

PALACKÝ UNIVERSITY OLOMOUC

PHILOSOPHICAL FACULTY

Analysis of tourism in Hainan

**Bachelor thesis**

**Author:** Jana Mužíková

**Supervisor:** Ing. et Ing. Lucie S. Závodná, Ph.D.

Olomouc 2014

Univerzita Palackého v Olomouci  
Filozofická fakulta  
Akademický rok: 2013/2014

Studijní program: Humanitní studia  
Forma: Prezenční  
Obor/komb.: Čínská filologie - Aplikovaná ekonomická studia  
(ČI-AE)

**Podklad pro zadání BAKALÁŘSKÉ práce studenta**

PŘEDKLÁDÁ:	ADRESA	OSOBNÍ ČÍSLO
MUŽÍKOVÁ Jana	8.března 16, Ostrava	F10604

**TÉMA ČESKY:**

Analýza cestovního ruchu na Hainanu

**NÁZEV ANGLICKY:**

Analysis of tourism in Hainan

**VEDOUcí PRÁCE:**

Ing. Lucie Sára Závodná, Ph.D. - KAE

**ZÁSADY PRO VYPRACOVÁNÍ:**

1. Proveďte literární rešerši dostupné literatury z oblasti cestovního ruchu.
2. Charakterizujte prvky typické pro cestovní ruch v Číně.
3. Analyzujte současný cestovní ruch na čínském ostrově Hainan.
4. Proveďte dotazníkové šetření s cílem zjištění, zda je Hainan chápán jako atraktivní destinace cestovního ruchu, jaké jsou hlavní přednosti a nedostatky Hainanu jako turistické destinace, jaký je potenciál rozvoje cestovního ruchu na ostrově.

**SEZNAM DOPORUČENÉ LITERATURY:**

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Podpis studenta: Mužíková Jana

Datum: 24.1.2014

Podpis vedoucího práce: Závodná

Datum: 24.1.2014

**Declaration**

I hereby declare that I have worked out the bachelor thesis on Analysis of tourism in Hainan independently under professional supervision and that I have listed all the sources used in this thesis.

Olomouc, 24.4.2014

Signature:

## **Acknowledgements**

I would like to thank my supervisor, Ing. et Ing. Lucie Sára Závodná, Ph.D., for the guidance, encouragement and advice she has provided throughout this work. I would also like to thank my friend Emma for help in translating the questionnaire and Michal for help in distributing the questionnaires.

*“The world is a book, and those who do not travel read only a page.”*

*St Augustine of Hippo*

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## **INTRODUCTION**

Traditionally, Hainan, as a remote island far from the capital city, was known as a place where the civilized world officially ended. Convicted officials from the imperial court were sent here to exile. Hainan was out of any tourism concern. After the separation from Guangdong Province and the foundation of the Special Economic Zone, Hainan recognized its potential as a tropical tourism destination and began to follow the path of tourism development. A number of policies that promote the development of tourism were introduced and Hainan Provincial Government has committed to focus on tourism as a strategic priority.

The reason why I have focused on this topic is because during my study stay in Hainan I had an opportunity to see how huge the potential of tourism development in Hainan is. I have also realized how unknown this destination is in the world. Since Hainan is a newcomer to the tourism field, the number of published studies in which the topic is elaborated, is limited. Thus, I consider relevant to deal with the issue of tourism in Hainan.

The thesis is divided into two parts. Theoretical part explains terms related to tourism, later used in analytical part. Although the impacts of tourism are mentioned, both positive and negative, I will not deal with the topic of sustainable tourism. One of the chapters describes the development factors of tourism (geographical analysis) and is crucial for the other parts of the work. Natural and social factors of tourism development are described, as well as stimulatory factors and realization prerequisites. Theory is then applied to the area of Hainan and provides the basis for the next part of this work – questionnaire survey. Conclusions from the questionnaire survey could be used in practice by service providers and investors in the field of tourism in Hainan Island.



## **I. THEORY**

# 1 TOURISM

Tourism is a significant socio-economic phenomenon from the perspective of individual and also from the perspective of society. Tourism annually represents the largest movement of human population in order to explore and relax. [2]

This global industry involves hundreds of millions of people travelling each year. In 2012, more than 1 billion people travelled the world, by 2030 the number is expected to reach 1,8 billion. Tourism is the fifth biggest export sector in the world (after fuel, chemicals and automotive products) and represents 9% of global GDP (direct, indirect and induced). It is responsible for one in eleven jobs all around the world (direct, indirect and induced). [14]

## 1.1 Definition of tourism

Since tourism is a comprehensive socio-economic phenomenon without any fixed boundaries, engaging a lot of areas (economy, geography, sociology, psychology, demography, ecology etc.), there is no unified definition of tourism.

The officially accepted definition was formed at the 1991 WTO Ottawa Conference on Travel and Tourism Statistics: *„Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.“* [50] Usual environment excludes trips of a routine character, for instance regular trips between the place of permanent residence and the workplace. [8]

According to Zelenka and Pásková (2012), the definition of tourism reads as follows: *„Tourism is a complex social phenomenon, including activities of persons travelling outside their usual environment or staying in such places no more than one year for purpose of entertainment, recreation, education, occupationally or for other purposes, as well as activities of subjects providing services and products to these persons, running facilities offering services to these persons, including activities of persons who offer and ensure these services, activities related to using, development and protection of tourism resources, political activities and activities of the public administration and reactions to these activities.“* Unlike the UNWTO definition, which is focused only on participants of tourism,

this extended conception is based on the perception of tourism as a complex process that concerns not only its participants, but also service providers. [11]

Goeldner and Ritchie (2009) lay stress on distinguishing between four different perspectives of tourism: the tourist, the businesses engaged in providing tourist goods and services, the government of the host community or area, the host community. „*Thus, tourism may be defined as the processes, activities, and outcomes arising from the relationships and the interactions among tourists, tourism suppliers, host governments, host communities, and surrounding environments that are involved in the attracting and hosting of visitors.*“ [1]

As it can be derived from the conceptions mentioned above, the definition of tourism is not clear and depends on author's point of view – UNWTO has a preference for tourism defined in demand site terms, whereas the other authors consider important to perceive tourism both on the demand and supply side.

## 1.2 Basic terminology

Tourism, as an open and dynamic system, consists of two subsystems – subject of tourism and object of tourism. These subsystems are linked to each other.

**Subject of tourism** represents participant of tourism – anyone, who satisfy his/her needs by consumption of tourism goods outside his/her usual environment, usually in his/her free time. From the economic point of view, it is carrier of demand and consumer of tourist product.

**Object of tourism** is anything that can be target of change of usual residence of the participant of tourism – tourism destination itself, companies and tourism institutions, culture, nature etc. Object of tourism is carrier of supply. [2]

There are several similar terms related to the participants of tourism – but do all of them mean the same?

**Travellers** are persons who move between different geographic locations (both within one country and between different countries) for any kind of purpose and any duration. Travellers are divided into two groups – travellers included in tourism statistics

(visitors and residents) and travellers not included in tourism statistics (other travellers - trips to work, school etc.).

**Visitors** take trip to a destination outside their usual environment for less than a year for purposes other than to be employed by a resident entity in the country or place visited. Visitors are particular type of travellers (therefore tourism is a subset of travel).

**Tourists** (overnight visitors) are visitors whose trips include an overnight stay.

**Excursionists** (same-day visitors) are visitors whose trips do not include an overnight stay.

**Residents** – in domestic tourism these are persons who live at least six consecutive months in one place prior to coming to another place for a period not exceeding six months; in international tourism these are people who live at least one year in one country prior to coming to another country for less than one year. [2]

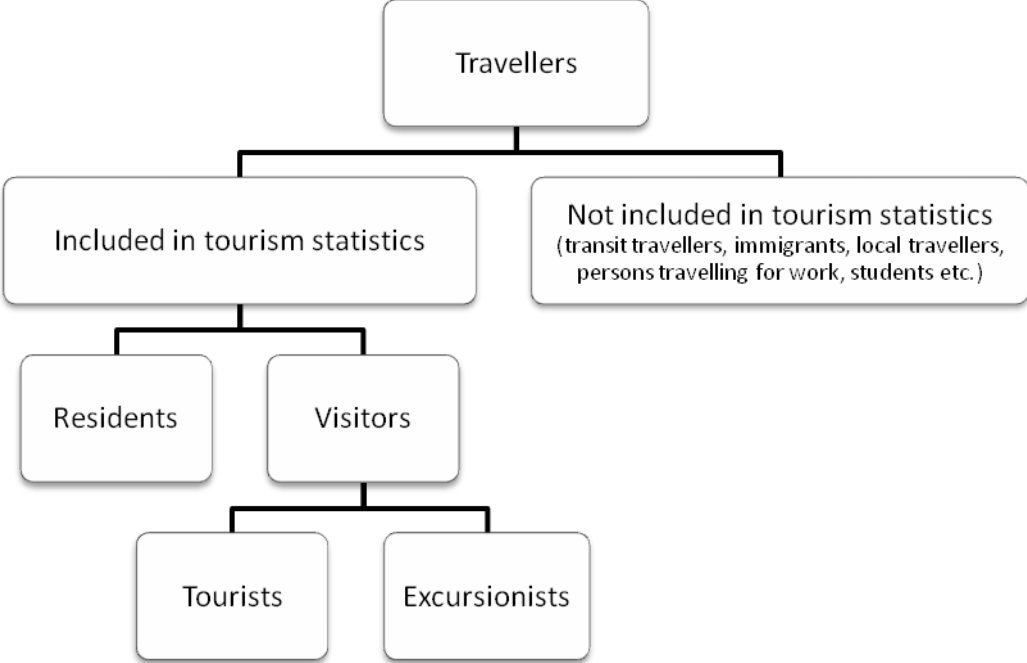


Figure 1 Classification of travellers [2]

## 1.3 Impacts of tourism

In order to understand tourism in the wider context, it is essential to know relations between tourism and its external environment. Tourism, as it has been mentioned in the previous chapter, is not a closed, isolated system. Tourism is affected by the external environment (see chapter 1.5) but also tourism affects the external environment in either positive or negative way. When discussing the impacts of tourism, it is useful to distinguish **human environment** from **natural environment**, but we must keep in mind that in fact these two environments are interwoven. Many authors consider convenient to categorize the impacts of tourism in these categories: **economic impacts**, **socio-cultural impacts**, **environmental impacts**. Although this type of sorting is widely accepted, tourism issues are problematic and multi-faced, thus cannot easily be categorized solely as economic, social or environmental.

Impacts of tourism can be also divided into **positive** (beneficial) and **negative** (detrimental). Similar to the previous sorting, positive and negative impact cannot be easily distinguished. Whether the impact is beneficial or detrimental depends on judgement of observer. Peter Mason (2008) gives an example: *„In this case, only economic impacts are considered and the example relates to the building of a hotel in an area with currently little tourism activity. It is possible for one observer to express a view that the building of the hotel will create more jobs, both in the building and running of the hotel and the observer would consider this to be a positive impact. Conversely, another observer may claim although jobs will be created, they will only be part-time, semi-skilled, poorly paid and lacking a career structure, as well as taking people away from traditional forms of employment. This observer would view the building of the hotel having a negative impact on the local economy.“* [6]

However, in accordance with the conventional presentation, tourism impacts in this chapter are characterized in economic, socio-cultural and environmental category on both positive and negative sides.

