

RESEARCH ON MARKET CULTIVATION STRATEGY OF HAINAN INTERNATIONAL TOURISM CONSUMPTION CENTER

Hong Wang¹, Wei Guo², Shu-rong Yan³, Ling-Hua Peng^{*,3}

¹School of tourism, Hainan University, Haikou, 570228, China

²School of Credit Management, Guangdong University of Finance, Guangzhou, China, 510521

³College of Accounting and Finance, Jiangxi University of Engineering, Xinyu, 338000, China

*Corresponding Author: Ling-Hua Peng, email: manwen@126.com

Abstract

General Secretary Xi Jinping's speech on market cultivation and the Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up noted the importance of Hainan's tourism business environment and new business development. Focusing on this realistic research of great urgency, this paper analyzes the background of Hainan International Tourism Consumption Center, indicates that since the implementation of the international tourism island strategy in 2009, Hainan has entered the stage of industrial quality and efficiency improvement, as an upgrade of the international tourism island strategy, the market cultivation of Hainan International Tourism Consumption Center needs to focus on fostering business environment and market structure to promote the growth of the industry. Based on the empirical research on the existing problems in the cultivation of Hainan tourism market, this paper discusses the goals and paths of market cultivation of Hainan International Tourism Consumption Center, and proposes policy recommendations for cultivating the "pyramid" tourism market structure.

Keywords: market cultivation; Hainan International Tourism Consumption Center; role of government in tourism

Introduction

In November 2013, General Secretary Xi Jinping pointed out in his "Explanatory Notes on the Decision of the Central Committee of the Communist Party of China on Some Major Issues Concerning Comprehensively Deepening the Reform": China has established the socialist market economic system, and we must continue to give full play to the superiority of our socialist system and the active role of the party and government. The plenary session emphasized that the government's duties and functions are mainly to maintain macroeconomic stability, strengthen and optimize public services, ensure fair competition, strengthen market supervision, maintain market order, promote sustainable development, promote common prosperity, and make up for market failures¹. In December 2014, General Secretary Xi pointed out that China should develop new growth points. There are a lot of new growth points in China and the potential is huge. Discovering and nurturing new growth points is necessary². In January 2017, General Secretary Xi pointed out in his speech "taking the supply-side structural reform (SSSR) as the main direction and pursuing better-quality development" that we need to organically integrate the stock adjustment and optimized increment, as well as upgrading of traditional industries and cultivating of new industries to revitalize the real economy³.

General Secretary Xi Jinping's discourse on market cultivation emphasizes two points: First, create a good institutional environment for the vitality of market participants through developing a good business environment such as public services; second, promote the high-quality development of China's economy with SSSR by fostering innovation-driven economic entities and growth points.

The Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up pointed out the need to innovate the institutional mechanism for the construction of an international tourism consumption center. It is necessary to continuously optimize the development environment, further open up the tourism consumption field, and actively cultivate new forms of tourism consumption and new hot spots.

The speech of General Secretary Xi and the Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up point out the importance and strategic significance of the cultivation of Hainan's tourism market. China National Knowledge Infrastructure (CNKI) uses "Hainan Tourism" and "Government" as keywords, and the related documents retrieved can be divided into the following categories: First, suggestions on the supply-side reform optimization of Hainan's tourism industry: Dong Wancheng (2010), Yan Quanhui, Jiang

Jingjing (2010), Tian Xiaobiao (2013) put forward opinions and suggestions on the tourism real estate market cultivation system; Guo Qiang, Dong Linfeng and Wang Lin (2010) proposed to build a lean tourism service information system to finally realize the lean management of tourism services based on 3G technology. Second, the countermeasures related to the optimization of tourism management system and government role: Luo Junming (2010), Xie Xiangxiang, An Yingmin, Wu Jue (2014), Zhou Jinquan (2015), Wang Xiaohua (2007), Chen Yibo (2011), Guan Shen (2013), Liu Ping (2015) give advice on the optimization of the role of government in Hainan’s tourism development rely on the theory of different disciplines and overseas successful experiences. Third, research on Hainan International Tourism Consumption Center. Qi Yahui, Deng Yingying, Chen Yao; Chen Yao; Fan Shichen; Deng Yingying, Liu Feng, Lin Feng and Yang Zhenzhi et al. analyzed the strategic significance and construction path of Hainan International Tourism Consumption Center in 2018. In general, there are a lot of researches related to the government’s strategy of market cultivation in the development of tourism in Hainan. These studies have a good enlightening significance for us to analyze the government’s strategy of cultivating the market.

However, there are a few systematic and in-depth studies in the background of China's transition economy based on the theory of the relationship between government and market. Under the background of the construction of an international tourism consumption center, it becomes urgent to conduct a research in this area.

The theory in the Economics of Transition indicates that in the China’s transition from a planned economy to a market economy, the government needs to cultivate the market. Relying on the theory of Economics of Transition, combined with the relevant theories of tourism and Economics of Government, guided by the speeches of General Secretary Xi Jinping and Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up, the paper systematically studies the market cultivation of hainan international tourism consumption center.

1. BACKGROUND OF MARKET CULTIVATION OF HAINAN INTERNATIONAL TOURISM CONSUMPTION CENTER

1.1 Analysis Of The Development Speed Of Hainan’s Tourism Industry

Table 1: the Developing Speed Index of Hainan Tourism Industry(1998-2017)

Time	Tourism Arrivals		Tourism income		Increase rate of tourism income
	Person-time (10 thousand)	Increase Rate of tourist	(hundred RMB)	million	
1998	855.97	8.10%	66.96		8.50%
1999	929.07	8.50%	72.46		8.20%
2000	1007.57	8.40%	78.56		8.40%
2001	1124.76	11.63%	87.89		11.87%
2002	1254.96	8.10%	95.38		7.40%
2003	1234.1	-1.70%	93.55		-1.90%
2004	1402.89	13.70%	111.01		18.70%
2005	1516.47	8.10%	125.05		12.60%
2006	1605.02	5.80%	141.43		13.10%
2007	1845.51	15.00%	171.37		21.20%
2008	2060.00	9.97%	192.33		9.10%
2009	2250.33	9.20%	211.72		10.10%
2010	2587.34	14.98%	257.63		21.68%
2011	3001.34	16.00%	324.04		25.80%
2012	3320.37	10.63%	379.12		17.00%
2013	3672.51	10.61%	428.56		13.04%
2014	4789.08	10.60%	506.53		13.20%

2015	5336.52	11.43%	572.49	13.00%
2016	6023.6	12.90%	672.1	17.40%
2017	6745.01	12.00%	811.99	20.80%

(Data Resources: statistical bulletin of Hainan national economy and social development)

As shown in the above table, Hainan’s tourism industry has maintained sustained and accelerating positive growth between 1998 and 2017. Hainan’s tourism showed negative growth in 2003, which was mainly affected by the negative impact of SARS, a public health disaster.

