attention being directed to the Games itself. In other words, the event strategy for investment in the Games as a driving force for the economy was not effectively developed. If event planners do not address the concerns and issues as discussed above, it is likely that host residents may not approve the spending of their tax money on bidding other mega-events. A good financial return on the invested resources not only relies considerably on inward commercial investment, tourism, new business (Masterman, 2004), the generation of new jobs, the growth of existing business, and a legacy of new or upgraded capital works for host region (Westerbeek et al., 2005) but most importantly, plays a crucial role in the host communities' reaction to hosting sports mega-events (Kim et al., 2006).

Social dimension of event planning varies widely. The impact issues surveyed also reflect the attitudes of host communities reacting to the event planners' operation. This is in turn explained by the interdependent nature between sports mega-events and the social context of host areas. This study showed host residents actively support the Games ($M= 3.95$). Furthermore, it indicated that though the host residents agreed more recreational opportunities will be provided in host areas, such a provision of new state-of-the-art venues depends heavily on pre-planned urban development schemes and available land for use. Compared with Sheffield 1991 World Student Games (Bramwell, 1997) and London 2012 Olympic Games (LOCOG & ODA, 2007), a full assessment of precise needs and consultation with host areas during the timing when initiating to bid for hosting the Games was largely overlooked. Once these massive and costly buildings (funded by public money) cannot cater for host residents' expectation and local development needs, it is inevitable that the authorities, especially City Government, will be blamed. Host residents tended to agree that hosting the Games will grow their interest in sports participation ($M= 3.76$). This result also tailored opinions of some of the respondents who expressed that they supported hosting of the Games because 'it creates a chance and the atmosphere to get citizens involved in sports'. This information is encouraging when considering the present low rate of sports participation in Taiwan. Apart from that, for an event to be socially sustainable, the event strategy needs to closely connect sports participation with social exclusion and social equality. Taking this view deals with the involvement of socially disadvantaged groups and considers marginalized areas. As Smith (2006) observed, Birmingham's policy for sport and regional development strategy are gradually changed from external marketing tool towards the emphasis on the function of handling social exclusion and inequality issues. Likewise, Manchester 2002 Commonwealth Games' 'Active Sports Talent Camps' in nine sport involved 10,000 young able

and disabled participants in the Games as a strategy to achieve a lasting legacy for sport (Westerbeek et al., 2005). However, this study indicated that the Kaohsiung 2009 utilized their event strategy for sports participation to help young people avoid social problems, rather than helping combat social exclusion and social inequality. Accordingly, this study also argued strongly that the present strategy employed to enhance sports participation and to approach sports hosted in the 2009 World Games, faces challenges as above (see also challenges in social issues). As such, it is suggested that current strategies will need modification. In other words, a specific project is needed to instigate residents' interests and to provide a platform to attract their attentions.

Given that there were around ninety-one per cent of host residents support hosting of the Games, it was also not surprising that they think the Games is vital to their communities (M= 3.81) and should be enthusiastically supported (M= 3.95). Irrespective of these findings, the research demonstrated that not only was the involvement of residents omitted from decision-making procedures, but also wider consultation with host residents or citizens about Games-related projects was insufficient. Simultaneously these findings genuinely reflected host residents' views that the City Government paid less attention to their concerns with the World Games (M= 3.59). In addition, the host residents perceived a relatively low level of participation in the decision-making procedure (M= 3.59). As noted by Frey et al. (2007), the involvement of host communities and taking account of their views are essential. This is because major events are often able to play a significant part in improving social networks of trust and solving problems existing in local areas. Unfortunately, Kaohsiung 2009 has failed to do this through the consultation process. Although host residents valued the Games as important to their communities and would like to support the Games, the event planners and the Kaohsiung City Government should be aware that it won't guarantee this gap is itself bridged afterwards. Sheffield's Games had an adverse effect on the local majority political party. It is therefore suggested that event decision makers should learn from this and consider ways to sustain the high levels of support for longer term. The host residents were most likely to agree that staging the World Games will result in increased national and international recognition of the host region (M= 4.10). Tourism benefit is expected to transform an industrial city into tourist destination (M= 3.98). Both results suggest the host residents tended to agree that hosting the Game will not leave Kaohsiung with a negative image (M= 3.79). Indeed, being the second largest city in Taiwan but long being tagged "manufacturing place", Kaohsiung has struggled to be accepted as an attractive alternative to the capital city, Taipei. To some extent, hosting the World Games has been seen as a powerful destination development tool by urban planners. This in turn is believed to raise and reinforce residents' pride. Such a perspective is further strengthened by the host residents' attitudes toward staging the World Games (M= 4.03). In practice, despite facing challenges, event planners are prepared to recruit volunteers in local communities as an approach to enhance citizen's pride and confidence. With the anticipated re-imaging effect for Kaohsiung City and the consequences of its practice, future studies should examine how successfully the hosting of the World Games triggers this interrelationship. Compared with positive impact to be expected, host residents were more uncertain about potential negative consequences, e.g. crime rate (M= 3.39) and political turmoil (M= 3.03). 'Social representations theory' may play a part in explaining this result. The theory suggests that host residents may interact with various information sources which mainly shape their perceptions. Without a similar scale event to be held in host city or Taiwan, the absence of real experiences may mean that the host residents need to treat previous events or festivals in any kind as a benchmark to evaluate potential results. Further to this, as Gursoy and Kendall (2006) noted, the event planners and political leaders often ignore the potential cost prior to staging an event while promoting the expected benefits. In terms of this case study, considering both perspectives allows for a better understanding of the results during this stage of the Games.

With respect to environmental issues investigated, the study found that host residents have a high level of expectation in terms of the enhancement of city beauty (M= 3.93). Indeed, refurbishing works related to existing sports facilities and nearby environs (e.g., the Main Stadium, the Kaohsiung Dome, the Lotus Lake, etc.), Zhongshan Road, Formosa Boulevard, and Bo-ai World Games Boulevard, are initiated and will be completed in a shorter time for the Games. This is actually one of the main reasons for the high level of support from host residents. They also tended to agree that the

hosting of the Games will encourage an extra effort of preserving cultural heritage and natural resources (M= 3.86). The finding was consistent with previous study by Kim et al. (2006). To this point, the study showed that the thought of preservation of historic buildings and infrastructures with cultural meaning is embedded into construction plan. In terms of natural tourism resource, for example, refurbishing works on the Lotus Lake have led to enhancement of water quality and more waterfront leisure space for local people and tourists. As such, this finding is similar to IOC's (1999) and Deccio & Baloglu's (2002) observation relating to sports mega-events or mega events as being facilitator to catalyse protection of conservation areas, the natural resources, and the cultural heritage involved. Thus, host residents' expectation on this particular regard is likely to be achieved, which in turn is believed to contribute to the support of the Games.

On the other hand, however, host residents were uncertain of negative impact which may arise onto the environment as a whole (M= 2.98). According to host residents, the reasons why some of them did not support for hosting the Games regarding environmental concerns encompass that it will cause "much noise to the host communities" and "impact to daily life, especially traffic". Firstly, as Kim et al. (2006) noted, traffic congestion is unavoidable. Therefore, event planners and city governments should react to this existing challenge without question because sports mega-events such as the Olympic Games are held for a longer duration than other types of events. For the Kaohsiung 2009 World Games, transportation need at the time of the Games has been taken into account in order to lessen traffic congestion. This relies heavily on public transport systems such as KMRT and shuttle buses provided. Distances between hotels and competition venues are also arranged within several minutes walk or half an hour drive long. In spite of this, the study suggests that a further traffic plan for the Main Stadium areas is necessary. If this is not addressed then it will become an adverse factor that decreases support for hosting other similar events. Secondly, in terms of noise, it is taken for granted that the sources likely come from crowded spectators and participants, increased number of vehicles entering host areas, events, construction works, etc. This substantial impact seems to be inevitable as it appears as a phenomenon that shapes the atmosphere of 'hustle and bustle' in the host area. It is also taken as an important basis for host residents to support the Games. To this respect, future event planners need to address the above issues into event plan at the possible early stage, then undertake monitoring work during the Games, and assess the consequence afterwards. In this way, the 'noise' could possibly become the 'joy' of festival. Although great efforts have been dedicated to maintaining the quality of the environment through or within Games-related projects, the host residents tended to show a neutral attitude towards the overall environmental impact. The analysis indicated that the message of the City's strategy of investing in the Games as a means for regional regeneration, together with planning for environmental integrity, has not been fully delivered to residents.

The debate over the idea of hosting sports mega-events being sustainable continues to evolve with many beginning to doubt the long-term benefits touted by the event organizers and potential beneficiaries (e.g., politicians, shopkeepers, etc.). However, given that such events are prepared at least for some time to come, then it is at least an imperative for those involved to address overall urban strategies to ensure its practice as sustainable as possible (Pitts, 2008). It is suggested that some features of the Games were relatively more sustainable than others. Consequently, this research argued that the Games are unlikely going to produce the desired sustainable regeneration effects. It is the conclusion of this research that there is a window of opportunity during this interim period for amendments to policy and specific projects which will significantly impact the sustainability of the developments associated with the Games. The issue is being a lack of recognition of these emerging issues by planners and policy-makers. This suggests that a review at the interim stage of development would be beneficial and allow policy-makers to get back on track. Finally, the results would benefit the wider event studies and event managers in a way that both concepts of the TBL and the SD are considered whenever event phenomena need to be understood. Future event research considering longitudinal survey could apply this framework to studies before, during and post event.

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**STRATEGIC ALLIANCE FORMATION AND NEW PRODUCT DEVELOPMENT FOR
RURAL TOURISM PROMOTION –
THE EU LEADER+ 'RURAL TOURISM DAYS' INITIATIVE IN HUNGARY**

Emese Panyik
University of Aveiro

Tamara Rátz
Kodolányi János University College

and

Carlos Costa
University of Aveiro

ABSTRACT

This paper reports on the strategic alignment of alliance formation and new product development at a pioneer EU LEADER+ experimental initiative, the 'Rural Tourism Days' in Hungary, designed to serve as an alternative solution for rural tourism promotion. The case context for this illustration is an event of European initiation, national organization and local realization, resulting in the largest countryside tourism event of the country, creating a relational web of multiple actors of the public, private and non-profit spheres. Following a field research designed and applied in a case study approach, this paper attempts to delineate a conceptual framework and an applicable method towards the implementation and reinforcement of integrated rural tourism. The focus is primarily on the local event management strategies, including the collaborative capacity building of the LEADER Local Action Groups for innovative actions in tourism, with special attention on the formation of strategic alliances around the complex tourism products. Issues arising from the inauguration of the event and the potential it holds in boosting the rural network dynamics are discussed.

Keywords: strategic alliance, rural tourism promotion, event, LEADER+, Hungary

1. INTRODUCTION

Optimal business performance of public and private firms of various scale operating in a competitive environment compels product innovation and new product development (NPD), which are increasingly achieved through strategic alliance formation (Gulati, 1998; Gerwin, 2004) to reduce relational and competitive market contingencies. Notably, collaboration facilitates the development of complex new products depending on various competences and positioned for broad commercial application (Doz & Hamel, 1998; Lorange & Roos, 1992; Gerwin, 2004). A systematic and theoretically grounded line of research focuses on the background stimulants of strategic alliance formation for NPD (for a detailed review see Gulati, 1998 and Gulati, Nohria & Zaheer, 2000), but increased competitiveness, achieved by reducing the competitive pressure and triggering the collaborative capacity building through strategic partnerships, is certainly one of those most frequently mentioned. Taking the small and medium – sized enterprises (SMEs), particularly those operating in lagging rural areas, networking is a strategic tool to counterbalance the comparative market disadvantages derived from firm size, location and adverse business conditions. Within the highly fragmented, SME-dominated European tourism industry, where over 99% of all firms employ fewer than 250 individuals and 94.2% of which are in fact micro enterprises employing fewer than 10 persons (European Commission [EC], 2002), facilitating and fostering partnerships has been a substantial and powerful measure of intervention at the Community level (EC, 2006, 2007) within and between destinations of different types and stakeholders from the European to the local levels of both public and private spheres. From the marketing perspective in particular, joint efforts for more effective marketing solutions are likely to be the greatest where opportunities are perceived as being

available within a competitive environment (Palmer & Bejou, 1995), because reduced competitive pressure results in reduced adversarial conflicts (Bramwell & Sharman, 1999), which allows a better promotion of tourism products on a much wider scale (Tribe, 1997 cited in Telfer, 2001).

Accordingly, a local partnership approach has become a standard feature of many EU programmes and initiatives, including the URBAN programme targeted at deprived neighbourhoods in cities, the Poverty3 programme aimed at the integration of the most marginalized social groups and the LEADER (an acronym derived from 'Liaisons Entre Actions de Développement de l'Economie Rurale') Programme, for rural development (Geddes, 2000). The LEADER initiative, launched in 1991 as an experimental action drawing upon the progressive concept of integrated rural development, is currently being applied as an instrument for mainstreaming into the common rural development policy of the period 2007-2013 (EC, AGRI-F3, 2006). The term 'integrated', in this interpretation involves a vertical and a horizontal axis, that is, community participation in local decision-making (as synonym of "endogeneity", "bottom-up" or "grass-roots" approaches [Ray, 2000]) and sectoral diversification into rural economies, as agriculture has, in some point, retreated from its hegemonic position in the contemporary countryside (Marsden & Murdoch, 1998) and in parallel, raising attention is focused on the complementary sectors of agricultural activity, such as light manufacturing, handicrafts, food processing and tourism (Marsden, 1998, Saxena & Ilbery, 2007). In terms of the subject of this study, it is the local networks of LEADER actors of heterogeneous composition as outlined above, the so-called Local Action Groups (LAGs), and their collaborative capacity building for innovative actions in tourism, which are of interest. Most particularly, this paper reports on the strategic alignment of alliance formation and new product development at a pioneer EU LEADER+ experimental initiative, the 'Rural Tourism Days' in Hungary, designed to serve as an attempt of alternative solution for rural tourism promotion. The case context for this illustration is an event of European initiation, national organization and local realization, resulting in the largest countryside tourism event of the country, creating a relational web of multiple actors of the public, private and non-profit spheres. Strategically, the event drew on the inherent advantages of all levels, namely, the widely recognized LEADER brand of the European Union for promotion, its institutional background and relational capital at the national level for coordination as well as the existing local network of the Programme's rural communities for the realization of the event. Notwithstanding the widely recognized potential rural tourism represents in the LEADER Programme (Barke & Newton, 1997, Hjalager, 1996), the collaborative capacity building of the LAGs for innovative actions in tourism has not been a source of considerable academic discourse. The paper builds upon the premise that the nature of relationships among, and the coordination of, multiple private and public stakeholders involved in event tourism management influence the success of the event (Stokes, 2006). Underpinning the scholarly argument on the role of institutional forces in stimulating or inhibiting collaboration (Sharfman, Gray & Yan, 1991), this event was initiated by the Hungarian Leader Centre with the principal goal to address and mobilize the hardly accessible segment of rural tourists through temporal discount rates of designated services and complex tourism packages assembled locally by the LAGs through an extensive review of the fragmented and hidden rural stockpile.

The study argues that the clustering of destination attractions and services directly or indirectly linked to rural tourism through co-operative branding contributes to the disclosure of sparse and unexplored resources of lagging rural areas. While local festivals have widely been acknowledged as prominent tools for attracting new visitors to a locale or a region (Felsenstein & Fleischer, 2003), most obviously because festivals increase the demand for local tourism (Smith & Jenner, 1998) through image reshaping and potentially, destination branding (Kotler, Haider & Rein, 1993, Getz, 2008), the hypothetical construct of a temporal network of spatially dispersed but centrally coordinated local events has been neglected in the literature. Despite the well – documented nature, structure and transformations of destination networks (Scott, Cooper & Baggio, 2008; Pavlovich, 2003; Saxena, 2005; Augustyn & Knowles, 2000; Hawkins, 2004) only a few studies have addressed the context of events with, and impacts on, such partnerships (Stokes, 2006). Indeed, little is known in particular about the role and potential of promotive events as catalysts of the rural network dynamics. Primary evidence is drawn from a comprehensive non-probability sample survey (n=353) conducted by the Hungarian Leader Centre with the involved local service providers by the assistance of the

LAG managers which has further been completed by 19 in-depth interviews with key informant technique. The focus is primarily on the local event management strategies and on the local collaborative capacity, with special attention on the formation of the strategic alliances around the complex tourism products. Issues and difficulties arising from the inauguration of the event and the top-down approach of coordination are explored and the potential it holds in boosting the rural network dynamics and in reinforcing integrated rural tourism are discussed. It is important to note however, that the emphasis here is not on the evaluation of the event's short-term returns and their quantitative measurements, as, in a LEADER-specific context, it would risk applying inappropriate criteria (Ray, 1998) but rather, on the assessment of the event's strategic implication in long range rural planning.

