

# Sanya China 中国·三亚

August 11–16, 2013



# Sanya China

Becoming a World-Class Resort City

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# About the Urban Land Institute

## THE MISSION OF THE URBAN LAND INSTITUTE

is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. ULI is committed to

- Bringing together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs;
- Fostering collaboration within and beyond ULI's membership through mentoring, dialogue, and problem solving;
- Exploring issues of urbanization, conservation, regeneration, land use, capital formation, and sustainable development;
- Advancing land use policies and design practices that respect the uniqueness of both built and natural environments;
- Sharing knowledge through education, applied research, publishing, and electronic media; and
- Sustaining a diverse global network of local practice and advisory efforts that address current and future challenges.

Established in 1936, the Institute today has more than 30,000 members worldwide, representing the entire spectrum of the land use and development disciplines. ULI relies heavily on the experience of its members. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. The Institute has long been recognized as one of the world's most respected and widely quoted sources of objective information on urban planning, growth, and development.

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# About ULI Advisory Services

## THE GOAL OF ULI'S ADVISORY SERVICES

program is to bring the finest expertise in the real estate field to bear on complex land use planning and development projects, programs, and policies. Since 1947, this program has assembled well over 400 ULI-member teams to help sponsors find creative, practical solutions for issues such as downtown redevelopment, land management strategies, evaluation of development potential, growth management, community revitalization, brown-field redevelopment, military base reuse, provision of low-cost and affordable housing, and asset management strategies, among other matters. A wide variety of public, private, and nonprofit organizations have contracted for ULI's advisory services.

Each panel team is composed of highly qualified professionals who volunteer their time to ULI. They are chosen for their knowledge of the panel topic and screened to ensure their objectivity. ULI's interdisciplinary panel teams provide a holistic look at development problems. A respected ULI member who has previous panel experience chairs each panel.

The agenda for a five-day panel assignment is intensive. It includes an in-depth briefing day composed of a tour of the site and meetings with sponsor representatives; a day of hour-long interviews of typically 50 to 75 key community representatives; and two days of formulating recommendations. Long nights of discussion precede the panel's conclusions. On the final day on site, the panel makes an oral presentation of its findings and conclusions to the sponsor. A written report is prepared and published.

Because the sponsoring entities are responsible for significant preparation before the panel's visit, including sending extensive briefing materials to each member and

arranging for the panel to meet with key local community members and stakeholders in the project under consideration, participants in ULI's five-day panel assignments are able to make accurate assessments of a sponsor's issues and to provide recommendations in a compressed amount of time.

A major strength of the program is ULI's unique ability to draw on the knowledge and expertise of its members, including land developers and owners, public officials, academics, representatives of financial institutions, and others. In fulfillment of the mission of the Urban Land Institute, this Advisory Services panel report is intended to provide objective advice that will promote the responsible use of land to enhance the environment.

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Finally, the panel wishes to thank the more than 50 individuals from the public and private sectors who took time out of their busy schedules to participate in the panel interview process. These interviews allowed the panel to probe the panel assignment from a number of different perspectives and provided the panel with the type of unvarnished and candid feedback that has been the hallmark of the panel process.

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# Introduction and the Panel's Assignment

**SANYA, A CITY OF 685,000, IS LOCATED** on the south shore of Hainan Island in the People's Republic of China. At the request of the government of Sanya, the Urban Land Institute convened an Advisory Services panel in September 2000. The panel report, titled *Strategies for Becoming a World-Class Resort Community*, included a series of strategic recommendations to help the city reach that goal.

In the spring of 2013, the government of Sanya asked the Urban Land Institute to return both to provide a follow-up to the 2000 panel and to address a series of additional questions regarding the city's future. The growth associated with the significant increase in the luxury hotel and resort business has been dramatic. The number of visitors to Sanya (almost 11 million) can be attributed primarily to the substantial increase in the buying power of the Chinese population and is consistent with the substantial increase in the overall standard of living for China. Located on the only tropical island in China, Sanya has seen construction of numerous new luxury hotels, including many in Yalong Bay and Haitang Bay.

In this report, the 2013 Advisory Services panel suggests that for Sanya to improve its standing as an international tourist location it must address a host of issues. From the panel's perspective, the city must address two overarching issues:

- The urban core of the city must be improved to provide a broader range of visitor experiences.
- The city must focus on reaching a broader regional visitation, which requires a focus on major cities within four to five hours traveling time from Sanya.

In addition, the city must understand the fundamentals of great resort cities. These fundamentals are the key to



Study area map.





*ULI members and the sponsor group during the panel tour.*

establishing a framework to reach these goals. The panel provides its observation of these fundamentals in the first part of this report. The panel also outlines Sanya's market health in terms of observed strengths and challenges.

Finally, the panel focuses on six principles around which physical, organizational, and marketing improvements can be structured. These principles are

- Protect;
- Enhance;
- Connect;
- Care;
- Promote; and
- Collaborate.

The remainder of this report elaborates on these subjects.



*The urban core of the city must be improved to provide a broader range of visitor experiences—change that should be made in conjunction with improvements to the tourist, recreational, and entertainment amenities.*

# Fundamentals for World-Class Resort Cities

**WORLD-CLASS RESORT CITIES** do not occur by happenstance. They usually begin by first being great world-class cities. Hong Kong, London, Miami, New York, Paris, Rio de Janeiro, San Diego, Singapore, and Venice are all world-class resort cities. On a smaller scale, Cannes, Honolulu, Key West, Swansea, Vail, and Wellington hold the same distinction. What these cities and many others all have in common are the following fundamental characteristics that allow them to attract visitors and investment.

Also, it is important to understand how much the resort business has changed, especially as it relates to the Internet. The huge increase in the number, detail, and quality of websites catering to the discriminating traveler has made every corner of the globe accessible for download, critique, and comparison in a manner that could not have been comprehended just a few years ago. Sanya needs to be cognizant of this fact, and it must respond accordingly.

## Safe and Clean

All world-class resort cities want to project the idea that they are clean and safe. This requires a commitment to ensuring not only the security of visitors but also that of residents. In addition to increased security personnel (for those areas with real or perceived problems), clean-and-safe programs include such routine actions as sidewalk sweeping, trash and debris removal, power washing of sidewalks and pathways, systematic graffiti removal, maintenance of landscaping and trees, weed abatement, and emergency services. Clean-and-safe programs also can extend to concierge-like services, information booths, and enhanced lighting.



Many locations in Sanya appear to have some of these elements in place already. However, this commitment must extend to those areas of the city where such service is not provided. A systematic review of how, where, and when tourists visit the downtown will be helpful in preparing a clean-and-safe program and in tailoring it specifically to a geographic area.

*World-class resort cities share a number of fundamental characteristics.*

## Ease of Access

This concept embraces both the initial entry into the city from the airport, rail, or road and the internal connectivity to and from the urban core from the resort beaches and luxury hotels. One observation from the

panel was limited access from the hotels to the urban core, short of a very expensive taxi ride and the ability to navigate the city by public transportation.

## Public/Private Partnerships

All successful world-class resort cities are taking advantage of public/private partnerships. These can run the gamut from cooperative transportation services to full-scale festival sponsorship, joint marketing, and strategic planning. The panel's observation is that currently, cooperation between the luxury hotels and the city government is almost nonexistent. The hotels should be willing to partner with the city on a variety of issues that are mutually beneficial to them and the city.

## Personality

World-class resort cities have a distinct and recognizable personality. This personality can focus on one particular attribute but more likely comprises a set of attributes that include anything from distinctive architecture, historical resources, and cultural character to food, sports, and performing arts. Personality eventually creates and becomes a location's brand.

## Brand Clarity

In recent years, the savvy international traveler has been inundated with options and choices through new media outlets (that is, Internet sources), easing of restrictions on travel, increasing wealth, and additional leisure time. Successful tourist destinations have certain aspects that set them apart from similar destinations. Sanya does not appear to have the brand clarity to allow it to distinguish itself from similar locations in South Asia. In the world of commercial product marketing, a muddled brand is deadly, and it is a clarion call to action. Sanya must rise to the challenge of improving its brand clarity.

## Respect for Nature

The statistics indicating repeat visits to a tourist destination are highest for those locations that have protected and enhanced the natural beauty of a location. TripAdvisor, one of the leading travel websites, which assists customers in gathering travel information by posting reviews and opinions of travel-related content, regularly identifies locations with safe and well-managed access to natural features and protection of view sheds and habitats as a leading reason for return trips.

## Diverse Activities and Entertainment

An extended trip to a world-class resort should involve many activities, and this fact suggests that a menu of events (dining, sports, tours, shopping) must be presented to the traveler. The quality of the travel experience is enhanced when these activities provide opportunities for various groups of differing ages, different levels of athletic skill, and varied interest in cultural, historical, and performing pursuits. Within each general activity area, say shopping, a variety of opportunities should be offered, such as luxury shopping, bargain shopping, and local folk craft and cultural shopping. The same holds true for sports. An opportunity should exist for a variety of strenuous, moderate, and more passive activities (for example, mountain biking vs. tour biking vs. walking).

## Focus on Food

Most successful world-class resorts have begun to focus on cuisine as a factor that can draw tourists. Culinary tourism or *food tourism* means experiencing the food of the country, region, or area, and it is now considered a vital component of the tourism experience.

## Smart Growth

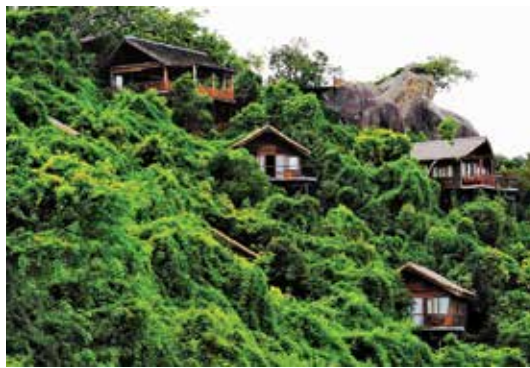
Almost all locations with significant tourism are struggling with the effects of growth. Those locations that exhibit an understanding of smart growth are best equipped to plan for its impact on the tourism industry. Smart growth values long-range, regional considerations of sustainability over a short-term focus. Its goals are to achieve a unique sense of community and place; expand the range of transportation, employment, and housing choices; equitably distribute the costs and benefits of development; preserve and enhance natural and cultural resources; and promote public health. Urban growth boundaries are one technique cities use to manage growth. Urban growth boundaries focus infrastructure in those areas best equipped to accommodate growth.

## Striking a Balance between Tourists and Residents

As with each of the other fundamentals previously noted, successful world-class resorts understand and channel the energy of their citizens and their urban development to complement the tourism industry. Focusing solely on visitors at the expense of citizens is a recipe for decline. The leadership of most world-class resorts sees their citizens and workers as an integral part of the community. New development, improved infrastructure, and expanded services must be carefully balanced between the tourist and the full-time residents.



*Enhancements to a wide variety of physical, organizational, and marketing components will allow Sanya to emerge as a truly world-class resort city.*



# Market Health

## UNDERSTANDING THE SOCIOECONOMIC TRENDS

that are affecting the study area can help planners, public officials, and private business identify the potential and pressure for future land uses. ULI believes that successful urban planning and land use policy can best be described as public action that generates a desirable, widespread, and sustained private market reaction. Therefore, Advisory Services panels typically have their foundation in market possibilities. This section outlines and assesses the positive and negative components of the market.

## Strengths

Sanya exhibits many positive characteristics that help the city compete with other locations in South Asia. Although some of these characteristics existed in 2000, the panel observed a dramatic improvement since the last panel and the addition of new characteristics in the last 13 years.

### Huge Nearby Market

Sanya has excellent proximity to mainland China. With a population of 1.4 billion people, the sheer number of potential visitors is tremendous. For southern China, travel time from home to resort locations is only two to three hours by air. Future planning and policy decisions for Sanya, Hainan province, and the private sector should keep this overarching information in mind.

### Young and Affluent Market

The average age in China is 35 years, and the increase in disposable income over the past ten years has been significant. Tourist attitudes and preferences are influenced heavily by age and income. In general, younger visitors are more tolerant of important components such as travel delay, beach and room conditions, and food

and shopping varieties. The market is maturing, but for the time being these conditions are very positive for Sanya. Additionally, the increasing affluence of visitors from mainland China will improve the profit margins for tourism locations through increased length of stay and increased consumption.

### Minimal Competition within China

China has very few tropical tourist opportunities. Hainan Island—and specifically Sanya—is the only real opportunity for a tropical beach experience that has the hotel accommodations to house these visitors on a large scale. Increasingly, holidays such as the Chinese New Year (Spring Festival) and the Mid-Autumn Moon Festival have seen increasing visitation in Sanya, and that trend is likely to continue and expand.

### Natural Resources

Sanya has an abundance of beaches, rivers, and tropical forests that provide ample opportunity for visitors to experience a wide variety of activities. For example, Yalong Bay and Haitang Bay have six miles and 15 miles, respectively, of uninterrupted sandy beach. The Yalong Bay Tropical Paradise Forest Park, located within 15 minutes of the shore, is an extraordinary asset that has just recently opened and provides a wide variety of activities, such as biking, hiking, birding, a zip line, and other activities.

### Commitment to Tourism

Among city officials, the panel experienced a dedication to promoting tourism. Tourism is the primary source of revenue for the city, and each city department that was interviewed by the panel expressed a desire to help the industry. Likewise, the major hotel operators were committed to providing their customers with excellent service. This commitment will help the

city in its quest to become a preferred location for visitors from both mainland China and South Asia.

### **Healthy Core Industries**

The panel observed that agriculture and fishing are still a very important part of Sanya's overall economy, thus providing a certain measure of diversity that is important. The panel sees this diversity as an extremely positive sign that can allow the city to weather local, regional, or international recessions, thereby providing the activity that is essential to a well-functioning city.

### **Significant Capital**

China is currently blessed with significant capital to allow the construction of public facilities, infrastructure, and housing. Other sources of private capital typically flock to those locations where public capital is expended. City and province officials should continue to take advantage of these capital resources and continue to leverage public improvements with private investment.

### **Affordable Labor Force**

China also continues to have an abundant supply of affordable labor that can be employed in both the private and the public sectors to ensure continued growth. Although the panel understands that over time the affordable labor force, especially for the hospitality and construction industries, may plateau or even shrink, for the foreseeable future this component of the economy is a positive sign.

### **Increasing University Population**

The increasing university population is a positive sign for any city. The economic impact of universities is undeniable. They employ thousands of people. They develop and contribute to their communities. They introduce new technologies, some of which result in new business opportunities. They attract talent from around the world. They even help start and nurture new businesses, a direct source of new jobs and economic growth. They also give a verve and pulse to a city that improves demand for restaurant and food services, and attracts older generations.

### **Close-in Airport Location**

The airport in Sanya is just a few minutes away from the city center and about a half-hour drive to its luxury resort hotels and the beaches. Few cities have an airport so close, and this can be an incredible incentive to those visitors with limited vacation time.

## **Challenges**

The panel observed a number of issues that can best be described as negative characteristics. Again, although some of these characteristics existed in 2000, the growth and maturity of the tourist industry will require Sanya to understand these issues and attempt to minimize and offset their impacts.

### **Reputation for Poor Service and Price Gouging**

The panel heard from a variety of sources that Sanya has a reputation for poor service and price gouging. One interviewee indicated that local restaurants in the downtown had three menus: one for locals, one for visitors from the Chinese mainland, and one for foreign tourists. This reputation needs to be replaced with one that embodies a courteous, friendly, and fair tourist destination.

### **Lack of Clear Vision for the Future**

Although the city seems to take great care with its technical planning documents, the basic vision for the future seems muddled and static. The future vision for the city (tourist areas as well as old city) needs to be public, transparent, and understandable. It should reach out to a wide variety of stakeholders, such as citizens, business owners, investors, hotel operators, and government officials.

### **Brand Confusion**

From the outside, a number of Sanyas seem to exist: the old city, Yalong Bay, Haitang Bay, the rural agricultural area, and the spaces in between. The Sanya brand should be a unified vision for the entire city.

### **Lack of Focus on Human Experience**

The local culture and personality of Sanya seems to be relegated to secondary status. Most successful international tourism locations focus on the unique nature of their location, climate, people, and culture.

### **Ghost Projects**

As noted in the previous panel in 2000, a number of abandoned office, residential, and tourist projects still exist throughout the city. Such projects give a negative impression to the first-time visitor and investor.

### **Airport Capacity and Service Levels**

Although the runways at the airport are long and can handle almost any type of commercial jet activity, the airspace management seems to limit the number of air operations. Also, the terminal needs to be upgraded to that of a world-class airport.

### **Lack of Comprehensive Transportation System**

Access to and from the tourist hotel areas to downtown and in and around downtown is limited. Marked improvement has occurred in the regional transportation systems, such as the high-speed rail from Haikou, but local connectivity is still lacking.

### **Lack of Focused and Consistent Internet and Social Media Marketing**

As noted earlier, the world is a very different place than it was even five years ago because of the steady and increasing impact of Internet marketing and social media sites. The panel noted that Internet and social media marketing for Sanya was lacking and that a campaign focused on these aspects alone would reap significant benefits.

### **Inferior Construction Quality and Costly Ongoing Maintenance**

Although significant construction of both private and public infrastructure continues, the panel believes the quality of construction has been less than stellar, which means that future and deferred maintenance will be problematic.

### **Employee Turnover**

Employee turnover is always a problem in resort communities; however, stakeholders need to build this dynamic into their strategic planning. Also, the city needs to consider the needs of hotel and resort employees in terms of housing, education, and other services.

### **Low Level of Environmental Commitment**

Although most of the city, especially the tourist area, appears to be clean, some concern exists about new development and its potential environmental impact. The reputation of the city as a tropical paradise could be altered if the environment is even perceived as being diminished.