Overall, 2007 is a node for the change of growth rate. Since 2007, except for 2008 and 2009, the growth rate of tourist arrivals and tourist income has reached to a higher level, that is, the growth rate of tourist arrivals has hit double digits. The growth rate of tourist income continued to exceed 13% (before 2007, around 8%, only a few years reached double digits). Data show that after maintaining a relatively stable growth rate in 1998, Hainan’s tourism industry showed a rapid growth rate in 2007. However, the growth trend did not continue in 2008 and 2009 as a result of the impact of the financial crisis. From 2010 to 2007, the trend of rapid growth has continued to this day.

Specifically speaking, in the development of tourism in Hainan, the growth rate of total tourist arrivals and income of Hainan tourism were outstanding in 2001 and 2007, the two years with outstanding achievement in the tourism industry. Overall, the growth rate of Hainan’s tourist arrivals was below 10% before 2010. Except for the data of 2004 and 2001 and 2007, from 1998 to 2009, the growth rate of tourist arrivals in nine years was below 10%; since 2010, the growth rate of Hainan’s tourist arrivals has continued to maintain above 10%. The growth rate of tourism revenue in Hainan is also consistent with this rule. That is to say, the growth rate of tourist income was below 13% before 2010, except for the data of 2004, 2001 and 2007. Since 2010, the growth rate of tourist income in Hainan has continued to maintain above 13%.

Figure1: the yearly change of tourist number of Hainan

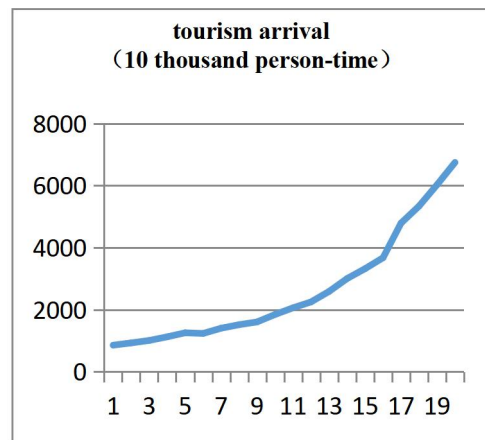


Figure2: the yearly change of tourism income of Hainan

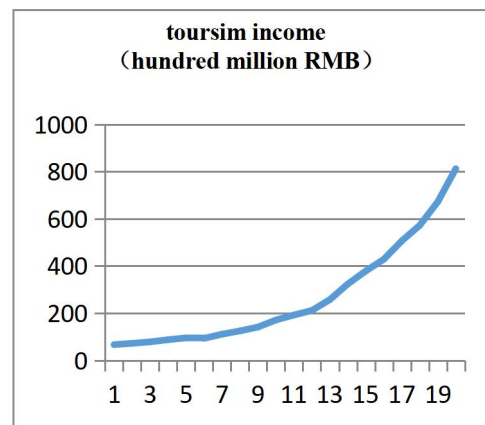


Figure 1 and Figure 2 show that Hainan’s tourist arrivals and income have shown a rapid growth trend after maintaining a relatively stable and low growth rate. Such change happened in 2010, one year after the implementation of strategy of building Hainan into an international tourism island.

1.2 Comparison Of Scale Of Hainan’s Tourism With Domestic Tourism

Table 2: the proportion of tourist arrival and tourism income of Hainan province and China (1998-2007)

Time	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
The tourist arrival of Hainan (10 thousand person-time)	855.97	929.07	1007.5	1124.7	1254.	1234.	1402.89	1516.4	1605.02	1845.51
The tourist arrival of China(10	76,640.	80,102	83,791	88,514.	99,25	98,18	123,988	136,33	155,346	178,282
)	40	.80	.65	74	1.03	8.40	.82	1.86	.57	.73

thousand person-time)										
Proportion of tourist number	1.12%	1.16%	1.20%	1.27%	1.26%	1.26%	1.13%	1.11%	1.03%	1.04%
Tourism income of Hainan province (hundred million RMB)	66.96	72.46	78.56	87.89	95.38	93.55	111.01	125.05	141.43	171.37
Tourism income of China (hundred million RMB)			4519.00	4950.00	5566.00	4882.00	6840.00	7680.00	8935.00	10957.00
Proportion of tourism income			1.74%	1.78%	1.71%	1.92%	1.62%	1.63%	1.58%	1.56%

(Data resources: the statistics of economics and social development of Hainan, the yearly report Chinese tourism)

Table 3: the proportion of tourist arrival and tourism income of Hainan province and China (2008-2017)

(Data resources: the statistics of economics and social development of Hainan,

Time	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
The tourist arrival of Hainan (10 thousand person-time)	2060.00	2250.33	2587.34	3001.34	3320.37	3672.51	4789.08	5336.52	6023.6	6745.01
The tourist arrival of China(10 thousand person-time)	188,787.18	207,613.21	229,414.87	284,667.35	317,258.70	348,926.30	385,609.15	426,168.04	471,357.38	527100.00
Proportion of tourist number	1.09%	1.08%	1.13%	1.05%	1.05%	1.05%	1.24%	1.25%	1.28%	1.28%
Tourism income of Hainan province (hundred million RMB)	192.33	211.72	257.63	324.04	379.12	428.56	506.53	572.49	672.1	811.99
Tourism income of China (hundred million RMB)	11600.00	12900.00	15700.00	22500.00	25900.00	29500.00	37300.00	41300.00	46900.00	54000.00
Proportion of tourism income	1.66%	1.64%	1.64%	1.44%	1.46%	1.45%	1.36%	1.39%	1.43%	1.50%

the yearly report Chinese tourism)