2. THE LEADER PROGRAMME AND ITS IMPLEMENTATION IN HUNGARY

In retrospect, the past 17 years since the beginning of the LEADER Programme's history have yielded diverse, yet broadly comparable, implementation experience on the distinctive features of endogenous rural development across Europe, most indubitably however, in old EU members (see for instance, Barke & Newton, 1997, Shucksmith, 2002, Ray, 1998; Storey, 1999 and the special edition of *Sociologia Ruralis*, dedicated to the LEADER Programme, 40:2, 2000). The sequential phases, LEADER I of initiation (1991-1996), LEADER II of generalization (1996-2001) and LEADER+ (2001-2006) of consolidation have been represented in a shorter, hence more contracted-time span in most recently joined Central Eastern European countries coincident with the fifth enlargement process (in 2004 in its first and in 2007 in the second round), challenging profoundly the transformation of the institutional and territorial structures pertaining to the pre-accession preparation, particularly at the local level. This is owing to the progressive and unconventional LEADER-style approach of rural development, based on convergence between actors and establishment of links between activities, areas and sectors, which can potentially be captured by enlisting the 7 principals of the LEADER Programming: (i) area-based approach, (ii) bottom-up approach, (iii) partnership approach and LAGs, (iv) innovation, (v) integrated approach, (vi) cooperation and networking, and (vii) local financing and management (EC, AGRI-F3, 2006). Local participation is ensured by the establishment of the LAGs, the ultimate micro units of LEADER comprising of representatives of the local private-public-non-profit triangle, with a restriction of 50% regarding public sphere representation. The LAGs' degree of autonomy, and the configuration of decision-making system within may vary considerably depending on the Member States' specific mode of organisation and institutional context (European Commission, 2006), which implies that the structural dimensions of participatory development are not necessarily fixed, but quite on the contrary, marked by an impressive diversity (Ray, 1998).

Prior to the EU accession in 2004, there had been two pilot rural development programmes carried out in Hungary. As a result of the integrated, participatory approach implemented in micro-regions in terms of agricultural structures and rural development, voluntary associations of rural settlements had been established in the period between 1999-2001. In sequence, the LEADER+ pilot programme was launched in 2001, funded by the National Rural Development Support Scheme, with the comprehensive goal to lay down the foundations for the future implementation of the LEADER+ Community initiative and acquire the essential procedures, skills and practices. Though these pilot schemes undeniably fulfilled the role of exclusive representatives of the *interlocuteurs*' missing link, the main problems that have arisen, such as inadequate local human capital, lack of experience in administering public funds and low level of promoter activity (Krolopp et al., 2005) anticipated those associated with, and accompanied the further rounds of, the LEADER Programming.

The third generation of the programme in EU chronology, yet the first in Hungary, LEADER+ was introduced in 2005. In the first run, a group of LAG managers were selected through an open, public tendering procedure, followed upon by an extensive professional training, in parallel with a two-step selection procedure of the LAGs. In addition, a central coordinative body, the Hungarian Leader Centre (Hereafter: HLC) was set up to orchestrate and support the implementing procedure of the LEADER network. A total number of 186 LAGs applied, and 70 were found to meet

successfully the LEADER eligibility criteria. The selected LAGs included 980 settlements, covering approximately 1/3 part of the country's territory. For most of the LAGs throughout the country, tourism has been seen as the most appropriate path to diversification of the rural economy, in accordance with the European tendency (Barke&Newton, 1997). Out of 3600 submitted projects, 2700 were approved and scheduled to have been completed till September 2008, third part of which directly refers to tourism. In terms of the current budgetary period (2007-2013), considerable changes accompany the mainstreaming procedure of the LEADER Programme. While the overall number of the LAGs remains 70, the strategic objective is that from 2009, they shall cover at least half of the rural areas (MARD, 2007). This measure brings along the restructuring of both the territorial and the organizational system of the LAGs, as well the inclusion of new rural settlements and the establishment of new LAGs.

3. THE CASE CONTEXT AND RESEARCH DESIGN

The 'Hungarian Rural Tourism Days' event ('Magyar Vidéki Turizmus Napok') originally has been initiated by the director of the Hungarian LEADER Centre following the vital case of, with the aim to reproduce, a promotive campaign picked from the catering industry, the so-called 'Greedy Thursday' ('Torkos Csütörtök') in the area of rural tourism. Within this campaign of the Hungarian National Tourist Office, 50% off the total food bill is provided for guests in designated restaurants, pubs and café shops across the country (obviously those that join the action), on an appointed Thursday in the low-season (February or March). The three-fold strategic aim is to spotlight the old Hungarian customs and rituals related to the carnival season; to draw guests to more remote settlements by this opportunity which may furnish as catalyst to visit other villages, towns or cities; and thus to stimulate tourist activity in the 'dead season' and combat low tourist demand (Getz, 2008) through event development coupled with brand image building. The event has periodically been organized for 3 years by now, achieving only modest success in the first year, but gaining rapidly growing interest and popularity, thus producing gradually but steadily increasing returns, in the following ones. The idea was to replicate and set this event within the rural tourism context, under the co-ordination of the HLC, with the marketing sponsorship of the Hungarian National Tourist Office (HNTO) and most importantly, building upon the collaborative action of the LAGs. In order to elaborate a feasibility plan for the event, an event management team was set up, recruited from the HLC staff and a strategic planning document has been formulated around the assessment of critical factors determining the details of the event's implementation. Questions such as how to motivate the LAGs and how to design, conduct and marketing the event, have been addressed. Throughout the negotiations on the co-finance strategy, the LEADER delegates reached agreement with representatives from the Marketing Directory of the HNTO, and with two related Ministries at a state-secretarial level (Ministry of Agriculture and Rural Development and the Ministry of Local Government and Regional Development). In addition to the well-developed information and communication channels of the HNTO, the working organization of the Hungarian Leader Association ('Innovation Center of Gödöllő Ltd.') functioned as the event's official communication centre, taking the responsibility of a wide range of tasks from designing the event's website to the edition of related publications and advertising materials.

Strategically, the 26 local LEADER managers (each of them responsible for two LAGs) played a central role in terms of joining the LAG members with external rural stakeholders and service providers in strategic alliances and assembling the complex tourism products based on the participants' business profiles and the local attractions. The event took place between 21-23 September 2007 and gathered 52 out of the 70 LAGs, involving 340 settlements and 876 tourism service providers throughout the country, promoting 1376 services and 46 complex tourism packages with fixed minimum 30% off prices guaranteed in the course of the event. Thus, taking into account the diverse forms of resources available for this research, data were collected in three stages. Firstly, content analysis of the structure and composition of the 46 complex tourism packages was carried out by consulting the event's website, to identify clusters of tourism activities and resources. Secondly, primary data were obtained by the Hungarian Leader Centre's survey conducted shortly after the event in the fall of 2007. 509 questionnaires were sent out to 26 local LEADER managers across the country,

who were in charge of administering them during personal conversations with local participants, selected upon random probability and simple practical criteria such as availability and willingness to co-operate. The exclusion of the self-administration method yielded a high number of valid questionnaires, and although two LAGs refused to assist in data collection, 353 questionnaires were returned and only 3 questionnaires were excluded due to missing data. Hence, a sample of 350 questionnaires was eventually applied for further analysis. Owing to the 'semi-authoritative' nature of the survey, that is, having been conducted by the Hungarian Leader Centre, the questionnaire included 50 questions divided into 5 sections, resulting a hardly applicable length in 'voluntary' cases of scientific research. The first section considered the evaluation of the event based on the applied individual discount rates, revenues related to the event, guest/customer feedbacks, and perceptions on the efficiency of the national and local event marketing. The following three sections addressed separately the three largest sectors of service providers representative to the event, that is, that of the accommodation providers, the catering industry representatives, and the event organizers, respectively. The remaining questions are devoted to the recognition and knowledge of the LEADER Programme among participants, including the assessment of the tendering activity and the openness towards the implementation of a new innovative LEADER initiative in Hungary, the regional project chains.

Thirdly, to complete these results with further qualitative data, 18 semi – structured, in-depth interviews were completed (in Hungarian) between May and August 2008. 15 key respondents, all local LAG managers, were selected from the LEADER+ 'Information Point' staff designated to provide the tourists with detailed information on the event. Further, two members from LAG managing organizations, and the HLC's LAG coordinator were interviewed. The goal was to interview at least half of the participant LAGs' managers. Key informants were selected because of their broader view on the event arising from their involvement in event management. Interviews lasted on an average of 1 h ($\frac{1}{2}$ – $1\frac{1}{2}$), were type-recorded, transcribed and translated, and a few interviewees later provided, voluntarily or upon request, further information or written materials such as event summaries or complete lists of local participants. Interview questions were structured preliminary into three flexible categories according to the areas of interest to allow further relevant themes to emerge, and shed light on the research participants' concerns during the interviews as grounded theory analysis suggests (Holstein&Gubrium, 2003). These categories were as follows: 1) the LAG network system and its relational capital 2) the local event management strategies and experiences, including the formation of strategic alliances to collectively produce complex tourism packages and 3) further collaborative actions for rural tourism development in the LEADER programming. Supplementary questions were posed on the future implementation of the event with the aim to collect suggestions on the amelioration and refinement of the management agenda.

4. FINDINGS AND DISCUSSION

4.1 Rural entrepreneurial profile and visitor segments

The main business profiles of the participant tourism services providers of the sample are indicated in Table 1, including as well the specific profiles that each of the strata is composed of. According to the data most of the entrepreneurs were accommodation providers (30.9%), dominantly guest houses of various types such as B&B, self-catering cottages and forest-based properties (24.5%) and partly hotels (6.4%).The catering industry was the second largest in the sample (20.2%), with restaurants (13.8%) and traditional Hungarian restaurants typical of the countryside, the so-called 'csárda' (6.4%). Further, a vast range of niche retailing ventures were represented, particularly under the 'others' category from goat and cheese farms to watermills and tiffany lamp manufacturers, but the slightly higher representation of thermal baths, wine houses/cellars and horse farms reflects the touristic profile of the country. Furthermore, these entrepreneurial segments can potentially be pulling forces of the event, because the interviews revealed a relatively higher visitor number in many of these establishments, notably in the bigger, regional-level thermal baths and the horse farms, which are particularly attractive for children from urban families. Indeed, to cite one particular case triggering the local network dynamics, a thermal bath joined the LEADER LAG right after the event though had not participated in LEADER actions before. In accordance with the accommodation

providers, the vast majority of the restaurant owners and the ticket sellers (covering all the remaining categories) provided 30% off discount rates (87,7% of the total sample), and only a little part of the service providers offered more than 30% (12,3%), an average of 60,3% off discount rates during the three days of the event. There had been a sort of extremism accompanying this core element of the event, the discount rates. On one hand, apathy and scepticism dominated the attitude of the service providers towards the event. When the LAG managers were asked about the reasons why some of the local business owners refused to join, they recalled some of the typical responses: 'it surely wouldn't work', 'I'm not interested' or 'I wouldn't earn returns'. As one LAG manager pointed out, "The attitudes of the village people are different. They have lower incomes, than the city people. For them, 30% is a relatively bigger loss, than it is for city business people. (...) In addition, if they are to be paid by incentive holiday cheques, that would mean yet another 30% off their income. Thus, for many of them it really doesn't worth. Under these circumstances, it was difficult to convince them". Another argument they often encountered is the differences in the local entrepreneurs' comparative position. For instance, out of two neighbouring wine regions the one with higher recognition and fame represents higher tourism potential, and the challenge of the event has been to redirect wine tourists from wine regions they already know to those small ones they probably don't.

Table 1
Rural Entrepreneurial Profile

Tourism Diversification (<i>n</i> = 353)	Percentage share of the total number of rural tourism enterprises and entities included in the sample
Accommodation	30.9
<i>Guest House</i> ^a	24.5
<i>Hotel</i>	6.4
Catering	20.2
<i>Restaurant</i>	13.8
<i>Csárda</i> [*]	6.4
Ticket sellers	48.9
<i>Foundations and institutions</i> ^b	10.7
<i>Horse farms</i>	6.4
<i>Light manufacturing and handicrafts</i> ^c	5.3
<i>Museum / folk art exhibition</i>	5.3
<i>Thermal baths</i>	3.2
<i>Wine houses / cellars</i>	3.2
<i>Eco- and organic farming</i>	2.1
<i>Event organization</i> ^d	2.1
<i>Others</i> ^e	10.6

* Traditional Hungarian restaurants typical of the countryside.

^a Guest houses include: B & B, Self-catering cottages and forest-based properties;

^b Foundations and institutions include: Art and recreation centres, education centres, innovation centres, churches and public companies;

^c Light manufacturing and handicrafts include: blacksmiths, ceramists, potters and demonstrations of production techniques;

^d Event organization includes: Vintage festivals, religious festivals and village days;

^e Others include: cheese farm, goat farm, watermill, bicycle renting, guided tours, nature parks, libraries, local forest service;

However, far on the other hand, though in a few cases only, enthusiasm received the idea of the event. " (...) there was one person I hadn't think of [initially] who came to me and told me that I had included his neighbour in the programme, but him I hadn't although he wanted to join [the event] very much. Only those understood what the point was here, who could be able to think not in terms of

money but in terms of perspectives. I had one guest house owner in my LAG, an old woman from a small village who told me: I will even let the tourists sleep here free of charge. I will clean up the rooms; I just want them to come over”

This echoes the strategy of another LAG manager, who described her successful technique towards making the concept understandable among the locals.

“The way I put it forward, - and I now can say it worked for 95% of the locals – is that I made clear the best and the worst possible scenarios for them. That is to say, they either might be fully booked in that weekend or they might have not even a single guest. They should be prepared for both, as it should be bear in mind that it [the event] was experimental in nature and provided an exclusive opportunity for them. Considering all they gain in return, an all-around, national-level promotion reaching far beyond their individual capacities, including a website advertising their venture nonstop throughout and even after the event, 30% off discount during three days is quite a reasonable deal. I brought up my personal experience with ‘Greedy Thursday’, saying, that when the whole thing had started, me and my partner had been the only people in the local restaurant on that particular day. A year later, the very same restaurant was full. Thus, my efforts did not fall through in this aspect. I have had no phone calls from disappointed participants after the event like so many other LAG managers. We simply did not raise false expectations”

In fact, these kind of local event management strategies were preceded by personal consultations with each of the local service providers and by multilateral cooperations between the LAG managing organizations and the local public tourism entities, namely, the Tourinform offices and the Regional Tourism Project Development Offices prompted by the LAG manager, established around core themes such as matching the complex tourism packages’ contents, and developing a local marketing strategy. At the central levels, collecting and handling the incoming individual local requests in relation to the discount rates, has been identified as a challenging task. Several visitor groups or tourists had, for example, months before the event reserved tables or booked rooms for weddings or family celebrations for that particular weekend of the event, raising the question whether to be granted or not, by discounts. Some restaurant owners finked out of the conditions laid in the written contract and did not, or just partly provided discount rates for the visitors, being aware the lack of central capacity to control hundreds of service providers. In these cases the local knowledge of the LAG managers was an important source to invite trustworthy and acknowledged business people to be included in the programme.

Overall, there has been a moderate increase discerned in the domestic visitors’ number in contrast to the same period of the previous year (25.7%). However, interviewees reported on an average of 5-15% of increase only, revealing as well the higher attractiveness of key tourism products as opposed to the hidden tourism attractions. This is probably due to the fact that most tourists did not stay overnight in the destinations but rather, they picked from the locations, attractions and programmes upon personal interests and tastes, and compiled an itinerary for a one-day excursion, enough just to visit the main attractions of the area. Ideally, two or three days of length of stay could be sufficient to discover the hidden values of the subregions within the frames of the complex tourism packages, which the event failed to attain according to the interviews. Optionally, the niche products can be inserted in a rainy-day alternative programme package. In accordance with the general visitor habits as described above, accommodation providers reported on the lowest level of increase in visitors’ number (16%), whereas the catering industry (29%) and the ticket sellers (32%) achieved a relatively higher increase, reflecting the dominance of the ‘getting out & eating out’ sort of leisure activities in the demand profile of the event. Visitor segments are identified through the percentage distribution of age, group composition and place of origin, braking down into the three sectoral groups. The sheer volume of visitors aged between 31-50 in each of the sectoral groups indicates the majority of middle-aged visitors. Rural accommodation was sought by couples and families (69.2%), restaurants and other eateries roughly equally by couples and families (50.7%) and friends (46.5%) whereas ticket sellers had mostly couples and friends (47.8%) and families (36.8%) among their customers. Strikingly, the majority of restaurant customers and programme or event attendees came from the very same county (52.4% and 47.7%, respectively) while the guests of rural accommodation

properties came over from the capital, Budapest (38%) and the neighbouring county (31.6%). In sum, the event's potential overnight tourists comprise of couples and families from the neighbouring counties and Budapest, whereas day visitors can be retrieved by the displacement of residents, particularly groups of friends as potential restaurant customers, and local families as event attendees.

4.2 Event marketing strategies

In spite of these patterns of visitor segments, national-level campaigns had largely dominated the central marketing strategy. In addition to four TV spots and reports broadcasted in national public and private television channels, a two-page advertisement section of one prominent Hungarian newspaper, which enlisted all the participant LAGs, have to be accentuated. Also, online internet websites, mostly those of thematic profiles dealing with entrepreneurship, economy, EU funding or tourism, posted a column or so on the event. Unluckily, one of the leading private television channels inserted a spot in prime time in the news on the last day of the event. According to the website's press link, the event had been advertised in 18 local newspapers throughout the country. Not surprisingly, the direct campaign, particularly a TV report focusing on two LAG's programmes and attractions the day before the event, had dramatically increased the visitors' number the following day; in the broadcasted villages all accommodation facilities and restaurants were fully booked during the event. However, there had been no separate LEADER budget allocations reserved for local campaigns, therefore the carrying out of a local promotion, if at all, depended heavily upon the creativity of the LAG managers and on the actual local LEADER budget or eventually on the individual entrepreneurial budget. Hence, extreme examples stretching from not having anything at all to dynamic, multi-level local campaigns, sometimes 'conjured out of nothing' revealed throughout the interviews. One illustrative example for the latter is the case of one LAG manager who prepared posters of A/4 size in a WORD document and small printed handbills and pamphlets to distribute locally hand-to-hand and place them on advertising columns. He as well forwarded the local programme package by e-mail to hundreds of accommodation providers in one of the neighbouring cities famous of its thermal bath and advertised the event among his acquaintances on the virtual message board of a popular Hungarian social networking website.