### **Lack of Iconic Gathering Place**

People crave iconic locations for gathering and meeting others. The panel was in Sanya for only a week, but gathering spaces and iconic destinations appeared to be only internal to the hotels. Although some of the city's main commercial streets exhibited some of the attributes of these desired concepts, hotel staff did not suggest these in-town locations or provide directions.

### **Financial Pressures on Hotels**

Room price mandates by either the local or provincial government have affected the profit margins of the hotels. If continued mandates are put on the operators, maintenance and guest services could be affected.

### **Education**

The panel was told that the educational system needs to be improved. Sanya should strive toward the concept of world-class primary, secondary, and postsecondary education. This will help the city diversify its economy and reduce the impacts of tourist recessions and seasonal visitation.

The challenges noted require action not only by the city, but also by the various stakeholders in the Sanya community. Each of these challenges is addressed in the organizing principles in the following sections.

# Organizing Principles—Protect

## THE PACE OF GROWTH AND THE AMOUNT

of development that has been accomplished in Sanya in the past 15 years is truly impressive. Yet the continuation of this tremendous growth is also alarming because of the potential impacts on the environment and natural resources. Sanya must protect its precious resources for the future. World-class tourist destinations know that their long-term success depends upon the quality of the natural environment and a unique sense of place. World-class destinations place top priority on protecting the things that make the place special. These include the following elements:

- **Water:** The quality of the ocean is crucial to a beach resort town as well as to the health of the fishing industry. Yet the briefing book reported that sewage is being discharged into the ocean, large amounts of trash are floating out of the rivers and onto the beaches, and golf course development is not regulated, thereby enabling fertilizers and chemicals to affect estuaries and cause algae blooms, and will cause long-term damage to the reefs. All-terrain vehicles driving on the beach are a safety concern and have a significant environmental impact.
- **Air:** The blue sky and clean air at Sanya are a tremendous advantage for travelers coming from mainland China. Yet the rapid increase in the number of vehicles—30,000 new cars and scooters each year—will negatively impact air quality and create massive traffic problems that affect the quality of visitor experience.
- **Land:** Continued urban sprawl will consume important open spaces and scenic vistas.

## Building Healthy Places Initiative

Around the world, communities face pressing health challenges related to the built environment. For many years, ULI and its members have been active players in discussions and projects that make the link between human health and development; we know that health is a core component of thriving communities.

The ULI Building Healthy Places Initiative will build on that work with a multifaceted program—including research and publications, convenings, and advisory activities—to leverage the power of the Institute’s global networks to shape projects and places in ways that improve the health of people and communities.

As part of that effort ULI has produced *Ten Principles of Building Healthy Places*, which distills lessons learned from the three Advisory Services panels ULI conducted in the spring of 2013, as well as insights from a workshop attended by experts from a variety of fields. The publication sets out ten important principles that can be used to create a new approach to building healthy communities. In addition, *Intersections: Health and the Built Environment* explores global health trends and makes the link between those trends and what has been happening to our built environment. It looks at the relationship between how healthy we are and the way our buildings and communities function.

For more information, visit [www.uli.org/research/centers-initiatives/building-healthy-places-initiative/](http://www.uli.org/research/centers-initiatives/building-healthy-places-initiative/).



- **Heritage:** The fishing tradition and the indigenous populations are important aspects of Sanya’s history that must be protected from the incursion of development. Destruction of heritage resources, such as the fishing village, and total displacement of indigenous people deprive the community of its unique identity.

To become a world-class destination, Sanya must emphasize quality as much as quantity. Lao Tzu said, “Nature does not hurry, yet everything is accomplished.” The experienced and well-financed developers bear greater responsibility to set a high standard of excellence for others to follow. The large professional developers should work with the government to establish high standards, so that all development occurs in a responsible manner. Government and business leaders must set a high priority on protecting the quality of the water, air, open space, and heritage of the region for the long term-health of the economy.

Now is the opportunity for Sanya to be recognized as a world leader in responsible, thoughtful development and to leave a legacy for future generations of Chinese citizens. A healthy economy requires a healthy environment. In addition, Sanya should strive to make every new development consistent with the Urban Land Institute’s Building Healthy Places Initiative.

The panel recommends three big moves to the leadership of Sanya to protect these important natural resources that will inspire consumers and residents.

## Establish an Urban Growth Boundary

To prevent sprawl and to ensure preservation of open spaces and prevent loss of important farmland, the city should consider establishing an urban growth boundary. An urban growth boundary is a set of principles and policies used in conjunction with a geographic boundary (map) that mandates that the area inside the boundary be used for higher-density urban development and the area outside be used for lower-density development. Such a policy will allow the city to properly coordinate capital improvements such as schools, roads, and public facilities in an efficient and planned manner.

Additionally, an urban growth boundary will allow the city to retain diverse development types and promote a sense of place. Not all development should be high-density, large-scale urban development: the city should maintain small-scale neighborhoods in key locations.

## Establish the Sanya World Center for Ecology and Environmental Learning

This center should be developed in cooperation with a prestigious university and can become recognized as a world leader in research as well as environmental protection and resource conservation. The panel has named this center the Sanya World Center for Ecology and Environmental Learning, and it will ensure that best practices in protection of natural resources are implemented for Sanya. The center should be a place where millions of visitors from all over China and the world can be inspired to lead a more sustainable lifestyle and understand their role and connection to the world around us. The center should revolve around the following objectives.

### Education

The center should be a place where visitors, locals, developers, and government employees can learn

*The Ecological Center project in St. Austell, Cornwall, United Kingdom, can serve as an example of the type of institution that should be established in Sanya. The architecture of the Ecological Center acts as a draw for both academicians and the general public.*



and share best practices and set an example for all of China on water quality: the ocean, beaches, and fishery; air quality: blue sky and fresh air; and soil quality: high-quality agriculture for high-quality food.

### Setting Standards

The center should work with government and business to establish clear rules and regulations that permit and encourage development in appropriate areas but hold that development to the highest standards that protect the natural resources. Such development will earn the gratitude of future generations.

### Monitoring and Resource Mapping

The center can be responsible for monitoring existing conditions and ensuring that resource quality is retained and enhanced. The center should monitor permitting, providing transparent and clear requirements that streamline permitting as long as developers and industries comply with rigorous quality standards.

## Create a Hainan National Park

Visionary leaders around the world have set aside vast land areas to protect important areas and provide for future generations. The province and the city should consider creating a world-class national park that will act as a draw to tourists. The park should be located in the encompassing Boating and the Central Mountain Areas.

Components of this park have already been established, such as the Yanoda Rainforest Cultural Tourism Zone, the Li and Miao Minority Village, and the Yalong Bay Tropical Paradise Forest Park. But the panel feels currently these are three separate entities and that each of these components needs to be knit together from a marketing and management perspective so they can be offered as a single location and a single product. A Hainan national park could be a huge game changer in terms of perception from the international community.



*The Yanoda Rainforest Cultural Tourism Zone, the Li and Miao Minority Village, and the Yalong Bay Tropical Paradise Forest Park provide Sanya and Hainan with important core components for a world-class national park. The panel recommends expanding and enhancing these core components.*

# Organizing Principles—Enhance

**TO BE A WORLD-CLASS RESORT CITY**, Sanya must leverage its existing uses and strengths. The panel encourages the city to create a great destination by improving existing amenities and celebrating its local art, culture, and food. For planning purposes, the panel concentrated on three primary areas of enhancement: the urban core, the natural area, and the hotel/visitors area—with specific strategies for each area.

## Urban Core

A city is defined by its urban core. As noted previously, Sanya’s downtown requires focus and commitment to improve its infrastructure and urban design and planning to make it more attractive to both domestic and international visitors. One approach that can help would be to identify a number of specific areas within the urban core that can act as an attraction for international visitors. Although numerous initiatives and projects are currently in the planning stages or underway in the downtown core, the panel recommends that the following items be considered.

*The panel sees the potential for Sanya Bay Road to serve the same function as Ocean Drive in Miami Beach, Florida.*



## Tree-Planting Program

Outside the urban core, the city is blessed with an abundance of natural vegetation and trees; however, panelists observed a noticeable lack of shade and ornamental trees inside the core. Given Sanya’s rapid urbanization, it is understandable why trees have been forgotten. However, successful resort locations around the world use trees as a central organizing feature that distinguishes them from other nearby or similar competing locations.

The panel recommends a tree-planting initiative with a goal of planting 1 million new trees in the next five to ten years. These trees should be a combination of shade and ornamental, but the concentration should be on shade trees to combat the sun and perhaps even encourage off-season travel to experience the city center.

## Sanya Bay Road Enhancements

The panel believes that the Sanya Bay Road area can be the hub of a new entertainment district. Taking advantage of the existing shoreline park system, the existing roadway system, and the number of underused or vacant tracts of land adjacent to the road (especially to the west), the panel recommends an urban design and development program that provides shops and restaurants that cater to visitors. The panel sees the potential for Sanya Bay Road to serve the same function as Ocean Drive in Miami Beach.

The panel believes that the “Ocean Drive” approach does not require a wholesale change. It can be accomplished incrementally, a few blocks at a time. However, the entertainment area of Ocean Drive did not happen organically; it was accomplished by a deliberate and focused effort of the city. Specific design requirements were implemented for signage,

café space, mix of uses, and even music. Moreover, the location is such that it requires most visitors from Haitaing Bay and Yalong Bay to travel through the downtown core, thus allowing them to see and experience the working city of Sanya. This connectivity will perhaps spur additional revitalization and development in the city proper.

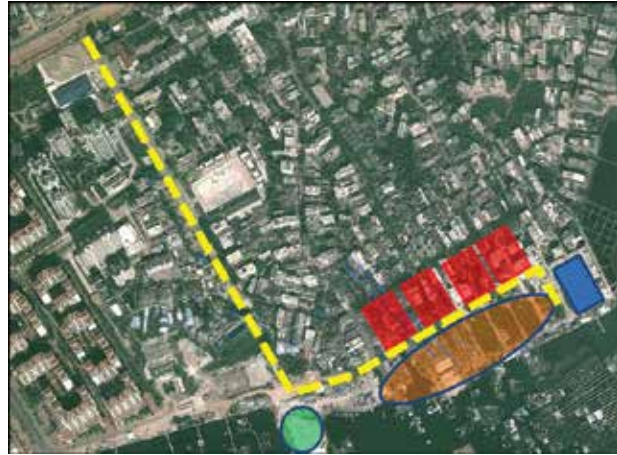
### Red Sand Village Enhancements

The panel understands the need to improve the Red Sand fishing village. Its narrow street and substandard infrastructure present both safety and congestion problems. However, this neighborhood is one of the few sites visited by the panel that appears to give the visitor a true sense of the old city of Sanya. Cities throughout East Asia are taking advantage of traditional fishing villages and their associated markets to allow visitors to experience a traditional way of life.

The panel recommends that the redevelopment of the Red Sand fishing village be used as an opportunity to retain some of the traditional street design, improve public access to the waterfront, and provide both new commercial facilities and education facilities. Successful examples of this approach can be seen in Singapore, Hong Kong, and Bangkok. The panel recommends consideration of a design that permits waterfront seafood restaurants, an education center focused on the fishing industry, retail shops selling locally made goods, a fish market for both residents and visitors that can provide an outlet for the fishing fleet, and a new pier for river taxis and other marine activities.

## Enhancements to Natural Areas

The panel believes that a series of specific actions revolving around enhancing and protecting the city's natural area will improve the social interaction between the resort area and the urban core and improve the overall visitor experience. These actions could also encourage a whole new demographic of international visitors: the adventure/nature tourist.



### Link Existing Parks

The city is blessed with abundant open space, but these parks and spaces appear disjointed and disconnected. The city should look at creating and implementing a master plan for trails and pedestrians. The master plan should focus on making pedestrian, bike, and vehicular connections among the existing parks and generally improving connectivity between the residents, visitors, and attractions. This master plan is consistent and complementary with the city's ongoing efforts to update and refine its overall master plan.

### Create Hiking Routes and Cycling Trails

In conjunction with the suggested master plan, a new emphasis should be placed on identifying, planning, and building new hiking routes and cycling trails. The potential additional connections between Dadonghai, Yalong Bay, Haitaing Bay, and the urban core are obvious. But the city should also consider trails between the urban areas in the south and the natural area to the north. The Yanoda Rainforest Cultural Tourism Zone, the Li and Miao Minority Village, the Yalong Bay Tropical Paradise Forest Park, and other attractions in the mountains are all locations that adventure/nature tourists would visit by biking or hiking if a safe and pleasant route could be provided.

### Create an Ecological Mangrove Park

Tourists always look for a variety activities, and this is especially true for adventure/nature tourists. The

*The panel recommends that the redevelopment of the Red Sand fishing village be used as an opportunity to retain some of the traditional street design, improve public access to the waterfront, and provide both new commercial facilities and education facilities. This sketch provides a notional concept, with new commercial space depicted in red and waterfront restaurants and fish markets outlined in orange.*



*The panel recommends creating an ecological mangrove park as another driver for ecotourism. This park can be coupled with the creation of the Sanya World Center for Ecology and Environmental Learning.*



variety of the visitor experience is always a key factor in longer stays and return visits from tourists. The panel believes that one biome that appears to have potential as an attraction is the island's mangrove forests. The panel recommends creating an ecological mangrove park.

Because mangroves are an integral part of a marine environment that provides shelter for both sea and land wildlife, they have been the focus of much international research and preservation efforts. Every year, organizations hold international seminars on mangrove protection issues. So such locations not only are a great place of interest to tourists but also are a place of scientific research both in China and abroad. This could mesh well with the panel's earlier suggestion about creating a Sanya World Center for Ecology and Environmental Learning. This approach has already been proven in north Hainan Island at the Dongzhai Harbor Mangrove Natural Reserve Area. In addition to scientific research, Dongzhai attracts thousands of tourists each year with a wide variety of nature-oriented programs such as bird watching, camping, and kayaking.

### **Improve Access to Waterfronts**

A master plan for trails and pedestrians must also consider improved access to the city's waterfronts and beaches. Significant portions of the urban waterfront appear to be inaccessible to residents and tourists. The panel also understands that pressure exists for even more urban waterfront to be used for private yachts. The panel believes that this approach is the wrong route and that a new effort should be undertaken to begin opening the abandoned industrial waterfront areas and to convert them to public access parks and commercial activities such as shops and restaurants.

For the sand beaches at Yalong Bay and Haitang Bay, the goal should be complete public access. Over time, the individual hotels have "claimed" their portions of the beach, creating an implied sense that the beaches belong to the hotels. This "exclusive" approach to the shoreline may, in the short run, prove successful for the

hotel operators, but in the long run it will stifle visitation and damage Sanya's reputation.

For both the urban and the hotel beach areas, the city should set goals (one kilometer a year) for major improvements, including subtle wayfinding and maintenance that convey a sense of openness, safety, and connectivity.

## Enhancements to Hotel Areas

The sheer number of luxury hotel rooms in Sanya is staggering. And although the panel expects that each individual hotel and hotel operator will maintain its property to its own advantage, the city can undertake a number of steps and actions to help.

### Dadonghai Bay

Dadonghai Bay and the adjacent area is an opportunity for more specialized hotels. Quieter and smaller than Yalong Bay and Haitang Bay, Dadonghai and its immediate environs have an opportunity to fit a niche market of international and regional travelers who seek a more intimate vacation experience with easy access to the urban core. Primary recommendations for the several hotels in the area are to consider shared programs and activities, such as health and fitness, and perhaps explore the concept of a culinary institute that would provide visitors a chance to teach and learn in cooking classes. The proximity to downtown will allow the culinary arts easy access to local cuisine. Also, a shuttle bus program from Dadonghai to downtown should be explored.

### Yalong Bay

Yalong Bay should develop an overall vision that portrays it as part of Sanya but with specialized emphasis on families and larger groups. The panel is deeply concerned that the older hotels in the Yalong Bay area will continue to deteriorate and begin to give the area a reputation for second-class hotels. A renewal program for hotel grounds and buildings should be explored. The city should partner with hotel operators in estab-

lishing a program of regular maintenance and periodic major renewal.

The hotels on Yalong Bay should establish a round-table or working group of the managers to consider and discuss issues of shared concern, such as beach maintenance, retail opportunities, shared recreation programs, and facilities that can be shared by all of their guests. This working group can also provide a forum and conduit for discussion with the city of Sanya regarding major infrastructure improvements.

### Haitang Bay

Haitang Bay is the largest and newest of Sanya's resort areas. As in Yalong Bay, the various property owners and hotel operators should consider establishing a working group of the managers to allow regular and periodic discussion of issues of mutual concern. The large infrastructure-associated improvements to Haitang Bay and a regular and sustained effort at active programming for new park should provide a motive for return visitors.

All three resort areas should have an annual summit to consider what mutual actions they should take and how city actions will affect their respective areas. As a general rule, less emphasis should be placed on construction and sale of units and more concern directed to the quality of construction and viability of second homes for the entire city.

# Organizing Principles—Connect

**TO BE A WORLD-CLASS RESORT CITY**, Sanya must be a fully connected city. This concept of connecting at all levels is critical to improving productivity and enhancing the quality of life for citizens and visitors. A fully connected city will contribute to interaction among residents and with both regional and international visitors. The panel has identified three big “forwards” for Sanya in terms of connections.

First, the city must have a 21st-century transportation system that allows not only connections with the outside world but also multimodal connections within and throughout the city. This includes the airport, local and regional transit, and using smart technologies to address congestion.

Second, the city must connect important nodes and places. This includes not only better access for the resort areas, but also a variety of sustained and multimodal options to connect green spaces, beaches, activity areas, neighborhoods, and employment areas.