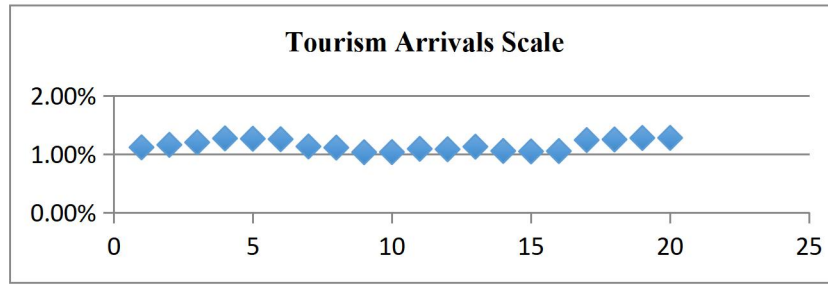


Figure 3: Scatter Plot of Hainan's tourism arrivals scale in China (1998-2017)

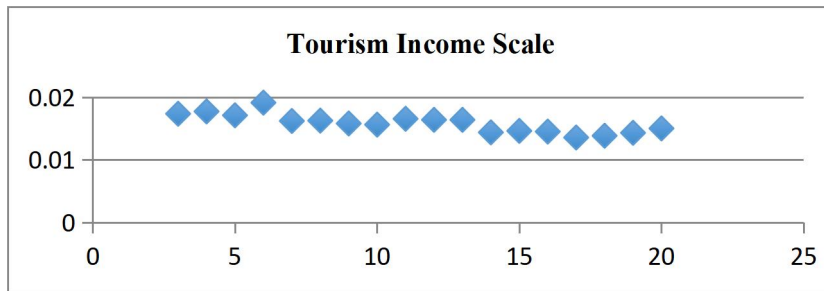


Figure 4: Scatter Plot of Hainan's tourism income scale in China (1998-2017)

As shown in the table data and scatter plot above, Hainan's tourist arrivals and income scale in China have been relatively stable. In terms of the proportion of tourist arrivals, it has been maintained at between 1.00%

and 1.30%; while the proportion of tourism revenue has been hovering between 1.36% and 1.92%.

1.3 Research On The Development Quality Of Tourism Industry In Hainan

Table 4: The Change of Hainan's Tourism Quality (1998-2007)

Table 5: The Change of Hainan's Tourism Quality (2008-2017)

Time	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Per Capita Expenditure of Tourist (RMB / Person)	782.2	779.9	779.7	781.4	760.0	758.04	791.3	824.6	881.1	928.5
Proportion of tourism income to GDP	15.14%	15.20%	14.91%	15.18%	14.84%	13.10%	13.54%	13.93%	13.54%	13.66%
Growth Rate of Per Capita Expenditure of Tourist		-0.30%	-0.03%	0.22%	-2.74%	-0.26%	4.39%	4.21%	6.86%	5.38%
Growth Rate of Proportion of tourism income to GDP		0.37%	-1.90%	1.76%	-2.21%	-11.70%	3.36%	2.82%	-2.80%	0.95%

Time	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Per Capita Expenditure of Tourist (RMB / Person)	933.6	940.8	995.7	1079.6	1141.8	1166.9	1057.6	1072.7	1115.7	1203.8
Proportion of tourism income to GDP	4	4	3	5	0	4	8	8	8	4
Growth Rate of Per Capita Expenditure of Tourist	12.80%	12.80%	12.55%	12.88%	13.28%	13.62%	14.47%	15.46%	16.62%	18.20%
Growth Rate of Proportion of tourism income to GDP	0.55%	0.77%	5.83%	8.43%	5.76%	2.20%	-9.36%	1.43%	4.01%	7.89%
Growth Rate of Proportion of tourism income to GDP	-6.35%	0.02%	-1.91%	2.62%	3.07%	2.58%	6.23%	6.85%	7.48%	9.50%

According to the data and graphs in the above table, from 1998 to 2017, the per capita expenditure in tourism in Hainan has shown an overall upward trend. Since 2003, the per capita spending of tourists in Hainan's tourism has shown positive growth except for 2014. Judging from the proportion of tourism income to GDP, although the growth rate of nine years in the past 20 years is negative, the proportion of tourist income in tourists' consumption per capita, there is still a large space for improving the quality of Hainan's tourism industry.

1.4 Conclusion Of The Characteristics Of Hainan's Current Development Stage Based On Industrial Development Data Analysis

The scale and industrial quality of Hainan's tourism industry have shown a relatively stable improvement since 2010. At the same time, the industrial quality and its scale in the country of Hainan's tourism industry are generally at average level, and there is still much room for improvement.

In the development of tourism, it developed at a fast pace at the initial stage and kept growing; it grew at a faster rate in the development phase and the quality of the industry was constantly improving; it transformed from scale growth to efficiency growth, and the growth rate of industry scale was slow, but the quality of the tourism industry has reached the level of developed tourism regions in the developed stage. With reference to the development stages of tourism development, combined with the various data indicators of Hainan's tourism industry, we believe that Hainan's tourism development has shown the characteristics of the initial stage before 2010; and it is still in the development stage and has not yet entered the developed stage.

2. RESEARCH ON THE CHALLENGES FACING THE MARKET CULTIVATION OF HAINAN INTERNATIONAL TOURISM CONSUMER CENTER

Under the background of improving the quality and efficiency of Hainan's tourism industry and the

Hainan's tourism industry has continued to grow and has shown a high growth rate since 2010.

Therefore, from the analysis of the rules presented by these two indicators, we believe that Hainan's tourism industry has continuously improved its industrial quality and achieved quality growth; but overall, the trend has been relatively stable since 2010; at the same time, from the growth of

strategic target and great opportunity endowed by the state to build Hainan into an international tourism consumption center, we have systematically explored the challenges faced by the government in cultivating the tourism market through the empirical research on tourism enterprises, industry associations and tourists.

2.1challenges Facing The Tourism Business Environment In Hainan

Drawing on the Travel and Tourism Competitiveness Index (TTCI), which ranks global destinations by the World Travel and Tourism Council (WTTC), based on the analytical variables in the TTCI, combined with actual conditions of China's tourism, the author designed a questionnaire about the tourism business environment of Hainan, and analyzed the current business environment of Hainan tourism industry through questionnaire survey and structured interview with the leaders of tourism enterprises, institutions and relevant industry associations.