### 1.3.1 The economic impacts of tourism

Historically, the economic impacts of tourism have been discussed the most. Countries mostly perceive positive economic impacts as the major tourism impacts, therefore tend to support the development of tourism. Goeldner and Ritchie (2009) and Lickorish and Jenkins (1997) state following list of **economic benefits**:

- Tourism, as a labor-intensive industry, provides both skilled and unskilled employment opportunities. [1] According to World Travel and Tourism Council, employment in tourism in 2012 was 261,4 million jobs, 8,7 % of total employment. [46]
- It increases incomes.
- It contributes to generating a supply of foreign exchange.
- It increases government revenues.
- It increases gross national product.
- It contributes to diversification of economy.
- It contributes to regional development.
- The development of infrastructure can help stimulate local commerce and industry. [1,6]

Mason (2008) and Holloway (2009) also state **negative economic consequences** of tourism:

- It causes inflation. Prices of land, housing and food may increase as a result of placing extra demands on local services at the destination by tourists.
- It causes opportunity costs. This point refers to investing in tourism instead of investing in another form of economic activity. For example, in a coastal area with rural inland, opportunity costs represent investments flowing into tourism, instead of agriculture.
- Over-dependence on tourism can occur. The emphasis on tourism in some states increases. As a result, there is practically no other conception of development. State becomes dependent on tourism and any change in demand can cause major economic crisis. [3, 6]

### 1.3.2 The socio-cultural impacts of tourism

Due to interactions and contacts between hosts and tourists, a range of socio-cultural impacts may occur. **Positive impacts** involve:

- revival of traditional arts or handicraft activities
- preservation of heritage, traditional customs and festivals
- encouragement of learning new languages and skills
- breaking down socio-cultural barriers, racial barriers, religion barriers, political barriers
- promotion of global community
- promotion of international understanding and peace
- broadening educational and cultural horizon

On the other hand, **negative impacts** are not negligible:

- degradation of cultural environment
- commercialization of culture, religion, art
- increase in crime rate, gambling, prostitution and social problems
- creating misunderstandings [1,6]

Particularly significant is the possibility of loss of cultural identity. For instance, when host population is located in a developing country and tourists are coming from developed countries, **demonstration effect** may occur – hosts in developing country observe and imitate activities of tourists, such as consuming branded fast food and drink, but also can take the form of drug use or prostitution. [6]

### 1.3.3 The environmental impacts of tourism

In terms of tourism, the environment is a crucial resource. The dependence of tourism on the environment is much greater than the dependence on the environment in other economic activities. Any detriment of environment may lead to decrease in tourist numbers. The environment can be divided into the human (built environment) and the natural environment. Human environment comprises buildings and structures, villages and

townscapes, transport infrastructure, dams and reservoirs. Natural environment comprises the landscape (particular features such as rivers, rock outcrops, beaches), plants and animals.

**Beneficial environmental impacts** of tourism include:

- formulating measures to protect the environment/landscape/wildlife
- promotion of establishment of National Parks and Wildlife Reserves
- preservation of buildings/monuments
- inflow of money (for example via entrance tickets) may be used to maintain historic buildings, heritage sites and wildlife habitats

A far greater number of **detrimental environmental impacts** of tourism include:

- increase in litter
- overcrowding of people
- traffic congestion
- pollution of water courses and beaches
- footpath erosion
- damage/disturbance of wildlife habitats
- excess demand for resources
- creation of unsightly structures (buildings not fitting in with vernacular architecture)

One of the key approaches to environmental and other impacts of tourism is **tourism carrying capacity**. UNWTO defines tourism carrying capacity as „*the maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic, socio-cultural environment and an unacceptable decrease in the quality of visitors' satisfaction*”. This approach is especially useful in planning and managing tourism impacts. [6]



## 1.4 Typology of tourism

Considering the nature of tourism, any categorization of tourism is very difficult. In everyday practice, many different types and forms of tourism can be found. These types and forms are constantly developing and their number is growing, depending on the demand of tourists and technical and technological state of supply.

Approaches to the tourism typology in the literature vary. Hesková (2006) sorts tourism into two categories – forms of tourism (sorting according to the aspects which influence tourism and consequences brought by tourism) and types of tourism (sorting according to the motivation of visitors). [2]

### 1.4.1 Types of tourism

**Recreational tourism** is characterized by active and leisure relaxation in order to restore psychological and mental strength. Usually it represents stay in favourable natural conditions with various kinds of physically undemanding activities such as taking a walk, camping. With the worsening situation of urban environment, recreational tourism is gaining more and more importance.

**Sports tourism** is realized in nature setting as well. Contrary to the recreational tourism, it includes active sport activities that require a certain level of physical condition such as swimming, hiking, skiing, skating, tennis, golf etc. Apart from improving physical fitness, these activities also have an influence on moral qualities of the person (tenacity, courage, collectiveness).

**Adventure tourism** can be considered as a part of sports tourism and represents desire for unknown and exploration. Participants in the adventure tourism want to escape from the everyday routine where everything is strictly organized and experience, at least for a short period of time, alternative way of life. Adventure tourism may include meeting various kinds of challenges, nocturnal excursions, visiting remote places or places difficult to reach, doing extreme sports such as bungee jumping, rafting, canyoning etc.

**Hunting and fishing tourism** have partly the character of recreational and sports tourism. Participants in hunting and fishing tourism must respect the valid legislative

regulating the conditions for hunting and fishing. Shooting of animals or birds and catching fish therefore must be controlled and charged.

**Cultural tourism** represents spiritual enrichment through learning about the cultural heritage and the way of life of residents in visited destinations. It can take form of visits to museums, galleries, exhibitions, archeological sites, music, theater and film festivals, social and religious events. Cultural tourism is a symbiosis of education and efficient spending of leisure time. A popular form is also studying abroad, university summer courses, internships, etc. Cultural tourism contributes to increasing social, cultural and professional level of people and therefore is often combined with other types of tourism, especially spa, recreational, health and congress tourism.

**Religious (pilgrimage) tourism** may be considered as a part of cultural tourism. Pilgrimages are its most frequent manifestation. Place of pilgrimage can be a city, town, village, or landscape element.

**Spa tourism** represents medical-preventive and curative activities under professional medical supervision during free time. Development of spa tourism is dependent on the existence of natural medicinal resources. Spa treatment helps to prevent diseases, improves health and thereby reduces the work incapacity of the population. Social and cultural life in spa cities is developing intensively, which positively affects results of spa treatment.

**Health tourism**, as reaction to the growth of health awareness of the population, is experiencing a rapid expansion. Wellness represents for the companies economically very interesting concept. It used to be seen as a fad, but it turned out to be a long-term trend, even a way of life. Not only spa offer products of health tourism, but also hotels in holiday resorts. Their main components are various kinds of sport, recreational, fitness, relaxation and other activities and programs.

**Congress (convention) tourism** represents set of activities related to visiting congresses, conferences, symposia, seminars, exhibitions and trade fairs. Congress tourism includes stay in the conference place that is focused on the exchange of scientific and technical knowledge and experience. Congress tourism includes also business trips and incentive tourism. Part of the congress meetings are supporting, before-congress and after-

Congress programs associated with the efficient use of free time in the congress location, region or state. Unlike other types of tourism, congress tourism is usually concentrated in large cities, congress meetings are organized especially in the off-seasonal period and is connected with above-average incomes of most of its participants. Expenditure of foreign participants of conference events is 2-3 times higher than the costs of other tourists.

A summary of the activities associated with the profession and taking place outside permanent residence in the literature refers to the concept of **business tourism**. It can also be specified as relatively independent type of tourism, which includes congress tourism. Both are part of the **career tourism**, respectively **professionally oriented tourism**.

**Incentive tourism** is a term that refers to effective way to reward and motivate employees, managers, business partners and clients. The purpose is to encourage their interest in the commercial success of the company. Incentive tourism requires perfect organization and content-demanding program. [2]

## 1.4.2 Forms of tourism

Typology of forms of tourism uses a lot of classification criteria:

1. **From the geographical perspective** tourism can be classified into domestic, foreign and international. Derived forms are internal, national and regional tourism.

**Domestic tourism** involves residents of one country travelling only within that country. In developed countries it has become a basis for the development of foreign tourism, whereas in developing countries the foreign tourism has become a basis for the development of tourism.

**Foreign tourism** deals with travelling and staying of the residents abroad. Inbound and outbound tourism can be distinguished. **Inbound tourism** represents foreign visitors (non-residents) coming into given country (incoming tourism). It has a positive effect on the trade balance of the state. **Outbound tourism** involves residents travelling in another country (outgoing tourism). Outbound tourism negatively influences the trade balance of the state.

**International tourism** comprises inbound and outbound tourism of several states or regions. International tourism is related to terms tourism of the world and global tourism. **Tourism of the world** represents the sum of inbound and outbound tourism of all countries around the world. **Global tourism** comprises foreign tourism (inbound and outbound) and domestic tourism of all countries in the world.

**Internal tourism** includes domestic tourism and inbound foreign tourism. **National tourism** represents domestic tourism and outbound foreign tourism. **Regional tourism** includes tourism of regions – in domestic tourism it can be a part of the country, in international tourism it can be a continent or part of it (for example tourism of Africa, tourism of Western Europe etc.).

**2. According to the number of participants** tourism can be divided into individual, group, mass and ecological.

**Individual tourism** means individual travelling and organizing by one participant or small group of participants. It is characterized by independence and self-realization when creating a program. Typical example can be so-called second home (cottage recreation).

**Group tourism** can be either organized by participants themselves or organized by professionals (for instance travel agencies). Participants of group tourism benefit from travelling in groups and get various discounts (on transportation, accommodation sightseeing etc.).

**Mass tourism** is the opposite of **ecological tourism**. Hesková (2006) states following characteristics of mass tourism: limited time, fast means of transportation, fixed program controlled from outside, imported lifestyle, sightseeing, comfortable and passive, no or little spiritual preparation, no foreign languages, feeling of superiority, shopping, souvenirs, postcards, curiosity, noisiness. Ecological tourism is characterized by: plenty of time, appropriately slow means of transportation, spontaneous decisions arising from inside, experiences, way of life typical for the country, exhausting and active, studying prior to visiting country, learning foreign languages, joy of discovering, presents, notes, memories, taking photographs, drawing, painting, tact, silence.

**3. According to the way of organizing** tourism can be distinguished into individual and organized.

The number of participants in **individual** tourism reaches up to 80%. Characteristics of individual tourism have been stated above.