Most part of the visitors had been informed about the event through the official website (<http://www.hazajaro.hu/>), or the local media, and considerably less through the national newspaper advertisement or the television spots, although, it is important to emphasize, that these last two options were not significantly more important, than the word-of-mouth referral, a powerful but often overlooked marketing tool in practice within rural territories. For example, more people knew about the promotions related to the event on the last day, than on the first thanks to the ripple effect, which can potentially be more striking in a network context (Sonnenberg, 1990). The lack of effective local campaign and the short period (about two months) for marketing and organization of the event were unanimously referred to by all interviewees. As a LAG manager noted:

"...We have been bombarding the leaders to direct some funding for local marketing so that we could advertise the event in the local or the county newspaper, which makes more sense than a two-page PR advertisement. We [neighbouring LAG managers] even allied and suggested a brochure enlisting all the service providers and programmes by region in the country to be centrally distributed, but we were turned down."

In other cases, the local programme was uploaded into one or more municipality websites, but not advertised in the local media, for the same reasons. However, 'rural reality', especially in lagging, peripheral regions, sets the scenes for very specific marketing conditions and requires adjusted strategy:

"It [the event] was not advertised in the local newspaper and we had no money for posters. (...) Here we don't have Tourinform offices [local units of the Hungarian National Tourist Office], neither a local television channel, and hardly anyone knows what the internet is. The LAG's website has 700 visitors per year! Here if one doesn't see the things written on columns in the streets, than he

will not know about it”

Individual, local campaigns were initiated by 13% of the services providers to reinforce the national promotion, presenting crisply the mistrust that generally marked the attitudes towards the new event, coupled with the inherent same sort of attitude that generally describes the rural population as respondents reported. Yet the few cases of individual marketing efforts yielded very positive results. One restaurant owner that intensely advertised the event in the local media reported significant increase in guest turnover in its property and that 80% of his guests purposefully came over because of the promotions. Similarly to the campaign in general, the website of the event started functioning only weeks before the event, further limiting the efficiency of the marketing campaign. Proper and simple structure that allows quick navigation has been pointed out as crucial by the LAG managers. However, many found the navigation overcomplicated and the long list of the complex programme packages, entitled with geographical names that many visitors from different parts of the country cannot pinpoint easily, led to confusions. Alternatively, these packages could have been attached to the list of service providers grouped by collective areas of reference, such as the regions. Another important shortcoming detected throughout the interviews has been the website’s failure to match with commonly applied tourism key words in the hit list of search engines such as Google. To put plainly, during an extensive mapping exercise of the total regional accommodation capacity of one LAG manager’s working group, the website’s link was not even once included in the hit lists of targeted search commands. In order to exploit entirely the website’s potentials and accommodate the ultimate goal to promote rural tourism, strategic alignment with online search engines is essential.

4.3 Strategic alliances for complex tourism packages

Invoking rural multifunctionality as an instrument, the purpose of constructing complex tourism packages by the collaborative action of rural stakeholders, has been three-fold. First, to map the fragmented rural tourism resources and compound marketable products; second, to interweave the elements of the adjacent villages’ tourism supply and third, to target the so-called ‘passive’ tourist, who favours package tours over individual itineraries. The LAG managers were entrusted to assemble a draft programme plan for the three days of the event with one or more packages, in conformity with the local factor endowments and the LAGs’ size. In most cases, this process begun with an objective-driven scan of the external-internal situational factors similar to SWOT analysis, to assess the strengths and weaknesses of the subregions embraced by the LAGs, in tourism terms. Equally important had been the identification of tourist segments potentially attractable to areas with diverse characteristics. For this reason of imposing diversity, each LAG required a different approach. The most commonly inquired sources of information on the local assets were the majors and the Tourinform databases, although the attendance had not generally been satisfactory. Most difficulties the managers found in building up mutual trust with the local service providers based on superficial central instructions and in the absence of professional tourism assistance within limited time constrains. Strategically, the available approximately six weeks had certainly been not enough to establish trust partnerships and plant the ‘market collectively but sell competitively’ sort of view, particularly among reluctant rural stakeholders. Other than the formal presentation of the event, there had been no consultations arranged to discuss incurring problems on a regular basis between the HLC and the LAG managers, and no coherent guidance whatsoever provided on its implementation. In part this is due to the newness of the event and the lack of experience to rely on, but also, it is indeed an upshot of belated action. Likewise, since selling a product is restricted to entrepreneurial entities, all services included in the package had to be purchased separately. Regarding that each of the programme packages was labelled informatively with an indicated lump sum price, this subsequently led to severe misinterpretations of the legal regulations pertaining such products and to confusions among the participants. For example:

“I received a phone call from a tourist who asked me where he could pay the indicated package price. I explained to him that the prices were not fixed and the services were supposed to be paid separately. Disappointedly he said that then he would rather go to the thermal bath in the nearby town and pay a fixed weekend package price because there at least he could clearly see what he was

going to pay for.”

In another case representative to the failure in consonant action and communication between the HLC and the LAG managers, a smith remained unpaid after a demonstration of traditional techniques because his visitors persistently cited and insisted on, the package price. At the horizontal level however, regional clusters of LAG managers frequently consulted on the aspects of organization of common interest, whereas the participant local businesspeople generally gathered once prior to the event to get familiar with each others' services and reconcile their plans, if time permitted. The event provided a good opportunity to involve external entrepreneurs, such as for instance outskirts city districts which in some cases are more rural than urban in nature (forests, nature parks or lakes, to mention a few), but due to the LEADER administrative regulations they are not allowed to form part of a LAG. Often, these areas presented an important chain link and were profitable during the event.

Throughout the formation of alliances the strategic involvement of peripheral settlements with chronic inherent area-specific problems had been a critical issue. These isolated, often dead-end villages are scattered over within relatively wide distances and are located far not only from other settlements but also from the known natural or cultural attractions and typically have either a restaurant or a guest house, but rarely both. These are usually not recognized in tourism databases, and were never scanned through for tourism potentials unless being known by niche markets such as hunters or equestrians. However, if but for one reason, it is for these villages that the free national-level campaign of the event could be worthwhile, therefore the inclusion of these villages was of distinct relevance, as pointed out by one of the respondents. Although there were cases in which these villages couldn't possibly be tied up with others and had eventually to be left for a one-day individual programme obviously with a lower marketing power, but on the whole, an extensive review of the hidden rural stockpile unveiled viable methods to link up these villages, as illustrated by the following quote:

“There is for example one little settlement in my LAG, a quasi-dead-end village with high gipsy population called Pély. When I called up the major to inquire of him about the local sights, he said that there were none. I thought to myself: none of my villages can be excluded from the event, (...) it is impossible that there is nothing around there to be found! It is impossible that there is not at least a chatty old man or a woman who could tell stories! Then, it slowly turned out that they have a recently renovated church and a village museum, a little abandoned though, but with a little clean up and a little persuasion of the door keeper to open it up for the weekend, it can nonetheless be accessible. In the neighbouring village with similar characteristics there is a rarity: a truffle museum; whereas in the third there is a stone bridge of Classicist style. I convinced a knowledgeable old man from the fourth to give guided tours in the moorlands next to the village. In addition, we have here a nature route and a private lake. There are activities to be found here for the whole family, and the villages can be tied up in a bicycle tour”

Correspondingly, interview research has further unfolded three existing forms of indicators, within the nexus of informal relationships, conducive to boosting the local rural network dynamics. Despite the apparently still predominant 'hostile brothers' attitude and the lack of mutual counselling in rural communities particularly within the same sector, throughout the event active mutual advocating of the partners could be discerned in LAGs with a background of participation in wide spreading cross-border cooperations, such as for example the Village+ Eco label of Pan European Routes to rural ecotourism, in the case of the Lake Tisza LAG. Identically, chain-structured endeavours planted in the wide promotional context of the event such as tourism routes, bicycle tours or equestrian tourism chains represent a potentially successful operational method for deepening integrated rural tourism, attributable to the fact that these create not only a virtual but a physical link among the service providers through the tourist movements. On the other hand, locally embedded central rural actors can significantly induce network activity through counselling, as illustratively depicted by a LAG manager the case of a potter, to whom customers were systematically directed by surrounding accommodation providers. Thirdly, successful cases indicated that reinforcing the event

with further local events and programmes organized by alliances of neighbouring LAGs can attract groups of overnight tourists, particularly when linked with curiosities such as for instance the opening of a small, off-limits mud field from which mud is extracted on therapeutic purposes, exclusively for the event. This programme, coupled with an authentic guided tour given by the director of the local Village Centre and archery, tackled the visitors in the immediate locale for all the three days of the initiative.

Notwithstanding the shortfalls arisen as outlined in the beginning of this section, the huge database of complex tourism packages stocked up in the website is certainly one of the value-added outcomes of the event. This is due to the fact that there is a dearth of a national-level, all-inclusive database cataloguing the tourism attractions and activities of the rural countryside by settlements not only in Hungary but also elsewhere in Europe. As the LEADER LAG coordinator pointed out:

“If you check out a tourism website for options on excursions, you will find suggestions on cities, thermal baths, museums or zoos. But if you want to go to the countryside, you will be able to find the guest house, but practically nothing beyond that. You don’t know what to do there, what the local specialties are, where the excursion routes are; you are lost. All those information you have to fish from different websites. This huge database we created represents a big potential. The question is now: whom it belongs to, who has the rights to sell it or to utilize it, how, and on what purpose. There are interests here which generated counter-interests. It’s a deadlock, and no one steps forward”

In terms of the future implications of the event, the LAG managers highly agreed upon the importance of sequential organization to ultimately pass it as a tradition, not least because the following events can build upon the accomplished directly or indirectly tourism-related projects of each tendering session, and also highlighted the potentials of cross-border implications. As one respondent noted, “all the tourism-related services have been mapped in the region, so now we could even make twenty tourism packages”.

5. CONCLUSIONS AND IMPLICATIONS

Following a field research designed and applied in a case study approach, this paper attempted to delineate a conceptual framework and an applicable method towards the implementation and reinforcement of integrated rural tourism. The event cannot be judged purely in terms of the vital dimension of success, but in a long-range perspective, the potential it holds lies in the capacity of the local actors involved to develop a ‘collective dynamics of proximity’ manifesting in the constitution of types of knowledge and collective reference points in an uncertain environment (Dupuy and Gilly, 1996 cited in: Ray, 1998). The analysis undertaken here appears to support recent findings reported in the academic milieu with regard to both integrated rural tourism and to the importance of partnerships, but further provides implementation guidelines through the experiences of the LEADER LAGs’ collaborative capacity building for rural tourism promotion within the frames of a pioneer, national-level event. The spotlight purposefully focused on the contrasting cases of local attitudes and the local event management and marketing strategies identified a range of key success factors in the endeavour to aggregate the experiences. While segregating the demand market segments, the need for more emphasis on targeted local marketing, with an extended ‘flare path’, has explicitly been discerned. As pointed out by a LAG manager, “In general, it can be noticed that the restaurant owners could have been satisfied with queues of residents in front the tables. Fundamentally, they anticipated locals that usually are not restaurant customers, but could have been activated by the discounts”. Research also highlighted the pivotal role of LAG managers as intermediary actors particularly in terms of the skills such as commitment, local knowledge and creativity. At the decisive level, a failure of the vertical link between the central coordinative body and the LAG managers to match the actors as regards the steps of programme implementation and reconciliation of the issues stemming from divers bottom-up approaches has been recognized. At the operational level, synergy effects were traced in the cooperations of the regional clusters of LAG managers. Research further indicated that the involvement of external rural actors from the public, private and non-profit spheres and that of peripheral settlements apparently boosted the patterns of rural network dynamics of the LEADER

LAGs. In empirical terms, mutual advocating, as an indicator of the interdependence between alliance members has particularly been successful within chain-structured and locally multiplied endeavours such as tourism routes and dual events respectively and in the redistribution of information at the local levels by embedded central rural actors, whose identification therefore is, right from the onset, indispensable.

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ACKNOWLEDGEMENT

The authors gratefully acknowledge assistance provided by the (former) Hungarian Leader Centre and László Simon director and István Már LAG coordinator in particular. This study has been financed by the Fundação para a Ciência e a Tecnologia (FCT) of Ministério da Ciência, Tecnologia e Ensino Superior de Portugal.

上海会议旅游质量评价的实证研究

姜静娴 郭英之 陈沁园 叶云霞
复旦大学旅游学

摘要

随着上海会议旅游的迅速发展,会议旅游产品成为上海市都市旅游产品的重要组成部分。本研究从参会代表的角度出发,建立会议旅游质量评价的量表,找出参会代表评价会议旅游产品质量的主要因素,探索决定参会代表评价会议旅游产品质量的主要原因。

关键词: 会议旅游; 参会代表; 质量评估; 上海

A CASE STUDY ON THE CONVENTION TOURIST QUALITY EVALUATION IN SHANGHAI

Jingxian JIANG Yingzhi GUO Qinyuan CHEN Yunxia YE
Department of Tourism, Fudan University

ABSTRACT

Convention tourism product has been a key element of urban tourism system of Shanghai. This thesis constructed the evaluation scale for convention tourism quality, based on which main factors of convention tourism quality evaluated by delegates were abstracted, and then explored the reasons determining their evaluation. Previous research on convention tourism was scarce, not to mention those from the view of delegates constituting the biggest group of convention tourists. From this point, this empirical study could not only contribute to convention tourism research pool, but also shed light on the improvement of convention tourism in Yangpu district as well as in Shanghai as an international convention destination.

Keywords: convention tourism; delegates; quality; Shanghai

一、引言

作为中国的国际大都市之一,上海的会议旅游正在迅速成长。一方面,上海的国民经济已连续十一年保持两位数增长,人民生活水平将进一步提高,城市环境将进一步优化,城市功能将更加完善,这些都为会议旅游的发展创造了良好的条件;另一方面,2008年奥运会和2010年世博会日益临近,成为拉动会议旅游发展的巨大引擎。到2010年,上海将建设成为国际商务、会展购物、现代都市观光、郊区休闲度假的旅游圣地和文化体育、工农业、科技教育等专项旅游目的地,旅游增加值占全市GDP比重达10%左右,初步建成国际化旅游都市(上海旅游年鉴编辑委员会,2005)。可见,会议旅游将是未来上海旅游业发展的一大重点。

相比于会议旅游的蓬勃发展,学术界对于会议旅游的研究却相对匮乏。国外学者的研究成果集中在会议管理以及会议策划者对会议目的地的选择,国内学者的研究成果则主要集中在对具体城市的会展旅游发展现状及对策的定性分析。而对于会议旅游者中比例最大的群体——参会代表,却鲜有文献探讨他们的行为特征及需求。本研究以参会代表为研究视角,着重考察参会代表评价会议旅游质量的标准。通过问卷访问参加上海市杨浦高校集中区国际会议的代表,尝试编制会议旅游质量评价的量表,希望发现决定参会代表评价会议旅游质量的主要因素,为会议主办方或策划者提高会议旅游质量提供参考,也为会议旅游目的地各项指标质量的提升提供意见。

二、会议旅游质量评价的文献综述

Abbey和Link(1994)总结,会议旅游及相关的研究在很大程度上是一片空白。时至今日,国际上会议旅游相关的研究虽然也在逐步向前推进,但相对于其它主题的旅游研究来讲,仍然不是十

分丰富。我国的会展/会展旅游研究偏重展览/展览旅游，而会议/会议旅游的研究极其缺乏。比如，北京市市政府研究室的《北京会展业发展研究报告》实质上是展览业研究报告，完全没有涉及会议业的发展。在为数不多的成果中，学者们几乎都是研究会议策划者选择会议旅游目的地及会议宾馆的标准（Opperman, 1996），只有 Var 等（1985），Oppermann（1997）和 Chon, Zhang, Leung 和 Qu（2007），Severt 等（2007），Lee 和 Back（2008）以参会代表为研究对象。本研究探讨参会代表评价会议旅游质量的指标及其影响因素，丰富了会议旅游研究的内容，对参会代表行为研究进行补充，为进一步理解参会代表这个会议旅游者中最广泛群体对会议旅游产品质量的需求打下基础。

对于会议旅游来说，目的地所提供的服务和设施是非常重要的（Crouch 和 Weber, 2002）。但是，研究会议旅游者选择或评价会议设施及服务的文献却仅仅局限于在宾馆。虽然质量和及时的服务是选择会议地点最重要的标准（Baloglu 和 Love, 2001），但却极少有研究挖掘参会代表对会议旅游质量的需求。本研究甄别参会代表评价会议旅游质量的指标，除了将会议旅游目的地（不仅包括广义上的会议旅游目的地，即会议目的地城市，也包括狭义的会议旅游目的地，即会议召开的宾馆或会议中心）因素包括在内，也考虑到了参会代表对于会议设施和服务的需求，不仅探讨各个指标的相对重要性，也将探讨参会代表的哪些特征将对他们评价会议旅游质量产生影响。测度旅游服务质量的方法主要有 4 种：重要性-绩效分析法（Importance-Performance Analysis, IPA）；SERVPERF 方法；SERVQUAL 方法；多维变量测量法。

本研究希望从参会代表的角度探讨会议旅游质量，因此，国内外文献对本研究的重要意义在于：一是对会议策划者选择会议目的地的研究将为本研究建立会议旅游评价量表提供参考；二是通过服务质量研究方法的综述可以看出，IPA 方法、SERVAQUAL 方法和 SERVPERF 方法对于检定会议旅游服务质量都不是合适的选择，因为案例分析的会议旅游产品的服务质量并不能用通用的服务质量量表测量，所以本研究采用多维变量测量法，尝试建立会议旅游质量评价的特定量表；三是采用实证研究，通过市场调查来取得一手资料，根据调研数据得出研究结论和建议。国内使用一手调研数据、定量地研究会议旅游的文献很少，比较缺少较为深入的实证分析。本研究希望能够找到参会代表评价会议旅游质量的主要因素，弥补这一主题研究的不足。