2.1.1Design and implementation of the survey on the current situation of tourism business environment in Hainan

From July 13 to August 30, 2018, the author conducted a survey on 18 cities and counties in Hainan. Through the exchanges with the tourism committees of various cities and counties in advance, the recommendation of the tourism committees of various cities and counties, the representatives of the main market players of each city and county are invited to have in-depth interviews or intensive seminars. Expert interviews with conference focus interviews and questionnaire surveys were conducted on large regional tourism tax payers, innovative tourism operational types and representatives of active associations or enterprises. A total of 82 questionnaires were collected on the

tourism development environment of Hainan Province from the perspective of enterprises, public institutions and responsible persons of associations.

The 82 questionnaires collected not only cover the traditional commercial activities: hotel industry, scenic

areas, but also pay attention to the emerging business of Hainan tourism, mainly involving marine recreational fishery, low-altitude flight, RV camping, etc. The specific composition is as follows:

Table 6: the scatter situation of investigation sample of tourism companies and associations

Among the respondents, the decision-making level accounted for 15%, the management accounted for 69%, and the executive accounted for 16%. In the implementation process of the survey, the respondents were asked to leave blanks on topics that they are unfamiliar and cannot give precise answers, so as to

distributed. Through the design of such procedure, the respondents can focus on the research questions and think seriously about the questions, laying a good foundation for answering questions related to the questionnaire; before filling out the questionnaire, the staff responsible for the meetings organized by the cities

Area	Hotel (under three star)	Hotel (above four star)	Scenery (spot) 5A	Scenery (spot) NON-5A	International travel agency	Domestic travel agency	Tourism associations	other
Amount of the questionnaire	4	12	6	20	0	2	10	28
Proportion of the questionnaire	4.9%	14.6%	7.3%	24.4%	0.0%	2.4%	12.2%	34.1%

make the answers to the questionnaires more authentic and effective.

In order to make up for the deficiency of insufficient quantity of the interviewees, the author pays attention to the influence of industry association representatives and the number of questionnaires, as well as the impact of the survey procedures on the validity of the questionnaire. In the end, by the support and cooperation of each city and county with associations, 10 valid questionnaires from representatives of the association were obtained, accounting for 12.2% of the respondents. The questionnaire data from the persons in charge of the associations contribute to the feedback of the overall and comprehensive evaluation information of the whole area. To some extent, it can reflect the evaluation of the respondents who failed to attend the survey discussion meeting and fill in the questionnaire, and cover the shortage of relatively small sample size of the interview and questionnaire. In addition, in the process of the survey, the interview outlines were distributed firstly, focus interview meetings or expert interviews were held, and then paper questionnaires were

and counties constantly emphasize that the authenticity of the questionnaire is the key, and hope that the respondents could truthfully fill in the questionnaire to make the research results really contribute to the development of academic research; in the process of filling out the questionnaire, if the respondents have questions about the questionnaire, the person in charge of the investigation has effectively and fully explained their questions. With the control of the survey process, the respondents are able to complete the questionnaire with a serious and objective attitude.

To sum up, the research team obtained 82 valid questionnaires based on the scientific design of the research objects and the rigorous control of the implementation process of the survey. Based on these questionnaires, the business environment for the development of Hainan tourism was systematically analyzed.

3. CONCLUSION OF THE EMPIRICAL RESEARCH ON THE BUSINESS ENVIRONMENT OF HAINAN TOURISM INDUSTRY

Table 7 : Evaluation of Hainan Business Environment

Business Environment Evaluation Items	Evaluation Result	Proportion of 3 score and	Proportion of 4 score and above	Proportion of 5 score and above
		and		

		below		
1.Average evaluation of business environment		23.1%	43.8%	43.4%
1.1	protection of property effective	10.3%	89.7%	72.4%
1.2	encouragement of foreign investment Encouragement exist	7.1%	29.8%	54.8%
1.3	the effectiveness of dispute handing Need to be improved	27.6%	34.5%	6.9%
1.4	the convenience of opinion feedback Comparatively convenient	9.6%	85.5%	59.0%
1.5	the competition of tourism market More monopoly than competition	52.6%	33.3%	10.5%
1.6	tax and work motivation influence is little	23.9%	20.5%	51.1%
1.7	tax and invest motivation Has some influence	30.5%	13.4%	48.8%
2.Average evaluation of Safety environment		13.8%	74.4%	54.3%
2.1	cost to fighting crime and violence Very few	4.9%	91.5%	73.2%
2.1	the dependability of police Need to be improved	31.0%	36.6%	8.5%
2.2	the cost to deal with terrorist incident Very low	5.6%	95.0%	81.3%
3.the average evaluation of tourism e-business		11.4%	78.0%	65.8%
3.1	the use of internet in business with companies popularized	12.2%	85.4%	63.4%
3.2	the use of internet in business with customer Highly popularized	6.1%	90.2%	70.7%
3.3	the electric power supply Need to be more stable	15.9%	58.5%	63.4%
4. The priority of tourism industry		25.1%	63.3%	29.6%
4.1	the importance to tourism industry Need to be improved	37.9%	44.8%	10.3%
4.2	the effect of tourism destination marketing Comparatively good result achieved	12.2%	81.7%	48.8%
5. The average evaluation of		1.6%	91.8%	71.5%

tourism eco-environment				
5.1 the strictness of environment regulation	strict	1.2%	95.1%	81.7%
5.2 the implication of the environment regulation	Comparatively strict	2.4%	90.2%	75.6%
5.3 the effect of sustainable development	Relatively good	1.2%	90.2%	57.3%
6. The quality evaluation of aviation infrastructure				
7. ground and harbor infrastructure.	Need to improve	24.1%	62.2%	38.7%
7.1 quality of road	well	15.8%	76.8%	50.0%
7.2 quality of railway infrastructure	Comparatively well	23.0%	62.1%	48.7%
7.3 the quality evaluation of harbor	Need to be improved	30.5%	43.9%	26.8%
7.4 the ground transportation quality (busee, taxi, metro, etc.)	common	26.9%	65.9%	29.3%
8. evaluation of tourism service infrastructure				
9. Quality of accommodation facilities	well	17.1%	75.6%	48.8%
Evaluation of taxi	Need to be improved	50.0%	45.2%	28.1%

In the study of Travel and Tourism Competitiveness Index (TTCI), the supporting environment for tourism development mainly involves the first three questions; the policy environment mainly involves the fourth and fifth questions; and the infrastructure environment mainly involves the sixth to eighth questions. Through the data analysis of the questionnaire, we believe that the current business environment of Hainan's tourism has the following characteristics:

3.1 The Supporting Environment For Tourism Development In Hainan Needs To Be Improved

In the survey, we mainly consider and discuss the supporting environment of Hainan's tourism development from three aspects including basic business environment, security environment and e-commerce environment.