Third, the city must allow its people to connect by encouraging community centers, festivals, and cyber connection.

*The panel strongly encourages the city to retain the existing airport as the primary gateway for visitors to Sanya.*



## Improve Transportation

Transportation is the most obvious component of connecting the city. The panel believes that transportation in Sanya can be significantly improved and that the city and private industry can play significant roles in these improvements. The panel suggests that an improved transportation system is key to reducing the urban-rural divide that is currently present in Sanya.

### Keep the Airport: Gateway to the World

The airport, while adequate to serve the current tourism industry, will not be able to handle increased passengers without a better understanding of the restrictions placed on airspace and gates. The panel understands that the runways can accommodate any existing airframe and that the limit on the number of heavy jets (i.e., A380 or 777) is caused by airspace restrictions, not runway length or gate capacity.

The panel believes that the current location for the airport is ideal, allowing easy taxi access from the airport to Yalong and Haitang. World-class cities around the world rely on excellent airport access with quick ground transportation to desired destinations. The proposed relocation of the airport, in the panel's opinion, is a bad idea. The city should, instead, gain a clear understanding of how and why the restrictions on airspace exist.

### Improve Local Public Transport

Local public transportation needs to be improved. These improvements are necessary not only for the occasional visitor trip to and from resort areas, but also for the efficiency and productivity of employment, retail, and university areas within the city. The most logical improvements could be in the way of dedicated bus lanes and true bus rapid transit. Bus rapid transit offers the speed

of light rail with the construction and maintenance cost of rubber-tire transit.

### Improve East–West Rail Corridor

The Sanya and Hainan province governments should be commended for their dedication to deliver high-speed rail from Haikou. The high-speed rail offers an incredible opportunity not only for regional travelers on Hainan Island, but also for local travelers seeking access to center-city services. The planned rail station for the Haitang Bay area will allow resort visitors quick access back to the center city. It will be important for the hotel operators or the city to provide the link between the resort areas and the train station.

### Build East–West Bridges

As part of the branding of Sanya, easy access to the center city will be required. Significant congestion appears to occur along the downtown east–west transportation corridors. The city needs to study improvements to vehicular and pedestrian traffic routes between east and west in the center city. The choke points for vehicles in rush hour could be improved with careful consideration of additional bridges.

### Use Smart Information Technologies

A variety of smart technologies are available to the city to address parking availability, bus and train schedules, and traffic light synchronization. The city should make a goal of having a fully integrated smart technology infrastructure in ten years. This will provide the type of efficient and available transportation access needed in a variety of modes from taxi to bus to train to private car.

### Improve Taxi Service

Both city officials and hotel operators noted that taxi service throughout the city needs improvement. World-class cities have fair and available taxi service, and the various public and private companies providing such service should be held to a very high standard. The city should take the lead in evaluating and establishing a new standard for taxi service. In addition to safe, clean, and reliable service, fares should be standard through-



out the system and all taxis should take credit and debit cards. In addition, the panel recommends that the entire taxi fleet be replaced with hybrid or electric cars in a five- to ten-year period.

### Provide Proper Parking Spaces and Bike Lanes

World-class cities promote a sense of walkability and connectedness when vehicular parking is uniform and consistent and bikes and pedestrians are treated as well as motor vehicles. In some areas this may require physically separating bike and pedestrian lanes from the motoring public. In others, it means establishing vehicle speeds, bike lane locations, and design that do not conflict. The panel recommends that the city undertake a comprehensive study of these elements with the goal of identifying strategies to improve vehicular, bike, and pedestrian movements.

*The panel recommends that the city undertake a comprehensive study of transportation elements with the goal of identifying strategies to improve vehicular, bike, and pedestrian movements for the central market streets throughout Sanya.*



*The Sanya and Hainan provincial governments should be commended for their dedication to deliver high-speed rail from Haikou. The planned rail station for the Haitang Bay area will allow resort visitors quick access back to the center city. The hotel operators, the city, or both must provide the link between the resort areas and the train station.*



## Connect Places

A fundamental objective of a city is to provide a place where discrete activities can coexist within a relatively small geographic area. Connectivity provides the means to link these discrete uses through roads, bridges, paths, trails, sidewalks, and railways. Residents can connect with employment centers, resort uses with retail areas, and industrial uses with ports. Connecting places should be a primary function of local governments.

### Connect Green Spaces

Connecting green spaces and open spaces has been a desired function of city planning since its inception. For all of its urban woes, Sanya actually has some spectacular green spaces and parks. The panel's observation is that the spectacular green space in the city could be leveraged substantially with a connectivity plan between these spaces. For example, providing an inviting and easily discernible connection between Luhuitou Park and the beach at Sanya Bay could be just the effort needed to have a family stay for a full day in the

*The city needs to study improvements to vehicular and pedestrian traffic routes between east and west in the center city. Improved links within the various neighborhoods of the city are an important factor in bringing together the city's citizens.*



center city, instead of making a one-hour visit to either one or the other of those locations. Again, the walkability of a city will make a huge impression on visitors, and the panel believes Sanya has significant room for improvement in this area.

### Create Foot and Bike Paths

The city of Sanya needs to be much more pedestrian-friendly. This is true not only for the center city but also for the resort areas. As noted earlier in this document, the panel recommends that the city undertake a comprehensive study of these elements with the goal of identifying strategies to improve vehicular, bike, and pedestrian movements. A city bike-trail map would be an excellent companion to a visitor wishing to explore the city.

### Develop Community Centers

As in so many cities around the world, everyday work activities often prevent communities from growing intellectually and socially. In Sanya, a variety of physical constraints, including new roads, an influx of rural dwellers into large multistory buildings, and large, single-use commercial sites, prevent the interactions between neighbors that traditionally created a community. The tall apartments near the northern edge of the urban area have much less of a community feel than the Red Sand fishing village area. To combat this potential sense of isolation, the panel suggests that the city consider the development of a series of community centers that will help neighborhoods nurture their social interaction and provide an outlet for artistic and entrepreneurial expression.

## Link People

Successful cities have a variety of programs and activities that bring the population closer to one another. Connecting people through physical undertakings locally and through cyberspace to a larger Hainan community and the outside world will help move Sanya toward a more global view. This approach will allow Sanya to focus more on the human experience and present itself as a totally connected world-class city. This is especially true for a city like Sanya where the urban-rural divide is so stark.

Although improved internal transportation is important, the city should consider linking the rural resident and the urban resident with a series of programs and activities such as fairs and festivals, as noted below.

### **Festivals, Fairs, and Gatherings**

Festivals, fairs, and similar gatherings help build community. Skilled workers and students want to locate in places that have a defined sense of place. A focus on the arts and culture can improve a community's competitive edge, create a foundation for defining a sense of place attract new and visiting populations, integrate the vision of a community and its business leaders, and contribute to the development of a skilled workforce.

### **Cyber Connectivity**

Visitors as well as residents often judge a location by its connections with the outside world. If Sanya hopes to improve regional and international visitation, one element that will help is significantly improved cyber connectivity. The city should investigate not only a citywide strategy for this connectivity, but also a specific focus on heavily visited areas. Free citywide Wi-Fi, Wi-Max, or similar system should be considered. This type of connectivity can give Sanya a significant competitive advantage over other resort locations.

# Organizing Principles—Care

**SANYA NEEDS TO CARE** for its citizens and its visitors. One approach that the panel suggests would be for city leaders begin to think about what Sanya will look like in 2030. A “stretch” goal for the city in 2030 could be to achieve prominence as *the most livable city in China* or perhaps *the healthiest city in China*. Those labels can be an incredibly powerful competitive advantage as Sanya looks to diversify its visitation and economic development strategies. Such a goal will require the city to take bold action consistent with this section and previous sections of this report.

## Integrated and Convenient Neighborhoods

Neighborhoods need to be walkable with a more human scale. This goal can be achieved through the creation and implementation of design guidelines with a particular focus on pedestrian paths, sidewalks, and bike-friendly facilities such as racks, lockers, and bike-share stations.

Neighborhoods should also be planned to accommodate a mix of uses including retail and residential, and the residential should mix rental and for-sale units for a variety of income levels.

Access to public transportation, as noted previously, should be a priority for new development. Density patterns and employment centers should be designed and located to support public transportation and appropriate “last-mile” facilities, such as sidewalks and path; feeder bus systems should be used to ensure that residents can easily access public transportation.

Finally, the panel was impressed with the city’s ability to maintain its public parks. The city should continue to concentrate on well-maintained public facilities and encourage residential and commercial areas to do the same.

## Education

Sanya needs to seriously consider upgrading its educational opportunities. The entire educational system—primary, secondary, university, and vocational schools—should be studied to determine what opportunities exist to achieve these improvements. Human talent is “the” key component of local economic development in relation to location decisions for large corporations and institutions. The panel believes that improving the educational opportunities for Sanya residents will result in a better-informed and educated public. A better-informed and educated public will reap huge benefits as business investment evaluates locations around the globe for human talent.

In addition, locations such as Sanya, which host a significant tourist industry, should have a vibrant and growing arts community. The demand for arts, cultural experiences, and creative sciences could be a significant boost to the economy, and Sanya should not have to import creators and teachers from other locations; they should be drawn from local sources. Sanya should begin to significantly invest in the arts, arts education, and the creative sciences.

*A better-informed and educated public will reap huge benefits as business investment evaluates locations around the globe for talent.*





*Sanya should have a significant and world-class hotel and restaurant management program at one of its universities.*

Sanya should have a vibrant and diversified sports program. Research has found that participating in sports can have a healthy developmental impact on young children. These activities can promote cooperative play, teamwork, and good sportsmanship while helping to refine gross motor skills. Sports can also help children get along with and become accepted by others, including peers, family members, teachers, and coaches. In addition, through positive feedback, group play builds self-esteem, helping children realize they are capable people able to accomplish significant achievements. School-age children will benefit from such an approach by being healthier and living a more active lifestyle.

As a center of hospitality, Sanya should have a significant and world-class hotel/restaurant management program at one of its universities. The programs should look to hiring world-class teachers and instructors and be the envy of other locations in south Asia.

Finally, Sanya should consider significantly investing in foreign-language training to support increased visitation from regional and international locations. Given the number of luxury hotel rooms in Sanya, a language institute that caters to Russian, English, French, Italian, Japanese, Korean, and Cantonese would be an excellent investment.

## Medical Care, Health, and Wellness

Medical care is a key component of a world-class city. Although the military hospital is first-rate, the panel heard from some interviewees that civilian care is limited. The city should explore opportunities to construct top-level comprehensive hospitals with a specific focus on health and wellness, geriatric care, and similar fields. The city should build a platform to service a growing elderly population while considering whether options exist for medical tourism.

Sanya should also begin a focused effort to promote farm-to-table products for the many restaurants and hotels. This can be accomplished by promoting organic farming, but it must also include increased food safety for both visitors and residents. Culinary tourism is a niche that Sanya should explore, especially as it relates to seafood.

## Economic Diversification

Resort hotels, along with the military and the seafood industry, are the primary drivers of Sanya's economy. As noted in the previous sections of this report, diversification of the economy should be an overarching goal for the city. Reaching this goal will require action from the municipal government, private business, the education community, and citizens.

Sanya should begin to cultivate a business-friendly environment with a specific focus on coordinated

development in the tourist zones and better management of existing infrastructure. The city should also explore leveraging the universities as economic engines that can attract world-class professionals who will see Sanya as their home—not just a vacation location. In addition, the city should explore how the wealthy vacation homeowners can be better integrated into the Sanya experience.

The panel suggests that Sanya explore the possibility for other types of industries and businesses. As previously noted, the tourist aspect of Sanya and Hainan Island could be parlayed into a location for additional convention business based on its environmental qualities. The city should consider funding a Sanya World Center for Ecology and Environmental Learning, as previously recommended by the panel. This will provide the impetus for investment from the private sector in the realm of scientific research.

# Organizing Principles—Promote

**A WORLD-CLASS CITY MUST HAVE A** world-class marketing program. The panel's initial observation is that currently the domestic and international marketing of the city as a tourist location is muddled. The panel suggests the city consider implementing a series of actions that will help Sanya reach out to a broader domestic market as well as an enlarged regional and international market. Two specific goals for the marketing program should be to promote Sanya in the consideration for the set of top-five Asian coastal resorts and to increase international awareness of Sanya as a unique destination for discriminating global travelers.

## Sanya: "The Best Experience of My Life!"

Sanya needs to position itself so that visitors tell a story when they return home that Sanya was the best experience of their lives. The experience should include recreation, food, cultural amenities, and of course a comfortable, luxurious stay at their hotel. Many of the suggestions in this report about improving the center city, improving access to unique cultural experiences, and improved service regarding food and transportation will go a long way in achieving this goal.

Sanya should take hints from places such as Bali, Waikiki, Rio de Janeiro, the Gold Coast, Paris, and other well-known locations to understand how people feel when they return.

## Regional Competition

Many locations currently compete with Sanya, including Bali, Lombok, Penang, Langkawi, Da Nang, Cebu, Phuket, Koh Samui, Hawaii, Guam and Saipan, Fiji,

Russia, and Vanuatu. The good news is that Sanya's market is huge and growing, and it is close. For the domestic market, the focus should be on major cities with good connections to Sanya. These cities include Beijing, Chengdu, Chongqing, Guangzhou, Hangzhou, Nanjing, Ningbo, Shanghai, Shantou, Shenzhen, Tianjin, and Wuhan. Internationally, cities such as Busan, Fukuoka, Hong Kong, Khabarovsk, Kuala Lumpur, Nagoya, Osaka, Seoul, Singapore, Taipei, Tokyo, and Vladivostok are all within a four- to five-hour plane ride.

In the panel's opinion, these Asian locations should be the primary focus of Sanya's marketing strategies and will provide the greatest rate of return for marketing funds spent. Spending significant funds to lure people from North and South America and Europe would be a costly mistake and unlikely to significantly provide a return on investment.

The city should explore options to increase plane connections to these locations and should consider direct marketing approaches, including special packages for these locations because they are the most likely locations that will attract visitors to Sanya. The methods for both domestic and international marketing can best be enumerated and articulated by a global marketing firm that should have broad experience in both of these segments.

## Global Marketing Firm

The panel recommends that Sanya hire a global marketing firm immediately. A global marketing firm will possess the expertise to develop a fine-grained market plan that will show immediate results, quickly improving visitation. This firm should have broad experience in the domestic Chinese, regional Asian, and international markets, and a three-tiered marketing plan should be developed based on these geographic divisions.

### Brand Aggressively

The city should undertake a vigorous effort to brand Sanya. Sanya should think about branding from a variety of perspectives, including going visual, digital, and direct.

This effort should include apparel, souvenirs, and gifts. It should also include a program of signage both in the city of Sanya and in other regional and select international cities. Signage on taxis, buses, and other vehicles and in airports should be considered. In addition, consideration should be given to aircraft logo and signage rights. Numerous examples of such programs exist throughout Western Europe, North and South America, and Asia. A global marketing firm can identify the components of signage programs that have proved successful.

### Brand Consistently

Brand clarity and brand consistency are fundamental components of a successful marketing campaign. The panel noted that Haitang Bay, Yalong Bay, Sanya Bay, and Hainan Island, as well as other venues, were all presenting themselves as separate entities and locations with different messages, logos, and attributes. The Sanya logo is a wonderful starting point for brand consistency and should be a starting point for rolling out a new marketing program for the entire city.



## Deploy Resources Effectively and Efficiently

To effectively deploy marketing resources, the panel suggests that the city needs to think from a multi-dimensional perspective. It needs a focused message with specific media outlets based on the target audiences. The table outlines one suggestion about how to deploy resources based on different target groups.

Again, a qualified global marketing firm will be well versed in both the strategies and the tactics needed to create and organize this approach.

### Marketing Deployment Matrix

Target	Message	Media
Individuals, professional singles (China)	Fun, excitement, freedom	Social media, events, product placement
Couples	Ideal for romantic getaways; indulgent	Social media, online travel agents, product placement
Upper-middle-class families (Greater China)	Fun, safe, great value	Social media, print, online travel agents, product placement
Discriminating international travelers	New destination; new experience	Social media, video, documentaries, online travel agents
Corporate meetings (China and international)	Accessible, conducive	Direct, corporate travel agents
Conferences (China and international)	Ideal venues, ideal environment	Conference organizers, associations

## Activities as Marketing Components

Numerous activities will act as catalysts for marketing the city of Sanya. The 2013 World's Strongest Man event is an example of how an international event can boost Sanya's brand. These activities could include marathons and triathlons; bicycle races; Red Bull extreme sports events; X-games; music festivals and outdoor concerts; international sports demonstration games such as soccer, badminton, cricket, and rugby sevens; dragon boat races; golf and tennis championships; and art festivals.

Each of these events can have its own identity but should be required to incorporate the emblem, logo, sign, and symbols of Sanya. Recognition of Sanya as a host city for such events will most certainly improve interest from international visitors.

## Create a Tourist and Visitors Bureau

The panel recommends that Sanya create a Tourist and Visitors Bureau to coordinate all marketing efforts. The bureau can be created from existing organizations in the Sanya government and can be supported by member businesses through business membership dues, annual funding by the city, business taxes, and special events.

In addition to organizing and promoting the special events noted previously, the bureau can collect, coordinate, and leverage information on the Sanya visitor for internal needs and provide information to the Sanya visitor in the form of marketing campaigns.

Consumer information is important in creating an effective marketing strategy. The panel believes that currently the availability of information on the consumer in Sanya is limited or nonexistent. Consumer information is important because consumers mature; tastes change, markets change, and demographics evolve. Knowing what consumers think, what they want, what they do not like, and what their recommendations are is important. Consumer information provides a useful feedback mechanism to the hotel and tourist industry and can be used to predict future trends.