**Organized tourism** means that tours are organized by professionals - travel agencies (tour operators) or other organizations. Unlike individual tourism, points of the programs in organized tourism are fixed and independence of participants is limited.

**Club tourism** is part of the organized tourism. Participants in this form of tourism stay in attractive tourism resorts. Besides accommodation and catering, club resorts offer wide range of additional services, predominantly animation services. Animation refers to cheering, entertaining, encouraging, respectively organizing and performing various activities. Club stays are often offered as all-inclusive for up to three weeks.

**4. According to the age of participants** tourism can be divided into children's, youth, family and senior.

**Children's tourism** is tourism of children younger than 15 years who attend organized trips and excursions without parents, but with their consent (summer camps for children, school trips etc.).

**Youth tourism** includes travelling of young people from the age 15 to 25, who are no longer children but cannot be integrated into any certain socio-economic group yet. Young people prefer collective social activities, noisier types of entertainment, sport and cultural competitions. They are interested in staying with people of the same age, learning about society and culture in the place visited. Tour operators offer international exchanges based on reciprocity with accommodation in families, focused on studying languages, as well as international work programs, internships and language courses.

**Family tourism** represents tourism of people from the age 25 to 44 with their children. Family recreation is provided by facilities that are willing and able to prepare a suitable product for both adults and their children.

Participants of **senior tourism** are people in so-called third age, characterized by sufficient time and sufficient funds, especially in economically developed countries. Thus, they can afford to travel more often and for a longer period of time. Seniors require special services adapted to their needs. They are less mobile and prefer places with pleasant atmosphere and special food, particularly spa and health stays, sightseeing and recreation stays, boat tours and visits of relatives and friends.

A separate group of travellers consists of people at the age between 40 and 50 whose children are already grown up, they have relatively plenty of free time, sufficient money and good physical condition. Such circumstances allow this group of people to travel intensively.

**5. From the perspective of duration** excursions/trips, short-term tourism and long-term tourism can be distinguished.

**Excursions/trips** are associated with the stay outside permanent resident for less than one day (without staying overnight). Excursions/trips can be realized either independently or as part of the tour (facultative trips).

**Short-term tourism** represents tourism with the maximum of two to three overnight stays. The most common form of short-term tourism is **weekend tourism**.

**Long-term tourism** is a form of tourism which exceeds three to four overnight stays. The length of stay is laid down differently in each country.

**6. According to the predominant place of stay** urban tourism, suburban tourism, rural tourism, mountain tourism and coastal tourism can be distinguished.

**Urban tourism** represents tourism in cities with various kinds of motivation – congress tourism, cultural tourism, visits of relatives etc. In order to attract visitors, it is essential to create orientation boards, car parks, pedestrian and relaxation zones. Information services are significant, therefore opening hours of information centers should be as long as possible.

**Suburban tourism** is realized in external city areas with the time availability no longer than 45-60 minutes. Suburban tourism can be considered as an alternative to so-called second homes, especially when concerning places used also in working days.

**Rural tourism** includes staying in rural areas with accommodation in village houses and optional participation in various activities associated with the countryside stay. The development of rural tourism aims to involve local population.

Agritourism and eco-agritourism are related to rural tourism as well. **Agritourism** represents trend of returning to nature by spending active vacation on a farm. A big attraction are experiences associated with work on the farm (character of the work, plants, animals, tools etc.), crafts and traditions (woodcarving, pottery, weaving, folk festivals etc.), sport and recreational activities (horse riding, hunting, fishing etc.). **Eco-agritourism** is a form of agritourism realized on ecological farms. In crop and livestock production on the ecological farm no synthetic chemicals, fertilizers, hormone preparations or artificial colorings can be used.

**Mountain tourism** is a set of activities realized in suitable natural environment of mountain tourism centers. Its participants are engaged in mountain hiking, climbing, skiing etc. In some terrains it is advisable to use the services of mountain guides.

**Coastal tourism** is realized in seaside resorts where tourists do sports/recreational activities during day (swimming, sunbathing, other water sports) and social/entertaining activities at night (gathering with others, dancing etc.).

7. **According to season** three forms of tourism can be distinguished: **seasonal tourism, off season tourism** and **year-round tourism**.

Seasonality in tourism is affected by natural and social factors. Natural factors are objective and cannot be changed by humans (weather conditions, length of the day). Social factors such as tradition of taking leave from work and school holidays are partly subjective, therefore can be changed.

8. **According to the means of transportation** tourism can be divided into **mototourism, railway tourism, air tourism, marine tourism**.

9. **In terms of dynamics** tourism can be classified into residential tourism and cognitive tourism.

**Residential tourism** represents form of tourism in which participants stay several days in one place. Optional facultative trips can be offered as a form of enrichment.

**Cognitive tourism** is associated with travelling according to the certain route with specific cognitive goal.

**10. From the sociological perspective** tourism can take form of visits of relatives and friends, social tourism and ethnic tourism.

**Social tourism** is form of tourism in which either part of the costs or all of them is paid by state, employer, foundation etc. Participants of social tourism are usually handicapped persons or persons with low income, but also participants of incentive tourism.

**Ethnic tourism** represents travelling with a motive to visit original homeland of visitors or get to know other nationalities, their customs and way of life. [2]



## 1.5 Prerequisites of tourism

Zelenka and Pásková (2012) state, that prerequisites of tourism represent a sum of natural and anthropogenic aspects and their multilevel relations that form preconditions for the realization of tourism. [11]

### 1.5.1 Localization prerequisites

Localization prerequisites constitute the primary potential of the destination and give us the answer to question “Why should I go there?” They represent “physical” base for meeting potential demand. Localization factors determine how the destination will be presented in relation with the competition, respectively what will be the distinctive aspects of the destination.

#### **Natural factors**

The more the climate is pleasant, scenery fascinating, animals exotic, the better preconditions for tourism exist. Natural factors are given by the territory and almost unchangeable. They determine what kind of tourism is suitable for given area. Snowy mountain terrains can be used for winter sports tourism, moderate and low terrains are convenient for cycling. When dealing with potential of tourism, hydrological conditions (seas, rivers, lakes, reservoirs) are very important. For example in France, about 55% accommodation facilities is located by the sea. Natural prerequisites have a large influence on seasonality of tourism. [8]

#### **Social factors**

Unlike natural factors, social factors are created by humans. Three categories can be divided:

- **Historic and cultural sites** – represent deciding factors in cognitive tourism. Participants of tourism through visiting these sites (e.g. castles, palaces, old towns, sacred buildings) get to know history, architecture and culture of given destination.

- **Cultural facilities and events** – this category includes various types of facilities and events, e.g. museums, galleries, theatres, concerts, folk festivals, congresses, symposia.
- **Sport events** – importance of sport events is getting higher, not only from the perspective of tourism, but also in terms of developing friendly international relationships. [10]

### 1.5.2 Selective (stimulatory) prerequisites

Selective factors stimulate the development of tourism. They determinate whether anyone will come to the destination, who it will be and what will be the quantity of comers.

- **Political factors** – represent basic political issues, such as peace settlement, political situation in the country, free movement of persons and capital. If the political climate is stabilized, tourism grows (e.g. Croatia). If conflicts occur, tourism experiences depression (e.g. Lebanon).
- **Economical factors** – involve convertibility of currency, amount of real wages, amount of the unrealized purchasing power among population, GDP growth, amount of investment into presentation of the destination etc.
- **Demographic factors** – represent various stimulatory prerequisites on both supply side (providers of tourism services) and demand side (consumers, participants of tourism). Demographic factors include the number of inhabitants in the destination, their economical activity, average life expectancy, standard of living, gender composition, growth of population, occupation, life stages etc. Families with children, seniors or youth – all these groups vary in their preferences.
- **Administrative factors** – include legislation, regulations, passport and visa requirements, the need of vaccination etc. [8,10]

### 1.5.3 Realization prerequisites

Realization prerequisites make the final phase of the realization of tourism possible. Without sufficient capacity of services it is not possible to make use of the potential of destination. Even with satisfactory capacity but without sufficient quality the economic benefits resulting from tourism cannot be preserved, certainly cannot increase.

- **Transportation network and means of transportation (communication base)** are the basic prerequisites for the development of tourism. In the deciding process of the participant of tourism, simplicity, safety, quickness and comfort of the transportation are the crucial factors. The unpleasant experiences related to transportation should be minimized. Thus, tour operators should make efforts to create as comfortable transport conditions as possible. Importance of the environment when using means of transportation is increasing, new types of environment-friendly tours are being offered.
- **Primary and complementary tourism infrastructure (material-technical base)** represents a sum of prerequisites that ensure the most effective use of tourism areas. Following components of tourism infrastructure can be distinguished: mediation services (tour operators), accommodation, catering, sports and recreation facilities and services, cultural and social facilities and services, facilities of municipal services, commercial services and other infrastructure. [8,10]

## **2 USED RESEARCH METHODS**

In the analytical part of this thesis I use two methods that help to clarify the issue of tourism in Hainan. This chapter aims to describe their essence.

### **2.1 Geographic analysis**

When dealing with the potential of tourist destination, it is necessary to examine the destination according to certain development factors in order to find out whether it is possible to evolve this potential. The factors can be divided into three categories – localization factors, stimulatory factors and realization factors. From the results of the geographical analysis, we should be able to gain an overall picture of the situation of tourism in the destination. Detailed description of geographical analysis is mentioned in chapter 1.5 Prerequisites of tourism.