Among the 13 sub-items of the basic business environment evaluation, the respondents made negative comments on five sub-items, which are the legal effectiveness of disputes resolved by the relevant government departments, the sufficiency of tourism market competition, impact of tax revenue on individuals' investment motivation, dependability of police work in the region, and the power supply situation in the region respectively. The research conclusions show

that the above aspects are the areas to be improved by the relevant departments of Hainan government for the development of tourism.

3.2 The Policy Environment For Tourism Development In Hainan Is Better, And There Is Still a Certain Distance From The Needs Of The Industry

In the survey, the policy environment for tourism development in Hainan is mainly presented through the priority of tourism industry and the ecological environment. The survey results show that the respondents gave a credit for the effect of tourism destination marketing and the promotion of sustainable development of the tourism industry by the regional government. They also believed that the government has formulated strict systems and laws in environmental regulation, indicating that the policy environment for Hainan's tourism development is relatively good; however, at the same time, the respondents had a low opinion of the government's strictness of environmental regulation laws and regulations and the importance attached to the industry. There is still a gap between Hainan's current industry development policy environment and demand.

3.3 The Infrastructure Of Hainan's Tourism Is Good, And Some Areas Need To Be Improved

This paper mainly investigated and evaluated the

infrastructure environment of Hainan’s tourism development from three aspects: aviation infrastructure, ground and port traffic conditions, and tourism service infrastructure. The results show that aviation infrastructure, port facilities and conditions and ground transportation (mainly refers to buses, taxis, subways, etc.) are to be upgraded; other roads and hospitality

facilities were given a good evaluation by the respondents, which demonstrate that Hainan's tourism development has relatively good infrastructure and hospitality facilities, but there is still room for improvement in some areas.

3.4 The Problem Of Imbalance In The Supply Of Public Products Is More Noticeable

Table 8: the investigation result of the business environment of different towns in Hainan

(tourism public goods)

	Electr ic suppl y	Indus try Impor tance	Mark eting effect	Aviation infrastruc ture	Road qualit y	Railw ay qualit y	Harb or qualit y	Ground transpo rtation quality	Total score
HAI KOU	6.14	6.71	2.00	5.57	5.57	5.57	5.00	4.86	5.18
CHEG N MAI	6.00	6.00	4.00	1.00	5.00	4.00	4.00	5.00	4.38
DING AN	4.60	5.40	4.60	5.40	4.00	3.20	3.00	4.00	4.28
WEN CHAN G	4.00	4.50	5.00	7.00	5.00	1.00		5.50	4.00
QION G HAI	5.40	5.14	2.67	4.86	5.14	4.60	5.33	3.71	4.61
WAN NING	4.00	5.40	4.33	2.50	3.75	4.60	3.00	2.75	3.79
LING SHUI	4.86	5.29	5.29	3.75	5.43	5.67	3.86	4.71	4.86
SAN YA	5.36	5.27	5.18	4.77	4.62	4.58	4.45	4.25	4.81
BAO TING LE DONG	4.38	6.00	5.86	2.57	3.88	2.88	1.67	4.25	3.93
DONG FANG	3.00	7.00	6.00	2.25	4.00	6.50	4.00	4.25	4.63
WU ZHI SHAN	4.33	2.67	4.33	1.00	3.00	1.00	1.00	3.33	2.58
BAI SHA	7.00	6.00		2.00	6.00	5.00	5.00	4.00	4.38
QION G ZHON G	4.50	6.50	6.00	1.00	4.50		1.00	2.50	3.25

TUN									
CHAN	4.00	4.80	3.60	3.00	4.00	1.80	1.50	3.00	3.21
G									
LING									0.00
GAO									
DAN									
ZHOU	5.43	5.29	4.00	1.83	4.50	2.88	4.20	4.29	4.05
CHAG									
N	4.50	5.50	4.50	2.50	5.50	4.50	5.00	4.00	4.50
JIANG									

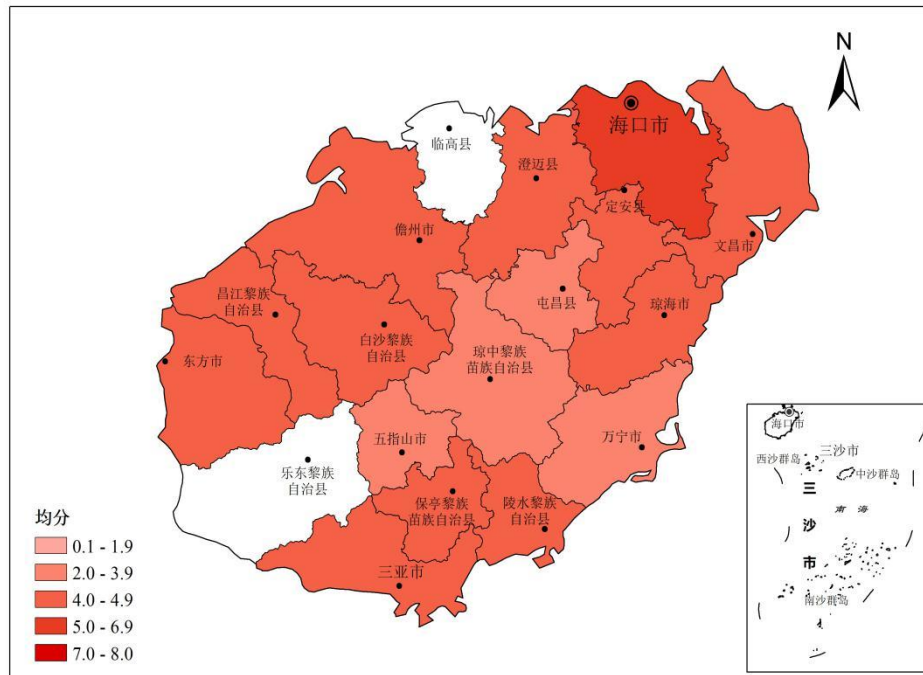


Figure 5: the Evaluation of Tourism Public Service Quality of 16 Towns of Hainan

(Based on the investigation data)

Due to the limitations of the research conditions, the author failed to obtain data about Sansha, Ledong, and Lingao in Hainan. Therefore, these three cities and counties were not analyzed in this paper. However, this has little effect on the aforementioned analytical conclusions. Sansha is currently in development, and its infrastructure is under-developed; one reason why Ledong and Lingao failed to obtain data is that it is difficult to contact relevant research objects due to such factors as tight schedule, and there is no suitable tourism enterprises recommended by the government, which also reflect the importance of local tourism and the investment in infrastructure.