The panel suggests that the bureau collect both quantitative data (household characteristics, spending patterns, lodging type, length of stay, and activities) and qualitative data (where else they vacation, what are their perceptions of Sanya, who is the competition, and what they think about service levels). Methods for collecting these data include focus groups, airport exit interviews, intercept interviews, and e-mail surveys.



# Organizing Principles—Collaborate

## A WORLD-CLASS CITY MUST HAVE EXCELLENT

collaboration among the important stakeholders who lead the city. For Sanya, the panel believes that collaboration begins with the creation of three entities. The first is the Tourist and Visitors Bureau noted in the previous section. The other two are the Sanya Task Force and the Sanya Partnership. Together, these three entities will create the effective institutional capacity that is necessary for Sanya to become a world-class city.

## Create a Sanya Task Force

The Sanya Task Force is a government entity that draws on the existing city government department resources to ensure they are united in an effort to implement a shared vision and goal of making Sanya a world-class city. The task force will conduct weekly meetings with a rolling agenda chaired by the mayor or vice-mayor and attended by every senior department head. The objectives of each meeting are to make timely, critical decisions about setting priorities and financing the various priorities already established by the city to ensure orderly and attractive urban development. The task force should also concentrate on addressing the two overarching goals of this panel:

- Improving the urban core to provide a broader range of visitor experiences; and
- Reaching a broader regional visitation requiring a focus on major cities within four to five hours traveling time from Sanya.

The task force approach has been used by municipalities around the globe as a technique to ensure that the physical development of a city is consistent with the strategic goals and that critical leadership remains a focus.

## Create a Sanya Partnership

Sanya must begin to think about partnerships with the private sector. Public/private partnerships harness not only the combined talent and value of the participating organizations, but also the desire of each member to go beyond a simple relationship. Such partnerships always produce exponential value.

The Sanya Partnership is a public/private entity united by a shared vision for Sanya. The partnership includes senior government officials and senior business leaders who can share ideas and priorities and determine how the public and private sectors can work together to identify weaknesses within the local economy, suggest solutions, and consider financing options to remedy those weaknesses. The partnership's mission is to advocate for economic development that benefits Sanya's industrial, commercial, cultural, and residential sectors. The goal is to attract new businesses to Sanya, retain those already here, welcome new residents and visitors, and promote a vibrant and authentic mixed-use community with a focus on tourism.

# Conclusion

**SANYA HAS MORE LUXURY HOTEL ROOMS** than any other single location in China and rivals places like London and Las Vegas for the sheer number of five-star rooms. Sanya's growth residentially and commercially has been tremendous; whether or not such growth is sustainable remains to be seen. Over the past ten years, the tourism industry has grown at a tremendous rate, and the city of Sanya has struggled but generally has done a commendable job in managing this significant growth. This ULI panel has recommended a number of physical, organizational, and marketing initiatives that will help the city begin to address the challenges that come with this growth and that will help move the city toward being a truly world-class resort city. In particular, the panel believes that Sanya must improve its urban core, and it must reach out to a broader regional and international tourism market.

The panel's approach to providing these recommendations was organized around six key organizing principles:

- Protect;
- Enhance;
- Connect;
- Care;
- Promote; and
- Collaborate.

The recommendations range from installing smart information technologies for the city's transportation systems to redeveloping the Red Sand fishing village to improving residents' educational opportunities. The panel feels that a number of these recommendations are truly game changers that will fundamentally change how the city

is perceived and how efficiently it works. These recommendations include the following:

- Constructing a more walkable city;
- Providing a comprehensive, multimodal transport system;
- Creating a "South Beach-style" entertainment district on Sanya Bay;
- Providing better physical and social links between cultural areas, natural areas, and the hotels;
- Creating a Sanya National Park;
- Creating a World Ecological Center to rebrand Sanya as an environmental tourism location;
- Creating urban growth boundaries to concentrate infrastructure where it is needed most;
- Creating true multiuse/mixed-use neighborhoods;
- Upgrading the existing airport, rather than building a new airport; and
- Creating several organizational entities that can help Sanya efficiently manage its growth and promote the city.

All of the recommendations in this report are intended to provide the city with guidance to make it a world-class resort city. The Urban Land Institute looks forward to its next visit to assess the city's progress in that regard.

# About the Panel



## Harry Frampton III

*Panel Chair  
Avon, Colorado*

Frampton is past chairman of the Urban Land Institute and founding partner of East West Partners. A Clemson University graduate, he has spent more than 35 years in real estate development. He started his career with the Sea Pines Company on Hilton Head Island. In 1982 he became president and CEO of Vail Associates Inc., the owner/operator of Vail Mountain and Beaver Creek Resort in Colorado. In 1985 he started East West Partners, a resort development company based in Beaver Creek, Colorado. Notable real estate projects include multiple developments within Beaver Creek and the Vail Valley. Accomplishments also include the Riverfront Park development and Union Station Redevelopment in downtown Denver. East West Partners has received two ULI Awards for Excellence: Beaver Creek Village Center and the Riverfront Park Downtown Denver Development project. Frampton is a trustee of the Urban Land Institute.

He was active with the Young Presidents' Organization and served as Colorado chapter chairman. He is presently chairman of the board of the Vail Valley Foundation. He has been recognized as the Citizen of Year of Vail and Citizen of the Year of Beaver Creek, Colorado. In 2004 he was recognized as the outstanding real estate developer in Colorado by the University of Colorado, and in 2005 he received a similar award from the University of Denver.

Frampton was inducted into the Colorado Business Hall of Fame in February 2008, and in November of 2010 he was inducted into the Colorado Ski Museum Ski and Snowboard Hall of Fame. He is a member of the board of directors for the United States Ski & Snowboard Team

Foundation. Finally, Frampton served as chairman of the Clemson Foundation Board.

## Richard Albrecht

*Park City, Utah*



Albrecht is a developer and management professional with over 25 years of experience in the development and operation of successful luxury resort communities. His expertise is in creating viable development plans for resorts and communities that create long-term value by integrating top-quality development with first-class resort operations focused on personal service. He has led the successful execution of several complex projects from the conceptual stage through the design, construction, sales, and operations stages. Albrecht has extensive experience forming and operating clubs and homeowners associations, and property management programs.

As president, development, for Miraval Resort in Tucson, Arizona, Albrecht led the master planning for the renovation, expansion, and new residential development of this top-ranked destination spa. He also led the planning and created the economic model for the brand extension into several new resorts and wellness lifestyle communities. These properties incorporated extensive sustainable development practices, with a focus on creating healthy living environments for guests and residents.

As chief operating officer for Talisker Deer Valley, Utah, Albrecht led the development and successful launch of an enclave of lots at the top of Deer Valley Ski Area and managed the development and successful relaunch at Tuhaye, a golf and ski-oriented community in Park City, Utah. In this role, his leadership

and expertise in project execution was instrumental in turning around a faltering community development. He reorganized the management team, repositioned the project with a new marketing and sales program, and created a new membership program.

As chief operating officer with the Hualalai Resort in Hawaii, he led a team with responsibilities for an award-winning resort community that includes a Four Seasons Hotel, Jack Nicklaus and Tom Weiskopf golf courses, a spa, and several dining facilities. In this role, Albrecht led the management of the resort operations and real estate development. He led the creation of the second phase master plan and oversaw the development of a broad mix of single-family homes and lots, multifamily units, significant infrastructure projects, and expansion of the amenities.

Albrecht was director of development for the Lanai Company Inc., where he was responsible for the day-to-day operations of residential developments at Koele and Manele Bay. He also directed the sales and marketing program, created the membership program, and established and operated the property management services to its members.

He is a full member of the Urban Land Institute where he chairs the Recreational Development Council and has served as a speaker at the Institute's Golf Course Conferences. He has an MBA from the Anderson School at UCLA and a BA from the University of California at Berkeley.



### A. Neill Cameron Jr.

*Clemson, South Carolina*

In 1999 Cameron retired from global advertising and communications giant Ogilvy & Mather where he was a division president and member of the board of directors. He then joined a lifelong crusade to improve higher education and is currently Clemson University's vice president with primary responsibility for

interacting with external audiences of the university and brand building.

While in the marketing and advertising business, Cameron helped develop brand-building communications programs for a variety of clients, including American Express, Kodak, IBM, US Virgin Islands, Ritz Carlton Hotels, and Sara Lee. He has won numerous industry awards, including National EFFIEs, CLIOs, *Adweek* magazine's 1994 Agency of the Year, and the Ad Club's Silver Medal for 1995 Advertising Man of the Year.

He has been involved in several public and private sector boards, including the Organizing Committee for the 1996 Olympic Games, the 2012 PGA Tournament Host Committee, and chairman of the Chick-fil-A Bowl. He is founder and past chairman of Atlanta Children's Hospital CEO Clown Corp and helped raise funds for the restoration of the Statue of Liberty in New York City harbor.

Cameron is a frequent speaker nationally and internationally on subjects such as building lasting brands, creating big ideas, and effective communication.

He received his BS from Georgia State University, an MBA from Emory University, and a certificate in international management from the London School of Business and Finance.

### Greg Cory

*San Francisco, California*



Until 2009 Cory was senior vice president with Economics Research Associates (ERA). The ERA brand was absorbed by a publically traded engineering company in 2007, the name extinguished, and the historic consulting lines largely abandoned. To rekindle the unique culture that was embodied in ERA, Cory founded his own company, Land Use Economics LLC, headquartered in San Francisco. While at ERA, he served as head of the Resort Practice Group and was the corporate representative to the Caribbean Tourism Orga-

nization, the National Golf Foundation, and the National Ski Area Association.

Cory is also founder of the Land Use Guild International, a member-based consortium of seasoned, respected practitioners with similar backgrounds dedicated to sharing knowledge and resources, helping maintain standards, and providing peer review of each other's work as an additional service to clients. The guild represents the resources of four separate companies, a combined expertise of more than 130 years, and experience in over 50 international markets.

Cory has specialized in developmental economics throughout his career. While he has dealt with a broad cross section of land uses, he has specialized in tourism and resort development because of its potential impact on less-developed economies. He has accumulated over 30 years' experience in analyzing the demand for hotels, resorts, and recreation-oriented facilities; has studied more than 450 resorts in over 45 international markets in depth; and is a frequent lecturer on resort economics and tourism.

He also served as chairman of the Recreation Development Council of the Urban Land Institute and is a contributing author for two books on resort development published by that organization, specifically the *Resort Development Handbook* and *Developing Golf in Residential Communities*.

## Ray Vees Goh

*Hong Kong SAR, China*

Goh is director of AECOM's Tourism and Hospitality practice, heading their Hong Kong and Taipei teams.

Through his expertise in landscape architecture and planning, Goh has directed many world-class hotel and resort projects throughout Asia, including a number of projects in Hainan, China. He has also accumulated extensive experience in a wide spectrum of project types, including public buildings,



commercial, residential, and mixed-use developments. His leadership in conceptualization, detailed design, and the final execution stages has been instrumental in ensuring the projects' successful actualizations.

Goh holds a master's in architecture and a BA (architectural studies) from the National University of Singapore. He was part of the National University of Singapore/Carnegie Mellon Exchange Program from 1999 to 2000.

## In-Keun Lee

*Seoul, Korea*



Lee graduated from Seoul National University with a BSc in civil engineering in 1979. After graduation he entered the public service and worked for the Seoul Metropolitan Government. During his 32 years in the government, he served at various departments and offices dealing with urban planning and infrastructure-related projects for the capital. Major positions he held include director for subway planning and design, director for engineering review, director for urban planning, and director-general for Cheong Gye Cheon Restoration Project.

He worked as a director-general for the Urban Planning Bureau of Seoul from January 2007 to December 2008. Then he was promoted to assistant mayor and was in charge of the metropolitan area's infrastructure until the end of 2011.

He retired from the public service and has joined the University of Seoul as a visiting professor since February 2012.

In 1985 Lee won a government fellowship for overseas study and carried out engineering research at City University in London, which awarded him a PhD in 1991. He is a fellow of the Institution of Civil Engineers, UK, and a member of National Academy of Engineering of Korea.

## Tom Murphy

*Washington, D.C.*



Murphy is a senior resident fellow, ULI/Klingbeil Family Chair for urban development. Formerly mayor of Pittsburgh, Murphy joins six other ULI senior resident fellows who specialize in public policy, retail/urban entertainment, transportation/infrastructure, housing, real estate finance, and environmental issues. His extensive experience in urban revitalization—what drives investment, what ensures long-lasting commitment—is a key addition to the senior resident fellows' areas of expertise.

Since January 2006, Murphy has served as ULI's Gulf Coast liaison, helping coordinate with the leadership of New Orleans and the public to advance the implementation of rebuilding recommendations made by ULI's Advisory Services panel. In addition, he worked with the Louisiana state leadership, as well as with leadership in hurricane-impacted areas in Mississippi, Alabama, and Florida, to identify areas appropriate for ULI involvement.

Prior to his service as the ULI Gulf Coast liaison, Murphy served three terms as the mayor of Pittsburgh, from January 1994 through December 2005. During that time, he initiated a public/private partnership strategy that leveraged more than \$4.5 billion in economic development in Pittsburgh. Murphy led efforts to secure and oversee \$1 billion in funding for the development of two professional sports facilities and a new convention center that is the largest certified green building in the United States. He developed strategic partnerships to transform more than 1,000 acres of blighted, abandoned industrial properties into new commercial, residential, retail, and public uses, and he oversaw the development of more than 25 miles of new riverfront trails and urban green space.

From 1979 through 1993, Murphy served eight terms in the Pennsylvania State General Assembly House of Representatives. He focused legislative activities on changing Western Pennsylvania's economy from

industrial to entrepreneurial and authored legislation requiring the Commonwealth of Pennsylvania pension fund to invest in venture capital. In addition, he authored legislation created the Ben Franklin Technology Partnership, which is dedicated to advancing Pennsylvania's focus on technology in the economy, and he authored legislation to encourage industrial land reuse and to transform abandoned rail rights-of-way into trails and green space.

Murphy served in the Peace Corps in Paraguay from 1970 through 1972. He is a 1993 graduate of the New Mayors Program offered by Harvard University's Kennedy School of Government. He holds an MS in urban studies from Hunter College and a BS in biology and chemistry from John Carroll University.

He is an honorary member of the American Society of Landscape Architects, a board member of the Pennsylvania League of Cities and Municipalities, and a board member of the National Rails to Trails Conservancy. He received the 2002 Outstanding Achievement of City Livability Award from the U.S. Conference of Mayors and was selected as the 2001 Pittsburgh Man of the Year Award by Vectors Pittsburgh.

## Karmi Palafox

*Makati City, Philippines*



An environmental planner and urban designer, Palafox is the senior urban planner and partner at Palafox Associates, one of the largest architectural firms in the world.

She leads a complement of architects, engineers, designers, planners, and administrative staff. She is currently involved in the planning and design of communities, resorts, commercial areas, parks, and other mixed-use developments all over the Philippines and in other countries. As the head of urban planning and design, she leads the land use and zoning plans of cities, streetscape designs, master plans, tourism development plans, and

place-making projects of islands, rural communities and big cities, provinces, and regions.

Palafox earned her master's degree in industrial economics at the University of Asia and the Pacific and her master's of science degree in urban planning with specialization in urban design at Oxford Brookes University. She has also completed certificate courses in strategic management and innovation from Far Eastern University, and in entrepreneurship from Said Business School, University of Oxford. She became a registered environmental planner in 2008, placing sixth in the national board exams. She is also a chartered planner of the Royal Town Planning Institute in the United Kingdom.

Her nine years' experience in urban, regional, and environmental planning are filled with collaborations among the country's top real estate developers, landowners, and leaders in government regarding best and most sustainable use of land, best practices in development, environmental policies, and creating places and properties of value. Every project adheres to the green urbanism practice that Palafox Associates strongly upholds, which has set it apart from other firms.

Some of the firm's projects that she led include Eco-Tourism Development Plan for Panglao Island; Metro Ilocos Norte Priority Areas Tourism Development (Paoay Lake, Kapurpuraoan White Rock, Sand Dunes, Mangroves, and Cape Bojeador); Boracay Integrated Tourism Master Plan for Boracay Island, Carabao Island, and the Municipalities of Buruanga, Malay, and Nabas; and Master Plan of a Seaside Community in Sogod, Cebu.

Apart from her work at Palafox, she is an active member of the Philippine Institute of Environmental Planners and served as director in 2011–2012. She is a trustee of a condominium corporation and is part of the Urban Land Institute's Advisory Council in the Philippines. She is one of the founding members of a Philippine chapter of the International Federation of Business and Professional Women.

## Ken Rhee

*Shanghai, China*



Rhee brings a great deal of experience and knowledge in real estate investment in mainland China. He maintains an extensive network among the owners and top executives of mainland Chinese developers and local and foreign investors.

Before founding Huhan Advisory in November 2011, Rhee worked for more than five years as vice president and executive director at Morgan Stanley, playing leading roles in successful IPO and bond offerings by leading Chinese developers. He also originated a large number of successful investments in pre-IPO stage developers, hard assets as well as development projects.

Prior to joining Morgan Stanley, Rhee served as vice president of investment operation at Shanghai Dragon Investment, a leading investment arm of the Shanghai municipal government, where he led a number of investments, including over a \$100 million nonperforming-loan portfolio from China Construction Bank and a \$90 million acquisition of a distressed office building in Shanghai.

Rhee also serves as ULI Chief Representative, Mainland China. He has been leading ULI's efforts in membership outreach and event and content creation, including the ULI Asia Pacific Summit in Beijing in May 2012.