### **2.2 Questionnaire survey**

Questionnaire survey is a method of data collection of respondents and their knowledge, based on use of questionnaires. Each respondent answers the same set of questions asked in the same order and in the same way by trained interviewer (guided interview) or respondents fill questionnaires in printed or electronic version. Questionnaire survey can be used both in quantitative and qualitative (in a limited extent) research. [11]

## **II. ANALYSIS**

## 3 CHARACTERISTICS OF TOURISM IN CHINA

### 3.1 Historical and cultural context of China's tourism development

When dealing with the development of tourism in past times, China, as a huge nation with imperial history of over 4000 years, plays a significant role. The main theme, throughout Chinese history of tourism, is the place of culture and the traditions of heritage tourism and pilgrimage. Sofield and Li (1998) explain why pilgrimage and heritage tourism are now deeply embedded in psyche of Chinese people and why these represent important features of Chinese domestic tourism: "*Powerful dynastic emperor-gods stood at the apex of a religious and political hierarchy in which ancestral gods and animistic spirits resided in mountains, rivers, lakes, and other natural features. Stretching in an unbroken chain from the beginnings of the Shang dynasty (ca 1350-1050 BC) to the final demise of the emperors with the fall of the Qing dynasty, each successive emperor and his court paid homage to a wide range of gods and goddesses. The sites multiplied over the centuries and as Buddhism became established, even more sacred sites were added. Much ancient travel was thus for pilgrimage, embedded in the beliefs of the god-kings.*" [9]

In imperial times, Confucian ethic required Mandarins (scholar-officials) to travel and "seek ultimate truth from the landscape". [9] Travel was considered an intellectual feat, way of broadening one's mind. Classical writings, paintings and calligraphies are inspired by the experiences gained during travelling through China. Under the saying "he who travels far knows much", Mandarins had to move in a different province every few years throughout their careers. The figure of poet-traveler became very famous in China. [7] Works of Mandarins have influenced generations of Chinese, both in China and overseas. These philosophical interpretations of historical and sacred sites remain part of Chinese "common knowledge." Sofield and Li (1998) state: "*When Western tourists look at the Yangtze, they see a river; the Chinese see a poem replete with philosophical ideals.*" [9]

During the 20th century, China suffered from the series of upheavals. The line of annual imperial pilgrimages was broken by the declaration of Republic in 1912 and the theme of pilgrimage and heritage tourism practically disappeared. Further developments in

China were not favorable for tourism. The country was affected by internal unrests, Second Sino-Japanese War and civil war between Chinese Communist Party led by Mao Zedong and Kuomintang led by Chiang Kai Shek. After the victory of Communists and the establishment of the People's Republic of China in 1949, there was a period of Mao Zedong's regime and his cult of personality that lasted 27 years, until his death in 1976. In this period, both traditional culture and freedom to travel were suppressed, often in very harsh way. Tourism was not considered an appropriate form of economic activity. Both domestic and international tourism nearly did not exist. Any tourism activity was held in the hands of the state machinery and entry into the country was strictly controlled. From 1954 till 1978, only 125000 foreign visitors were hosted by China International Travel Service. These limited foreign visits were approved for one reason - to demonstrate successes of communism to the selected international audience. Tours were not focused on the cultural heritage, but material achievements of communism such as factories and worker communities. Contacts between visitors and locals were rigorously regulated. Tourists in hotels were segregated into categories of foreign tourists, overseas Chinese, Hong Kong and Macau Chinese and locals. Under Mao's regime, existence of tourism in any real sense was impossible, whole past culture was rejected and consequently massive destruction of cultural heritage occurred.

In 1978, when Deng Xiaoping came on the scene with his "open door" policy, the situation changed and tourism became acceptable for its capacity to make a contribution to modernization of the country. Tourism studies, as separate courses, appeared in universities for the first time, focused on China's history, traditions and culture. Deng rehabilitated China's heritage as an important resource of restoring national unity after trauma of the Cultural Revolution, as well as valuable factor on his way to revitalize the economy. Wide range of cultural heritage sites became accessible for tourists. Under Mao's regime, no more than 12 cities were open to foreigners. One year after Deng Xiaoping initiated "open door" policy, 60 destinations were open and by 1987, 469 destinations were approved for visitation of foreigners. By 1992, this number doubled to 888. Due to release after Mao's strict control over tourism through implementation of permit system for the purchase of bus and train tickets and accommodation, domestic tourism increased extensively.

There are 55 minorities ("xiaoshu minzu") recognized in China, representing about 8% of the population (approximately 100 million people). Deng introduced policy toward ethnic minorities, more tolerant of their traditional cultural. In further years, ethnic culture was promoted, but it was necessary to find a way how to synthesize socialism and modernization with the preservation of traditional cultural of minorities. Thus, Chinese were encouraged to visit heritage sites, cultural festivals and performing arts in order to promote better cultural understanding between people from different parts of China and "make culture pay". [9]

### **3.2 China's tourism boom and future challenges**

Nowadays, tourism is a strategic industry in China's development toward a socialist market economy. China faces a lot of opportunities and challenges in developing its tourism in 21st century. [4] Increasing numbers of visitors prove that China's tourism has a bright future. In 1995, China registered 20 million international tourist arrivals, 46,8 million in 2005 and 57,7 million in 2012. [52] According to World Travel & Tourism Council, by 2024 this number is forecasted to reach 115 million. Total contribution (direct, indirect and induced) of travel and tourism to China's GDP in 2013 was second in the world ranking, 850,1 billion USD, after USA (1416 billion USD). [49]

Ping Zhou (2012) states that inbound tourism growth predictions result from following:

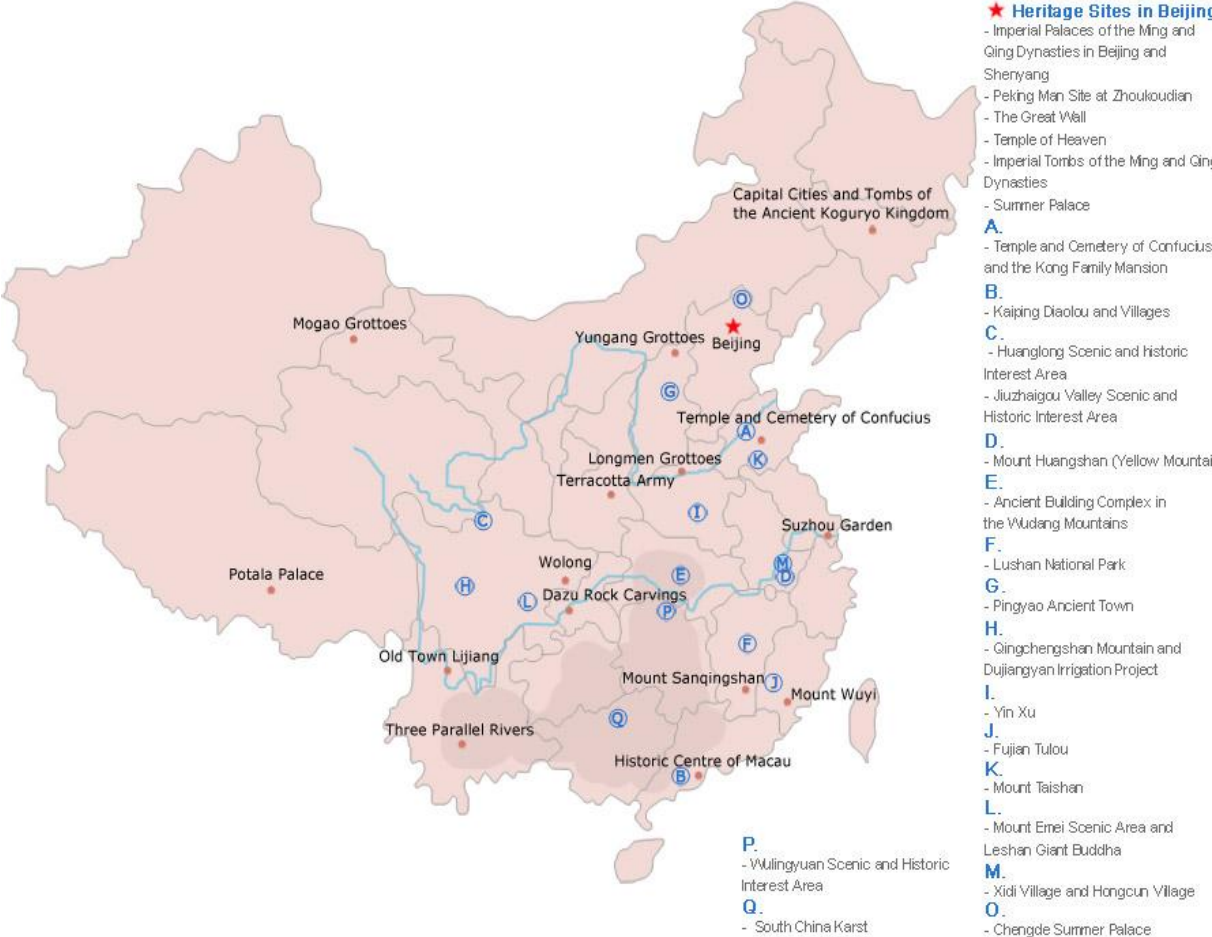
1) After joining WTO (World Trade Organization) in 2001, further relaxation of travel limitations in China occurred. Formalities and barriers for international travelers were reduced. [53] Regulations on travel agencies were amended and this sector opened up to foreign investment. [22] Joining WTO enhanced China's position as a country with favorable conditions for financial investment and international business. With rapid business development, tourism blooms as well.

2) Due to worldwide exposure of China on the Olympic Games 2008, increase in tourism numbers was encouraged and positive image of China was built. Beijing's tourist attractions were displayed and opening and closing ceremonies showed China's rich culture and history. [53]



### 3.3 China’s tourism resources

China is a vast country, rich in tourism resources. The incredible diversity of landscapes and cultural sights creates ideal conditions for the development of tourism. China is able to meet the requirements of any type of tourists: dynamic modern cities with skyscraper skylines, cities with old traditional architecture, agricultural villages, snow- and ice-covered mountains offering adventurous tourism, coastal resorts with world-class golf facilities. Tourism focused on ethnic minorities and their colorful culture has a great potential. [4] China has 45 sites inscribed in UNESCO World Heritage List - 31 cultural sites, 10 natural and 4 mixed (see Picture 1, displaying most of the China’s UNESCO sites).[20]



Picture 1 Map of World Heritage Sites in China [38]

## 4 ANALYSIS OF TOURISM IN HAINAN

### 4.1 The overview of developing Hainan into tourism destination

Hainan Island was part of Guangdong province until 1988, when it became a separate province. After that, former leader Deng Xiaoping declared Hainan a Special Economic Zone (the largest SEZ in China). Potential for tourism growth was recognized and investment incentives were created. In fact, development of tourism in Hainan started in the mid-1990s. According to World Travel and Tourism Council it was probably related to the fact that, before this time, Chinese themselves were not real fans of sun and beaches. International awareness of Hainan's potential as a tourism destination was limited. [32]

The first Tourism Development Master Plan was presented in 2002, supported by the UNWTO. In the beginning of the 21<sup>st</sup> century, the numbers of both domestic and inbound visitor arrivals in Hainan were increasing with the exception of years 2009 and 2010 due to global financial crisis which reduced numbers of foreign tourists (see Table 1). One of the biggest events that helped to promote the island and increase global awareness of Hainan, was hosting Miss World competition in 2003, 2004, 2005, 2007 and 2010. [32]

Arrivals ('000)	1995	2000	2005	2006	2007	2008	2009	2010
Inbound	327.8	486.8	431.9	616.9	753.1	979.3	551.5	663.1
Foreigners	64.5	93.7	269.4	465.7	593.1	731.3	372.1	473.8
Hong Kong & Macau	148.8	325.4	106.7	99.5	107.4	168.2	127.4	121.2
Taiwan	114.5	67.7	55.8	51.7	52.6	79.8	52.0	68.1
Domestic	3,282.4	9,588.9	14,732.8	15,433.3	17,702.0	19,620.7	21,951.8	25,210.3
Hainan residents	na	na	5,343.5	5,616.1	6,503.0	7,292.5	8,122.8	na
Other Mainland Chinese	na	na	9,389.3	9,817.2	11,199.0	12,328.2	13,829.0	na
<b>Total</b>	<b>3,610.2</b>	<b>10,075.7</b>	<b>15,164.7</b>	<b>16,050.2</b>	<b>18,455.1</b>	<b>20,600.0</b>	<b>22,503.3</b>	<b>25,873.4</b>

Table 1 Visitor arrivals in Hainan 1995-2010 [32]

The construction of Hainan International Tourism Island started in 2010, when the Opinions of the State Council's on Improving and Development of Hainan International Island were officially issued. Developing Hainan into international island destination has become national strategy. Central government issued the Outline of the Construction of Hainan International Tourism Island Plan. [20] According to the goals described in the outline, by the year 2020, Hainan will become worldwide first class tourism destination. That time, direct contribution of tourism industry to Hainan's GDP should exceed 12% (in 2011, direct contribution of tourism industry to Hainan's GDP was 8,5 %). [13, 32]

In December 2010, an offshore duty-free policy was issued, guaranteeing both Chinese and international visitors tax free shopping in Hainan. Policy aims to accelerate the pace of construction Hainan into international tourism island and encourage domestic citizens to visit Hainan since it was designed for passengers leaving the island, not national territory. [12, 22]

The facts that Hainan is relatively unknown destination, perceived to be safe and secured place for tourists with favourable environment for investors, government support and funding, diversity of tourism resources - all these suggest that Hainan is entering a new era of its existence, full of challenges. Further characteristics of tourism prerequisites and steps that have been made on Hainan's way to become well-known tourist destination are described in the following text.