三、会议旅游质量评价的实证研究方法

第一，问卷设计。结合文献综述、深度访谈和他人问卷的结果，本研究将参会代表评价会议旅游质量的变量维度设定为四个：会议旅游目的地特征；会场所在地特征；会议设施和服务特征；会议安排特征。为了保证会议旅游质量评价量表的效度，本研究在问卷中还要求参会代表根据自身体验对会议旅游的价值感知、总体满意度和行为意愿作出评判。

第二，样本选择。为了建立会议旅游质量评价的指标体系，本研究使用实证研究的方法，样本选择范围以复旦大学为中心的上海市杨浦高校集中区的国际学术会议。以区域内丰富的学术资源和高新技术产业为依托，上海市杨浦区的高校每年都会召开众多的学术交流会议、研讨会、论坛等，吸引了一批以参会为主要目的旅游者。本研究的调研样本即为杨浦区高校酒店国际会议。

第三，数据收集。由于本研究采用便利抽样的抽样方法，拦截访问参会代表进行问卷调查。调查时间分为两个阶段，第一阶段为2007年9月至2007年12月，这一阶段主要是在校园内召开会议的场所进行现场调研。第二阶段为2008年1月至2008年4月，在复旦大学等高校周边的宾馆进行调研。此阶段涉及的样本选取问题主要是国际会议参会代表的鉴别。第一阶段共发放问卷100份，回收90份；第二阶段共发放问卷500份，回收483份。经检验，有效问卷为486份。回收率和有效率分别为95.5%和84.4%，可以进行数据统计分析。

四、会议旅游质量评价的实证研究结果

综合文献综述和深度访谈的结果，本研究共总结出参会代表评价会议旅游质量的52项变量项目，形成会议旅游质量调查的问卷。为进一步明确参会代表对会议旅游质量评价的潜在因子，需要使用因子分析的方法。首先，对52个变量项目进行项目分析。根据Churchill（1979）的建议，应该反复使用精简策略以获得更加简化、收敛的量表。首先，计算量表的总分，如果一个项目对量表总

分的系数接近零，这个项目将被删除；或者，如果一个项目对量表总分的系数相比于其它项目系数显著下降，这个项目也将被删除（Churchill, 1979）；其次，求出每一个项目的临界比率（Critical Ratio，简称CR值），将未达显著水准的项目删除（吴明隆，2000）。经过检验，从52个项目中剔除14个项目，余下的38个项目将进入因子分析过程。

对会议旅游质量评价项目进行因子分析之前，利用巴特利特球度检验（Bartlett Test of Sphericity）和 KMO（Kaiser—Meyer—Olkin）检验法对数据的因子分析适合性进行检验。如表 4-2 所示，样本的取样适当性 KMO 的指标为.898，大于 0.5。同时，巴特利特球度检验的统计量值为 5327.319（自由度为 253，P=0.000），小于设定的显著性水平。以上检验表明，本研究中的相关矩阵不是单位矩阵，可以使用因子分析做进一步的分析考察（马庆国，2002）。

本研究使用主成分分析法（Principal Components）获取初始的公共因子，求得初始负荷矩阵，再用正交旋转法（Varimax）对初始因子进行旋转，求得最终的因子负荷矩阵。删除因子负荷小于 0.4 的 8 个项目，对余下的项目再进行因子分析，保留特征值大于 0.1 的因子。因子分析的结果如表 1 所示。表 1 列出了各项因子的特征值、因子负荷、解释方差、累计解释方差和可靠性系数 α 。所有的项目被归入了四个因子中，分别命名为“会议旅游目的地”、“会议安排”、“会议设施和服务”、“会场”。所有因子的特征值都大于 1，共解释了总体方差的 59.007%。对四个因子进行信度检验，可靠性系数 α 在 0.8197 到 0.8570 之间，大于 0.5，表明这些因子及其内部的项目组成的量表比较稳定且可靠（Nunnally, 1987）。

表 1 参会代表对会议旅游质量评价的因子分析结果

因子	项目	特征值	因子负荷	解释方差 (%)	累计解释 方差 (%)	可靠性 系数 α	均值
会议旅游目的地		4.136		17.983	17.983	.8539	
	社会政治稳定，治安良好		.831				4.07
	有便捷的交通方式可以到达上海		.786				4.12
	市内交通便利		.745				4.02
	城市标示系统国际化		.682				4.17
	到达周边商务或旅游城市或地区交通便利		.562				4.34
	城市知名度高		.556				4.08
	城市口碑良好		.454				4.02
会议安排		2.780		16.118	34.101	.8570	
	会议主题有吸引力		.852				2.67
	会议演讲者的发言内容质量很高		.816				2.56
	会议演讲者声望很高		.772				3.05
	会议持续天数安排合理		.731				3.52
	会期选择合理		.731				2.77
	会议日程设计合理		.666				2.83
会议设施和服务		2.948		12.818	46.919	.8197	
	会场指示标志信息清晰，且有足够的数量		.771				3.46
	有足够的网络接口或者能收到网络信号		.755				3.54
	有足够的休息室		.553				3.86
	会场工作人员友好		.545				3.70
	会场工作人员反应迅速		.509				3.86
	会场的茶水服务很好		.478				3.63
会场		3.707		12.088	59.007	.8225	
	会场步行可达范围内可以选择的住宿设施丰富		.802				3.57
	会场步行可达范围内可以选择的餐饮设施丰富		.765				3.59
	会场附近购物场所丰富		.743				3.72
	会场周边有多样的娱乐设施或服务		.629				3.92

第一个因子“会议旅游目的地”解释了总体方差的 17.983%，反映了会议旅游目的地——上海是参会代表评价会议旅游质量最主要的因子，包括“社会政治稳定，治安良好”、“有便捷的交通方式可以到达上海”、“市内交通便利”等 9 个项目。第二个因子“会议安排”因子是指和会议本身相关的指标，共解释了总体方差的 16.118%，表明了参会代表将会议主题、会议发言时间和质量等因素也作为评价会议旅游质量的重要因子之一。第三个因子“会议设施和服务”表示参会代表对会议设施和会场服务的要求和评价，既包括硬件条件如会场指示标志、网络接口等，也包含会场工作人员的友好态度和反应速度等服务要素。第四个因子“会场”表示参会代表对上海市杨浦区高校附近的酒店或其它会议场所作为会议所在地的各项特征的表现，包括“会场步行可达范围内可以选择的住宿设施丰富”、“会场步行可达范围内可以选择的餐饮设施丰富”等 5 个项目。会议旅游目的地因子各个项目的均值相对而言最高，会议安排因子各个项目的均值最低，说明参会代表对上海作为会议旅游目的地的各项特征评价较高，而对所参加的会议的各项特征评价较低。

为了进一步检测参会代表对会议旅游质量评价量表的收敛效度和预测效度，本研究将检验会议旅游质量评价的四个因子和参会代表对会议旅游总体满意度之间的关系，以及这四个因子和参会代表的行为意愿之间的关系。取得参会代表对会议旅游的总体满意度时，询问受访者“总体而言，您对本次会议旅游的满意度”，请受访者根据自己的感受衡量满意程度，“1”表示非常不满意，“5”表示非常满意。检验预测信度的发问问题有两个：（1）您是否愿意参加下次的会议旅游？（2）您是否愿意向他人推荐参加此类型的会议旅游？(Parasuraman, Zeithaml 和 Berry, 1988; Geva 和 Goldman, 1991)，请受访者根据自己的意愿作出回答，“1”表示“非常不愿意”，“5”表示“非常愿意”。

会议旅游质量评价因子和参会代表对会议旅游的总体满意度、行为意愿之间的 Pearson 相关系数如表 2 所示。除了会议旅游目的地和参会代表“愿意参加下次会议旅游”（行为意愿 1）之外，参会代表对会议旅游质量评价的各项因子和他们对会议旅游的总体满意度以及行为意愿之间显著相关。相关关系的存在，不仅表明本研究的会议旅游质量评价的量表比较可靠，同时，也和现实相符合，容易理解：被访问代表对会议旅游目的地的评价和他们的总体满意度及行为意愿显著正相关，说明如果参会代表认为会议旅游目的地社会稳定、交通便捷、国际化程度高、知名度高、口碑良好等，他们就倾向于对整个会议旅游过程表示满意，并且愿意向他人推荐此项产品，但他们是否愿意参加下次会议旅游的意愿和他们对会议旅游目的地的评价没有联系；被访问代表对会议安排的评价和他们的总体满意度及行为意愿显著正相关，说明如果参会代表认为会议主题有吸引力、发言内容质量较高等，他们就会倾向于对整个会议旅游过程表示满意，并乐于参加下一次的会议旅游，且愿意向他人推荐此项产品；被访问代表对会议设施和服务的评价和他们的总体满意度及行为意愿显著正相关，说明如果参会代表认为会场的指示信息充足且清晰、网络接收状况良好、有足够的休息场所、会场服务人员态度友好反应迅速等，他们就会倾向于对整个会议旅游过程表示满意，并乐于参加下一次的会议旅游，且愿意向他人推荐此项产品；被访问代表对会场的评价和他们的总体满意度及行为意愿显著正相关，说明如果参会代表对会场周边的住宿、餐饮、商务、娱乐等设施评价越高，他们就越倾向于对整个会议旅游过程表示满意，并乐于参加下一次的会议旅游，且愿意向他人推荐此项产品。参会代表对会议旅游质量评价因子和他们对会议旅游的总体满意度及行为意愿之间的相关关系检验结果，和研究服务业其它部门中服务质量、总体满意度和行为意愿的部分成果部分吻合，只不过本研究是将其放在会议旅游业背景下、以参会代表为对象进行检验。例如，本研究的此项研究结果和 Baloglu 和 Love（2005）的研究结论部分印证，后者证实了旅游目的地的表现、总体满意度、行为意愿之间的关系，得出了旅游目的地的表现是总体满意度及行为意愿的预测变量的结论。由于本研究采用总体满意度、行为意愿仅为了测度会议旅游质量评价量表的收敛和预测效度，故不再对他们之间的相关关系作更进一步的探讨。

表 2 会议旅游质量评价量表的收敛信度和预测信度检验

类别	会议旅游目的地	会议安排	会议设施和服务	会场
收敛信度				
总体满意度	.260**	.743**	.197**	.112*
预测信度				
参加下次会议旅游	.077	.802**	.280**	.098*
向别人推荐	.139**	.771**	.131**	.222**

注：* 表示在 0.05 水平上显著；** 表示在 0.01 水平上显著

此外,从表2中还可以看出,“会议安排”因子和参会代表的总体满意度($p=.743$, $Sig.=0.01$)、行为意愿的相关系数($p=.802$, $Sig.=0.01$; $p=.771$, $Sig.=0.01$)最大。或者说,参会代表评价会议旅游质量的四个主要因素中,“会议安排”他们对本次会议旅游的满意度和行为意愿影响最大,其次是会议旅游目的地因素、会议设施和服务因素以及会场因素。

五、会议旅游质量评价的实证研究结论

参会代表对会议旅游质量的评价大致可以从会议旅游目的地(上海)特征、会议安排特征、会议设施和服务特征和会议所在地(上海市杨浦区)特征四个方面来考量。参会代表对上海作为会议旅游目的地各项特征的评价较高,他们对上海到达周边商务或旅游城市或地区的交通便利状况($M=4.34$)、城市标示系统的国际化状况($M=4.17$)、是否有便捷的交通方式可以抵达($M=4.12$)、城市知名度($M=4.08$)、社会政治稳定,治安良好($M=4.08$)等均给予了较高的评价。参会代表对上海市杨浦区作为小尺度的会议旅游目的地——会场的评价较上海而言偏低,他们对于在会场步行范围内可以选择的住宿设施、餐饮设施、购物场所、娱乐设施的丰富状况评价一般,均值接近4.0。会议设施和服务方面,参会代表对杨浦区的会议硬件条件和服务评价一般,各项指标的评价均值接近4.0,且差别不大;对会场工作人员的友好态度($M=3.70$)、反应速度的评价稍高($M=3.86$)、休息室数量(3.86)评价最高,而对会场指示标志数量足够且清晰($M=3.46$)、网络信号接收($M=3.54$)的评价稍低,且这两个项目的标准差都大于2,说明受访者对三者的评价分歧较大,这可能是由于本研究调查地点的不同状况造成的。值得关注的是,参会代表对杨浦区召开的国际会议安排方面的评价并不高,其中,会议持续天数设计($M=3.52$)、会议演讲者声望($M=3.05$)均值最高,对其他项目的评价中等,而对会议主题的吸引力($M=2.67$)、会议日程设计合理性($M=2.56$)的认同度尤其偏低,说明上海市杨浦高校集中区的国际会议并没有充分利用其学术资源、智力资源高度集聚的优势,这是会议组织者需要特别关注的一个问题。

从本研究的局限性来看,本研究试图从参会代表的角度出发,探讨会议旅游质量评价的模式。由于参照的研究成果主要是会议策划者研究,因此本研究在指标的选取和筛选方法上存在局限性。今后的研究可从以下两方面开展:一是进一步完善参会代表评价会议旅游质量的指标评价体系;二是对于会议旅游产品来说,它的评价指标可能也会具有多层次、多维度的性质,今后的研究可以在指标层次性方面进行探讨。

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致谢

本研究得到国家自然科学基金（批准号 70873025）、上海市哲学社会科学规划系列课题（批准号 2008XAH004）、复旦大学本科生学术 research 计划“君政学者”的资助，特表感谢。

论我国品牌化展会的策划与培育

朱海森 夏丽萍
上海师范大学天华学院

摘要

论文阐述了品牌化展会对提高我国会展业发展水平的重要意义，探讨了品牌化展会的衡量标准，划分了目前我国主要地区品牌化展会的类型，分析了诸多类型形成与发展的条件，评估了我国许多地区品牌化展会的发展阶段。基于上述分析，文章进一步提出了发展我国品牌化展会的对策与措施，主要有树立强烈的品牌意识、国家科学的宏观战略布局、各级政府的着力打造、企业加强品牌管理与维护、行业协会的支持与协作、教育部门加强专业人才的培养等。

关键词：会展业；品牌化；专业化；产业化

STUDY ON PLANNING AND CULTIVATING BRAND-ORIENTED EXHIBITION OF CHINA

Haisen ZHU Liping XIA
Economics & Management, Tianhua College, Shanghai Normal University

ABSTRACT

The paper firstly points out some of the importance of brand-oriented exhibitions and events in MICE industry, analyses the standards, classifications and conditions. Then it evaluates different development stages of regions in our country. Based on the above analysis, the paper finally suggests some of the measures to further develop brand-oriented exhibition and events in the future, mainly including brand awareness, state macro-control, industrialization based on different special regional environment, construction and regional cooperation.