## Robert Wilson

*Melbourne, Australia*



Wilson is a cofounder and managing director of 3R Hospitality, a pan-Asian advisory firm based in Melbourne, Australia, since April 2010. 3R Hospitality provides business development advice to hospitality management companies, hotel owners, and institutional investors. Previously he was president of Panorama Hospitality and an executive director of Morgan Stanley Capital, based in Tokyo.

As a founding member and leader of the hotel asset management group of Morgan Stanley Properties based in Tokyo, he oversaw the growth of the group and was responsible for its transition into a separate, dedicated entity, Panorama Hospitality, and served as president of the company from its incorporation. Under his leadership, Panorama asset managed and operated a portfolio of 49 hotels in Asia and Europe valued at \$5.5 billion. The portfolio largely comprised upscale hotels that operated under InterContinental, Hyatt, Hilton, Sheraton, Westin, Marriott, Mandarin Oriental, and Crowne Plaza brands. During 2008 and 2009, he ran the business from Morgan Stanley's European headquarters in London.

Before his Panorama role, Wilson was vice president—Asia Pacific of the Ramada International division of Marriott International during 1999–2003.

He was in charge of Australia and New Zealand for Bass Hotels and Resorts (now IHG) during 1998, based in Sydney. Between 1994 and 1997 he was president—Japan, Korea, and Micronesia, based in Tokyo, for Bass Hotels and Resorts.

From 1989 to 1993, he was vice president sales and marketing—Asia Pacific for Holiday Inn Worldwide, based in Hong Kong, and served as a member of the company's global marketing steering committee. Prior to this role he held a variety of corporate and hotel-level positions in Australia and Hong Kong.

Wilson serves on the advisory boards of *Hoteres*, Japan's leading hotel trade magazine, and the Shanghai-based China Boutique Hotel Group. He was also on the advisory board of Temple University's School of Tourism and Hospitality, Tokyo campus.





Sanya,  
China

中国·三亚

Becoming a World-Class Resort City  
成为世界一流的旅游度假城市

August 11–16, 2013  
2013年8月11-16日

An Advisory Services Panel Report  
咨询服务顾问小组报告

# About the Urban Land Institute

## 关于城市土地学会

城市土地学会的宗旨是在世界范围内负责任地使用土地以及创造和维持繁荣社区中发挥领导作用。城市土地学会承诺

- 汇聚来自房地产和土地使用政策等领域的精英，交流最佳实践，为社区需求提供服务；
- 通过指导、对话和解决问题来促进城市土地学会会员之间及与外部的协作；
- 探索城市化、保护、再生、土地利用、资本形成和可持续发展等方面的问题；
- 推进尊重建筑与自然环境独特性的土地使用政策和设计实践；
- 通过教育、应用研究、出版和电子媒体分享相关知识；和
- 维持一种本地实践多样化全球网络，不断努力，致力于应对当前和未来挑战的咨询工作。

学会创建于1936年，如今在世界各地已拥有三万多名会员，来自土地使用和发展的各个领域。城市土地学会在很大程度上依赖会员的经验。正是通过会员的参与和信息资源，城市土地学会才得以开发实践建立起优良标准。长期以来，学会一直被公认为世界上最受尊重的机构之一，并且是城市规划、成长和开发方面被广为引用的客观信息来源。

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# About ULI Advisory Services

## 关于城市土地学会咨询服务

城市土地学会咨询服务计划的目标是运用房地产领域最优秀的专业技术，对复杂的土地使用规划和开发项目、计划和政策施加影响。自1947年以来，该计划已经聚集了城市土地学会400多个会员小组，帮助主办方找到市区重建、土地管理战略，发展潜力评估、成长管理、社区复兴、建成区再开发、军事基地重新使用、提供低成本且负担得起的住房和资产管理策略等问题创造性的实用解决方案。各种各样的公共、私人和非营利组织已经签约了城市土地学会的咨询服务。

每个顾问小组由自愿抽出时间为城市土地学会工作的资深专家组成，之所以选择他们是由于他们掌握了有关顾问小组主题的专业知识，并对他们进行了筛选，以确保客观性。城市土地学会的跨学科顾问小组从整体的角度来看发展问题。每个顾问小组由一位曾拥有顾问小组经验，且受人尊敬的城市土地学会会员主持。

为期五天的顾问小组任务日程很紧。其中：进行深入介绍一天，包括参观现场，并与主办方代表会晤；通常与50到75名主要社区代表进行长达一小时的访谈一天；制定与汇总建议两天。在顾问小组得出结论以前要进行彻夜讨论。在现场的最后一天，顾问小组向主办方口头陈述其研究成果和总结。编写并公布书面报告。

由于主办单位负责顾问小组到访前的主要准备工作，包括向每个会员发送大量的简报材料，安排顾问小组会见当地被研究项目的关键社区成员和利益相关方，所以城市土地学会五天顾问小组工作的参与者能够对主办方的问题做出准确的评估，并在这么有限的时间内提出建议。

该计划的一个主要优势是城市土地学会利用其会员专业知识和技能的独特能力，这些会员包括土地开发商和业主、政府官员、学者、金融机构的代表，等等。在履行城市土地学会宗旨的过程中，制定这个咨询服务顾问小组报告旨在提供客观的意见，促进未来负责任地使用土地以及改善环境。

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# Acknowledgments

## 鸣谢

首先，顾问小组想感谢三亚市市委书记姜斯宪先生。若没有姜书记的参与和支持，本次顾问小组不可能获得成功。

顾问小组想感谢三亚市常务副市长吴岩峻先生。我们非常感激吴市长对顾问小组的热情接待。

顾问小组向三亚市城市规划局表示感谢。他们在顾问小组访问期间投入的时间和精力，包括安排参观项目、访谈以及演讲等，极大地帮助了顾问小组更好地了解三亚面临的问题。

我们想向海南经济发展与环境保护基金会（FEED），海南省首任常务副省长、海南经济发展与环境保护基金会指导委员会会长鲍克明先生，以及海南经济发展与环境保护基金会会长卫飒英女士表示感谢。鲍先生关于三亚与海南岛的个人观点对顾问小组起到了非常大的帮助。卫女士是第一、第二次城市土地学会三亚专家顾问团的发起人与协调人，若没有卫女士，本次顾问小组不可能成行。

最后，顾问小组想感谢来自公共部门与私人部门的50多位专业人士，他们从百忙之中抽出时间参与了顾问小组的访谈。这些访谈使得顾问小组能从很多不同的视角对本次任务进行探索，并提供了真实的反馈，体现了顾问小组咨询的特点。

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# ULI Panel and Project Staff

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# Introduction and the Panel's Assignment

## 简介和顾问小组的工作任务

三亚，一个有着685,000人口的城市，位于中华人民共和国海南岛南岸。在三亚市政府的要求下，城市土地学会在2000年9月召集了一个咨询服务顾问小组。题为《成为世界一流旅游度假胜地的策略》的顾问小组报告包括了一系列帮助三亚实现这一目标的战略性建议。

2013年春，三亚市政府要求城市土地学会继续跟进2000年顾问小组的后续工作，并解决一系列关于三亚城市未来发展的其他问题。豪华酒店和度假村业务的显著增加带动了相关领域的蓬勃发展。三亚游客数量的（大约1100万人次）猛增可能主要归因于中国公民购买力的显著增加，并且与中国国民整体生活水平的大幅提升相一致。作为中国唯一的热带海岛，三亚兴建了许多豪华酒店，其中包括许多位于亚龙湾和海棠湾的豪华酒店。

在这份报告中，2013年咨询服务顾问小组建议，三亚要提高其作为一个国际旅游目的地的地位，必须解决一系列问题。顾问小组认为，三亚必须解决两个最主要的问题：

- 必须改善三亚的城市核心，提供更广泛的游客体验。
- 三亚必须把重点放在进一步扩大区域旅游方面，这就需要把重点放在距离三亚四到五个小时车程范围内的主要城市上。

此外，三亚必须了解大型度假城市的基本原则。这些基本原则是建立一个实现目标框架的关键。顾问小组在本报告第一部分中提供了对这些基本原则的观察意见。顾问小组还根据观察到的优势和挑战概述了三亚的市场健康问题。

最后，顾问小组把重点放在六项原则上，围绕这些原则可以从物质、组织和营销方面着手改善。这些原则是

- 保护；
- 加强；
- 连接；
- 关怀；
- 改进；和
- 协作。

本报告的其余部分详细阐述了这些主题。



# Fundamentals for World-Class Resort Cities

## 世界一流旅游度假城市的基本原则

世界一流的旅游度假城市不是偶然使然。它们通常首先是从较大的世界一流城市开始。香港、伦敦、迈阿密、纽约、巴黎、里约热内卢、圣地亚哥、新加坡和威尼斯都是世界一流的旅游度假城市。规模较小的城市，戛纳、檀香山、基韦斯特、斯旺西、韦尔和惠灵顿也享有同样的盛誉。这些城市以及其他许多城市的共同点是具有以下基本特征，这些基本特征使它们能够吸引游客和投资。

此外，了解旅游度假业务有多少改变也很重要，特别是因为它涉及到互联网。为了迎合挑剔的旅行者，网站在数量、细节和品质方面都呈现出大幅改善，在全球的每一个角落都能够访问、下载、提出批评和进行比较，这在几年前是无法想象的。三亚必须认识到这一事实，而且做出相应的回应。

### Safe and Clean 安全、清洁

所有世界一流的旅游度假城市都希望自己成为一个既整洁又安全的城市。这就需要承诺不仅要确保游客的安全，同时也要确保居民的安全。除了增加安保人员（针对那些实际存在或预计会存在问题的地区）、清洁和安全计划——包括人行道清扫、垃圾和杂物清除，人行道和小路的电力清洗、涂鸦系统化清除、绿化和树木维护、除草和应急服务等日常措施。清洁和安全计划还可以扩大到礼宾式服务、信息亭、以及增强照明。

三亚许多地方已经整合了其中的一些方面。然而，这一承诺必须扩大到三亚没有提供此类服务的区域。系统地审视游客如何、在哪里以及

何时游览市区，将有助于为某个地理区域量身定制一个清理和安全计划。

### Ease of Access 交通便利

这个概念涵盖从机场、铁路或公路首次进入城市 and 往返于度假海滩及豪华酒店和城市核心之间的内部连通性。据顾问小组的一项观察，从酒店前往城市核心的交通方式非常有限，除了乘坐非常昂贵的出租车以外，无法乘坐公共交通工具游览城市。

### Public/Private Partnerships 公营/私营合作关系

所有成功的世界一流旅游度假城市都在利用公营/私营合作关系，这些能够贯穿从合作式交通服务到全面节日赞助、联合营销和战略规划的整个范围。据该顾问小组的观察，目前，豪华酒店和市政府之间几乎没有合作。在许多双赢的问题上，酒店应该乐于与城市建立合作伙伴关系。

### Personality 个性

世界一流的旅游度假城市都具有鲜明的、特有的个性。这种个性可以侧重于某个特定的属性，但更可能是一组属性，包括来自独特建筑、历史资源和食物、体育和表演艺术等文化特质的一切事物。个性最终造就并成为—一个地区的品牌。

## Brand Clarity

### 品牌清晰度

近年来，通过新媒体（也就是互联网资源），精明的国际旅客有了大量的选择，旅行的限制减少了，财富增加了，而且有了更多的闲暇时间。成功的旅游目的地总在某些方面区别于类似的目的地。三亚似乎并不具备使其能够从南亚类似的旅游景点中脱颖而出品牌清晰度。在营销商业产品的世界里，一个混乱的品牌是致命的，它号召着采取行动。三亚必须奋起迎接提高品牌清晰度的挑战。

## Respect for Nature

### 尊重自然

统计数据显示，注重保护和改善自然风光的旅游目的地的游客回访率最高。旅游网站领跑者之一TripAdvisor通过发布旅游评论及意见，协助客户收集旅游信息，对游客回访的原因进行定期确认，结论是安全且管理完善的自然景观、保护景域和栖息地是游客回访的热点。

## Diverse Activities and Entertainment

### 娱乐活动多样性

世界一流的度假胜地往往提供各色活动借以丰富游客的旅行体验，这一事实表明，须为游客提供种类丰富的活动（餐饮、体育活动、游览、购物）。活动须为不同年龄层、不同运动技能以及在文化、历史和表演方面追求和兴趣不同的人量身打造，以增强旅游质量和游客体验。在每一个日常活动的区域，比如购物区，都应该提供多种选择，比如奢侈品消费、平价消费，和当地民间工艺和文化品消费。体育运动也应如此，需提供不同运动强度的活动，包括剧烈运动、适度运动和休闲型的运动（例如，山地自行车、自行车骑行游以及徒步活动）。

## Focus on Food

### 注重饮食

多数成功的世界一流度假胜地已经开始注重美食，以此作为吸引游客的一大亮点。美食游或餐饮旅游意味着享受该国、该地区或该区域的特色食品，现在品尝美食被认为是旅游体验的一个重要组成部分。

## Smart Growth

### 智慧型发展

几乎所有旅游业蓬勃发展的度假胜地都在疲于应对发展所带来的影响。那些充分懂得智慧型发展的地方都为智慧型发展战略对旅游业的影响做了最健全的准备。智慧型发展从区域短期内可持续方面进行考虑，更加重视长期发展。其目标是打造当地社区和场所的独特性；扩大交通范围、增加就业和住房选择；公平分配发展的成本和利益；加强自然和文化资源的保护；促进公众健康。扩大边界是很多城市用来实现增长的一种方式。扩大城市边界是把基础设施集中在那些最有能力适应发展的地方。

## Striking a Balance between Tourists and Residents

### 实现游客和居民之间的平衡

和前面提到的每一个基本原则一样，成功的世界一流度假胜地能够了解并且激发居民活力，利用城市化发展辅助旅游业。牺牲市民利益，仅把重点放在游客上势必会导致衰退。大多数世界一流度假胜地的领导者都把当地居民和工作人员看做社区的一部分。新的发展、基础设施的改善、服务范围的扩大必须做到在旅游和当地居民之间取得平衡。

# Market Health

## 市场健康

了解影响被研究地区的社会经济发展趋势，可以帮助规划者、政府官员和私营企业找出未来土地使用的潜力和压力。城市土地学会认为，成功的城市规划和土地使用政策是一种能够引发具有吸引力的、广泛的和持续的私有市场反应的公共行动。因此，咨询服务顾问小组在市场可能性方面通常有自己的基本原则。本节概述和评估了积极和消极的市场组成部分。

### Strengths

#### 优势

三亚展现出的许多优势有助于它与南亚地区其它旅游城市竞争，尽管这些优势在2000年已经存在，但顾问小组观察到这次较上次已经有了很大的改善，并且在过去13年中增加了一些新的优势。

#### Huge Nearby Market

巨大的周边市场

三亚地理位置极佳，接近中国大陆。中国有十四亿人口，潜在的游客数量巨大。对于中国南方的旅行者而言，从家里到三亚度假胜地只需要乘坐两到三个小时飞机。在考虑三亚，海南省和私营领域的未来规划和政策制定时应该将这一最重要的信息铭记在心。

#### Young and Affluent Market

年轻而富裕的市场

中国人的平均年龄为35岁，过去的十年中民众的可支配收入显著增加。游客的态度和偏好在很大程度上受到年龄和收入的影响。一般来说，年轻游客对行程延误、海滩和客房条件、以及饮食和消费选择多样化等重要元素的要求更为宽松。市场正在走向成熟，但目前对于三亚来说这些条件非常乐观。此外，中国大陆游客日

渐鼓胀的钱包势必通过延长停留时间和增加消费提高旅游目的地的利润空间。

#### Minimum Competition within China

在中国内部竞争最小

中国的热带旅游资源极少。海南岛——尤其是三亚——是唯一具备容纳大量游客的酒店住宿条件，并且让游客真正体验热带海滩的地方。假日里，如中国农历新年（春节）和中秋节等，越来越多的游客来到三亚观光，而且这种趋势很可能会持续并且扩大。

#### Natural Resources

自然资源

三亚有大量海滩、河流和热带森林，游客们可以体验丰富的活动。例如，亚龙湾和海棠湾分别拥有6英里和15英里的不间断沙滩，距离海岸15分钟车程的亚龙湾热带天堂森林公园是一个非常特别的地方，最近刚刚开放，举办各种各样的活动，如自行车骑行、徒步旅行、观鸟、滑索等活动。

#### Commitment to Tourism

致力于旅游业

顾问小组感受到了市政府官员致力于推动旅游业发展。旅游业是该城市税收的主要来源，且每个接受顾问小组访谈的城市部门都表示愿意辅助旅游业。同样地，各大酒店运营商都致力于为顾客提供优质的服务。这一承诺将有助于三亚不断探索，成为中国内地及南亚游客的首选旅游地。

#### Healthy Core Industries

健康的核心产业

顾问小组观察到，农业和渔业仍然是三亚整体经济中非常重要的组成部分，因此一定程度的经济多样性显得非常重要。顾问小组认为，这

种多样性是一个非常积极的迹象，可以让三亚经受住本地、区域或国际经济衰退的风雨，从而提供一个运作良好的城市所必需的活动。

### Significant Capital

重要的资本

中国目前有充足的资金，可以进行公共设施、基础设施和住房建设。其他私人资本一般涌向花费公有资本的地方。市和省政府官员应继续利用这些资本资源，继续使用私人投资来建设公共设施。

### Affordable Labor Force

廉价劳动力

无论在私营企业还是公共部门，中国仍然有充足的廉价劳动力可用，从而确保持续发展。尽管顾问小组意识到随着时间的推移，廉价劳动力，特别是酒店业和建造业的劳动力可能不会继续增长，甚至会有所减少，但在可预见的将来，这一经济现象仍具有积极意义。