## **4.2 Analysis of development factors**

Analysis of tourism development factors in Hainan is based on chapter 1.5 Prerequisites of tourism.

### **4.2.1 Localization prerequisites**

In this chapter, the most significant localization prerequisites of tourism development in Hainan are described - natural factors (such as geographical location, landscape, climate conditions, fauna and flora) and social attractions (cultural heritage, museums and events).

# Natural conditions and attractions

## Geographical location

Hainan is China's southernmost province, located in South China Sea and separated from the Leizhou Peninsula of southern Guangdong province by Hainan Strait. It is often dubbed "Chinese Hawaii", because it is the only tropical province in China, lying virtually at the same latitude as the Hawaiian Islands (18°N). The island measures about 260 km from east to west and 210 km from north to south at its widest point and extends over 34300 square km, excluding disputed areas of Xisha Islands, Nansha Islands and Zhongsha Islands located at the southeast of Hainan Island. [34, 32] For the purposes of this paper, the term "Hainan" refers only to Hainan Island.



Picture 2 Location of Hainan Island [23]

## Landscape

The southern part of the island is mountainous with the highest peak Mount Wuzhi (1867 m, literally "Five Finger Mountain"). Mountainous and hilly areas, covered in dense tropical rainforests, take up approximately 38% of the whole island, and represent the

characteristic feature of island's physiognomy. Lower hills and tablelands extend out from the mountainous centre to the northeast, where they merge in narrow alluvial plains. There are several well preserved volcanic cones in the northern part of the island. Rivers and streams flow from the highlands seaward through tablelands and plains. The longest river Nandu flows northeastward, other major rivers Changhua and Wanquan flow to the east and west (see appendix A for physical map of Hainan). Low-mineralized hot springs with curative effects are widely scattered on the island. Sandy coasts represent about 50-60% of Hainan's more than 1500 km long coastline. Beaches are usually extensive, reaching up to thousands of meters. Due to their gradual, approximately 5° slope into the sea, conditions for non-swimmers are thus very pleasant. [23, 47]

## Climate

Hainan has tropical and monsoonal climate with favorable temperatures all over the year (see Table 2). Rainfall is primarily heavy in the period from May to October, due to wet monsoon. In other months rain falls rarely. Thus, "dry season" and "wet season" can be distinguished. Tropical storms and typhoons sometimes occur, especially in late summer and autumn. [34] One of the most important features of Hainan is the quality of air that works as great attraction for tourists coming from China's smoggy cities.

<b>January</b>	Avg low: <b>16°</b>	Avg hi: <b>23°</b>	Avg precip: <b>2.06 cm</b>
<b>February</b>	Avg low: <b>18°</b>	Avg hi: <b>24°</b>	Avg precip: <b>3.62 cm</b>
<b>March</b>	Avg low: <b>20°</b>	Avg hi: <b>27°</b>	Avg precip: <b>3.93 cm</b>
<b>April</b>	Avg low: <b>23°</b>	Avg hi: <b>30°</b>	Avg precip: <b>7.16 cm</b>
<b>May</b>	Avg low: <b>25°</b>	Avg hi: <b>32°</b>	Avg precip: <b>16.84 cm</b>
<b>June</b>	Avg low: <b>26°</b>	Avg hi: <b>33°</b>	Avg precip: <b>12.77 cm</b>
<b>July</b>	Avg low: <b>26°</b>	Avg hi: <b>33°</b>	Avg precip: <b>12.46 cm</b>
<b>August</b>	Avg low: <b>25°</b>	Avg hi: <b>33°</b>	Avg precip: <b>20.28 cm</b>
<b>September</b>	Avg low: <b>24°</b>	Avg hi: <b>31°</b>	Avg precip: <b>24.04 cm</b>
<b>October</b>	Avg low: <b>23°</b>	Avg hi: <b>29°</b>	Avg precip: <b>23.86 cm</b>
<b>November</b>	Avg low: <b>20°</b>	Avg hi: <b>26°</b>	Avg precip: <b>8.96 cm</b>
<b>December</b>	Avg low: <b>17°</b>	Avg hi: <b>23°</b>	Avg precip: <b>5.97 cm</b>

*Table 2 Average temperatures and precipitation in Hainan [33]*

## **Flora and fauna**

Hainan's flora and fauna is rich and varied. Flora includes 4600 species and more than 600 of them cannot be found anywhere else. Tropical forests in Hainan comprise of vertical vegetation zones, where mix of trees of different species and ages can be found. Coconut palm trees, bamboos, rattans and tropical hardwood trees are highly represented. Hainan is home to many threatened and endangered animal species, such as Eld's deer and clouded leopard. To protect endangered species, several wildlife reserves have been established. Hainan peacock-pheasant, Hainan hare, Hainan partridge, Hainan black crested gibbon - all of these animal species are endemic to Hainan. [26, 34, 37, 44] Last-mentioned is even critically endangered, considered the rarest ape in the world. There are only 20 gibbons on the island, living in two family groups. [28] On the other hand, macaque monkeys are very popular in Hainan.

## **List of natural attractions in Hainan**

***Macaque Reserve*** - China's largest area for raising and training monkeys, currently having more than 2000 "inhabitants". [32]

***Bawanling National Nature Reserve*** – famous for the protection of Hainan black-crested gibbon, considered one of the best-preserved tropical rainforest in China. Reserve is located in the western part of Hainan. [15]

***Jianfengling National Forest Park*** - largest tropical primeval forest in China, located in the southwest of Hainan. The area is considered "the ecological treasure of China" due to its diverse range of tropical vegetation, unspoiled by human intervention. [36]

***Datian Natural Reserve*** – home of endangered Eld's deer, located in the western Hainan. [46]

***Mangrove Natural Reserve Area*** – largest mangrove reserve in China situated near Haikou, also known as a great place for bird watching. [41]

***Dongjiao Coconut Plantation*** – situated on the seaside of Dongjiao town (northeast of Hainan), it is large farming community with long sandy beaches. [19]

**Haikou Volcanic Cluster Geopark** – volcanic crater covered with lush vegetation and surrounding park with examples of indigenous plants, lava rocks etc. [19]

**Holiday Beach** – the most famous attraction of Haikou, fully equipped with restaurants, swimming pool, hot springs, entertainment and sport facilities etc.

**Beaches in Sanya and surroundings** – considered the most beautiful sandy beaches in Hainan, annually attract large numbers of visitors.

## **Social attractions**

### **Historic and cultural heritage**

While the natural tourism resources are widely represented all over the island, the number of historic and cultural sites is relatively small, especially compared to the rest of China. Hainan, as a remote frontier island shrouded in mystery, was on the periphery of China's cultural field, largely ignored by series of dynasties. The island served as a place of exile for criminals and spurned state officials who dared to criticize the emperor. Ancient records state, that island was dubbed "the tail of the dragon", the last unexplored frontier of China and civilization. [34, 29] As we can see from Picture 1, there is no site in Hainan inscribed in the UNESCO World Heritage List. Nevertheless, there are several cultural sights worth mentioning:

**Five Officials Temple** - temple and surrounding gardens built in Ming dynasty, dedicated to five officials who were banished to Hainan in Tang and Song dynasties. Su Dongpo, Song dynasty poet, is commemorated here as well. The sight is located in the capital of Hainan, Haikou. [25]

**Tomb of Hai Rui** – tomb of the uncorrupted official of the Ming dynasty and relics related to his life, situated in Haikou. [48]

**Nanshan Culture Tourism Zone** - area is located on the coast, 40 kilometres southwest from the second largest city in the island, Sanya. The dominant feature of the area is the giant sea-side statue of bodhisattva Guanyin, completed in 2005. Measuring 108 metres, it is 15 metres taller than the Statue of Liberty. Apart from the statue, there are three theme parks with ornamental gardens and temples: Buddhism Culture Park portraying

the Buddhist culture, Blessing and Longevity Park embodying Chinese culture and Hainan Custom Culture Park characterizing Hainan Province. [39, 32]

For pictures of natural and social attractions in Hainan, please see appendices B – H.

## **Museums**

**Hainan Provincial Museum** - opened in 2008 in Haikou, it is the only comprehensive modern museum of Hainan Province. Exhibitions display history of Hainan, culture of Hainan's national minorities and cultural relics. Museum possesses more than 20000 collection items. Most of the captions are written in English. [19, 27]

**Hainan Nationalities Museum** - primarily exhibits cultural relics of the ethnic minorities in Hainan. Museum was established in 1986 in Wuzhishan city. [30]

## **Events**

**Boao Forum for Asia** - annual conference of hundreds of top-level officials, academics and economists from the Asia region, its venue is permanently located in Bo'ao town. Thus, Bo'ao is properly equipped with conference and other facilities, including five-star accommodation and golf course. [19, 32]

**Miss World competition** - Hainan hosted the pageant finals in 2003, 2004, 2005, 2007 and 2010. Crown-shaped Beauty crown theatre was specially built in Sanya for this event. [16]

**Omega Mission Hills World Cup 2011** – golf tournament that took place in Mission Hills golf complex, Haikou. [42]

**World Ladies Championship** – golf tournament on the Ladies European Tour, taking place in Mission Hills golf complex, Haikou (since 2012). [35]

**Volvo Ocean Race** – yacht race around the world, Sanya held a stopover in 2011-2012 route and in 2014-2015 will hold as well. [51]