4. CHALLENGES FACING THE CULTIVATION OF TOURISM INDUSTRY IN HAINAN

4.1 Empirical Research On The Challenges Faced By Hainan Tourism Industry

4.1.1 Questionnaire survey of consumers

Based on the questionnaire “Tourist Satisfaction” designed and released by China Tourism Academy, the author conducted a survey on the satisfaction of Hainan’s tourism consumers after a minor adjustment of some questions.

During the period from September 1, 2018 to September 10, 2018, the research team handed out electronic questionnaires on Sojump and collected 184 questionnaires. The sample of the questionnaire covers 24 provinces and municipalities directly under the Central Government; it also covers foreign countries such as Germany, the United States, Japan, and Malaysia. The top ten regions with the maximum sample size were: Hainan (56), Shanghai (16), Hubei (15), Guangdong (15), Foreign (11), Beijing (10), Chongqing (10), Fujian (8), Jiangsu (7) and Shandong (6).

From July 13 to July 30, 2018, the author went to various cities and counties in Hainan Province to conduct field research, and conducted on-the-spot investigations in scenic areas, traffic hubs, hotels and other places where tourists are concentrated. The investigations were carried out during summer vacation, which is not the

regular peak season for travelling in Hainan. However, considering the supplement of the electronic questionnaire sample, the paper questionnaire focused on the timeliness and authenticity of feedback information in the survey. Finally, a total of 161 valid questionnaires were collected.

In the questionnaire survey, we adopted a 10-point grading scale. According to the 100-point system of evaluation, we informed the respondents that the scores should be given based on the 100-point system.

4.1.2 Web text analysis of consumers’ travel notes

4.1.2.1 Text collection and preprocessing

We use Bazhuayu software, keywords “Hainan” as location and “within one year” (from August 1, 2017 to August 31, 2018) to search the ctrip website (<http://you.ctrip.com/travels/>) and mafengwo website (<http://www.mafengwo.cn/gonglve/>), and collected downloaded a total of 6,000 travel notes, ctrip and mafengwo each 3,000 copies.

Through converting excel to text file (TXT), 6000 copies of travel notes were converted into text file, and the “Em Editor” software was used to remove blank lines in the text; at the same time, the “Em Editor” software was used to divide the 6,000 copies of travel notes collected by ctrip into 46 texts with “400” lines as a text unit. Also, the “Em Editor” software was used to divide the 6,000 copies of travel notes collected by the official website of mafengwo into 41 texts with “250” lines as a text unit.

Based on the test results of word segmentation and word frequency statistics conducted by Rost Content Mining (version 6.1), we added “First Market” (name of Sanya Seafood Market), “Dadonghai” and “Haitang Bay” (all are Sanya Bay), Luhuitou (a scenic spot of Sanya) and other terms in the word database of the software for relevant analysis.

4.1.2.2 Semantic network analysis of text

Using Rost Content Mining (version 6.1) text analysis tool, we performed a semantic network analysis

on the txt composed of 6000 travel notes, and constructed a semantic network diagram of the total text.

4.1.2.3 Emotional analysis of text

The frost Content Mining (version 6.1) was used to conduct an emotional analysis of the travel notes. In order to study the factors that lead to consumers’ negative emotions and dissatisfaction, the evaluation and travel notes texts containing negative emotions were selected and analyzed artificially.

4.1.3 Expert interviews

Through the focus interview design with relevant government managers and business leaders, the existing problems of the tourism industry in Hainan are analyzed. In the focus interview, we sorted and numbered the interview recordings as information support for the research.

4.2 The Conclusion Of Empirical Research On The Challenges Of Hainan’s Tourism Industry

4.2.1 Catering, shopping, transportation and travel prices are relatively weak links

Data from the questionnaire survey show that the factors with combined and specific score less than 7 mainly involve tourist catering, tourist shopping, tourist transportation, tourist entertainment, entertainment and scenic spot price, etc., and their scores are shown in the table below. Specifically, in the field of tourist catering, the elements with low consumer evaluation include: food price, food hygiene, food quality and waiting time; in terms of tourist shopping, the elements with low consumer evaluation include: commodity price, commodity characteristics, commodity quality, sales staff service, business norms (clearly marked price, accurate measurement, authentic promotion, invoice provision, etc.); bus, subway and bus services in the field of tourism and transportation; the richness of entertainment activities in the field of tourism and entertainment and the reasonable price; and the ticket price of the scenic areas.

Table 9: the Items Scored Low by Tourist

Evaluation Items	Web Evaluation	Comprehensive assessment
Food sanitation	6.96	
Price of food and beverage	6.38	6.77
Food quality	6.87	
Waiting time	6.96	
Characteristics of souvenirs	6.97	
Price of souvenirs	6.44	6.86
Quality of souvenirs	6.89	
Service of salesman	6.95	

Standard running(sell at expressly marked price、 weigh correctly、 true promotion、 provide invoice, etc.)	6.98
Public transportation、 metro service	6.39
Bus service	6.94
Abundant entertainment	6.79
Reasonable price of entertainment	6.56
Charge of the scenery(spot)	6.68

4.2.2 Shortcomings in the supply of tourism public goods, market order regulation, and information supply

The information in the travel notes shows that the factors that cause tourists' negative emotions mainly

include the quality of tourism public goods and information supply provided by the government, and the standardization of market order. Hainan has shortcomings in these fields. The details are as follows:

Table 10: the Items result in negative emotion of customer and government function

the Items result in negative emotion	Travel note text number	Government function related
Sand quality of the bay	08、 10、 57	Public good should be improved
mosquitoes、 humid、 sunburn, etc.	14、 19、 20、 30、 32、 38、 47、 49、 50、 54、 67	
Safety recognition	22、 28、 51、 59	
Mating Consumer facilities plan and supply	11、 23、 24、 48、 56、 60	
Jam in high season	12、 13、 16	
Inter affect of tourist transportation	01、 02 04、 71、 46、 58	
Price dissatisfaction	05、 07、 09、 16、 21、 29、 31、 36、 42、 43、 44	
Tour guide dissatisfaction	06	
Aviation service dissatisfaction	25	
“solicit”phenomenon	17、 34、 35、 39、 40、 41、 52、 55、 62	
Product quality dissatisfaction	18、 26、 27、 45、 69、	

Web service dissatisfaction 46

Bad emotion due to Unreasonable expectation	03、37、53、61、33、68、70	Regulation of information asymmetry should be improved
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4.2.3The role of “coordinator” of the government is absent in the development of new tourism formats

Low-altitude tourism, cruise tourism, recreational fishery and other new tourist modes involve low-altitude use rights and the right to use sea area in operation. RV tourism involves control of new models on the roads, and traffic safety controls in China. In the system design of these new tourism formats, it often requires cross-departmental and cross-regional coordination and communication among various functional departments, such as tourism, customs port office, maritime bureau, highway administration bureau and transportation department. However, the tourism authorities do not have the power and ability to independently design a new business system of tourism. The characteristics of the new operational types make the relevant non-tourism departments face pressure when designing the corresponding system. First of all, the new operational types of tourism is in its infancy, with a few investment and operating entities, especially a few domestic professional investment and business entities, and the demand for standardized system is still small. Secondly, the new operational types of tourism industry are still in the market introduction period. Consumers who are willing to experience still have concerns about safety risks, and the prices of new business projects are relatively high. Finally, the investment threshold for new operational types is relatively high and certain safety and financial risks are involved in the operation. For these reasons, the scale of institutional demand for new tourism formats is relatively limited, and enterprises with strength and resource base are more likely to advance in coordination with relevant departments. Due to the possible regulatory risks during the industrial introduction period and the unmeasured factors in the practice, the relevant non-tourism departments are actually facing certain pressures when designing a complete system. In the new format field, the role of the government as a “coordinator” is actually missing.

4.2.4Analysis of existing problems in the government’s cultivation of “tourism +” industry integration and development

4.2.4.1Dependence on pure real estate projects

In some regions where tourism and comprehensive economic development are relatively backward, employees of tourism enterprises, institutions and government departments show their dependence on pure real estate projects in interviews. A representative of a hotel said in the interview (SC08) that we welcome the real estate projects like Country Garden. The project

investment can promote the construction and improvement of surrounding infrastructure, such as the construction of road traffic; and the project can increase the popularity of the destination, bring visitors...

4.2.4.2The improvement of quality and efficiency of rural tourism is facing great challenges

Relying on good ecological environment and effective ecological civilization construction, Hainan has actively explored the cultivation of rural tourism industry. However, at the initial stage, rural tourism that mainly relies on government investment and guidance is now facing great challenges of improving quality and increasing efficiency.

First of all, rural tourism in some areas mainly shoulders the task of poverty alleviation. How to seize Hainan’s new historical development opportunities in the later period and how to achieve higher levels of development and management are the problems that the operating entities give little thought. Secondly, the operating entities do not have a corresponding competitive strategy for the continuous emergence of rural tourism development with certain homogeneity, and do not pay too much attention to possible risks. In addition, the development of rural tourism in most areas also faces the problem of improving the tourism infrastructure such as widening the rural road and low coverage of public transportation.

4.2.4.3The rapid expansion of medical tourism and other emerging tourism projects does not match the service supply capacity of relevant government departments

In the survey, according to the feedback of relevant enterprises, enterprises need to apply to government departments and go through a lot of procedures in order to enjoy preferential policies, to provide better treatment for medical experts introduced and retain talents. In this process, the service supply of the relevant government departments is relatively insufficient. The service supply of relevant government department is not sufficient, when the corresponding business is increasing, but the number of staff and the working conditions are not changed, the current handling efficiency of the government is difficult to meet employment needs of enterprises. In addition, a number of enterprises in the park said (recording SC18) that the current public transportation design in the park is difficult to meet the needs of employees’ work and life, and slow implementation of supporting projects also affects the quality of life in the park and becomes a great concern after the implementation of the medical tourism project.

5. RESEARCH ON THE MARKET CULTIVATION GOAL AND PATH OF HAINAN INTERNATIONAL TOURISM CONSUMPTION CENTER

5.1 Target Of Market Cultivation Of Hainan International Tourism Consumption Center

According to the Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up, we set the goal of the government cultivating market in the development of Hainan tourism as follows aiming at the existing problems:

5.1.1 Pay attention to the whole industry chain of tourism new operational types, and unleash the potential of the tourism consumption

Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up pointed out: "We must actively foster new hot spots in tourism consumption." In the new operational types of tourism, such as cruise tourism, low-altitude travel, and RV travel, Hainan has carried out sound explorations, and formed a prototype of industrial supply in the developed areas of Sanya, Haikou and Qionghai. In the process of creating new consumption hotspots, the development potential of new types of tourism consumption needs to be further unleashed to achieve sustainable development in more regions of Hainan.

The new operational types of tourism has a complete industrial chain, and there is a value space worthy of attention in the upper, middle and lower reaches of the industrial chain. Taking the cruise industry as an example, the upstream cruise design and construction accounted for 20%, the cruise service in the middle reaches accounted for 50%, and the downstream terminal facilities accounted for 30%⁴. The maturity of the cruise industry and the cruise economy is inseparable from the coordinated development of the entire industry chain of the cruise ships. In the developed countries of tourism, the industries related to new operational types of tourism have entered a mature stage; at the same time, the new operational types of tourism are characterized by high degree of internationalization. The industrial competition is actually the competition of the industrial chain. Hainan is vigorously cultivating a good institutional environment for new operational types of tourism. In order to give full play to its advantages and gain a place in the fierce global competition, it is necessary to adapt to the actual situation of Hainan's resources and conditions, and realize the development of the whole industry chain of new operational types of tourism.