### Increasing University Population

持续增加大学人数

大学人数的增加对任何城市而言都是一种好的迹象。大学对经济的影响不可否认，他们雇用数千人，他们开发并且贡献社区，他们引进新技术，其中一些带来新的商机，他们吸引世界各地的人才，他们甚至帮忙启动和培育新业务，这是新的就业机会和经济增长的直接来源。他们为城市注入活力，提高了对餐馆和饮食业的需求，并吸引长辈们前来探望。

### Close-in Airport Location

机场的位置接近市中心

三亚机场距离市中心仅有几分钟的车程，到豪华度假酒店和海滩驱车仅需约半小时。很少有城市离机场那么近，这对于那些休假时间有限的游客将会是一个极大的诱惑。

## Challenges 挑战

顾问小组注意到许多不足之处，同样地，虽然其中的一些问题在2000年就存在，但是旅游业的发展和成熟需要三亚充分认识到这些问题，并尝试最小化或者抵消这些问题带来的负面影响。

### Reputation for Poor Service and Price Gouging

服务不佳和哄抬物价的名声

顾问小组从各种渠道得知，三亚有着服务不佳和价格欺诈的名声。一位受访者指出，当地市中心的餐馆有三个菜单：一个给本地人，一个给中国大陆的游客，一个给外国游客。这种形象应该被礼貌、友好、公平旅游胜地的形象取代。

### Lack of Clear Vision for the Future

对未来缺乏明确的愿景

虽然这个城市似乎对技术性规划文件非常谨慎，但是对未来的基本愿景似乎是混乱和停滞不前的。城市（旅游区以及老城区）的未来愿景应该是公开、透明和可理解的。它应该深入到各种各样的利益相关者中，如市民、企业主、投资人、酒店经营者和政府官员。

### Brand Confusion

品牌混乱

从外面看，大量三亚人似乎生活在：老城区、亚龙湾、海棠湾、乡村农业区，以及结合部。三亚的品牌应该是整个城市的一个统一愿景。

### Lack of Focus on Human Experience

对人性化体验的关注度不够

三亚当地的文化和个性似乎退居次要地位。大多数成功的国际旅游地点都非常注重自己独特的地理位置、气候及人文等。

## **Ghost Projects**

### 空置项目

正如之前2000年顾问小组指出的那样，全市仍然存在大量空置的办公室、住宅和旅游项目。这些项目给第一次到访的游客和投资商留下了不好的印象。

## **Airport Capacity and Service Levels**

### 机场运营能力和服务水平

虽然机场的跑道很长，几乎可以应付任何类型的商业飞机活动，但空域管理似乎限制了空运业务的数量。此外，航站楼需要升级到世界一流机场的水平。

## **Lack of Comprehensive Transportation System**

### 缺乏综合性交通系统

从旅游酒店进出闹市区，进入城市中心及市中心外围都不够方便。在区域交通系统方面已经有了明显改善，如连接海口的高速铁路，但本地仍然缺乏便捷的交通网络。

## **Lack of Focused and Consistent Internet and Social Media Marketing**

### 缺乏集中和一贯的互联网和社交媒体营销

正如前面提到的，网络营销和社交媒体网站对社会的影响稳中有升，哪怕是与五年前相比，这个世界已是今非昔比了。顾问小组认为，三亚的互联网和社交媒体营销似乎不够充分，举办一个注重互联网和社会媒体营销的大型活动将大有裨益。

## **Inferior Construction Quality and Costly Ongoing Maintenance**

### 建筑质量差和昂贵的日常维护

尽管大量私有和公共基础设施仍在继续建设，但顾问小组认为，施工质量一直不尽如人意，这意味着将来的维护及维护滞后将会是很大的问题。

## **Employee Turnover**

### 员工流动

员工流动始终是度假社区面临的一个问题；但是，利益相关者需要在其战略规划中把这种动

态变化考虑进去。此外，城市还需要考虑酒店和度假村员工在住房、教育和其它服务方面的需求。

## **Low Level of Environmental Commitment**

### 环保承诺水平太低

虽然城市中的大部分地方，尤其是旅游区，似乎是干净的，但是新的开发及其对环境的潜在影响仍存在一些担忧。如果三亚的环境哪怕是被认为受到了影响，那么这个城市热带天堂的声誉就可能会受损。

## **Lack of Iconic Gathering Place**

### 缺乏标志性的聚会场所

人们迫切需要标志性场所来进行聚会和与他人会面。顾问小组在三亚只呆了一个星期，但聚会场所和标志性目的地似乎只有酒店内部。虽然这座城市的某些主要商业街道具有这些概念的一部分特征，但酒店的工作人员没有建议我们前往这些位于城里的场所，也没有说明方位。

## **Financial Pressures on Hotels**

### 酒店的财务压力

不管是当地政府还是省政府要求的客房价格都已经影响到酒店的利润空间，如果继续对经营者强加要求，有可能对酒店维护和客人服务造成影响。

## **Education**

### 教育

顾问小组了解到三亚的教育系统有待改进。三亚应努力建立世界一流的小学、中学和高等教育机构。这将有助于城市经济多元化，降低旅游经济不景气和季节性旅游带来的不利影响。

这些挑战不仅需要城市采取行动，也需要三亚社区各利益相关方采取行动。所有这些挑战分别在以下各节的组织原则中解决。

# Organizing Principles—Protect

## 组织原则—保护

三亚在过去15年中的增长速度和发展速度确实令人印象深刻。然而，由于对环境和自然资源的潜在影响，延续这一快速增长也开始令人担忧。三亚必须为未来保护其宝贵的资源。世界一流的旅游目的地都知道其长期成功取决于自然环境的质量以及当地的独特性。保护让她们与众不同的资源是世界一流旅游目的地的首要任务。这些资源包括以下内容：

■ **水：**海洋的质量对于海滨度假城市以及捕鱼业的健康发展至关重要。然而，据简报报道，城市污水被排入海洋，大量垃圾从水面漂浮至海滩上，高尔夫球场的开发很不规范，致使化肥和化学品污染了河口，造成藻类大量繁殖，并会对珊瑚礁造成长期破坏。在海滩上行驶的全地形车是一个安全隐患，并对环境有着很大的负面影响。

■ **空气：**三亚蔚蓝的天空和清新的空气是吸引中国大陆游客的巨大的优势。然而，汽车数量的迅速增加——每年3万辆新的汽车和摩托车——将对空气质量造成不利的影响，并造成很大的交通问题，影响游客的观光体验。

■ **土地：**持续的城市扩张会消耗重要的开放空间和美景。

■ **遗产：**捕鱼传统和土著人口是三亚历史的重要方面，必须得到保护，不受发展的侵扰。渔村等文物资源的破坏和原住民总迁移使这个社区失去了其独特性。

要成为一个世界一流的旅游目的地，三亚对数量和质量必须一视同仁，给以同等的重视。老子说，“道恒无为，而无不为。”经验丰富和资金雄厚的开发商们要肩负更多的责任，为优秀项目设立高标准，以便他人效法。大型专业开发商应该与政府一起建立高标准，这样所有的项目开发都

### Building Healthy Places Initiative

#### 《建设健康场所倡议》

在世界各地，社区居民面临来自建筑环境的紧迫健康挑战。多年以来，城市土地学会及其成员在把人类健康与发展建立起联系的讨论和项目一直表现活跃，我们知道，健康是繁荣社区的一个核心组成部分。

城市土地学会《建设健康场所倡议》将与一个多元化计划（包括研究和出版物、集会和咨询活动）合作，在此基础上充分利用该学会的全球网络的力量来以改善人们和社区健康的方式来开发项目和场所。

为此，城市土地学会已经制作了《建设健康场所的十项原则》，其中汲取了2013年春季城市土地学会三次咨询服务顾问小组的经验教训，采纳了汇聚不同领域专家的研讨会的讨论成果。该出版物制定了用于开创新健康社区新方法的十项重要原则，并且，《交集：健康与建筑环境》探讨全球健康发展趋势，并把这些趋势与目前的建筑环境状况联系起来。它着眼于我们的健康状况与建筑和社区的功能性之间的关系。

欲了解更多信息，请访问：<http://www.uli.org/research/centers-initiatives/building-healthy-places-initiative/>

会以负责任的方式进行。为了保持经济长期健康发展，政府和企业领导人必须优先保护水质、空气、开放空间，以及该地区的文化遗产。

现在正是三亚在负责任且全面考虑型开发和为后代留下宝贵遗产方面成为世界领跑者的机会。一个健康的经济需要一个健康的环境。此外，三亚要努力让每一个新的开发项目符合城市土地学会的《建设健康场所倡议》的要求。

顾问小组向三亚领导建议了三大措施，用以保护这些重要自然资源，它们将会激发游客和当地居民的热情。

## Establish an Urban Growth Boundary 建立城市增长边界

为防止扩张，保护开放空间，并防止重要耕地流失，三亚应考虑设立城市增长边界。城市增长边界是一套与地理边界（地图）配合使用的原则和政策，规定边界内区域用于高度密集的城市开发，边界外区域用于低度密集的开发。这种政策将使城市有效、有计划地妥善协调学校、道路和公共设施等资本改进。

此外，城市增长边界将使城市可以保留多样化的开发类型，并促进地方特色的发展。不是所有城市开发都应该是高度密集和大规模的：城市应该在关键地点保留小规模社区。

## Establish the Sanya World Center for Ecology and Environmental Learning 建立三亚世界生态与环境学习中心

该中心应与一所名牌大学合作成立，并且能够成为研究、环境保护和资源节约领域公认的世界领先机构。顾问小组已经为该中心起名为三亚世界生态与环境学习中心，而且将确保在三亚实施自然资源保护的最佳实践。该中心应该让成千上万来自中国各地和世界各地的游客受到启发，接受一种可持续发展的生活方式，

并了解自己的角色以及与我们周围世界的连接点。该中心应围绕以下几个目标。

### Education

#### 教育

该中心应该是一个这样的地方，游客、本地人、开发商和政府职员可以在这里学习和分享最佳实践并且为全中国在如下领域树立一个榜样：水质：海洋、沙滩、渔业；空气质量：蔚蓝的天空和清新的空气；土壤质量：生成优质食品的优质农业。

### Setting Standards

#### 设立标准

该中心应与政府和企业合作，制定明确的规章制度，允许和鼓励在适当区域开发建设，但这种开发要达到保护自然资源的最高标准，这样才会造福后代。

### Monitoring and Resource Mapping

#### 监测和资源映射

该中心可以负责监测现有条件，并确保资源质量得以维持和提高。该中心应监测许可情况、规定透明和明确的要求，只要开发商和行业达到严格的质量标准，就可以简化许可发放程序。

## Create a Hainan National Park 打造一个海南国家公园

世界各地富有远见的领导都预留大片的土地来保护重要的领域，留给后代。省政府和市政府都应考虑建立一个世界一流的国家公园，吸引游客。公园应设在环绕保亭和中央山区的地方。

这个公园的一些组成部分已经建立，如呀诺达雨林文化旅游区、黎寨和苗寨、以及亚龙湾热带天堂森林公园。顾问小组感觉目前这些还是独立的实体，每个部分都需要从营销和管理的角度相互联系，使他们可以作为一个地点和单一的产品呈现。从国际社会的角度来看，一个海南省国家公园可能会带来巨大的改变。

# Organizing Principles—Enhance

## 组织原则—增强

三亚要成为一个世界一流的旅游城市，必须充分利用其现有的资源和优势。顾问小组鼓励三亚通过改善现有的设施和颂扬当地的艺术、文化和美食打造一个美好的旅游胜地。就策划而言，顾问小组把重点集中在增强三个主要领域：城市核心、自然区和酒店/游客区——每个领域都有具体策略。

### Urban Core

#### 城市核心

城市由它的城市核心定义。如前所述，三亚市中心需要注重并且承诺改善其基础设施、城市设计和规划，使其对国内外游客更具吸引力。一种可能会有用的方法是，确定城市核心范围内可以吸引国际游客的大量特定区域。虽然目前大量举措和项目正处于规划阶段，或正在城市核心中进行，但顾问小组还是建议考虑以下事项。

#### Tree-Planting Program

##### 植树计划

在城市核心外面，三亚得天独厚，有着丰富的自然植被和树木；但是，顾问小组成员观察到，核心内部明显缺乏树荫和观赏树木。考虑到三亚的快速城市化，可以理解为什么树木会被遗忘。然而，世界各地成功的度假地点把树木作为有别于其他附近或类似竞争地点的重要组织特征。

顾问小组建议开展一次植树运动，目标是在未来五到十年种植一百万棵新树。这些树应该既能遮荫又具观赏性，但重点是遮荫，以抵抗阳光，这样的举措也许吸引更多游客在淡季来三亚市中心体验游览。

#### Sanya Bay Road Enhancements

##### 三亚湾路改进

顾问小组认为，三亚湾路可以是一个新的娱乐中心区。关于利用现有海岸线公园系统、现有的道路系统，以及毗邻公路（特别是西部）大片未充分利用或空置的土地，顾问小组建议了一个城市设计和开发计划来提供满足游客需求的商店和餐馆。顾问小组看到了三亚湾路与迈阿密海滩海洋大道在功能性上具有相同的潜力。顾问小组认为，“海洋大道”的方法并不需要进行大规模的改变。它可以逐步完成，一次开发几个街区。然而，海洋大道的娱乐区并不是有机发生的，它是这个城市深思熟虑并且全力以赴的结果。在店铺标牌、咖啡馆空间、功能混合，甚至音乐上都运用了特定的设计要求。此外，这样的地理位置是大多数来自海棠湾和亚龙湾的游客游览的必经之路，他们因此能够看到和体验正在运转中的三亚。这种连通性也许能够进一步刺激城市的振兴和发展。

#### Red Sand Village Enhancements

##### 红沙村改进

顾问小组了解到需要改进红沙渔村。其狭窄的街道和不合标准的基础设施造成安全和拥堵问题。然而，这个社区是顾问小组参观的为数不多真正能让游客体验三亚旧城的地方之一。整个东亚的城市都在利用传统的渔村及其相关市场，让游客体验一种传统的生活方式。

顾问小组建议，把红沙渔村的再开发作为保留一些传统街道设计的契机，方便公众前往海滨，并提供新的商业设施和教育设施。在新加坡、香港和曼谷都可以看到这种方法的成功案例。顾问小组建议考虑一个允许设立海滨海鲜餐厅、一个侧重于捕鱼业的教育中心、出售本地制造商品的零售商店、一个可以为捕鱼船队



提供销售场所，为居民和游客服务的鱼市场和一个用于水上计程车和其他海洋活动的新码头的设计。

## Enhancements to Natural Areas 加强自然区

顾问小组认为，一系列围绕加强和保护城市的自然区域的具体行动，将提高度假区和城市核心之间的社会互动，提高游客整体体验。这些行动也可以吸引更多的国际游客：冒险/自然旅游。

### Link Existing Parks

连接现有公园

三亚拥有丰富的开放空间，但这些公园和空间似乎是分开的，不连贯的。城市应该着眼于创建和实施自行车道和人行道的总体规划。总体规划应侧重于连接现有公园中的行人、自行车和车辆以及普遍改善居民、游客和旅游景点之间的连通性。这个总体规划与城市不断努力更新和完善其总体规则是一致和互补的。

### Create Hiking Routes and Cycling Trails

创建徒步旅行道和自行车道

结合建议的总体规划，应该把一个新的重点放在确定、规划和建设新的徒步旅行路线和自行车道上。还需要在大东海、亚龙湾、海棠湾与城市核心之间建立额外的连接。但三亚也应该考虑在南部市区和北部自然区之间建立自行车道。如果可以提供一个安全和舒适的路线，呀诺达雨林文化旅游区、黎寨和苗寨、亚龙湾热带天堂森林公园，以及山区其他景点都是冒险/自然观光客通过骑行或徒步前往的好去处。

### Create an Ecological Mangrove Park

建一个生态红树林公园

游客总是寻找各种活动，对于冒险/自然观光客更是如此。游客体验多样性始终是游客延长住宿和再次来访的关键因素。顾问小组认为，有可能成为一个景点的生物群落是岛上的红树林。顾问小组建议建一个生态红树林公园。

因为红树林是为海上和陆地野生动物提供庇护的海洋环境一个不可分割的组成部分，它们一直是众多国际研究和保护工作的重点。每年各组织举办关于红树林保护问题的国际研讨会。所以，这种地点不仅是吸引游客的好地方，同时也是国内外进行科学研究的地方。这可能与顾问小组在早些时候提出关于建立三亚生态与环境学习世界中心很好地结合起来。这种方法在海南岛北部东寨港红树林自然保护区已经得到了证明。除了科研，东寨凭借观鸟、露营和皮划艇等各种自然导向项目，每年都吸引成千上万的游客。

### Improve Access to Waterfronts

让出入滨水区更为便捷

除自行车道和人行道外，总体规划还必须考虑更便捷地出入城市的滨水区和海滩。大部分的城市滨水区似乎是居民和游客无法进入的。顾问小组还了解到，即使是私人游艇用的城市海滨也存在压力。顾问小组认为这种方法是错误的，并认为应该重新努力，逐渐开放废弃的工业滨水区，将它们转换为公众可以进入的公园和商店、餐馆等商业活动区。

对于亚龙湾和海棠湾的沙滩，我们的目标应该是公众完全可以进入。随着时间的推移，个别酒店对属于他们部分的海滩“提出要求”，形成一种隐含的意义，觉得海滩属于酒店。这种海岸线的“独占”方法从短期来看可能对于酒店经营者是成功的证明，但是从长远来看，它会扼杀访问量，损害三亚的声誉。