**WTTC Global Summit** – Hainan is a venue for the 14th WTTC’s Global Summit (24-25 April 2014). [45]

## **4.1.2 Selective (stimulatory) prerequisites**

### **Political and administrative factors**

Although localization factors indicate that China, alternatively Hainan, is fully equipped with attractive natural and cultural sites, tourism would never be able to develop without government efforts. As it has been stated above, political conditions for the development of tourism in China were unfavorable for the significant part of 20<sup>th</sup> century. Nowadays, the political climate is stabilized and tourism development policies promoted. Two thirds of the provincial governments have committed to make tourism one of their pillar industries. More advantageous policies have been, or will be, initiated to support domestic tourism development. For example, in 2000 the central government increased public holidays to three weeklong periods per year – “golden weeks”. One of them was eventually reduced to three days. However, the practice has proved that most Chinese travel during the time of weeklong public holidays which is also the “harvest” time for tourism service providers. [40, 4]

One of the most important events in China in the 21<sup>st</sup> century was joining World Trade Organization in 2001. In terms of tourism, it provides opportunities of its development, such as fewer formalities for cross-border travelers, reductions in traveling costs due to global competition and upgrade of financial, information and communication facilities. China’s position as a country for financial investment, international business and business and leisure travel has been enhanced. [4]

Speaking specifically about Hainan, several tourism-promoting policies have been already introduced. An offshore duty-free policy, issued in 2010, enabled tax free shopping to all visitors leaving Hainan (not leaving country) and aimed to boost the number of visitors and economic development of the island. [12, 21]

Hainan is in favor of the idea of visa-free entry. In 2009, Hainan’s visa-free scheme was enriched by adding five additional countries to 21 countries that had already been

enjoying visa-free entry (as long as their visits are organized by travel operators registered in Hainan Province and do not exceed 15 days). The following 26 countries are exempt from visa requirements: Australia, Indonesia, Japan, Malaysia, New Zealand, Norway, the Philippines, Singapore, South Korea, Thailand, Austria, Denmark, Finland, France, Germany, Italy, the Netherlands, Russia, Spain, Sweden, Switzerland, Ukraine, UK, Kazakhstan, USA and Canada. [32]

**Economical factors**

In recent years, Hainan has recorded continuous grow of GDP. Hainan’s GDP increased in 2011 by 9%, in 2012 by 12% and in 2013 by 9,9% to 314,65 billion RMB. Hainan’s per capita GDP was 35491 RMB in 2013. [43, 32] As it can be seen from Table 3, per capita Gross Regional Product has been continuously growing, as well as Local Government Expenditure. Unemployment Rate in Urban Areas in Hainan has been decreasing up to 1,7% in 2011 which was one of the lowest among China’s provinces.

	Per Capita GRP (RMB)	Local Government Expenditure (RMB)	Registered Unemployment Rate in Urban Areas
2003	8592		4.1
2004	9812		3.4
2005	11165	15 124 210 000	3.6
2006	12810	17 453 660 000	3.6
2007	14923	24 519 670 000	3.49
2008	17691	35 797 080 000	3.7
2009	19254	48 606 240 000	3.5
2010	23831	58 133 790 000	3
2011	28898	77 880 000 000	1.7

*Table 3 Economic indicators – Hainan 2003-2011 [18]*

**Demographic factors**

Hainan has a population of about 8,8 million, including a number of ethnic minorities, of which the three largest are the Li, Miao and Hui. The Li people were the first who settled on Hainan, 3000 years ago. The population density is 253 persons/sq km. [32, 43]

Sex ratio in Hainan is one of the most skewed ratios in China. In 2010, the sex ratio at birth in Hainan exceeded 125 males per 100 females. [24]

Some of the demographic indicators and their developments over time are presented in Table 4. The population of Hainan has been constantly growing. Hainan’s natural growth rate (birth rate minus death rate) has been steady, without any significant changes which ranks Hainan among the provinces with the highest natural growth rate in China. The development of gross dependency ratio (ratio of those not in the labor force and those in the labor force) has been decreasing in the last years.

	Total Population (year-end)	Birth Rate	Death Rate	Natural Growth Rate	Gross Dependency Ratio
2003	8.11	14.68	5.52	9.16	46.88
2004	8.18	14.77	5.79	8.98	45.81
2005	8.28	14.65	5.72	8.93	47.56
2006	8.36	14.59	5.73	8.86	44.62
2007	8.45	14.62	5.71	8.91	43.29
2008	8.54	14.71	5.72	8.99	43.85
2009	8.64	14.66	5.7	8.96	41.23
2010	8.69	14.71	5.73	8.98	38.5
2011	8.77	14.72	5.75	8.97	36.61

Table 4 Demographic indicators - Hainan 2003-2011 [18]

### 4.1.3 Realization prerequisites

#### Transportation network and means of transportation (communication base)

There are over 17000 kilometres of highways in Hainan, connecting 318 towns, villages and attractions scattered over the island. A national level highway was constructed along the island’s coast, making every harbour and major city in Hainan accessible. Journey time from Haikou to Sanya is 3 hours by east-line freeway and 4 hours by west-line freeway. A project of direct connection of the island’s east and west was introduced in the 12th Five-year plan. 400-km national level highway will cost 60 billion RMB.

Hainan is connected with mainland China via five railway routes leading to nation’s largest transportation hubs – Xi’an, Beijing, Shanghai, Chengdu and Changsha. The modern high-speed train from Haikou to Sanya was launched in 2011. The journey is 308 km long and takes only 2 hours. Other stations on this route include Haikou East, Meilan Airport, Wenchang, Qionghai, Boao, Wanning, Lingshui and Yalongwan.

All the vehicles and trains entering mainland from Hainan have to board the ferry. The journey across the Hainan Strait takes about 90 minutes. The 12th Five-year plan introduced a plan of construction a bridge over the Hainan Strait. Once finished it will cut the crossing time to 20 minutes.

There are 24 ports on the island, Haikou, Yangpu, Sanya and Basuo are the largest. Expansion of Sanya’s port is planned as a result of booming cruise business.

There are two airports in Hainan Province – Haikou Meilan Airport and Sanya Phoenix Airport. By the end of 2015, Boao International Airport is expected to start operation. [43]

### **Primary and complementary tourism infrastructure (material-technical base)**

There are over 330 travel agency outlets on the island, including 21 handling outbound tourism. The growth in domestic tourism has encouraged many tour operators and retail travel agents to open branches on the island, including online intermediaries. Sanya is now one of the most important holiday destinations for Ctrip.com, its services use about 300000 tourists a year. The number of tour guides is growing, but the majority represents unqualified and untrained guides, with poor language skills, especially when it comes to languages other than English.

According to the official statistics, there were 509 hotels in Hainan in 2011, including 22 hotels in the five-star category. There are 20 international hotel brands managing one or more hotels on the island. As we can see from Table 5, hotel capacity in Hainan is constantly growing. [32]

	1995	2000	2005	2006	2007	2008	2009
Total no. of hotels	195	238	364	387	414	440	459
1 *	5	4	9	13	12	15	10
2 **	11	20	63	71	66	55	42
3 ***	15	40	98	114	118	116	112
4 ****	5	14	41	50	53	54	54
5 *****	1	4	13	13	14	20	20
Unclassified	156	158	140	126	151	180	221
Total room count	19,232	28,479	48,388	53,977	56,812	61,499	67,391
Total bed count	37,733	54,655	89,396	98,623	105,002	116,973	124,689
Av room occupancy (%)	52.0	55.4	53.6	52.5	57.3	59.2	58.9

*Table 5 Hotel capacity in Hainan, 1995-2009 [32]*

Since China's State Council has decided to develop Hainan into international island resort destination, a large number of projects were introduced, including shopping complexes, theme parks and resort developments. At the end of the 12<sup>th</sup> Five-year plan period (2015), around 65 five-star rated hotels and 15 hotel resorts are scheduled to be completed. [32]

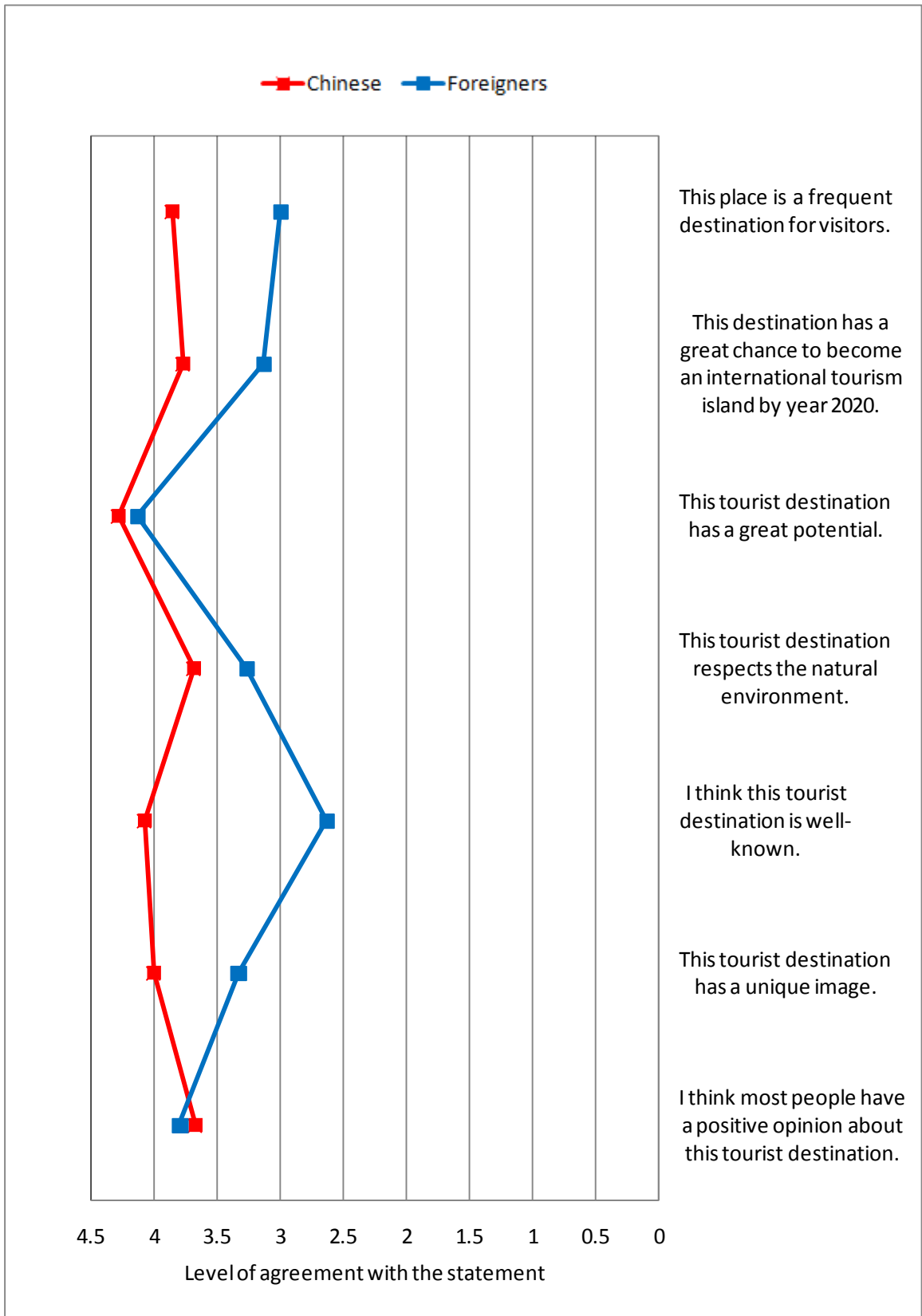
Due to the fact that Chinese love to eat out of their homes, there are a vast number of restaurants of various standards, including international brands. Some restaurants are open from early morning till late at night. Street barbecues can be found at night in high density areas. Although restaurants offer wide range of common Chinese dishes, Hainan suffers from the lack of traditional restaurants offering Hainanese cuisine and little attention is being given to the promotion of typical Hainanese dishes. This is particularly evident when comparing Hainan to other tourist destinations in China.