5.1.2 Complement the shortcomings in Hainan's tourism industry

5.1.2.1 Promote the upgrading of tourism consumption with the cultivation of weak fields of tourism

The study reveals that Hainan's current supply of tourist catering, shopping and entertainment is difficult to meet the needs of consumers. Although these are

traditional operating types, they form the basis of tourist consumption and are the choices that consumers of all types may choose. In the context of the escalating demand, these traditional formats, the relatively weak areas of Hainan, are difficult to lead new consumption hotspots and release new demand. However, as a means to realize the development of "improving quality and increasing efficiency" based on the existing consumption patterns, it is of strategic significance.

5.1.2.2 Cultivate high-quality supply based on market demand in the weak fields of tourism

First of all, rich and characteristic supply based on market demand should be realized in the weak fields of tourism. For example, in the field of tourist catering, Hainan's catering services has basically formed a multi-level supply pattern from multi-functional hotels to restaurants and roadside snacks. However, many local snacks and local dishes in Hainan have not been at large scale and achieved brand management. We need to cultivate more characteristic tourist catering brands. Secondly, in the weak fields of tourism, normalized and standardized supply based on market demand should be realized. Safe and honest operation of tourist catering sector; good quality and reasonable price and effective guarantee of after-sales service in the field of tourist shopping; and formal and legal operation in the field of tourist entertainment are necessary to provide great customer experiences. It is necessary to cultivate legal, formal and orderly suppliers based on market demand.

5.1.3 Construct the core competitiveness of "tourism +" integration development

5.1.3.1 Realize supply-side structural reform with the integration of "tourism+"

Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up points out that we should focus on improving the quality of the supply system, support the optimization and upgrading of traditional industries in Hainan, accelerate the development of modern service industries, and foster new drivers of growth with the real economy as a force to develop the economy. In the fields of tropical high-efficiency agriculture, medicine and coconut industry, Hainan has improved the quality of supply side products by exploring the upgrading of traditional industries through the integrated development of "tourism +".

5.1.3.2 Optimize the supply of basic public services in Hainan with the integration of "tourism+"

At present, the study travel market has shown a rapid development trend. The continuous unleash of consumption potential has enabled many study travel enterprises in the emerging industries to grow in relatively extensive mode of development, and the input in deep excavation and expansion is relatively insufficient. Under this background, in the cultivation of such "tourism +" integration development, it is necessary for the government to provide guidance and support for the construction of research products and their brand features, to develop and supply study travel products, and to optimize Hainan's educational products. We should create brand, characteristic and professional study travel products, establish the brand of Hainan's study

travel products, and optimize the supply of basic public services in Hainan. We take the study tour as an example in this paper. However, We believe that in medical tourism, cultural tourism and other fields, we can explore a region-wide tourism development model that relies on tourism demand, creates Hainan's "tourism +" industrial competitive advantage through "opening up and institutional innovation", and improves the supply of basic public goods in Hainan.

5.2 Path Of The Government's Development Of Market In The Development Of Tourism In Hainan

5.2.1 Develop a comprehensive industrial development plan

Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up puts forward that we should innovate the system and mechanism to promote the construction of an international tourism consumption center and expand the space of tourism consumption development: we should explore how to support the construction of tourism projects from the aspects of space planning, land supply and resource utilization.

The Hainan government can carry out scientific and macro-level planning on the spatial layout, resource utilization and development goals of the operational types that need to be cultivated for the development of tourism, and define the industrial development goals, key directions and layouts, industrial structure and policies to lead and guide the development of tourism and achieve effective market cultivation.

5.2.2 Establish a legal system for new operational types of tourism

Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up pointed out in the development goal that by the middle of this century, Hainan will take the lead in realizing socialist modernization and form a highly market-oriented, internationalized, legalized and modernized institutional system and become a leading region in terms of comprehensive competitiveness and cultural influence. Rule of law is one of the goals of construction in Hainan. China's "13th Five-Year Plan" also clearly proposes the rule of law in the Tourism Development Plan.

The author believes that the importance of perfecting the legal system in the development of new tourism formats is well known. However, in practice, there are also managers who hold the view that "deregulation is an effective means of cultivating the market in the early stage". In the current development of new types of tourism in the international competitive situation, there is no perfect legal environment that conforms to international norms. Actually, it is a manifestation of insufficient business environment, and it is difficult to introduce developed market supply entities. For the operators in the new operational types of tourism in China, the lack of laws and regulations is difficult to reduce the initial operating costs of enterprises. Illegal operation conceals business risks, affects the sustainable

development, and will not be an effective means to attract good market players. Therefore, we will build and continuously improve the legal system of new tourism formats as soon as possible to foster and promote the internationalization and sustainable development of new tourism formats.

5.2.3 Improve the talent development system

Guiding Opinions of the Central Committee of the CPC and the State Council on Supporting Hainan for Comprehensively Deepening Reform and Opening-up pointed out: Innovate the support mechanism for personnel training; build a more open talent introduction mechanism; build a contingent of highly qualified and specialized cadres; and comprehensively improve the level of talent service. Through the talent development system, the key human and intellectual support foundation for fostering the tourism market are established.

In the new business field of tourism, high-end and professional talents are scarce, which seriously restricts the high standard development in the industry. At the same time, well-known brands in the new business field of tourism are actively expanding markets in Asia, especially China, based on market demand. Hainan needs to formulate an effective talent introduction, use and training system in the market cultivation, and effectively provide a good talent support environment for the new tourism industry.

5.2.4 Improve the supply mechanism of tourism's strategic public services

President Dai Bin from China Tourism Academy (2016), Song Rui (2016) from Tourism Research Center of the Chinese Academy of Social Sciences and other scholars analyzed the construction of tourism think tanks in China, and discussed the importance and trend of the development of tourism think tanks. With the development of various ideological and academic think tanks in China, the strategic public service of tourism has a good supply subject, and the government can rely on various think tanks to obtain a tourism development strategy. Outside the think tanks, the government can also hire a special consultant to learn from the relevant development experience of tourism developed areas to form a tourism development strategy.

In addition to focusing on professional and international main bodies of supply, the government can also adopt the necessary hearing system, absorb stakeholders from the field of industrial practice, evaluate the tourism strategy, and enhance the operability of the tourism strategy from the formation mechanism of the strategy.

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