对于城市和酒店的海滩地区，三亚应该设定目标（一年一公里），进行重大改进，包括探寻和维护，传达一种开放、安全和连通感。

## Enhancements to Hotel Areas

### 加强酒店区域

三亚豪华酒店客房数量之多是惊人的。虽然顾问小组希望，每个酒店和酒店运营商都会为了自己的利益维护其物业，但市里可采取大量措施和行动来提供帮助。

#### Dadonghai Bay

##### 大东海海湾

大东海海湾和邻近地区对于更专业酒店来说是一种机会。大东海海湾比亚龙湾和海棠湾更安静、更小，大东海及其周围地区有机会成为一个利基市场，满足寻求既能够享受更亲密的度假体验同时又能很容易地到达城市核心的国际和区域游客的需求。向该地区几家酒店提出的主要建议是，考虑共享方案和活动，如健康和健身，并可能探索烹饪学院的概念，这个烹饪学院将为游客提供一个教授和学习烹饪的机会。靠近市中心将使烹饪艺术很容易接触到当地的美食。此外，还应该探讨从大东海到市区的专线巴士计划。

#### Yalong Bay

##### 亚龙湾

亚龙湾应该制定一个整体的愿景，将它描绘为三亚的一部分，但专门侧重于家庭和较大的团体。顾问小组非常担心亚龙湾地区的旧酒店将继续恶化，开始让该地区有了“二流酒店”集聚地的名声。应该探讨关于酒店地面及楼宇的重建计划。市里应与酒店经营者合作，建立日常维护和定期进行重大重建的计划。

亚龙湾的酒店应该成立一个圆桌会议或者管理人员工作组，考虑及讨论共同关心的问题，如海滩维护、零售商机、共享娱乐节目以及所有客人都可以共用的设施。该工作组还可以提供一个论坛和渠道，与三亚市讨论有关主要基础设施改善的问题。

#### Haitang Bay

##### 海棠湾

海棠湾是三亚规模最大、最新的度假区。和亚龙湾一样，各种业主和酒店经营者应考虑成立一个管理人员工作组，以便经常和定期讨论共同关心的问题。对海棠湾大型基础设施进行改进以及为积极规划新公园所做的定期和持续的努力，应该可以吸引更多的回头客。

所有这三个度假区应该有一个年度峰会，考虑他们应该采取哪些共同行动，城市的行动又会怎么影响到各自的领域。总体来说，不应当将重点过多在放在单位建设和销售上，建设质量和将整个城市开发为度假式第二居所的可行性更值得关注。

# Organizing Principles—Connect

## 组织原则—连接

要成为一个世界一流的旅游度假城市，三亚必须是一个完全连接的城市。所有层面的连接是提高生产力和提升市民和游客生活质量的关键。一个完全连接的城市，将有助于居民以及与区域和国际游客之间的互动。顾问小组已经找出三亚在连接方面的三大“前进的方向”。

首先，三亚必须有一个21世纪的交通运输系统，不仅可以与外界连接，而且可以在整个城市内进行多重方式的连接。这包括机场、当地和区域中转以及采用智能技术来解决交通拥堵问题。

其次，三亚必须连接重要节点和场所。这不只是包括更便捷地到达度假区，而且包括各种将绿地、沙滩、活动区、社区和工作场所连接起来的可持续发展的并具多重方式的方案。

第三，三亚必须通过鼓励社区中心、节日活动和网络连接加强人们之间的联系。

### Improve Transportation

#### 改善交通运输

交通是连接城市的最明显的组成部分。顾问小组认为，三亚的交通运输可以大大改善，并且城市和私营行业可以在这些改进中发挥极大的作用。顾问小组提出，改善交通体系是降低三亚现有的城乡差距的关键因素。

#### Keep the Airport: Gateway to the World

机场不搬迁：通向世界之门

尽管机场足以目前的旅游业提供服务，但如果缺乏对空域和近机位限制的清晰认识，将无法应对越来越多的乘客。顾问小组了解到，跑道能容纳任何现有的机体，重型飞机（即A380

或777）的数量有限是空域限制造成的，而不是跑道长度或近机位容量的原因。

顾问小组认为，目前机场的位置是理想的，可以很方便地从机场打车前往亚龙湾和海棠湾。世界一流城市都依托良好的机场设施与快捷的地面交通帮助旅客到达想去的目的地。顾问小组认为，机场搬迁的建议不是一个好主意。相反，城市应该对如何以及为什么会存在空域限制有一个清晰的认识。

#### Improve Local Public Transport

改善当地公共交通

当地的公共交通有待改善。这些改进不仅对于偶尔往返度假区的游客是有必要的，对于城市内就业、零售区域和大学区域的效率和生产力也是有必要的。最合乎逻辑的改进可能在于公交专用车道和真正的公交捷运系统的建立。公交捷运系统以橡胶轮胎交通的建设和维护成本提供轻轨的速度。

#### Improve East–West Rail Corridor

改善东—西铁路走廊

三亚和海南省政府致力于海口至三亚的高速铁路建设，这值得赞扬。该高速铁路为海南岛的区域旅客和那些寻求获得中心城区服务的本地旅客都提供了一个令人难以置信的机会。计划中海棠湾区域的火车站将让度假游客可以很快地返回到城市中心。这对于酒店经营者和/或提供度假区和火车站之间连接的城市而言将会十分重要。

## Build East-West Bridges

### 建设东-西桥梁

作为三亚品牌建设的一部分，方便地到达中心城区将是必需的。沿市区东西向交通走廊似乎存在明显的拥堵情况。三亚需要研究改进中心城区东部和西部之间的车辆和行人交通路线。可以通过谨慎考虑增加桥梁来改善车辆在高峰时间的拥堵情况。

## Use Smart Information Technologies

### 使用智能信息技术

三亚可以使用各种智能技术来解决可用停车位的数量、公共汽车和火车时间安排、以及交通灯同步等问题。三亚应该设定一个目标，在十年内拥有完全集成的智能技术基础设施。这将提供从出租车到公交车到火车到私家车多种模式所需的高效和实用的交通运输类型。

## Improve Taxi Service

### 改善出租车服务

城市官员和酒店运营商都指出，整个城市的出租车服务需要改进。世界一流城市都有公平和有效的出租车服务，各种提供这种服务的公共和私人公司应该保持一个非常高的标准。市里应带头评估并设立出租车服务的新标准。除了安全、清洁、可靠的服务，整个系统的票价应该是标准，所有出租车都应该接受信用卡和借记卡消费。此外，顾问小组建议，在五到十年内整个出租车队改换混合动力或电动汽车。

## Provide Proper Parking Spaces and Bike Lanes

### 提供适当的停车位和自行车道

世界一流城市推广一种适于行走和具有连通性的交通系统，车辆停车是统一、一致的，并且自行车和行人与机动车辆被同等对待。在一些地区，这可能需要在实际情况中把自行车和行人通道与机动车道分离开来。在另外一些地区，这意味着确定互不冲突的车速、自行车道的位置和设计。顾问小组建议，市里对这些元素进行一次全面性研究，目的是找出改善车辆、自行车和行人动线的策略。

## Connect Places

## 连接各个场所

城市的一个基本目标是提供一个相对较小而又能让各种离散的城市活动共同存在的地理区域。连通性通过道路、桥梁、便道、自行车道、人行道和铁路等，将这些离散的城市功能连起来。居民可以与就业中心连接，度假村用途与零售区连接，工业用途与港口连接。连接各个场所应该是地方政府的一个主要职能。

## Connect Green Spaces

### 连接绿地

自从“城市规划”概念的首次出现以来，连接绿地和开放空间一直是城市规划想要实现的一项功能。除去所有的城市发展问题，三亚拥有一些壮丽的绿地和公园。据顾问小组观察，通过连接这些绿色空间，可以充分利用城市壮观的绿色空间。例如，在鹿回头公园和三亚湾海滩之间提供一个具有吸引力和容易辨别的连接点，这样一来，出游的家庭会在市中心逗留整整一天，而不是花上一个小时的时间去参观其中一个或另外一个景点。同样，一个城市的可步行性会给游客留下一个很深的印象，顾问小组认为，三亚在这方面有显著改善的空间。

## Create Foot and Bike Paths

### 创建步道和自行车道

三亚应为行人创造更多方便。不仅是中心城区，度假区也是如此。正如本文前面所指出的，顾问小组建议，市里对这些元素进行一次全面性研究，目的是找出改善车辆、自行车和行人动线的策略。一本城市自行车线路地图，对想探索这个城市的游客而言，是一位很好的伴侣。

## Develop Community Centers

### 开发社区中心

和世界各地许多城市一样，日常工作活动往往阻碍社区居民在知性和社交方面的发展。在三亚，各种实际限制，包括新建道路、农村居民涌入大型多层建筑以及单一用途的大型商业用地，阻碍了传统上形成一个社区的邻居之间的互动。市区北部边缘附近高大的公寓给人的社区感远不如红沙渔村。为了对抗这种潜在的孤立感，顾问小组建议市里考虑开发一系列社区中心，这些社区中心将培育邻里间的社会互动，并提供一个艺术和创业表达的场所。

## Link People

### 把人们连接在一起

成功的城市有各种让人们彼此间更加亲近的计划和活动。通过当地的体育事业和网络空间把人们与海南以及海南之外的世界连接在一起，将有助于推动三亚朝着一个更加全球化的方向发展。这种方法可以让三亚更专注于人类体验，并以一个完全连接的世界一流城市展现自己。这一点对于像三亚这样城乡差距如此明显的城市而言特别正确。尽管提高市内交通很重要，但三亚还要考虑通过一系列项目与活动，例如下面列举的赛会和庆典活动，将乡村居民与城市居民联系到一起。

## Festivals, Fairs, and Gatherings

### 节日活动、博览会和聚会

节日活动、博览会和类似的聚会有助于社区建设。技术工人和学生都希望找到一个有明确地方感的地方。侧重于艺术和文化可以提高一个社区的竞争力，为界定一种地方感奠定基础，吸引新人群和观光客，整合社区及其企业领导者的愿景，并为发展技术型劳动力作出贡献。

## Cyber Connectivity

### 网络连通性

游客和居民经常会依据某个地点与外界的连接来判断这个地点的优劣。如果三亚希望提高区域和国际游客的到访量，大幅提升网络的连通性会有所帮助。三亚不仅要调查全市范围内这种连通性的战略，而且还要特别注重那些有大量到访量的地点。应考虑在全市范围内提供免费无线网络、无线宽频或类似系统。这种类型的连接可以让三亚具备比其他度假地点显著的竞争优势。

# Organizing Principles—Care

## 组织原则—关怀

三亚需要关怀本市公民和游客。顾问小组建议的一个方法是，市领导应开始考虑2030年的三亚将以怎样的面貌展现给世人。对于三亚而言，一个“极富挑战性”的目标可以是在2030年成为“中国最宜居的城市”，亦或是“中国最健康的城市”。三亚着眼于多样化其旅游和经济发展战略，上述标签可以成为三亚强大的竞争优势。为实现这个目标，三亚需要采取符合本节及本报告前面部分的大胆行动。

### Integrated and Convenient Neighborhoods

#### 综合性和便利社区

社区需要可以步行，更具人的尺度。这个目标可以通过制定具体设计方针并加以实施来实现，重点是人行道、步行道和停放架、锁车装置和自行车共享站等方便自行车的设施。

社区的设计也应考虑容纳混合用途的设施，包括零售和住宅，而住宅应包括为各种收入水平人群设计的租赁及出售单位。

如前面提到的，更好地连接城市公共交通系统，应该是三亚新发展首先要考虑的方面。密度模式和就业中心的设计和安排，应该支持公共交通和适当的“最后一英里”设施，如步道和便道；同时，还应考虑使用接驳巴士系统，确保居民能够方便地搭乘公共交通。

最后，三亚维护其公园的能力给顾问小组留下了深刻的印象。三亚应该继续把重点放在维护良好的公共设施上，并鼓励住宅和商业区也这么做。

### Education

#### 教育

三亚需要认真考虑提升其教育机会。应该研究整个教育系统——小学、中学、大学和职业学校——确定实现这些改进存在哪些机会。人才是当地经济发展的重要组成部分，人才资源关系到大型企业与机构的选址决定。顾问小组相信增加三亚当地居民的受教育机会将为三亚提供受教育程度较高的民众。拥有受教育程度较高的民众将为三亚带来巨大利益，因为企业投资在选址决策上倾向于选择拥有人才资源的地方。

此外，三亚等旅游业占经济比重很大的城市应该有一个充满活力和不断成长的艺术社区。对艺术、文化体验和创造性科学的需求可能成为经济发展很大的推动力，三亚不应该从其他地方引进创作人员和教师；应该从当地资源中选出这方面的人才。三亚应该开始大力投资艺术、艺术教育以及创造性的科学。

三亚应该制定一个充满活力和多元化的体育计划。研究发现，参加体育活动对幼儿的健康发展产生影响。这些活动可以促进合作性、团队精神和良好的体育道德，同时有助于提高肢体动作技能。运动还可以帮助孩子与人相处，并为他人所接受，包括同龄人、家人、老师和教练。此外，通过正面反馈，分组游戏建立自尊心，帮助孩子认识到自己是有能力的人，能够取得伟大的成绩。学龄儿童将受益于这项计划，他们的生活方式将变得更为活跃积极，他们的身心将变得更健康。

作为一个酒店中心，三亚应该在一所大学开设一个世界一流的酒店/餐饮管理课程。该课程应该着眼于聘请世界一流的教师和讲师，并成为让南亚其他地区羡慕的城市。

最后，三亚应考虑大量投资外语培训，以支持来自区域和世界各地越来越多的游客。考虑到三亚豪华酒店的客房数量，开设一所教授俄语、英语、法语、意大利语、日语、韩语、广东话的语言学院将是一个很好的投资。

## Medical Care, Health, and Wellness

### 医疗、保健和健康

医疗是一个世界一流城市的重要组成部分。虽然军队医院是一流的，但顾问小组从一些受访者那里得知，三亚在市民关怀方面做得相对有限。三亚要寻找机会，建设顶级综合性医院，特别侧重于卫生和健康、老年保健以及类似的领域。三亚应该搭建一个平台，为不断增长的老年人口提供服务，同时考虑是否存在医疗旅游的机会。

三亚也应该开始大力推广用于许多餐馆和酒店的“农场到餐桌”产品。这可以通过推广有机耕作来实现，但同时必须提高游客和当地居民的食品安全。烹饪旅游是三亚应该探讨的商机，特别是因为它涉及到海产品。

## Economic Diversification

### 经济多元化

旅游度假酒店，和军事和海产品行业一起，构成三亚经济的主要驱动力。正如本报告前面部分中所指出的，经济的多样化应该是一个城市的总体目标。实现这一目标将需要市政府、民营企业、教育界和市民共同采取行动。

三亚应该开始培养有利于商业的环境，特别注重旅游区的协调发展和更好地管理现有的基础设施。三亚还应该探索充分利用大学作为经济驱动力，来吸引世界级的专业人士，这部分人士会把三亚当成自己的家而不只是一个度假地。此外，还应探索如何让在三亚拥有度假住房的富裕阶层更好地融入到三亚体验中。

顾问小组建议三亚探索一些其它类型的产业发展。如之前提到的，可以充分利用三亚和海南岛的旅游业，基于当地环境特点，发展会议产业。像顾问小组之前建议的，三亚应考虑资助设立三亚世界生态与环境学习中心。该中心将为私人部门投资科研产业提供动力。

# Organizing Principles—Promote

## 组织原则—促进

世界一流的城巿必须有一个世界一流的营销方案。顾问小组的初步看法是，目前三亚作为一个旅游地，在国内和国际巿场上营销处于混沌状态。顾问小组建议三亚考虑实施一系列行动，帮助三亚深入到更广阔的国内巿场以及扩大的区域和国际巿场。这一营销方案的两个具体目标应是促进三亚考虑跻身于亚洲最佳五个沿海度假胜地之一，并提高三亚作为全球挑剔游客的一个独特目的地的国际知名度。

### Sanya: “The Best Experience of My Life!”

#### 三亚：“我一生中最好的体验！”

三亚的定位应该是，当游客回到自己的家里说起来的时候，会说在三亚的体验是他们一生中最美好的体验。这种体验应包括休闲娱乐、美食、文化设施，当然还有在酒店舒适、豪华的住宿。要实现这一目标，本报告中许多关于改善中心城区、增加独特文化体验以及有关饮食、交通改进服务的建议，还有很长的路要走。

三亚应该从巴厘岛、威基基海滩、里约热内卢、黄金海岸、巴黎和其他知名的地点受到启发，了解人们返回时会有什么样的感受。

### Regional Competition

#### 区域竞争

目前许多地方都在与三亚竞争，包括巴厘岛、龙目岛、槟城、兰卡威、峴港、宿雾、普吉岛、苏梅岛、夏威夷、关岛和塞班岛、斐济、俄罗斯和瓦努阿图。好消息是，三亚的巿场巨大，并且在不断增长，而且很近。对于国内巿

场而言，重点应放在与三亚有着很好的连通性的主要城市。这些城市包括北京、成都、重庆、广州、杭州、南京、宁波、上海、汕头、深圳、天津和武汉。在国际上，釜山、福冈、香港、哈巴罗夫斯克、吉隆坡、名古屋、大阪、首尔、新加坡、台北、东京和海参崴等城市都在四到五个小时的飞机路程范围内。

顾问小组认为，这些亚洲客源城市应该是三亚营销战略的主要焦点，并会为花费的营销资金带来最大的回报率。花费大量资金吸引北美、南美和欧洲人将是一个代价高昂的错误，并且不可能获得很高的投资回报。

三亚应该探讨各种方案，增加到这些城市的空中连接，并应该考虑直接的营销方法，包括为这些城市提供优惠旅游产品，因为三亚最有可能从这些城市中获得游客。在中国国内与国际上拥有丰富经验的全球性营销机构可以最好地列举和表述国内与国际营销的方法。