Keywords: MICE industry; brand-oriented; professionalization; industrialization

引言

近年来，我国会展业发展很快，也获得了相当的经济效益，但是，相比起国际会展业发展水平仍有很大差距。其中一个重要原因就是品牌化的展会不多，发展不快。“一个著名的品牌能救活一个企业，一个品牌化的展览会，也是一个展览公司赖以生存和发展的根本。”我国会展要从办展多、质量差走向办展精、质量好的品牌化发展道路。这样我国的会展企业才能在国内乃至国际行业领域中获得强大的竞争力。

一、品牌化展会在会展业中的重要性

随着会展业的竞争越发激烈，想要在会展业做强做大，几乎所有的会展公司都认识到创造品牌化展会的重要性和迫切性。拥有一个具有较强影响力的品牌展会，也是每一个办展机构所追求的一个重要目标。

（一）品牌化展会的含义

品牌英文为Brand，其名词解释有烙印，商标，牌子。字面意思可以理解为在商品上烙上标记，以起到识别和证明的作用。美国著名市场营销学专家菲利普·科特勒博士对品牌的定义是“品牌是一种名称、术语、标记、符号或图案，或是它们的相互组合，用以识别某个消费者或

某群消费者的产品或服务，并使之与竞争对手的产品或服务相区别”。基于过去对于品牌理论的分析，目前对于品牌化展会的定义是指具有一定的规模，能代表和反映该行业的发展动态和发展趋势，对该行业具有较强的指导和影响力的展会。

（二）品牌化展会的特征

品牌化展会包含以下特征，即国际认可度高、专业观众参与度高、经济效益好。所谓国际认可度高，是指该展会在行业领域中具有很高的声誉，展会的举办能够影响到该行业的发展，能够吸引来自社会各界的广泛关注，包括政府、会展协会、专业观众、参展商、会议组织者等。例如在会展大国德国的杜塞尔多夫国际船展、汉诺威工业博览会（HANNOVER MESSE）、信息及通信技术博览会（CeBIT）等都是极富盛名的展会，作为世界行业趋势的晴雨表及展示平台，它们已成为高层决策者在商业和行业领域所不可缺少的重要参考。所谓专业观众参与度高，是指展会所组织和吸引的观众是与该行业密切相关的专业人士。这些专业观众的出席，既能使参展商获得较为准确的市场需求信息，又能促成商业交易，提高办展的经济效益。这样就能避免看似人群很旺的展会，其实际价值并不大的局面。如著名的励展公司在展会营销的时候就已经有明确的参观客户，在邀请观众的时候会对观众的身份进行核实，当核实对方是专业的观众，并且经过正规的注册手续之后，励展才欢迎他进入场馆去参观，因此只有专业的买家才能进入场馆。保证了专业观众的参与度是励展之所以能够成为举办众多品牌展会的会展公司。所谓经济效益好，是指通过举办各种形式的会议和展览、展销，带来较高的直接或间接经济效益和社会效益。不仅为该行业的发展注入活力，更能够带动相关产业的发展。例如，2007年11月新加坡举办的亚洲媒体节（AMF）。32个展馆包括电视、广播、电影、动画、广告和数字媒体。与亚洲电视论坛、亚洲影片市场和研讨会共同促成了470万美元的商业交易。此次盛事对于推动亚洲媒体及相关行业的发展意义非凡。

二、衡量品牌化展会的标准的探析

了解品牌化展会的标准，有利于评价我国各地区会展业发展状况和水平，为各地明确发展方向和统筹协调提供依据。

（一）具有较高的知名度

创立品牌展会的重要性就是能够在行业内部出现区分度，使品牌展会在公众心中形成某一产业的标志，使其在市场中树立形象。获得专业协会和机构的认可，也是知名度的一种表现。如UFI对申请加入其协会的展览项目和其主办单位有着严格的要求及详细的审查程序。其主要标准为：国际性展会至少已经连续举办3次以上，至少要有2万平方米的展出面积，20%的国外参展商和4%的海外观众。这些标准可作为我们主要的参考依据，而对于我国来说也可做适当调整。

（二）具有较大的市场影响力

所谓市场影响力，就是展会在所举办的地区获得该产业中市场及消费者的认可。这种影响力具体表现在两个方面。一是对社会经济环境的影响。会展产业具有极大的关联带动作用，因此与城市之间的互动发展也表现得相当突出；二是品牌展会代表了行业权威和未来发展方向，由某种程度信誉的品牌展会通常会得到行业协会的支持与合作。因此，毫无疑问，他们所举办的展会能够得到广大观众，特别是专业观众和买家的参与。

（三）专业的展览服务和完善的功能

专业的展览服务包括展览企业的整个运作过程，从市场调研、主题立项、寻求合作、广告宣传、招展手段、观众组织、活动安排、现场气氛营造、展后服务，甚至包括展览企业所有对外文件、信函的格式化、标准化，都须具备较高的专业水准和从业员的严谨处事态度。同时展会要有针对性地安排相关的配套活动，如峰会论坛、商贸洽谈、信息发布等，为参展商和专业买家提供服务。例如承接专业展览服务的有会展筹办组织者（Professional Conference Organizer，简称PCO）与目的地管理

公司(Destination Management Company, 简称 DMC)。PCO 负责招徕和统筹安排会展, 是会展业的核心; 而 DMC 则负责实施接待。PCO 与 DMC 的发展影响着办展质量和国际化标准。

三、品牌化专业展会的类型及其形成

纵观国外各知名专业展会以及品牌化展会, 可以将品牌化展会分为以发达产业为背景的品牌化展会、以地域历史文化为背景的品牌化展会、以名人效应为背景的品牌化展会、著名企业举办的特色品牌化展会、政府着意培育的品牌化展会这五大展会类型, 了解及分析其类型及形成背景, 有利于探讨我国品牌展会的培育与发展。

(一) 以产业为背景的品牌化展会

一个地区会展业的品牌与其本身的产业发展特点密切相关, 产业有助于为会展的发展带来更多的商机。很多城市和地区都是因为其强大的产业背景, 才树立起会展品牌的。例如比利时, 其注重传统的手工业技术以及传统材料的应用, 发展了强大的设计产业, 比利时室内设计、礼品、园艺装潢展成为全球著名的设计展。又如钟表大国瑞士所举办的 BASELWORLD (巴塞尔世界)——世界钟表珠宝博览会, 入选在 BASELWORLD 参展的产品都是世界上独一无二的, 深得各专业人士的亲睐。在美国, 截至 2006 年底, 其石油剩余探明可采储量为 217.57 亿桶, 占世界总储量的 1.7%, 居世界第 12 位。强大的石油产业背景使其有能力举办世界上在石油钻井、开发、生产、环保等资源开发方面最重要的展览盛会——美国(休斯敦)国际石油展览会。同样, 美国的电影文化产业也相当发达, 坐落好莱坞的包括米高梅、二十世纪福克斯、华纳兄弟、环球等大型电影制作公司使美国电影节成为世界盛事。

(二) 以地域历史文化为背景的品牌化展会

每一个地区都有其产生的历史与文化背景, 将其特色化, 对于会展业的带动作用不容小觑。例如举世闻名的法国波尔多红酒节, 极富法国酒文化的波尔多不但产量大且生产多为品质优良的红酒, 被喻为“世界的葡萄酒宝库”。又如德国啤酒节, 是源于巴伐利亚州的路德维希王子(即后来的国王路德维希一世)与萨克森公主特蕾莎的婚礼, 全城的军民都应邀到城门参加这一皇家盛典。现在, 每年慕尼黑德国啤酒节都会吸引将近 6 万人参加, 而大型的德国啤酒节也在北美和南美乃至亚洲的国家流行。以风车王国著称的荷兰所举办的“风车节”在每年 5 月的第二个星期六举行, 这一天全荷兰的风车一齐转动, 举国欢庆。再如世界音乐之都奥地利维也纳音乐节, 维也纳的音乐文化几乎代表了欧洲近代音乐发展史, 吸引全球音乐爱好者的目光。

(三) 以名人效应为背景的品牌化展会

纵观世界各大名人展, 以艺术、文化方面展会居多。例如乔治·阿玛尼回顾展, 他是意大利时尚创始人, 现在已是在美国销量最大的欧洲设计师品牌, 他以使用新型面料及优良制作而闻名。又如托尼克设计展, 托尼克设计小组与同时代的荷兰著名工业设计小组 Droog、建筑事务所 MVRDV 齐名, 从视觉传达领域引领并影响着荷兰以及国际设计潮流。在日本, 国际建筑大师安藤忠雄举办巡回展, 他是获建筑界的诺贝尔奖——普利兹克奖的世界一流建筑师, 在匈牙利、纽约、巴黎、伦敦、马德里、巴塞罗那、意大利等地举办过个展。

(四) 著名企业举办的特色品牌化展会

世界各大知名企业时常会举办以其产品宣传为主的特色展会和发布会。例如国际化妆品品牌欧珀莱在今年夏天召开了秋冬新品发布会, 品牌代言人由舞者簇拥翩然而至, 给现场媒体朋友带来展示优雅自信的全新广告形象。著名运动品牌阿迪达斯, 为迎奥运举办了阿迪达斯运动艺术展, 阿迪达斯运动视界艺术展以“运动与人文”为主题, 吸引了海内外 70 余位艺术家, 以艺术灵感表达奥

运激情。再如美国电影制作大亨华纳兄弟，将为“哈利波特”办展，环球巡回历时5年，展出《哈利·波特》系列电影中所用的各种人工制品，让哈利·波特的影迷一饱口福。

（五）政府着力培育的品牌化展会

关注德国会展业的成功不难发现，它与独特的经营模式密切相关。德国的展馆大多由各州和地方政府投资兴建，展览公司由政府控股，实行企业化管理。如德国杜塞尔多夫国际船展、汉诺威工业博览会（HANNOVER MESSE）、信息及通信技术博览会（CeBIT）。由于德各级政府将展览业作为一项重要的产业给予高度重视，对展馆及其配套设施和交通建设均予大力支持，德绝大部分展览中心都拥有先进的设施，为举办高水准的专业博览会创造了良好的基础。

四、我国各地区品牌化展会的现状及其评估

尽管我国会展业总体发展还没有达到欧洲会展发达国家的水平，但如香港、上海、北京等局部地区会展市场的发展经历了从小到大的历程，规模逐步扩大，场馆建设日臻完善和专业，成为当地国民经济发展的新亮点，并且形成一批有影响力的会展品牌，总体水平已初步接近国际上会展发达国家和地区的水平。根据 ICCA 2007 年各国与城市举办会议总数排名，中国在世界排行第 11 位，而中国的北京与香港在城市排名中分别居于第 8 与第 12 位。充分体现了我国会展业欲跃居世界前列的势头。2006 年全国范围内所收集的数据表明，经 UFI（国际展览业协会）认可的中国大陆的展会共有 43 个，港澳台地区 16 个，台湾地区 3 个。

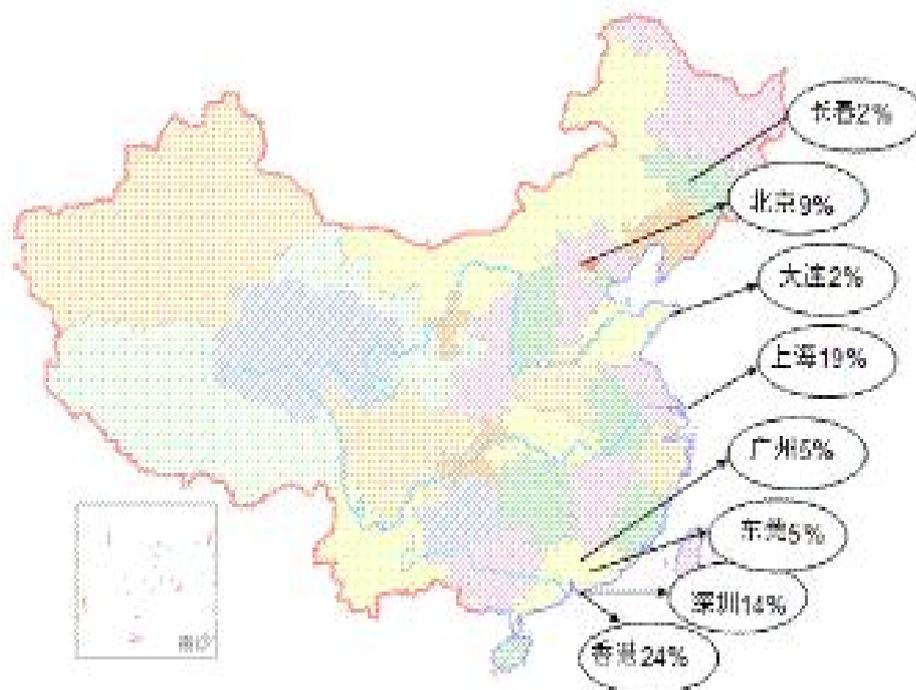


图 1 UFI 认证的中国展会分布图（未标注地区为 20%）

由此看出，我国会展主要集中在东部沿海地区，发展较好的地区是以长春为中心的东北边贸带、以北京、大连为中心的京津带、以上海为中心的长江三角洲带以及广州、东莞、深圳、香港为中心的珠江三角洲四大会展经济产业带。我国品牌展会主要集中在珠江三角洲，占全国总数 62 个的 48%。

（一）我国已经起步形成的品牌化展会

我国年均举办一定规模、水平的展会约 4000 多个，而在国际上有竞争力的展览品牌数更是屈指可数。除了上述 UFI 所认可的 62 个中国品牌展会，笔者认为，我国各地区还有许多展会已经成为品牌，例如以地域历史文化为背景的青岛啤酒节、潍坊风筝节，政府刻意培育的上海国际艺术节、上海电影节、中国昆明国际文化旅游节、昆明花博会、以名人效应为背景的曲阜孔子文化节等，这些展会依托着当地的地理和人文优势，呈现出极具地区特色的品牌展会。

（二）我国有可能发展成为的品牌化展会

我国许多城市和地区的展会虽没有成为国际知名的品牌展会，但其具备一定的区位条件、产业背景、政府协会支持和市场条件等的优势，同样有潜力成为品牌展会。例如以产业为背景的重庆国际汽车工业展览会、珠江三角洲的中国国际高新技术成果交易会电子展、长江三角洲的华东旅游交易会、京津带的中国（青岛）国际时装周，东北边贸带的大连国际工业零部件、原材料展览等。

五、我国品牌化展会策划与培育的对策与措施

要形成我国品牌化展会是一个系统的工作，需要方方面面的统筹与协调，主要包括社会各界树立起强烈的品牌意识、国家的总体战略部署、各级政府的扶植与培育、企业的品牌管理与维护、行业协会的支持与协作、教育部门提供专业人才输送的保障。

（一）树立强烈的品牌意识

展会不是越大就越好，展览也不是越多越好。忽略品牌盲目建馆，盲目办展，只会导致行业内的恶性价格战，使得原本有着良好发展的展会由于办展商的盲目跟风而再无市场可言。因此，无论是国家、地方政府、业界、行业协会还是教育部门，都应树立办展的品牌意识，在进行展会审批、场馆建设、举办、协调等工作时以办展精为目标，树立起品牌意识，这才是我国举办品牌化专业展会的首要条件。

（二）国家科学的宏观战略布局

首先，各级领导必须正确认识会展的功能，要从发展市场经济的要求出发，正确把握政府在展览业发展中的角色定位，逐步退出对展览活动的直接介入。政府暂时难以退出的，要对办展行为做出规范，制定参与主办的基本原则。包括规定什么样的展会政府可以参与，如何参与，什么样的展会政府不宜参与等。其次，我国应结合市场情况，以北京、上海、深圳、大连等一些经济水平较高、基础设施完善的并已经形成诸多品牌化专业展会的城市，去带动分别所属的京津、东北边贸、长江三角洲、珠江三角洲四大会展经济产业带。政府要指导条件适合的城市发展展览业，举办有当地特色的展览活动，避免各地盲目上项目、打造会展中心城市以及由此造成的资源浪费。再次，建立展览业投融资机制，政府要引导有条件的展览企业通过兼并、收购、战略联盟等方式壮大实力，创建我国自己的实力强大的国际展览公司。

（三）各级政府的着力打造

首先，注重以产业为导向的特色展会，分析我国各地区产业背景与格局，扶持具有良好产业背景的城市和地区发展会展业，结合地区特色，制定出一套符合当地总体经济发展的会展发展方案。以经济发展带动会展业发展，以会展业发展促进经济的增长。对于不具备发展会展的地区，加以一定的限制，避免盲目跟风办展，浪费资源。其次，打造中国重点地区和行业展会品牌，使之形成定位准确、概念清晰、形象鲜明的中国展会梯次发展格局，扩大中国展会在世界上的知名度。上海国际汽车展、大连国际服装节、北京国际印刷技术展览会、华南国际包装技术展等都是所在会展经济极富盛名的国际品牌的专业展会。

（四）企业加强品牌管理与维护

办展企业必须确立长远的品牌发展战略，从短期的价格竞争转向追求附加值及无形资产的长期竞争，用先进的品牌营销策略与品牌管理技术抢占会展市场。加强对于客户的信息反馈与调查，注重品牌的维护，有利于企业保持长久的核心竞争力。

（五）行业协会的支持与协作

首先，行业协会能为会员提供展会信息，其一项主要功能就是进行市场的分析和预测，向成员提供有关国家的政治经济情况、会展市场信息，帮助会展企业寻找商机。其次，行业协会能够为会员提供全方位的服务，包括法律援助、教育培训、调解纠纷、对外交流、协调产品(服务)价格或产量、企业的规划与发展环境、信誉共享等的支持。

（六）教育部门加强专业人才的培养

所谓专业人才，包括展会的策划、组织、管理、操作、研究等一系列的人才。首先，要鼓励人才引进与输出，加强与国外展览业的交流与合作，加快引进国外先进的管理手段和先进经验，同时，对会展人员进行专业培训，如参加 MPI (Association of Meeting Professionals)、PCMA (Professional Convention Management Association)、SGMP (Society of Government Meeting Professionals) 等著名国际行业协会所组织的专业培训课程，提高我国展览从业人员的整体素质，达到国际水平。其次，加紧培养 PCO、PEO 和 DMC 人才。尽快建立资格认证考核制度，通过各种办法迅速培养一批 PCO、PEO 和 DMC 的专业人员。

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大型活动与酒店人力资源管理的异同——以北京奥运会和香格里拉酒店为例

戴光全 赵娟

华南理工大学经济与贸易学院 (广东 广州, 510006)

摘要

大型活动人力资源管理与普通企业人力资源管理的方法不尽相同,对于大型活动的人力资源管理,学术界目前在某些方面仍未达成一致意见。本文选取北京奥运会和香格里拉酒店为例,通过两个代表性案例的对比,从组织结构、员工管理特点、工作特点、人力资源规划、培训、绩效考评、报酬与激励、劳动关系等方面,对比分析大型活动人力资源管理与一般酒店企业人力资源管理的异同,总结了大型活动人力资源管理的特点。

关键词: 人力资源管理; 大型活动; 酒店; 奥运会

SIMILARITIES AND DIFFERENCES BETWEEN MEGA-EVENT AND HOTEL HUMAN RESOURCES MANAGEMENT: CASE STUDIES OF BEIJING OLYMPIC GAMES AND SHANGRI-LA HOTEL

Guangquan DAI, Juan ZHAO

School of Economics and Commerce, South China Uni. of Technology

ABSTRACT

Based on two cases study of Beijing Olympic Games and Shangri-La Hotel, the thesis made a comparative analysis of Similarities and differences between large-scale activities and hotel human resources management on the aspects of organization structure, Employee Management, working features, human resource planning, training, performance evaluation, compensation and incentive and labor relations. Based on the result, It summarize the features of the large-scale activities human resources management.