### 4.3 Questionnaire survey

From the previous geographical analysis one can assume that Hainan's conditions for tourism development are favourable and the island is on a good way to become an international tourism destination. In addition to the natural and social attractions, a number of tourism-promoting policies have been implemented and significant amounts have been invested to the development of tourism infrastructure. In order to find out how people perceive Hainan as a tourist destination, to what extent the findings from the geographical analysis correspond with people's opinions and what are the strengths and weaknesses of Hainan as a tourist destination, the questionnaire survey was carried out. Questionnaires were given to 182 people, both Chinese and foreigners, in the capital of Hainan Province, Haikou. The structure of questions and their evaluation is described in the following text.

The first question aimed to find out the nationality of respondents. Selection of respondents to Chinese and non-Chinese was important because it was presumed that the answers to some of the questions would vary greatly depending on whether the respondents are Chinese or foreigners. Despite the fact that it was managed to get only 30 questionnaires from foreigners, I still consider interesting to depict comparison between the answers of Chinese and answers of foreigners for selected questions.

In the next section of the questionnaire, respondents were asked to indicate to what extent they agree with various statements. A bipolar scaling method was used – respondents were asked to circle numbers from 1 to 5, where number 1 means “completely disagree” and number 5 means “totally agree”. The set of statements was focused on the general image of Hainan as a tourist destination. Responses to the individual statements were averaged using the arithmetic mean and recorded in a single graph. Responses of Chinese and responses of foreigners were evaluated separately. As it can be seen from the graph 1, the level of agreement with the individual statements differed. The highest level of agreement was with the statement *“This tourist destination has a great potential”*. Both Chinese (average 4,28) and foreigners (average 4,13) consider Hainan to be a destination with a great potential. The most similar results were for the statement *“I think most people have a positive opinion about this tourist destination”* – the arithmetic mean values were



Graph 1 Assessment of the statements related to the general image of Hainan as a tourist destination (Chinese x foreigners)

almost the same (3,68 in responses of Chinese and 3,8 in responses of foreigners). Quite similar were the results for the statement *“This tourist destination respects natural environment”* – arithmetic mean value was 3,68 in case of Chinese and 3,26 in case of foreigners. The biggest differences were recorded in responses to the following statements: *“This tourist destination has a unique image”* (Chinese 4,0 and foreigners 3,33), *“This destination has a great chance to become an international tourism island by year 2020”* (Chinese 3,78 and foreigners 3,13), *“This place is a frequent destination for visitors”* (Chinese 3,86 and foreigners 3,0) and *“I think this tourist destination is well-known”* (Chinese 4,08 and foreigners only 2,63).

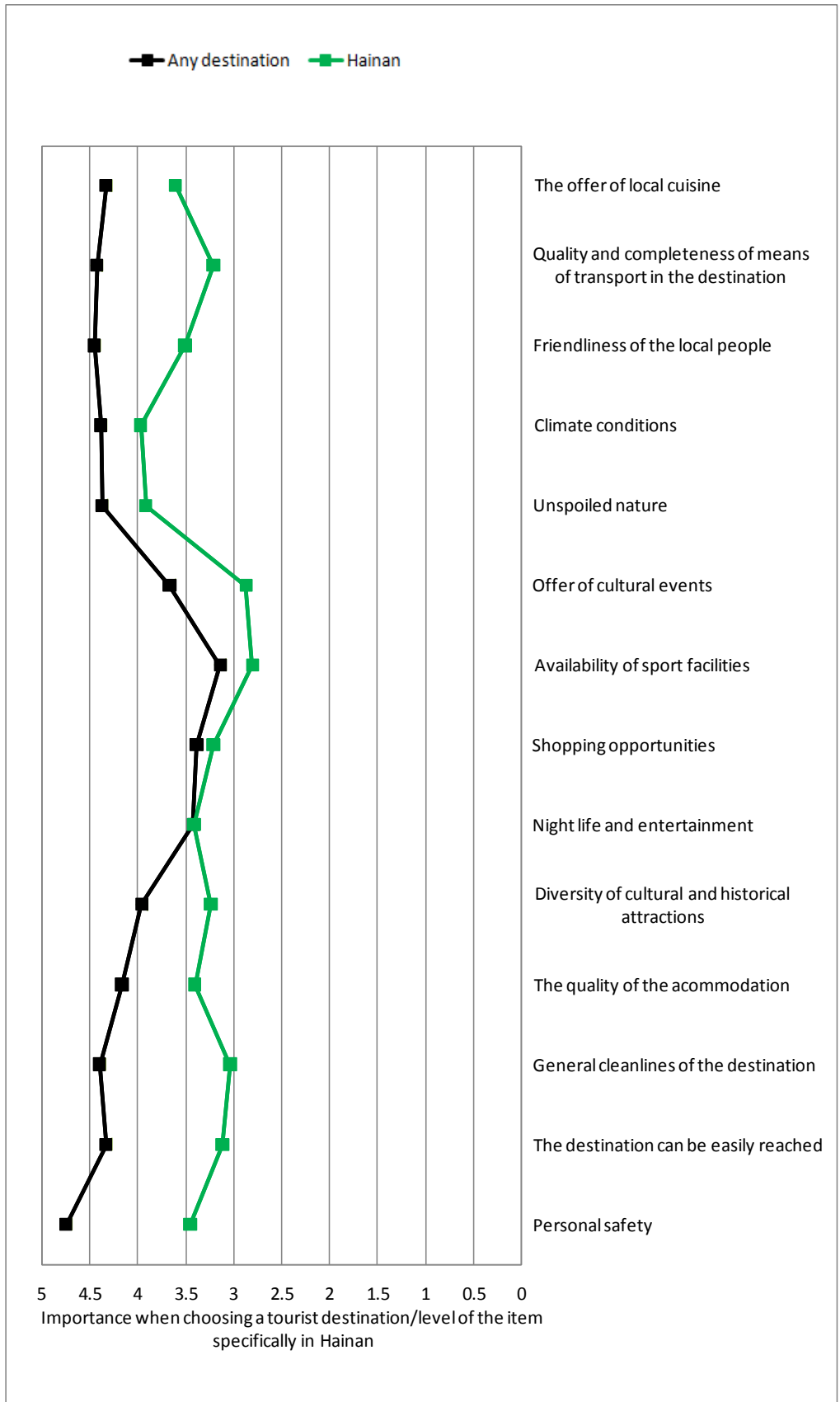
The next section of the questionnaire aimed to find out how important the various factors are when choosing a tourist destination in general and what the level of these items is specifically in Hainan. Respondents were asked to use numbers from 1 to 5 to indicate the importance of each item when choosing a tourist destination, where number one meant “not important” and number 5 “very important”. In the next column, respondents were asked to use again numbers from 1 to 5 to indicate the level of these items specifically in Hainan, where number 1 meant “very poor” and number 5 “very high”. All responses (responses of Chinese and responses of foreigners altogether) were averaged using the arithmetic mean and depicted in graph 2.

There are several items people may consider important when choosing a tourist destination. In graph 2, the relation between the importance of these items and the level of these items in Hainan is depicted. The evaluation of individual items reads as follows:

*Personal safety.* The evaluation of importance of this item was the highest. The vast majority of respondents considered personal safety the most important item when choosing any tourist destination and used number 5. The arithmetic mean value of responses was 4,75 for the importance of this item and 3,46 for the level of personal safety in Hainan.

*The destination can be easily reached.* This item referred to the accessibility of the destination in terms of transport, administrative barriers etc. The arithmetic mean value of the importance of this item was very high as well - 4,34, but only 3,12 in terms of the level of the item in Hainan.





Graph 2 Comparison of the importance of various items when choosing a tourist destination and the level of items specifically in Hainan

*General cleanliness of the destination.* Respondents indicated this factor to be one of the most important (4,4), but the degree of fulfillment of this factor was relatively low (3,12).

*The quality of the accommodation.* The arithmetic mean values for both categories of this item were relatively high – 4,17 and 3,41.

*Diversity of cultural and historical attractions.* Respondents did not consider the diversity of cultural and historical attractions as important as other items (3,96). The level of this factor in Hainan was 3,24.

*Nightlife and entertainment.* This factor is the only one among all the items in which the arithmetic mean value was practically the same in both categories (3,42 and 3,41).

*Shopping opportunities.* The results of this factor were also very similar in both categories (3,39 and 3,21).

*Availability of sport facilities.* Respondents indicated, that the importance of availability of sport facilities when choosing a tourist destination was the lowest among all the items (only 3,14), as well as the degree of fulfillment of this item in Hainan (only 2,8).

*Offer of cultural events.* This item is the fourth least important when choosing a tourist destination (3,67) and the level of this item in Hainan is the second lowest among all the other items (2,87).

*Unspoiled nature.* The evaluation of this factor was one of the highest in both categories (4,38 and 3,91).