Keywords: human resources management (HRM); mega-event; hotel; Olympic Games

大型活动项目的一次性、不确定性、交叉性、综合性特征决定了大型活动管理的复杂性远远高于一般的运营管理(王起静, 2004)。大型活动项目管理的内容包括: 组织建设与人力资源管理、成本控制与财务管理、时间进度管理、法律与合同管理、风险管理、现场管理、品牌管理等方面。因此,可以说,大型活动项目是项目的子集,在运作过程中主要采用项目化的管理模式(卢晓, 2006)。本文以北京奥运会和香格里拉酒店为例,从组织结构等方面对大型活动和酒店的人力资源管理的异同进行对比分析,以期找出大型活动人力资源管理不同于酒店人力资源管理的特点。

1 组织结构比较

饭店为适应日常管理需要,一般形成固定形式直线职能制组织体系(孙光, 2005)。而大型活动项目组织往往需在短期内完成多项任务,因此需要组成灵活性较大的矩阵结构。

表 1 北京奥组委组织结构

北京奥组委各部门	秘书行政部	总体策划部	国际联络部	体育部
	新闻宣传部	工程和环境部	市场开发部	技术部
	法律事务部	运动会服务部	监察审计部	人事部
	财务部	文化活动部	安保部	媒体运行部
	场馆管理部	物流部	残奥会部	交通部
	火炬接力中心	注册中心	开闭幕式工作部	奥运村部
		志愿者部		

需要特别指出的是，主要由项目组成的大型节事活动的人力资源管理更强调项目团队建设（傅广海, 2005；吴登峰, 2007）。

2 员工管理特点分析

二者都具有员工流动性高的特点，但流动性特点不同。希托普(Jean Marie Hiltrop, 1999)指出，影响员工流动的因素包括：(1)工作报酬；(2)工作的挑战性；(3)培训和提升机会；(4)社会经济状况；(5)工作时间安排；(6)工作责任；(7)工作自主权；(8)工作保障和职业发展机会等，这些是影响酒店员工自主流动的主要因素（转引自：邓桂芝, 2001）。从企业方面来讲，不少企业在旺季雇佣大量临时员工补充人力不足，而在淡季解聘员工以减少成本支出，由此造成了饭店行业人力资源雇佣比率随季节波动不平的现象。据统计，目前一些国际著名的品牌饭店的人员流动率大概在 10%-15%之间。而我国由于饭店行业尚未成熟，员工流动率更高。

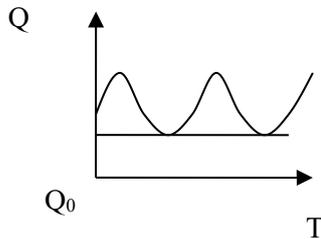


图1 酒店员工数量曲线

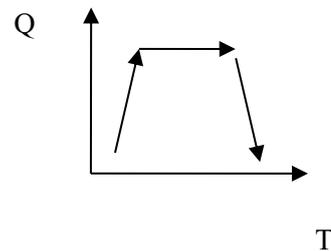


图2 大型活动员工数量曲线

(Q 为人数, Q_0 为固定员工数量, T 为时间)

大型活动的员工高流动率主要来源于大型活动的举办周期中人力需求的巨大差距。例如北京奥运会原本计划招募 7 万赛会志愿者参加北京奥运会，3 万赛会志愿者参加残奥会，随着奥运会竞赛项目的相继结束，完成自己的使命志愿者的就会退出志愿者队伍（第 29 届奥林匹克运动会网站）。

3 工作特点分析

从工作环境来说，酒店员工工作地点一般限于酒店内各自岗位。而奥运会从开始筹备到开幕，来自不同单位和部门的员工大量的时间都是远离自己的原始工作地点，聚集到同一地点完成任务的，因此需要为不同项目组提供合适的工作条件。

从工作内容来说，大型活动项目各阶段任务变化大，人员变动也大。例如在奥运会场馆设计阶段，项目的主要任务是控制设计的质量和进度、概算和预算，需要较多的项目管理人员而较少的现场管理人员；项目进行到施工阶段后，又需要补充施工现场管理人员。而酒店的日常经营管理员工是由固定岗位和职责的。

此外，对于大型活动来说，风险管理和控制要比酒店的风险控制更为重要。意外状况将对整个大型活动项目的正常进行产生非常大的影响。

4 人力资源规划

4.1 人力资源需求和供给预测

酒店根据企业的组织结构状况和未来的经营业务水平，分析供需，便可确定企业未来的人力资源剩余和短缺的情况，然后对企业的人力资源需求进行估算。

大型活动则针对具体的项目需要进行组织规划设计，通过对项目目标进行规划以及对项目工作进行结构分解，确定由哪些人员组成什么样的部门，有针对性地筹划短期内的人力资源需求，并且规划过程中需要考虑各项目参与方——投资方、赞助商、设计单位、合作方等之间的复杂关系。现代奥运会规模日益扩大，国际影响力不断提升，加上比赛日程集中，运动员、裁判员和记者以及观众来自全球各地，使得奥运会组织管理工作的难度不断加大，加之国际环境的复杂性，普通的劳动力市场难以应付奥运会对于人力资源的特殊需求。

4.2 人力资源开发

大型活动组织矩阵中各个任务小组都是具有相关知识和行业背景的人员组成，在职能组织结构中，大型活动项目的项目经理的作用非常重要，能力要求要比酒店经理高得多，必须具有丰富的项目管理经验，突出的创业能力，理性的决策和授权能力，还要求能树立个人的威信，善于激励员工和建立队员之间的合作关系。

另外，大型活动中的员工来自不同的企业、部门，在大型活动期间，单位个人经历团队形成、震荡磨合、规范、执行、解散五个过程，周期更短，且一般很少有人把参与大型活动当作职业的归宿。

酒店中人力资源个体发展周期要经过招聘、导入、发展、成熟、衰退四个过程，员工在企业内能够得到企业有针对性地培养和开发，例如香格里拉的 MTP 管理培训计划（储备人才培养）。

5 人力资源培训

酒店员工培训受到广泛重视。这是由服务业的行业特点决定的——客户买的产品主要是酒店员工提供的服务，员工是一线人员，是客户了解企业的窗口，酒店员工的培训很大程度上决定了顾客对酒店服务满意度。从下表可知高星级酒店的培训体系是相当完备的（王平，陈丽英，2007.）。

表 3 香格里拉员工培训体系

培训对象	培训内容	培训机构
经理	星级饭店经理岗位证书培训 酒店培训课程	香格里拉酒店管理培 训中心（星级饭店经 理岗位证书培训由负 责）
员工	知识培训、技能培训、素质培训	
储备人才	管理培训生计划	

奥运会的培训对象范围要广得多。其招聘的员工都具有一定专业背景知识，针对员工的培训主要是使员工熟悉未来工作所需的知识和能力。而针对项目经理的培训主要是项目相关知识、技能方面的培训，同时帮助其实现角色转换。另外志愿者培训也占了相当大的比重，不仅是因为其人数占了绝大部分比例，更为重要的是，志愿者无私奉献的行为对主办城市乃至主办国的民众有强烈的示范作用，同时志愿者是国家的代表，展示着一个国家民众的道德水平和精神风貌，因此志愿者培训同样重要（宋玉芳，2004）。另外不可忽略的是，当地居民也需要进行“培训”，以营造一个和谐的奥运氛围，展现一国的民族风貌。

6 绩效考评、报酬与激励

在绩效考评方面，酒店可以运用弹性工作时间安排计划（陈杰，2002；吴慧，徐栖玲，2005）。而大型节事则要求在固定期限内完成任务，任务计划安排紧凑，因此难以实施有效的弹性工作时间安排计划。

此外，大型活动项目委托方和项目经理之间存在着更复杂的委托——代理问题，由于时间短，

各种任务纷繁复杂，项目组出现道德风险的几率和控制难度更高，盐湖城 2002 年冬奥会贿选丑闻就是一个典型的负面案例。因此，委托方需要使用适当的激励、控制手段以使项目经理与自己的目标一致，对把握更大的监督、控制权，防止道德风险的发生（文新跃, 2005）。

7 劳动关系

大型活动项目与酒店同样都以市场契约形式固定了雇主和雇员的关系。但志愿者的存在是大型活动与酒店最大的区别。奥运会的志愿者们不以得到工资报酬为目的，有的人是受到奥林匹克精神的感召，有的人愿意对社会、国家做出贡献，有的人希望学习新知识、获取新技能，有的人想要结交朋友等等，从而形成了一种不能以金钱价值衡量的精神契约。

8 总结

事实上，之所以大型活动与酒店人力资源管理有如此之多的不同之处，根本上是因为大型活动的管理是项目管理，酒店作为常设的企业是运营管理。运营管理与项目管理的不同体现了大型活动与酒店管理的不同。

企业运营管理最基本的也是最主要的职能是财务会计、技术、生产运营、市场营销和人力资源管理。企业的经营活动是这五大职能有机联系的一个循环往复的过程。项目管理则需在规定的时间内、有限的资源和质量目标范围内，运用系统的观点、方法，对项目涉及的全部工作进行有效地管理。

时间、任务、团队是区分项目管理和运营管理的三个重要方面。按照时间进度，项目生命周期被划分为概念规划、发展、执行、终结四个阶段，每个阶段的目标任务必须在规定时间内完成。而企业组织的阶段目标实现的周期则相当长；项目团队以任务为中心，企业组织强调现阶段目标和周期目标的制定以及企业目标的实现；围绕着时间计划安排，项目任务需要一个能高效运转的团队组织，组织内需要将各自权责划分清楚，而企业为生存发展而建立起适应的管理体系，而非成立一个临时的项目团队。

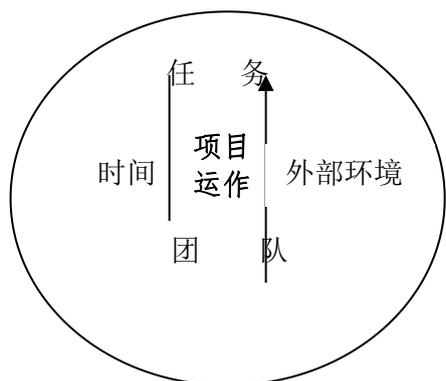


图 3 项目管理相关基本概念关系

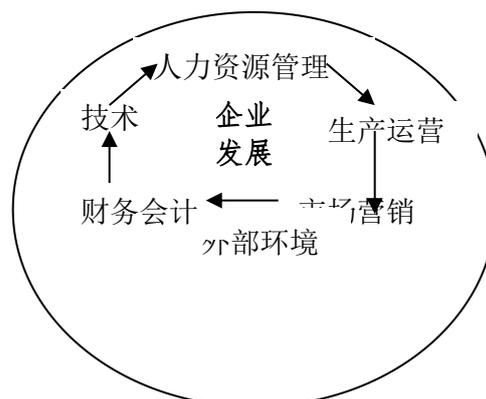


图 4 运营管理循环图

综合对运营管理和项目管理的分析，酒店和大型活动人力资源管理的不同点可以总结为表 4。大型项目人力资源管理的这些特点，体现了大型项目管理机构作为临时机构的基本特点（Packendorff, J. 1995；Lundin, R. A. Anders Soderholm, 1995；Modig, N. 2007）

表 4 酒店和大型活动人力资源管理比较

	酒店管理	大型活动管理
管理目标	企业生存发展	在一定时间内完成项目任务
管理对象	持续性经营组织人力资源	临时性任务组织人力资源

管理特点	侧重预警式管理，长期管理	为特定任务而存在，计划性、短期管理
组织结构形式	职能部门	项目团队（矩阵组织）
组织风险来源	战略风险，操作风险，财务风险，市场风险、更大的委托——代理风险....	内外部环境不确定性、项目综合性、项目一次性、时间限制，风险较高
管理空间	灵活性较差	很强灵活性

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致谢

本文的研究得到广东省科学院优秀青年科技人才基金项目（2004 年度）、广东省软科学研究项目（编号：2005B70101058）、广东省自然科学基金项目（编号：5301104）和华南理工大学 2007~2008 学年度“学生研究计划（SRP）”的支持，作者对这些机构的支持表示感谢。同时，作者也感谢宋海玲、肖璐、刘新菊、吴转宁、孙德芳等同学给予的帮助。

浦东新区会展活动对宾馆发展影响的定量研究——基于逐步回归法的实证测量

徐洁 胡平

华东师范大学商学院旅游学系

摘要

文章选取上海浦东会展活动相关统计数据，采用逐步回归法消除变量之间多重共线性的影响，分析会展活动对宾馆产生的影响。回归模型显示，在浦东新区的会展活动中，影响宾馆营业收入最主要的因素是展览面积和会议次数，其中展览面积每增加1万平方米给宾馆带来0.03亿元的营业收入，每多举办一次会议将给宾馆带来约0.004亿元营业收入。结合浦东新区实际情况，文章在分析原因的基础上对宾馆开拓市场提出相关建议。

关键词：会展活动；宾馆；逐步回归法；浦东

QUANTITATIVE RESEARCH ABOUT THE INFLUENCE OF THE MICE INDUSTRY ON THE HOSPITALITY IN PUDONG : BY USING THE STEPWISE REGRESSIVE METHOD

Jie XU Ping HU

Tourism Department of Business School, East China Normal University

ABSTRACT

Taking Pudong's MICE industry development as an example, this article analyzes the influence about the MICE industry on the hospitality. By analyzing the data with stepwise regressive method, a multivariate linear model is established, and the conclusion is drawn that in Pudong the exhibition area and the conference frequency make the largest contributions to the income of the hospitality. Every 10 thousand square meters increase of exhibition area will bring 3 million revenue, and one more conference will bring extra 360 thousand revenue. Then the paper analyzes the result both on general and specific aspects according to Pudong's current situation. Finally, on the basis of the analysis, the paper gives the hospitality some suggestions about how to explore the meeting market and develops on a sustainable way.

Keywords: the MICE industry; hospitality; stepwise regressive method; Pudong, in Shanghai

一、引言

会展业因其给城市经济带来的巨大影响而得到社会关注，国内外诸多学者专门就会展的经济效应进行研究，而作为会展活动受益者之一的宾馆酒店业也成为研究对象之一，不少学者研究会展组织者对酒店会议设施、会展专业人才素质、服务质量、娱乐提供等偏好及满意度(Astroff M. T., & Abbey J. R., 2002)。在相关研究中，国内学者多数停留在定性描述和分析，刘大可(2006)根据数据间接分析会展活动对饭店业产生的影响，并从宏观和微观方面提出相关建议；罗秋菊、李晓莉(2005)以广交会为对象，剖析会展业对城市酒店业的空间结构影响、效益带动作用以及参展人员对酒店的行为偏好，研究其与城市酒店配置的关系；胡林(2007)以广东酒店业为例，分析会展业对酒店业的空间结构和社会与经济效益的带动作用，研究酒店业角色转换。

自《财富》论坛后一系列国际重大会议和展览相继选址浦东，不仅给浦东新区带来巨大的参加人流，也为宾馆酒店带来大量的客源和潜在消费客源，而世博会也将给浦东新区的会展业带来新的发展契机。面对迅速发展的会展业，浦东新区的宾馆酒店究竟受其影响程度如何？本文选取浦东新区官方网站发布2005年1月至2008年5月的相关统计数据，借助Eviews5.0软件通过逐步回归分析建立相关模型，研究浦东的会展活动对宾馆营业收入的影响程度。

二、研究过程

1. 变量选择

浦东新区把会展业作为浦东现代服务业中的先导性产业和新的经济增长点来培育和推进，力争发展成为长三角会展核心集聚区、中国及亚太国际会展中心城区之一；另一方面，在区位上该区新兴酒店多集中于会展场馆周围，基本形成规划中的“三区一带”格局，即陆家嘴综合会议展览区、新博会展集聚区、世博配套博览区以及世纪大道综合会展带，并且逐渐形成宾馆酒店业的空间聚集。可以认为，浦东新区宾馆酒店近年来的业态发展与会展业有密切的联系。

基于研究主要针对会展业对宾馆的影响，因此忽略相关宏观因素作为解释变量；同时，受到统计数据来源的局限性，本研究对会展活动的定义为展览和会议。将代表宾馆经济收益的宾馆营业收入作为被解释变量（Y），选取代表展览规模和频率的举办展览会次数（X₁）、展出总面积（X₂），以及代表会议规模和频率的召开会议次数（X₃）与会人数（X₄）为解释变量。为增加回归方程结果的可信度，同时引入代表该地消费能力的宏观经济指标国内社会消费品零售总额（X₅）作为解释变量。

表 1：浦东新区展览业与宾馆业相关数据一览

	展览个数 (个)	展出面积 (万平方米)	会议次数 (个)	参加会议人数 (万人次)	宾馆营业收入 (亿元)	社会消费品零售总额 (亿元)
2005.1	2	2.04	51	1.07	2.67	35.67
2005.2	0	0	65	0.76	1.95	31.57
2005.3	12	31.7	131	1.57	3.29	33.01
2005.4	7	28.1	130	1.63	3.4	32.47
2005.5	10	27.63	111	1.37	3.12	33.34
2005.6	24	30.08	127	1.5	2.97	34.83
2005.7	9	14.1	155	1.25	2.55	34.6
2005.8	3	14.8	148	1.46	2.48	35.08
2005.9	12	24.15	151	1.56	3.68	35.39
2005.1	9	23.89	146	1.21	3.9	36.02
2005.11	9	30.4	148	1.41	3.57	34.67
2005.12	17	7.43	162	1.74	3	48.52
2006.1	0	0	150	1.7	2.87	32.6
2006.2	5	12.95	101	1.2	2.72	27.19
2006.3	11	44.3	195	1.81	4.02	30.44
2006.4	10	36.02	126	16.51	3.83	33.39
2006.5	10	29.12	106	0.91	3.83	33.51
2006.6	8	16.05	142	1.57	3.55	32.07
2006.7	6	17.25	175	1.26	3.01	32.92
2006.8	5	14.2	121	0.94	2.86	32.68
2006.9	12	36.8	173	1.58	4.33	33.83
2006.1	10	31.6	141	1.88	4.23	35.58
2006.11	10	49.4	157	1.41	4.24	34.02
2006.12	1	0.3	153	1.44	2.96	35.76
2007.1	1	1.74	149	1.52	3.14	36.14
2007.2	2	1.45	110	1.61	2.4	38.61
2007.3	14	49.04	175	1.54	4.11	35.29
2007.4	8	30.35	153	2.24	3.97	36.41

	展览个数 (个)	展出面积 (万平方米)	会议次数 (个)	参加会议人数 (万人次)	宾馆营业收入 (亿元)	社会消费品零售总额 (亿元)
2007.5	7	40.34	122	1.03	4.24	38.99
2007.6	9	33.08	130	1.09	3.69	36.87
2007.7	7	24.83	133	1.33	3.13	37.06
2007.8	7	17.18	150	1.25	3.02	37.08
2007.9	10	42.98	130	1.38	4.22	39.25
2007.1	8	38.31	135	1.18	4.46	40.89
2007.11	16	42.21	179	2.03	4.44	38.77
2007.12	5	8.75	142	1.53	3.09	40.68
2008.1	1	2.5	144	1.84	3.68	31.66
2008.2	3	7.24	75	0.71	2.63	42.74
2008.3	12	48.83	159	1.64	4.15	40.16
2008.4	9	46.81	145	1.65	4.34	41.57
2008.5	16	43.43	148	1.04	4.04	44.61

数据来源：根据浦东新区政府网站公布统计数据整理

2. 模型建立

(1) 初步分析结果：

结合表 1 统计数据，采用最小二乘法（OLS）分析，得到如下结果：

表 2：初步回归结果

结果	C	X ₁	X ₂	X ₃	X ₄	X ₅
相关系数	1.344932	-0.02858	0.036132	0.005054	0.012259	0.020775
T 值	2.305979*	-1.81446	7.26987*	2.343039*	0.507547	1.423959
R ²		0.748295		F 值		20.81036

*表示通过置信度在 95%的 t 检验

由以上分析结果可知， $R^2=0.748295$ ，方程的拟合优度较好。 $F=20.81036$ ，满足置信度为 95%的 F 值检验。而方程的回归系数显示， X_1 的相关系数为负，则说明回归过程中存在共线性的问题。

(2) 采用逐步回归法消除多重共线性

通过计算，发现回归结果有变量无法通过置信度为 95%的双尾 t 检验。 X_1 代表举办展览会次数 F 值较大而 t 值较小，说明方程各变量间存在多重共线性的问题，会使方程回归系数失真，严重的会使回归系数经济意义的合理性受到影响，因此采用逐步回归法确认那些变量引起多重共线性，并尽可能消除其影响。

根据逐步回归法的基本思想进行第一步回归：将被解释变量 Y 对每一个解释变量分别进行回归，从而得到五个回归方程式，其中 X_2 的 F 检验的值 (85.27047) 最明显，依次排列为 X_2 、 X_3 、 X_1 、 X_5 、 X_4 ，因此可以确定对于被解释变量来说， X_2 因素影响最大，为最主要的因素， $R^2=0.686168$ 也说明其拟合效果最好，所以选择 $Y=\beta_0+\beta_1X_2+u$ 作为基本模型。即：

$$Y=2.609233+0.034753X_2 \quad \textcircled{1}$$

$$(0.109176) (0.003764)$$

$$R^2=0.686168; \bar{R}^2=0.678121; F=85.27047$$

再方程①的基础上依次加入 X_1 、 X_3 、 X_5 、 X_4 ，进行逐步回归分析，同时检验在加入变量之后是否对基础方程造成影响，剔除所加入变量。经过逐步回归剔除多重贡献因素，得到最后回归模型为：

$$Y=2.088964+0.031471X_2+0.004362X_3 \quad \textcircled{2}$$

(0.27835) (0.003972) (0.002161)

$$R^2=0.716561 \quad \bar{R}^2=0.701643; \quad F=48.0338$$

三、结果分析

由回归结果可知,拟合优度 $R^2=0.716561$ 说明浦东新区会展活动对宾馆营业收入的解释程度为 71.65%; 其中影响宾馆营业收入最主要的因素是展览的面积和会议次数: 在浦东新区, 展览面积每增加 1 万平方米, 将给宾馆带来 0.03 亿元的营业收入; 每多举办一次会议, 将给宾馆带来约 0.004 亿元的营业收入。

1. 总体分析

浦东新区的会展活动对宾馆营业收入的解释程度为 71.65%, 主要原因在于, 浦东新区将会展业作为主要扶持产业, 并且制定相关规划。而事实表明, 近年来, 随着该区会展业的发展, 在展览场馆的周围兴建各星级酒店宾馆, 同时浦东新区在规划中也把即将新建的酒店宾馆选址于会展集聚区域。换言之, 在浦东新区宾馆业的发展过程中, 会展业扮演重要角色, 起到举足轻重的作用。

2. 各变量的分析

(1) 从单变量分析的结果看, 五个解释变量的相关系数都为正, 说明这些解释变量对宾馆的营业收入都有促进作用, 但从拟合优度来看, 只有展览面积相对高一些, 其余解释变量对于宾馆营业收入的解释程度都相对较低。

(2) 在逐步回归过程中, 展览面积为最先被引入的变量, 说明其对宾馆营业收入的解释作用最为明显, 并为正相关。一个地区的展览面积是衡量该地区展览业规模的重要指标, 一般而言, 单个展览举办的规模越大, 吸引的展商越多, 则在当地的消费就增加; 其次, 规模大的展览通常能吸引更多来自不同地区的观众, 给宾馆带来更多经济收益; 第三, 展览的规模越大越需要充分的准备, 从筹备开始到全部撤展结束所持续的时间也相对增加, 从而增加了组展方筹备期在宾馆的过夜数; 而主办方与参加者都会增加逗留天数, 这样就给宾馆带来更多的经济收益。

(3) 会议举办次数较展览面积对宾馆营业收入的解释作用稍弱一些, 主要原因在于: 首先, 举办会议的直接投入基本流向宾馆饭店, 但主要是场地租用、餐饮以及住宿等前期一次性支付费用, 并非展览期间相对持续的费用; 其次, 就时间跨度而言, 一次会议从筹划到举办的时间远远少于一次展览, 而会议的筹划并不需要像展前那样进行展馆的提前布置, 大动干戈的搭建展台等, 工程量比展览小, 那么所需人力物力也不及展览多, 从另一个角度说, 在准备期间不会有过多人流从而增加对宾馆客房和餐饮的需求。但是从回归结果来看, 一次会议能给宾馆带来约 0.004 亿元的收入, 若将会议与展览的规模和投入相比较, 不难看出该绝对数并不小。

(4) 考虑到宏观经济因素, 将社会消费品零售总额作为解释变量, 不可否认, 回归方程的拟合优度确实因为它的纳入而增加, 也就是说, 该变量对宾馆营业收入有一定影响, 但是在回归方程引入会议次数这个变量之后, 该变量的性质受到影响, 在联合的情况下, 该变量对宾馆营业收入的影响变得不显著, 不能通过检验。

(5) 会议参加人数对宾馆营业收入的影响不显著, 主要原因在于: 参加会议的人数与他们在宾馆的消费并没有太大的联系。这与会议的特点有关, 一般的会议在宾馆的消费相对比较固定和集中, 并不是由与会人员个人单独承担, 通常为会议主办方统一安排的支出。

从以上分析可以得出, 回归方程②中包括了浦东新区会展活动对宾馆营业收入的主要影响因素, 即回归方程②是一个拟合优度较好的回归主模型。

四、基于回归结果的思考

首先, 宾馆酒店应积极拓展会议市场。国外的相关研究结果表明, 在会展业中会议产业对宾馆酒店业的经济影响最大, 美国作为世界最大的国际会议主办国, 其饭店入住率的 33.8%来自国际会议及奖励旅游。而回归模型显示, 目前在浦东新区, 会议举办次数对宾馆营业收入的影响相对较小, 说明宾馆业在会议市场中的薄弱力量, 会议市场对宾馆营业收入的贡献程度还有很大的提升空间。会议产业对中国来说是正在兴起的产业, 而宾馆酒店作为国内较早进入该产业内部的行业已经具备了一定的会议组办经验, 但在市场营销和配套服务方面仍然很缺乏。回归结果表明, 会议举办的次数越多, 给宾馆带来的收入越多, 但十分不明显, 可以说, 在这些会议中, 并非每次会议的收入都很可观, 也许还存在零收益或负收益的现象, 这正说明宾馆还没有看到某些会议蕴藏的商机。面对如此巨大的市场潜力, 宾馆应积极地深入挖掘会议市场中蕴藏的机遇, 找准市场定位, 细分营销市场。明确宾馆自身究竟能够接待何种类型的会议, 例如一些低星级宾馆会议服务设施相对不够完善, 受到场地大小等限制, 就可以将目标锁定在展览的附属小会议上, 或者将目标市场定位在参加大型会展的小规模企业。在细分市场中树立自己的品牌, 逐步迈向专业化。

其次, 宾馆培养稳定市场客源。从分析结果来看, 会展活动对宾馆营业收入的解释程度为 71.65%, 从另一方面说明, 浦东新区的宾馆主要依赖于当地会展业的发展, 那么如果宾馆失去了会展业的依托, 当地的宾馆业态会呈现何种发展趋势? 会展业的蓬勃发展给宾馆酒店带来更多机遇, 但依托于会展业而发展的宾馆酒店, 更应该加强自身的软实力, 进而增强盈利能力。在拓展会展市场时, 宾馆应分析内外部各要素的变化, 提高自身的服务水平、建设品牌, 培养顾客忠诚度, 固定市场客源, 再积极拓宽市场, 逐步地发展多方面业务, 这样才能保持自身长期发展。

综合各方面因素, 在浦东新区, 会展业发展对宾馆营业收入有一定的影响, 本文分析的结论也表明, 该区展览面积和会议举办次数对于宾馆营业收入的影响程度为 71.65%, 其中展览面积对宾馆营业收入的影响最显著。会展业的发展给宾馆酒店带来更多的机遇和挑战, 在巨大的潜在利润面前, 宾馆酒店更应该理性面对, 形成持续发展。

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经济型酒店产品要素的客户感知分析

沈涵

复旦大学旅游系

吴凯

东北财经大学旅游与酒店管理学院

党宁

华东师范大学商学院旅游学系

摘要

本文通过在线调查,收集了 504 位经济型酒店客户对此类酒店产品要素的感知信息,分析了经济型酒店产品要素的客户感知和偏好,根据客户感知做出相应的产品调整和市场细分建议,在此基础上提出酒店经营的趋势战略建议。

关键词 经济型酒店; 产品要素; 客户感知

CUSTOMER PERCEPTION OF PRODUCT ATTRIBUTES IN THE BUDGET HOTEL SECTOR

Han SHEN

Tourism Department, Fudan University

Kai WU

School of Tourism & Hotel Management, Dongbei University of Finance & Economics

Ning DANG

School of Hotel & Tourism Management, Hong Kong Polytechnic University
School of Business, East China Normal University

ABSTRACT

This research collected 504 questionnaires through an online investigation to study the customer perception about product attributes of budget hotels in China. Results from the data analysis explained comprehensive customer perception in room facilities, services, environment, prices and brands. Suggestions for product modification and market segmentation were given and the operational strategy for budget hoteliers was discussed.

Keywords: Budget Hotel, Product Attributes, Customer Perception

在经历了 2002—2006 年的井喷式发展之后,中国经济型酒店已经陷入了相对缓慢的调整阶段,品牌战略、营销平台、市场细分、产品差异化等问题日益突显,谋求新的市场发展空间成为酒店经营者更多思索的问题。在产品主导的市场开拓日趋成熟的情况下,经济型酒店的消费理念已经基本培育完善。然而,不断更新的消费者需求逐渐形成一股强大的驱动力量,开始影响和主导这个行业的经营与发展趋势。因此,有必要在总结中外经济型酒店产品要素的基础上,对经济型酒店的客户需求进行深入调查和分析,通过测试客户对于现有经济型酒店产品要素的感知,调查他们的潜在需求,从而为酒店经营者调整经营策略,开发新的产品和服务,开辟细分市场提供借鉴和决策依据。本文通过对经济型酒店客户进行的网络调查,分析了经济型酒店产品要素的客户感知和偏好,在此基础上提出酒店经营调整的战略和建议,以期为深陷红海竞争中的经济型酒店管理者提供一些思

路。

一、中国经济型酒店的发展背景与产品特征

随着中国市场经济建设的成功推进，从“九五”时期开始，我国居民消费水平持续上升。根据国家统计局的数据，从1979年到2004年中国GDP年平均增长率为9.4%，而且这一指标经常维持在8-10%的最佳增速区间。经济的发展带动了居民消费的增长，进入了大众消费时代，引发了一系列的社会变革，反映在服务产业上，最明显的变化是服务业结构的巨大变革：在餐饮业，大众消费的兴起促生了简单快捷的快餐文化；在航空公司，针对日益壮大的大众消费群体，中国开始了低价位航空公司的发展；在宾馆住宿业，提供价廉物美的住宿设施的经济型酒店满足了大众旅行者的需求。服务产品变化趋势背后的逻辑动力是强大的：随着中国城镇居民消费能力的增强，大众阶层已经成为一股强大的市场力量，左右了消费市场的结构变迁，促使服务产业改进产品，以满足大众阶层的需求。

经济型酒店就是在这种大众消费背景下产生的一个大众化的改良住宿产品。重组饭店的产品和服务要素，把酒店的核心产品：客房作为唯一或主要产品予以保留，削减其在漫长发展过程中为适应高档市场而衍生的种种奢侈产品和附加服务，从而以低廉的价格提供优质的住宿产品，以满足一般消费者的住宿需求。这是对住宿产品的核心效用的理性回归。

一般来说，经济型酒店的产品要素可以归纳为以下几个方面：

表1 经济型酒店的产品要素与特征

产品要素	特征表现
价格	大众化的价格，明显低于一般的中高档星级酒店
产品	以客房为核心，讲究舒适度
服务	服务社会化，专业化外包
环境	成熟社区，交通便利
设施	简化，舒适
市场	大众旅游者和普通商务旅行者
财务	较高的利润率与投资回报率

二、经济型酒店产品要素的客户感知分析

1、研究方法

上述的产品要素的研究是基于经营者角度而总结的，目前为止，对于酒店消费者的产品认知研究还比较少。从经济型酒店的消费者来说，他们关注的角度，对经济型酒店要素的满意度和期望度可能不同于经营者。因此，有必要进一步细化经济型酒店目标市场的各项信息，用更详细的指标精确测量客户对经济型酒店经营要素的感知，这样有助于经营者更好的认识他们的目标市场，调整产品的各个要素，从而满足消费者的需求，获得对未来市场的把握。

本次研究将经济型酒店产品要素的基础上，将各个要素进一步细化，例如，将产品和设施细化为床、卫浴、隔音、宽带、电视、房间色彩、饮水机、写字台、衣柜、其他等十个指标，从而能更为细节的考察酒店产品的客户感知。设计了一份24个问题的问卷，覆盖了经济型酒店经营的主要因素，并且提出了2个开放式问题，引入消费者关心的产品因素。问卷分为4个部分，第一部分调查了问卷回答者的个人信息；第二部分调查了经济型酒店消费者的产品服务偏好；第三部分涉及到客户的未来需求；第四部分是关于消费者对经济型酒店品牌的选择行为。

504 份问卷通过中国经济型酒店网 (www.inn.net.cn) 这个平台, 采用网上在线填写的方式完成, 参加调查的对象都是经济型酒店的消费者, 他们在进行酒店预定时候被要求自愿参加此次调查。基于网络在线调查的技术, 回收的这 504 份问卷都为有效问卷。本次调查历时 10 个月, 从而有效的减少了因为季节变化和旅行方式的时间波动而带来的受访者的样本结构偏差。

采集的数据通过 SPSS 软件进行处理, 主要分析了样本的人口学特征, 对现有产品服务的感知, 对未来产品和服务的改进需求, 以及对酒店品牌的选择偏好。

2、调查结果分析

(1) 经济型酒店顾客的基本情况

504 名被试中男性占 63.3%、女性占 36.7%; 25-44 岁的客户最多, 占 68.5%, 其次是 25 岁以下的占 26.4%, 44 岁以上的占 5.2%; 被调查者中未婚者占 65.7%、已婚者占 34.3%; 受教育程度较高, 93.5% 的被调查者拥有大专以上学历; 被调查者中中等收入 (1001-4000 元/月) 的比例最高 (62.3%)、月收入 4000 元以上者占 24.2%、月收入低于 1000 元者占 13.5%。

从被试的空间分布上看, 华北、华东和华南三个地区占全部被试的比率为两位数, 分别为 24.2%、26.4% 和 22.4%, 华中 (9.3%)、西南 (8.9%)、西北 (4.4%) 和东北 (4.4%) 的被调查者相对较少; 被调查者的职业按百分比由高到低依次是企业管理人员 (32.7%)、服务销售人员 (18.1%) 和专业技术人员 (13.7%) 等; 被调查者来自的城市类型依次是一级省会城市 (41.1%)、中心城市: 北京、上海、广州 (35.5%) 和其它县市地区 (23.4%)

被调查的爱好依次是休闲旅游 (40.3%)、时尚购物 (14.5%)、体育汽车 (12.9%)、音乐娱乐 (8.5%)、聊天上网 (8.1%)、电子游戏 (7.3%)、金融理财 (6.5%)、健身美容 (1.8%)。

(2) 产品要素感知

本项数据是从顾客视角展开的研究, 分析的是顾客对经济型酒店产品要素的感知, 重点是设施、服务和价格的感知。通过对产品要素的客户感知分析, 我们可以更加清晰的了解在经济型酒店产品经营中, 决定客户满意度和产品评价的关键因素, 从而为经营者提高服务和产品质量提供依据。