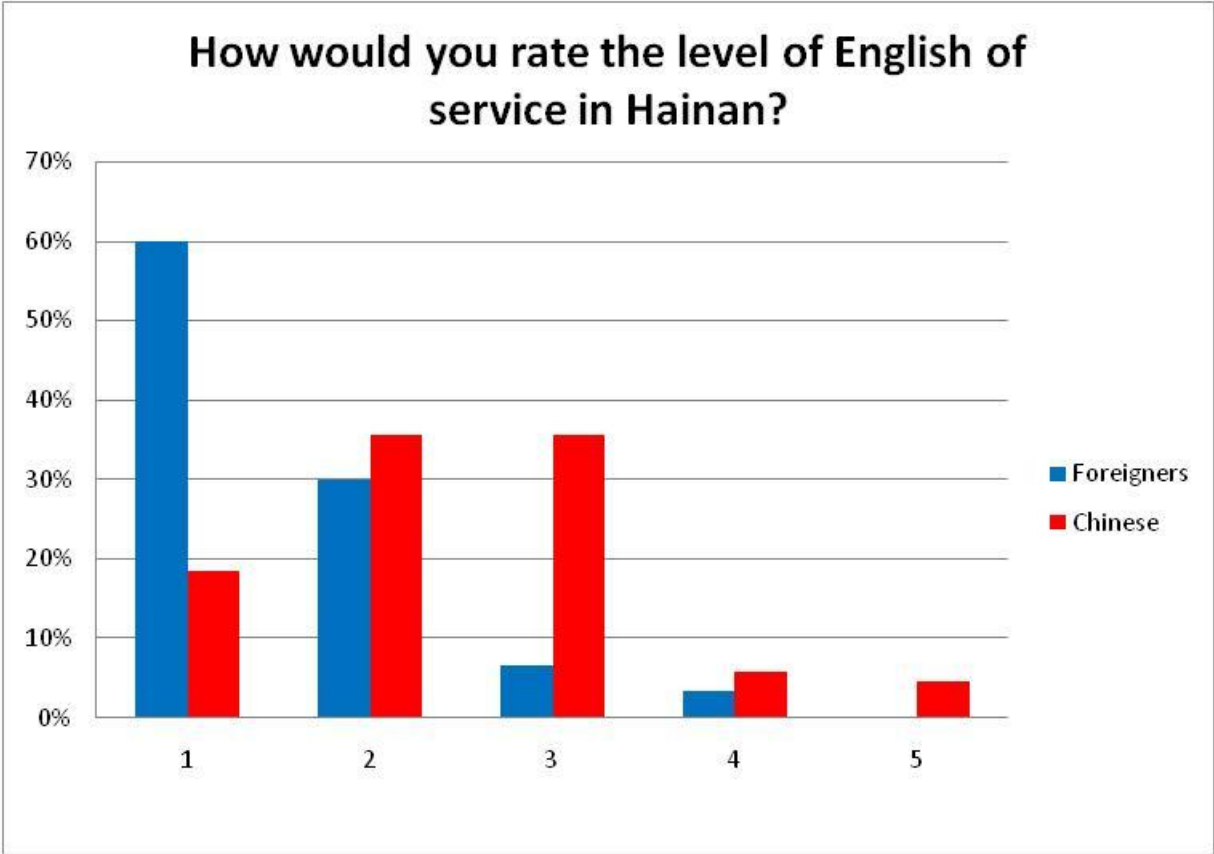
*Climate conditions.* The arithmetical mean value of the responses in terms of importance of climate conditions when choosing a tourist destination was 4,39 and the value of the level of this item specifically in Hainan was the highest among all the other items – 3,97.

*Friendliness of the local people.* The importance of this factor was the second highest (4,45), but the level of the item in Hainan was relatively low (3,5).

*Quality and completeness of the means of transport in the destination.* This factor was rated very high in its importance – 4,33, but the rating of its level in Hainan was one of the lowest – 3,12.

*The offer of local cuisine.* The arithmetical mean of the responses to this item in terms of importance was 4,34 and 3,46 in terms of its level in Hainan.

In the last part of the questionnaire, respondents were asked to rate the level of English of service in Hainan using numbers from 1 to 5, where 1 meant “very poor” and 5 “very high”. As it was expected, the responses varied greatly depending on the nationality of respondents. The evaluation of responses to this question is depicted in graph 3. As it can be seen, 60% of foreigners consider the level of English of service in Hainan very poor, whereas only 18% of Chinese share the same opinion. Most of the Chinese used number 2 and 3 to indicate poor to moderate level of English of service in Hainan.



Graph 3 The level of English of service in Hainan

## CONCLUSION

The objective of this bachelor thesis was to analyze tourism in Hainan Island. At present, both domestic and inbound tourism in Hainan is on the rise and formerly forgotten island on the “dragon’s tail” is becoming popular tourist destination with ambitions to be an alternative to famous destinations of coastal tourism, such as Hawaii Islands. Combined with the tremendous government support, investment incentives and the number of natural and cultural attractions, there is no doubt that the potential of development of tourism in Hainan is truly significant.

The thesis consists of two parts. Theoretical part deals with terms related to tourism, such as various approaches to the definition of tourism, subject and object of tourism, impacts of tourism, forms and types of tourism. One of the most important chapters in the theoretical part is the description of tourism prerequisites, which is later applied specifically on Hainan Island. In the analytical part, brief history of the tourism in China is characterized. The second section of the analytical part deals with the geographic analysis of Hainan Island - the prerequisites for the development of tourism in Hainan are mentioned. The findings of geographical analysis partly represent the basis for the last part of this thesis – questionnaire survey.

The structure of questions in the questionnaire aimed to find out respondents’ opinions about the image of Hainan as a tourist destination and identify strengths and weaknesses of Hainan as a tourist destination. The results of the questionnaire survey show that one of the most considerable problems is the level of English of service in Hainan. Chinese language is difficult to learn, without service providers knowing English or other international language, tourism can hardly develop.

Most of the respondents confirmed that the potential of Hainan Island is significant and that it has a great chance to become an international tourist island by year 2020. Hainan’s overall image in the eyes of Chinese respondents was positive. Foreigners indicated that the destination is not very known. Large differences were also observed in the level of agreement with the statement „I think this place is a frequent destination for visitors“. More attention should be given to the inbound tourism and raising awareness of the island in the world.

Largest discrepancy between the importance of factors that people consider when choosing a tourist destination and their level specifically in Hainan was recorded for these items: personal safety, the destination can be easily reached, general cleanliness of the destination, quality and completeness of means of transport in the destination. Compared to other tourist destination in China, Hainan's accessibility is poor since all the vehicles and trains have to board the ferry and the journey takes a lot of time. This should be improved by constructing a bridge connecting Hainan and mainland China. Although recently has been invested a lot in the construction of highways and railways, it has not been sufficient and Hainan should continue improving its transportation system, especially when it comes to overcrowded bus transport. More focus should be also given to improving sewage system and trash disposal.

This work could serve in the future as a basis for the analysis of sustainable tourism in Hainan, since the issue of sustainable tourism development is currently relevant due to inconceivable predictions that have been voiced for the future development of tourism in Hainan.

## SHRNUTÍ

Cílem této bakalářské práce bylo provést analýzu cestovního ruchu na čínském ostrově Hainan. Až donedávna byl ostrov považován za okrajové území čínského impéria, avšak po odtržení od provincie Guangdong a vytvoření Speciální Ekonomické Zóny se začal na ostrově cestovní ruch intenzivně rozvíjet. Hainan nabízí především přírodní atraktivity, příznivé podnebné podmínky a malé množství historických památek. Značné finanční prostředky byly v posledních letech investovány do výstavby turistické infrastruktury a přeměna ostrova na mezinárodní ostrovní destinaci cestovního ruchu se stala prioritou číslo jedna.

Práce sestává z teoretické a analytické části. V teoretické části jsou vysvětleny pojmy z oblasti cestovního ruchu, které jsou později používány v analytické části. Analytickou část tvoří primárně analýza předpokladů cestovního ruchu na ostrově Hainan, která je zároveň do určité míry podkladem pro dotazníkové šetření, které bylo provedeno v hlavním městě ostrova, Haikou.

Většina respondentů potvrdila, že potenciál pro rozvoj turistického ruchu na Hainanu je obrovský, avšak je třeba se více zaměřit na zvyšování povědomí ostrova ve světě za účelem zvýšení příjezdového cestovního ruchu. Největšími slabinami Hainanu jako turistické destinace je neznalost světových jazyků v terciárním sektoru, špatná dostupnost ostrova, kvalita dopravních prostředků a čistota.

Práce by mohla v budoucnu sloužit jako podklad pro studii o udržitelném cestovním ruchu na Hainanu. Toto téma je velmi aktuální, vzhledem k tomu, jaké byly vysloveny předpovědi pro budoucí rozvoj cestovního ruchu na ostrově a počty návštěvníků.

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## APPENDIX I: Questionnaire

### QUESTIONNAIRE: DEVELOPMENT OF TOURISM IN HAINAN ISLAND

#### 关于海南岛旅游发展调查

Hello everybody, my name is Jana and I am writing a thesis about development of tourism in Hainan Island. I would like to ask you to fill out the following questionnaire. Thank you in advance for your help!

大家好,我叫雅娜,我正在写一篇关于海南岛旅游业发展的论文.我想请您用几分钟的时间填写以下调查表,谢谢!

1. What is your nationality?

您来自哪个国家?

2. Below are listed some statements which refer to the general image of **Hainan as a tourist destination**. For each statement please indicate how much you agree with it.

1 means you completely disagree with it, 5 means you agree with it completely.

以下是人们对于海南作为旅游目的地的总体印象.请表明您对于每个观点的认可度.

1 表示完全不同意, 5 表示完全同意。

I think most people have a positive opinion about this tourist destination. 我认为大多数人对此旅游地都有积极的看法。	1	2	3	4	5
This tourist destination has a unique image. 此旅游地拥有其独特的形像。	1	2	3	4	5
I think this tourist destination is well-known. 我认为这是众所周知的旅游目的地。	1	2	3	4	5

This tourist destination respects the natural environment. 这个旅游目的地尊重自然环境。	1	2	3	4	5
This tourist destination has a great potential. 这个旅游目的地具有巨大的潜力。	1	2	3	4	5
This destination has a great chance to become an international tourism island by year 2020. 这个旅游地有望在 2020 年成为国际旅游岛。	1	2	3	4	5
This place is a frequent destination for visitors. 此旅游地为游客及参观者常选旅游目的地。	1	2	3	4	5

3. Below are listed some items you might consider when you choose a tourist destination. First, please indicate **HOW IMPORTANT** is each of these items to you when you choose tourist destination. Second, please indicate **LEVEL** of these items in **Hainan Island**. Use numbers from 1 to 5.

以下是您选择旅游目的地时可能会考虑的因素.首先,请说明每种因素的重要性.其次,请划分这些因素在海南岛旅游业所处的水平.可用数字 1-5 表明.

	How <b>important</b> is this item for you? 1=not important, 5=very important 于您而言此因素的 <b>重要性</b> 是? 1 =不重要, 5=非常重要	What is <b>level</b> of this item in Hainan Island? 1 =very poor, 5=very high 此因素在海南岛旅游业处于什么 <b>水平</b> ? 1=非常差, 5 =非常高
Personal safety 人身安全		

The destination can be easily reached 交通方便,易到达		
General cleanliness of the destination 目的地的整洁度		
The quality of the accommodation (hotels, hostels, apartments etc.) 住宿质量 (饭店, 旅馆, 公寓, ...)		
Diversity of cultural and historical attractions 多样的文化历史景点		
Night life and entertainment 夜生活和娱乐活动		
Shopping opportunities 购物机会		
Availability of sport facilities 体育设施的可利用性		
Offer of cultural events (cinemas, theatres, concerts, festivals, shows etc.) 文化及其他重大活动的开展(电影,戏剧, 演唱会,节日活动,展览....)		
Unspoiled nature 原生态的自然环境		
Climate conditions 气候条件		
Friendliness of the local people 友好的当地人民		
Quality and completeness of means of transport in destination 旅游区交通方式的质量及其整合性		



The offer of local cuisine 当地美食的供给		
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4. How would you rate the level of English of service in Hainan? Use number from 1 to 5.

1 =very poor, 5=very high

请用数字 1 到 5 为海南岛的英文服务水平进行评定.

1=非常差 5=非常好