A 硬件设施

顾客最关注的硬件设施	频数	Pct of Responses	Pct of Cases
床	504	21.8	100
卫浴	449	19.4	89.1
隔音	358	15.5	71
宽带	262	11.3	52
电视	237	10.3	47
房间色彩	213	9.2	42.3
饮水机	112	4.8	22.2
写字台	71	3.1	14.1
衣柜	70	3	13.9
其他	35	1.5	6.9
合计	2311	100	458.5

说明: 本题是一个多选题, 504 个个案 (case) 回答了 2311 个答案 (response), Pct of Responses 就是“频数”除以回答的答案数 (2311 个 responses) 得到的百分比 (percent); Pct of Cases 就是“频数”除以个案数 (504 个 cases) 得到的百分比 (percent)。

B 服务与环境

顾客最关注的服务与环境	频数	Pct of Responses	Pct of Cases
交通便利性	440	34.5	87.3

早餐	299	23.4	59.3
门店网点多	205	16.1	40.7
送餐服务	104	8.2	20.6
商务中心	97	7.6	19.2
正餐	85	6.7	16.9
其它	30	2.4	6
小商品	16	1.3	3.2
合计	1276	100	253.2

c. 期望价格

期望价格	频数	百分比
100 以下	79	15.7
100-150	243	48.2
150-200	147	29.2
200-250	27	5.4
250 以上	8	1.6
Total	504	100.0

上述三项统计充分印证了国内经济型酒店顾客的需求与前文中归纳的经济型酒店产品与服务的关键要素是一致的。从产品角度来看，顾客对床、卫浴和隔音的高度关注反映了经济型酒店以客房为核心，在简化设施的同时必须做到舒适卫生。而对服务与环境的调查中，顾客最为关注的是交通的便捷性、提供优质早餐和门店网点的多少。这反映了人们对经济型酒店所在区域及其周边环境设施的要求，而对商务中心、正餐和其他服务项目的低需求也反映了经济型酒店客户的有限服务需求，他们更加倾向于依托便利的交通和区域设施来实现各自的个性化要求。交通和社区环境为经济型酒店的服务外包与服务项目的专业化社会化提供了便利。从顾客期待的价格来看，几乎半数的受访者认为合理的定价在 100—150 元人民币，93% 的受访者认为价格应该在 200 元以下。这也反映了人们对经济型酒店低于全服务酒店的大众化价格的强烈需求。目前国内主要一线城市的经济型酒店价格普遍在 150—250 之间，稍高于人们的期望价格，随着竞争的加剧以及经济型酒店种类的增多，价格可能还有下调的空间。

(3) 需求偏好

本项统计是对顾客的偏好及其未来需求进行的调查，我们从希望增加的免费项目、认可的促销方式、预定信息的主要来源、预定方式的偏好、对房间大小的偏好等几个方面来了解顾客对酒店产品、营销举措的喜好和主要的信息渠道，旨在为经济型酒店的经营者提供市场需求的动向，从而改进其经营服务。

A. 希望增加的免费项目

希望增加的免费项目	频数	Pct of Responses	Pct of Cases
无线宽带	315	21.6	62.5
早餐	307	21	60.9
休闲书	221	15.1	43.8
会员卡年费	168	11.5	33.3
视频点播	163	11.2	32.3
国内长话	161	11	31.9
DVD 机	97	6.6	19.2
其它	28	1.9	5.6
合计	1460	100	289.7

注：个案缺失值 0，个案有效值 504

B. 认可的促销方式

认可的促销方式	频数	Pct of Responses	Pct of Cases
会员卡	256	24.4	53.8
优惠券	253	24.1	53.2
积分	217	20.7	45.6
抵用券	194	18.5	40.8
送早餐	84	8	17.6
其它	46	4.4	9.7
合计	1050	100	220.6

注：个案缺失值 28，个案有效值 476

c. 有关经济型酒店的信息来源

有关经济型酒店的信息来源	频数	Pct of Responses	Pct of Cases
朋友介绍	269	28.1	57.7
订房中心	200	20.9	42.9
网络搜索	121	12.7	26
公司协议	111	11.6	23.8
路过上门	97	10.1	20.8
旅游团队	70	7.3	15
宣传广告	54	5.6	11.6
其它	34	3.6	7.3
合计	956	100	205.2

注：个案缺失值 38，个案有效值 466

上述调查表明，在希望增加的免费项目中，超过 60%的受访者希望增加无线宽带和早餐，同时，休闲书是将近一半人的选择。此外，会员卡的收费取消也是 30%多的人所关注的，基于目前酒店信息科技的发展，越来越多的酒店客户将视频点播和国内长途作为他们希望能在经济型酒店中体验的免费服务。这些信息都值得酒店经营者认真考虑，在提升产品质量，创造更优的性价比的努力中，更多的能为客户带来便利和实惠的技术与服务永远是酒店应该追求的东西。

在对客户认可的促销方式调查中，会员卡和优惠券是消费者最青睐的促销方式，此外，通过积分和抵用券来获得促销优惠也是他们比较认可的方式。我们在调查中还发现一个有趣的现象，有将近六成的受访者表示他们通过朋友介绍获得有关经济型酒店的信息，这说明口碑效应和人际介绍在经济型酒店的营销推广中非常重要。这可能与经济型酒店的品牌形象与服务标准尚未完全建立有关。此外，诸如携程、易龙等订房中心的推广也是非常重要的信息来源。另有 20%左右的客户反映他们通过网络搜索、公司协议和路过上门的渠道获得经济型酒店的信息。广告宣传等方式对客户的影响比较小，只有一成的受访者通过广告获得经济型酒店的信息。从此看来，经济型酒店经营者提高客户满意度，增加口碑效应是最有效也是最经济的促销方式。

此外，在对预定方式的调查中，55%的受访者都采取了电话预定的方式，网上预定的比例也比较高，有 30.2%的客户通过网络平台预定客房。采取直接上门、短信预定和其他方式预定的客户比例相对较少，分别为 10.1%，2.6%和 2.2%。这说明电话和网络是目前经济型酒店预订的主要渠道。在对房间大小的喜好调查中，75%的客户偏向于 15-25 平方米的客房，还有 16%的人可以接受 15 平方米以下的客房，这可能与希望更低的客房价格有关。只有 8%的客户希望 25 平方米以上的宽敞型客房，相对来讲，他们能够接受的价格也比较高。

(4) 品牌偏好

我们在这个部分中列出了目前国内比较知名的 14 个经济型酒店品牌，要求受访者作出他们唯

一的选择，下表是统计的数据。在选择该品牌的原因这个开放性问题中，我们总结发现大多数受访者提出品牌的知名度高，产品与服务有保障是他们在进行品牌选择时的主要考虑因素。另外对该品牌的体验感觉与印象好也是一个重要原因。这项调查再次提出了服务质量为核心的经济型酒店品牌建设的重要性。

A. 品牌选择的偏好

您会首选哪个品牌	频数	百分比
锦江之星	149	29.6
如家快捷	75	14.9
其它品牌	59	11.7
当地品牌	49	9.7
7天连锁酒店	40	7.9
莫泰 168	32	6.3
国际青年旅舍	27	5.4
系统缺失值	20	4.0
速8酒店	19	3.8
宜必思	11	2.2
格林豪泰	8	1.6
金狮 100 宾馆	5	1.0
中州快捷	4	0.8
新宇之星	2	0.4
汉庭商务	2	0.4
宝隆居家	1	0.2
中江之旅	1	0.2
合计	504	100.0

三、总结

在行业竞争日趋激烈，品牌建设和营销手段逐渐多样化，市场细分需求变得强烈的当前经济型酒店行业，深层次的认识我们所面对的消费者的未来需求与行为偏好，已经成为酒店经营者迫在眉睫的任务。了解并把握经济型酒店客户消费偏好的外在变化规律，对于酒店的营销决策具有重要的参考价值。基于“效用最大化”的消费者决策这个重要假定，酒店经营者可以设计或者优化其产品和服务项目，提高消费者的使用满意度。现代酒店业的消费结构及其变化影响着整个酒店行业的组织形态以及经营方式的变迁，而对酒店客户消费偏好需求的把握已经越来越引起业界的关注，这为我们推进酒店行业的服务理念与体系，促进服务质量和产品设计的提升，构筑企业核心竞争力和品牌价值提供重要支撑。

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大型节事活动中的旅游接待——以上海世博会为例

赵新峰
北京石油化工学院旅游系

摘要

游客的满意度的高低是大型节事活动旅游接待成功与否的重要标志。笔者认为，上海世博会未来的两年的筹办准备阶段非常重要，要想提高游客的满意度，必须围绕影响游客满意度主要因素如：易达性；宣传导引；活动内容；节庆商品；饮食；周边旅游；便利设施等未雨绸缪。

关键字：大型节事； 旅游接待； 世博会； 上海

TOURISM SERVICES IN MEGA EVENTS: A CASE STUDY ON SHANGHAI WORLD EXPO

Xinfeng ZHAO
Beijing Institute of Petrochemical Technology

ABSTRACT

The degree of tourist's satisfaction is the sign of Mega event's success or failure. The author believes that the next two years are very important preparation stage for 2010 Shanghai World Expo. In order to enhance the degree of tourist's satisfaction, we have to focus on major factors that effects the degree of tourist's satisfaction , such as: accessibility; Propaganda and Introduction; Activities; festival souvenir; cuisine; surrounding tourism; facilities etc.

Key words: Mega events; Tourism services; World Expo; Shanghai

作者简介

赵新峰（1970-），男 北京石油化工学院旅游系讲师，硕士，主要从事旅游规划、旅游文化、中国哲学的教学和研究。

汕头市会展旅游市场发展对策思考

杨佩群 陈小霞
韩山师范学院旅游管理系

摘要

在我国，会展旅游业正呈现出蓬勃发展的态势，并已从大城市逐渐向中小城市扩展开来，为中小城市注入了新的经济活力。对中小城市而言，会展旅游是一把双刃剑；若不结合自身的具体情况和特色，统筹规划，进行科学合理的研究并付诸实践，则无法发挥其对一个城市发展应有的作用。本文用 SWOT 方法分析中型城市汕头市发展会展旅游的优势、劣势、面临的机遇和挑战，提出汕头市会展旅游发展的对策。

关键词：会展旅游；旅游业；汕头市

THE THINKING AND COUNTERMEASURES OF MICE TOURISM MARKET DEVELOPMENT IN SHANTOU

Peiqun YANG Xiaoxia CHEN
Department of tourism management, Hanshan Normal University

ABSTRACT

In China, MICE tourism is showing a flourishing growing trend. It has expanded gradually from big cities to small and medium-sized cities, and injected a new economic vitality into such small and medium-sized cities. For the small and medium-sized cities, the MICE tourism is a double-edged sword, which means for developing such industry, if not combining with their own specific conditions and characteristics, overall planning, and conducting scientific research and putting into practice, it can not play on a due role in urban development. In this paper, SWOT method will be used to analyze the strengths, weaknesses, opportunities and challenges facing of the development of the MICE tourism in Shantou, a medium-sized city. Moreover, the strategy of the MICE tourism development in Shantou will be proposed.

Keywords: MICE; tourism; Shantou city

作者简介：

杨佩群（1977-），女，广东潮州人，广东韩山师范学院旅游管理系教研室主任，讲师，硕士，主要研究方向：旅游经济与市场营销。陈小霞（1985-）女，广东汕头人，广东韩山师范学院旅游管理系学生。

长春会展旅游发展探讨

李俊

吉林华桥外国语学院

摘要

现代经济贸易的迅猛发展和科技文化的广泛交流促进了会展活动的加速发展。围绕会展活动形成的会展经济为我国正在转型中的旅游业提供了一个新动力——会展旅游。这一新兴的专项旅游产品以每年10%速度递增，是世界旅游市场中增长最快的一部分。长春市是国家重要的汽车工业基地和著名的历史文化名城，在成功举办了一系列引起广大市民广泛关注的展会之后，长春的会展旅游环境更加成熟，会展旅游市场开发空间也更加广泛。本文将重点探讨长春会展旅游市场开发优势、存在问题及具体对策，从而使长春的会展旅游走上可持续发展的道路。

关键词：长春；会展旅游；现状；发展对策

CHANGCHUN EXHIBITION TOURISM EXPLORED

Jun LI

School of International Business Administration, Jilin Huaqiao Foreign Languages Institute

ABSTRACT

The rapid development of modern economy and trade and the broad exchange of science and technology and culture accelerate the development of the exhibition activities. The exhibition economic provides a new impetus——exhibition tourism. This new special tourism product is increasing at a rate of 10% every year, which is the fastest part in the world's growing tourism market. Changchun City is an important national industry base and the famous historical and cultural city. After its successful holding of series of exhibitions that draw public attention, the tourism environment of Changchun is more and more mature. The article will focus on exploring the advantages, disadvantages and countermeasures of Changchun exhibition tourism market to take Changchun's exhibition tourism travel on the road to sustainable development.

Keywords: Changchun; exhibition tourism; status quo; the countermeasure of development

作者简介

李俊（1983—），女，于2006年7月毕业于东北师范大学旅游管理专业，2006年9月任教于吉林华桥外国语，担任国际工商管理学院旅游管理专业教师。

苏州会展旅游产品开发的SWOT分析及对策研究

郭巍

苏州大学社会学院旅游管理系

摘要

在苏州会展旅游产品的整体发展环境的基础上,从自然环境、经济环境和社会环境三方面入手,对苏州的会展旅游产品开发进行相应的SWOT分析,找出其会展旅游产品开发中存在的优势、劣势、机会和威胁,并提出了在2008年北京奥运会,2010年上海世博会的历史机遇下,苏州进行会展旅游产品开发品牌化、全面化、科技化对策。

关键词: 苏州; 会展旅游产品; SWOT; 对策

ANALYSIS AND COUNTERMEASURE FOR MICE TOURISM PRODUCT DEVELOPMENT OF SUZHOU

Wei GUO

Department of Tourism Management, Sociology School, Soochow University

ABSTRACT

Based on the whole developing environment of MICE tourism product in Suzhou, SWOAT analysis is made from the points of natural environment, economic environment and social environment. The advantages, disadvantages, chances and threats are obtained. The countermeasure is presented for Suzhou's MICE tourism product development with the historic opportunities provided by 2008 Beijing Olympic Games and 2010 Shanghai World Exposition

Keywords: Suzhou; MICE Tourism Product; SWOT; Countermeasure

作者简介:

郭巍(女,1980-),江苏省苏州市苏州大学社会学院旅游管理系讲师,目前主要研究方向包括会展旅游,旅游管理信息系统等。

ASSESSING THE EFFECTS OF PERCEIVED QUALITY AND VALUE WITH SEM IN A WEB-BASED TOURISM SERVICE ENVIRONMENT

Hao-Erl Yang, & Wei-Kun Huang
Department of Business Management
Tatung University, Taipei, Taiwan

ABSTRACT

In this study a newly developed and validated web-based service quality metric, that is, E-S-Qual metric, was employed to examine its reliability and validity in the context of travel agency websites. Furthermore, we address the roles of perceived service quality and perceived value in affecting tourists' satisfaction with and loyalty to the travel agency websites. Structural equation modeling (SEM) techniques were applied to the data collected by questionnaire from 407 travel agency websites users through online survey in Taiwan. The results validate an integrated web-based tourism service model and show that perceived service quality and perceived value have strong and positive total effects on tourists' satisfaction and which, in turn, strongly affected on their loyalty. Meanwhile, satisfaction completely and partially mediates the effects of service quality and perceived value on tourists' loyalty, respectively. The discussions of the findings and implications for the travel agency marketing and management are also provided.

Keywords: loyalty; perceived value; satisfaction; travel agency; web-based service quality

LEARNING BY DEVELOPING: INTERACTIVE TOURISM EDUCATION

Elina Wainio
Laurea University of Applied Sciences

ABSTRACT

Events represent a significant and fast growing sector of the travel market, generating economic growth and direct and indirect employment. However, the whole tourism industry is undergoing rapid and radical changes. Global economic restructuring, new technologies, sustainability and climate change and are only some of the challenges facing the tourism and event industry. In order to adjust to the changes, innovative pedagogical methods, techniques and strategies are needed. Curricula in educational programmes should be rethought in order to meet future challenges: interactive, integrative and dynamic approach to teaching and learning is welcomed.

Tourism's local and global challenges, industry qualifications and students' competence development have been taken into consideration when planning the Degree Programme in Tourism, called Interactive Tourism, Commerce and Culture. The international program started in autumn 2008 at Laurea, Finland's third largest university of applied sciences. The program is based on Laurea's innovative pedagogical model, Learning by Developing (LbD) which enhances learning in authentic projects, partnerships and interactions between the university and industry. The curriculum is based on five generic competences needed in working life: innovation, ethical, globalisation, network and reflection competences.

The Learning by Developing is a pedagogical operating model in which a development project can be seen as a learning environment. Learning is based on authenticity, partnership and experimental learning and research. In practise, students, lecturers and industry experts cooperate closely in real research and development projects, aiming to combine theory and practise in innovative ways and to create new tourism products and practices. By involving students in authentic cases, their competences and professional skills develop as projects progress.

It is important to create and maintain an open and continuous dialogue between tourism educators, authorities and industry when planning and conducting tourism education. Also, international networks and platforms for exchanging ideas and evaluating best practices are essential. The mutual interest is to educate innovative, industry-qualified and employable professionals who are able to work as prime developers in the tourism and event industry both locally and globally.

Keywords: interactive tourism; developing project; authenticity; innovative pedagogy