#### Global Marketing Firm

##### 全球营销公司

顾问小组建议三亚立即聘请一个全球营销公司。一个全球营销公司将拥有的专业知识，开发一个将起到立竿见影效果的细化巿场推广计划，迅速提升游客到访量。这家公司应该在中国国内巿场、亚洲区域巿场以及国际巿场上拥有丰富的营销经验，应基于这些地理区划制定一份三级营销计划。

#### Brand Aggressively

##### 大力打造品牌

三亚应积极努力打造三亚的品牌。三亚应该考虑从不同的角度打造品牌，包括视觉化、数字化和直接体验。



这项工作应该包括服装、纪念品和礼品。还应包括一个广告牌推广计划，这项计划应包括三亚、其他区域城市以及精心选择的国际城市。应考虑出租车、公交车和其他车辆上的广告牌以及在机场的广告牌。此外，还应该考虑飞机标识和标牌权。整个西欧、北美、南美和亚洲采用这种方法的例子不胜枚举。全球营销公司可以帮助确定那些经过证明已经是成功的广告牌推广计划。

### Brand Consistently

#### 品牌一致性

品牌清晰度和品牌一致性是一个成功的营销活动的基本组成部分。顾问小组指出，海棠湾、亚龙湾、三亚湾和海南岛以及其他场所，都用不同的讯息、标识和属性展现为独立的实体和地点。三亚标识是品牌一致性一个良好的开端，并且应该是推出整个城市新营销计划的起点。



## Deploy Resources Effectively and Efficiently

### 有效和高效地调配资源

为了有效调配营销资源，顾问小组建议三亚从多角度去思考。这需要通过特定的媒体工具来传递针对不同目标受众的营销信息。下表列出了一个关于如何根据不同的目标受众来调配媒体资源的建议。

Target 目标受众	Message 消息	Media 媒体工具
个人、单身专业人士（中国）	有趣、刺激、自由	社交媒体、活动、植入式广告
情侣	浪漫之旅；纵情	社交媒体、网络旅行社、植入式广告
上层、中产阶级家庭（大中国区）	有趣、安全、超值	社交媒体、印刷物、网络旅行社、植入式广告
挑剔的国际游客	新目的地；新体验	社交媒体、视频、纪录片、网络旅行社
公司会议（国内和国际）	方便、有利	直接行销，商务旅行社
会议（国内和国际）	理想会场、理想的环境	会议组织者、行业协会

同样，一个合格的全球营销公司非常善于创建和组织这种方法所需要的战略和战术。

## Activities as Marketing Components 作为营销组成部分的活动

很多活动将起到三亚市营销催化剂的作用。2013年世界大力士比赛就是一个国际赛事如何能提升三亚品牌的一个例子。这些活动可能包括马拉松和铁人三项赛；自行车比赛；红牛极限运动赛事；极限运动会；音乐节和户外音乐会；国际体育表演赛，如足球、羽毛球、板球和七人橄榄球；龙舟竞赛；高尔夫球和网球冠军联赛；和艺术节。

这些活动都可以有自己的标志，但应按规定加入三亚的徽章、标识、标记和符号。认识到三亚是此类活动主办城市肯定会提高国际游客的兴趣。

## Create a Tourist and Visitors Bureau 成立一个旅游局

顾问小组建议三亚成立一个旅游局，协调所有营销工作。该旅游局可以从三亚政府现有的组织中成立，会员单位可以通过交纳企业会费、市里每年的经费、营业税和举办特别活动等对其进行财政支持。

除了组织和推广前面提及的特殊活动以外，旅游局可以出于内部需要收集、协调和利用有关三亚游客的信息，并以营销活动的形式向三亚游客提供信息。

消费者的信息在建立一个有效的营销策略中是很重要的。顾问小组认为，目前三亚消费者信息的可用性是有限的，或者说不存在。消费者的信息很重要，因为消费者在走向成熟；口味在变化；市场在变化；人口在发展。知道消费者在想什么，他们想要什么、不喜欢什么以及建议什么很重要。消费者信息为酒店和旅游业提供了一个有用的反馈机制，可以用来预测未来的发展趋势。

顾问小组建议旅游局收集量化数据（家庭特征、消费模式、住宿类型、停留天数和活动）和定性数据（他们还去哪些地方度假、对三亚的认知是什么、谁是竞争者，以及他们认为服务水平如何）。收集这些数据的方法包括焦点小组法、机场出口访谈、拦截访谈以及电子邮件调查。

# Organizing Principles—Collaborate

## 组织原则—协作

在世界一流的城市，领导这个城市的重要利益相关者之间必须有良好的协作。对于三亚，顾问小组认为，合作首先要从建立三个单位开始。首先是在上一节中提到的旅游局。另外两个是三亚专责小组和三亚伙伴关系。这三个单位将共同打造三亚成为世界一流城市所必需的有效机构能力。

### Create a Sanya Task Force

#### 建立一个三亚专责小组

这个三亚专责小组是一个政府单位，利用现有市政府部门的资源，确保他们团结起来努力实现将三亚打造成为一个世界一流城市的共同愿景和目标。该专责小组将每周召开一次会议，会议议程为滚动议程，由市长或副市长主持，各高级部门负责人出席。每次会议的目的是对设置优先级和资助三亚已经制定的各项优先项目及时做出重要决定，确保城市发展有序，并且有吸引力。专责小组还应该集中解决本届顾问小组的两个总体目标：

- 改进城市核心，提供更广泛的游客体验；和
- 实现更广泛的旅游区域要聚焦距离三亚四到五个小时以内行程的主要城市。

专责小组已经被全球各地的市政当局用作一种确保城市的实际发展与战略目标一致，并确保关键领导力在位的方法。

### Create a Sanya Partnership

#### 建立一个三亚伙伴关系

三亚必须开始考虑与私营部门建立伙伴关系。公/私营伙伴关系不仅利用参与方的人才和价值，还利用每个成员希望超越一种简单关系的愿望。这种伙伴关系总是会产生指数式的价值。

三亚伙伴关系是出于对三亚的共同愿景统一起来的公共/私有实体。该伙伴关系包括政府高级官员和商业领袖，他们可以分享自己的想法和优先级，并决定公共和私营部门如何合作，一起找出当地经济中薄弱环节，提出解决方案，并考虑融资方案来弥补这些弱点。该伙伴关系的宗旨是为倡导有利于三亚工业、商业、文化、住宅行业的经济发展。其目标是吸引新的企业进驻三亚，留住那些已经在这里的企业，欢迎新居民和游客，促进充满活力和真正的多用途社区，侧重于旅游业。

# Conclusion

## 结论

相比中国的其他任何一个城市以及伦敦和拉斯维加斯等拥有数量众多的五星级客房的竞争对手，三亚有更多的豪华酒店客房。三亚在住宅和商业上的增长一直是巨大的；这样的增长是否可持续仍有待观察。在过去的十年中，旅游业的增长速度非常惊人，三亚市一直在努力，在管理这种大幅增长中做了一些值得称道的工作。本城市土地学会的顾问小组建议了很多物理、组织和营销举措，这些举措将有助于三亚开始解决这一增长带来的挑战，并将有助于推动三亚成为一个真正的世界一流度假城市。特别是，顾问小组认为，三亚必须改进其城市核心，必须达到一个更广泛的区域和国际旅游市场。

顾问小组提供这些建议的方法围绕着六个主要组织原则：

- 保护；
- 增强；
- 连接；
- 关怀；
- 促进；和
- 协作。

这些建议的范围从为城市的交通系统安装智能信息技术，到重建红沙渔村，到改善居民受教育的机会。顾问小组认为，其中很多建议会真正改变这个市场的游戏规则，将从根本上改变对这个城市的认识以及城市的工作效率。这些建议包括以下内容：

- 构建一个更加适合步行的城市；
- 提供一个综合性多式联运体系；
- 在三亚湾打造一个“南海风情”娱乐区；
- 提供文化区、自然区和酒店之间更好的物理和社会连接；
- 打造一个三亚国家公园；
- 打造一个世界生态中心，重新塑造三亚环保旅游点的品牌；
- 创建城市增长边界，集中最需要的基础设施；
- 打造真正的多用途/混合用途社区；
- 升级现有的机场，而不是建立一个新机场；和
- 建多个可以帮助三亚有效地管理其增长并促进城市发展的组织单位。

本报告中所有建议旨在为三亚成为世界一流的度假城市提供指导。城市土地学会期待下一次来评估三亚在这方面取得的进展。

# About the Panel

## 关于顾问小组

### Harry Frampton III 哈利·弗兰普顿三世

顾问小组主席

弗兰普顿是城市土地学会前任主席兼东西岸合伙集团公司（East West Partners）的创始合伙人。他毕业于克莱姆森大学，已经从事了超过35年的房地产开发工作。他的事业始于希尔顿黑德岛的海松公司（Sea Pines Company）。1982年，他成为科罗拉多州韦尔山和比弗河度假村所有者/经营者，韦尔合伙人事务所（Vail Associates Inc）的总裁和首席执行官。1985年，他开始创建东西岸合伙集团公司，这是一家总部设在科罗拉多州比弗河的度假胜地开发公司。有名的地产项目包括比弗河和韦尔谷内的多个开发项目。他所获得的成就还包括丹佛市中心的滨河公园开发和联合车站重建。东西岸合伙集团公司获得了城市土地学会的两项卓越奖：比弗河村中心和滨河公园丹佛市中心开发项目。弗兰普顿是城市土地学会理事。

他是青年总裁组织的活跃会员，并担任科罗拉多分会主席。他目前是韦尔谷基金会的董事会主席。他已被评为韦尔市年度公民和科罗拉多州比弗河市的年度公民。2004年，他被科罗拉多大学评为科罗拉多州优秀房地产开发商，2005年，丹佛大学又授予他类似的大奖。

2008年2月，弗兰普顿入选科罗拉多州企业名人堂，2010年11月，他入选科罗拉多州滑雪及滑雪板博物馆名人堂。他是美国滑雪和滑雪板团队基金会的董事会成员。最后，弗兰普顿曾担任克莱姆森基金会的董事会主席。

### Richard Albrecht 理查德·阿尔布雷希特

犹他州帕克城

阿尔布雷希特是一名有着超过25年成功度假社区开发和运营经验的开发商和管理专业人员。他的专长是为通过整合最优质的开发和侧重于个性化服务的一流度假区运营创造长期价值的度假村以及社区打造可行的发展计划。他曾带领成功执行几个复杂的项目，从概念阶段一直到设计、施工、销售和运营阶段。阿尔布雷希特拥有丰富的建构和运作俱乐部和屋主协会和物业管理方案的经验。

作为总裁，在亚利桑那州图森米拉沃度假村（Miraval Resort）的开发中，阿尔布雷希特领导这个世界排名第一的度假式水疗胜地改建、扩建以及新住宅的总体规划。他还领导规划并创建了经济模式，使该品牌扩大到几个新度假村和健康生活方式社区。这些房产结合广泛的可持续发展的做法，侧重于为客人和当地居民创造健康的生活环境。

作为犹他州鹿谷Talisker的首席运营官，阿尔布雷希特领导开发并成功推出鹿谷滑雪场顶的一片地，并管理了犹他州帕克城中一个以高尔夫和滑雪为导向的社区Tuhaye的开发和成功重新开张。在这个角色中，他在项目执行方面的领导和专业知识对于改变一个摇摇欲坠的社区很有帮助。他重组了管理团队，以一种新的营销和销售方案对项目进行了重新定位，并打造了一个新的会员制计划。

作为夏威夷华拉莱度假村的首席运营官，他带领一个负责一个屡获殊荣的度假社区（包括四季酒店、杰克·尼克劳斯和汤姆·韦斯科夫高尔夫

球场、一个水疗中心，以及多个餐饮设施)的团队。在这个岗位上，阿尔布雷希特带领进行度假胜地运营和房地产开发的管理。他领导制定第二阶段的总体规划，并监督各种单户住宅和地块、多户型单位、重要基础设施项目，以及便利设施扩建的开发。

阿尔布雷希特是拉奈有限公司(Lanai Company Inc.)的开发总监，在那里他负责科艾雷和马内尔湾住宅开发的日常运营。他还指导了销售和营销计划，建立了会员制计划，并为其会员设立及运作物业管理服务。

他是城市土地学会的正式会员，是娱乐发展理事会主席，并担任学会高尔夫球场会议的发言人。他获得加州大学洛杉矶分校安德森商学院的工商管理硕士学位，和加州大学伯克利分校的学士学位。

## A. Neill Cameron Jr. 小A·尼尔·卡梅伦

南卡罗来纳州克莱姆森

1999年，卡梅伦从全球的广告与传播巨头奥美公司(Ogilvy & Mather)退休，他在奥美是东南事业部的总裁兼董事会成员。随后，他加入了一场终其一生的运动——改善高等教育，目前他是克莱姆森大学的副校长，主要负责与大学外部受众互动和进行品牌建设。

在市场营销和广告业务中，卡梅伦帮助各种客户开发品牌建设通信程序，包括美国运通、柯达、IBM、美属维尔京群岛、丽思卡尔顿酒店和莎莉集团。他获得多项行业大奖，包括国家艾菲(EFFIE)奖、克里奥国际广告奖(CLIOS)、《广告周刊》杂志1994年年度机构和广告俱乐部的1995年广告年度人物银质奖章。

他曾参与多个公共和私营部门委员会的工作，包括1996年奥运会组织委员会、2012年PGA锦标赛主办委员会，并担任福来鸡杯(Chick-fil-A Bowl)的主席。他是亚特兰大儿童医院CEO小丑集团公司的创始人和前任董事长，并帮助筹集修复纽约市港湾自由女神像的资金。

卡梅伦经常在全国和国际上发表各种主题的演讲，如建立持久的品牌、创造大理念和建立有效的沟通。

他取得了乔治亚州立大学的学士学位、埃默里大学的MBA学位，并获得伦敦商业金融学院的国际管理证书。

## Greg Cory 格雷格·科里

加利福尼亚州旧金山

科里一直是经济研究协会(ERA)的高级副总裁，直到2009年。ERA的品牌在2007年被一家公开交易的工程公司吸收，随后这个名字不再存在，有着历史沉淀的咨询系列服务基本上被放弃了。为了恢复ERA所体现的独特文化，科里创办了自己的公司——土地使用经济有限责任公司(Land Use Economics LLC)，公司总部设在旧金山。在ERA，他担任度假村业务组的负责人，是加勒比旅游组织、国家高尔夫基金会和全国滑雪场协会的法人代表。

科里也是土地使用公会国际的创始人，这是一个由经验丰富、受人尊敬的从业者组成的会员制公会，这些人有着相似的背景，致力于分享知识和资源，帮助维持行业标准，并提供彼此工作的同行评审，作为给客户的一项额外服务。公会代表四家独立公司的资源、合计超过130多年的专业知识以及50多个国际市场的经验。

科里在整个职业生涯中专门从事发展经济学。尽管他处理过大量不同的土地使用项目，但由于旅游和度假区开发对欠发达经济体的潜在影响，他一直在专门从事这项工作。他在分析以酒店、度假村和娱乐为导向的设施需求方面积累了超过30年的工作经验：深入研究了超过45个国际市场的450多个度假村，并经常进行度假区经济和旅游业方面的讲演。

他还担任了城市土地学会娱乐发展理事会的主席，是该组织出版的两部有关度假村开发的书的特约作者，即《度假区开发手册》和《在住宅小区开发高尔夫球场》。

## Ray Vees Goh

中国香港特别行政区

Goh是AECOM旅游及酒店管理业务的主管，负责香港和台北团队。凭借景观设计和规划方面的专长，Goh参与了整个亚洲许多世界一流的酒店和度假村项目建设，包括许多在中国海南的项目。他还在各种不同项目类型中积累了丰富的经验，包括公共建筑、商业、住宅和混合用途开发。他在概念化、详细设计以及最终的执行阶段的领导一直在确保项目成功实现中功不可没。

Goh持有新加坡国立大学建筑学硕士和学士学位（建筑研究）。他参加了1999年至2000年新加坡国立大学/卡内基·梅隆的交流计划。

## In-Keun Lee

韩国首尔

Lee 1979年毕业于首尔国立大学，获得土木工程科学士学位。毕业后，他成为公务员，任职于首尔市政府。在他在政府工作的32年期间，他曾在多个部门和办公室工作，处理首尔在城市规划和基础设施方面相关的项目。他担任的主要职务包括，地铁规划和设计主任、工程审查主任、城市规划主任以及清溪川复原工程总干事。

2007年1月至2008年12月，他在首尔土地规划局担任总干事。然后，他被晋升为市长助理，负责首都地区的基础设施，直到2011年底。

2012年2月，他从公务员退休，自此加入首尔大学，担任客座教授。

1985年，Lee获得政府留学奖学金，在伦敦城市大学进行工程研究，1991年获得该大学博士学位。他是英国土木工程师学会的研究员，并且是韩国国家工程院院士的院士。

## Tom Murphy

### 汤姆·墨菲

哥伦比亚特区华盛顿

墨菲是ULI/Klingbeil家族城市开发委员会的一名高级常驻研究员。墨菲是匹兹堡市前市长，他和其他六个城市土地学会高级常驻研究员，一道研究公共政策、零售/都市娱乐、交通运输/基础设施、住房、房地产金融和环境问题。除了高级常驻研究员的专业知识领域，他在城市复兴——什么驱动投资、什么是长久社区的保证——方面拥有的丰富经验也十分重要。

自2006年1月以来，墨菲一直担任城市土地学会的海湾海岸联络员，帮助协调新奥尔良的领导和公众，推动城市土地学会咨询服务顾问小组提出的重建建议的落实。此外，他曾与路易斯安那州的政府领导合作，并与密西西比州、阿拉巴马州和佛罗里达州受飓风影响地区的政府领导合作，以找到适合于城市土地学会参与的区域。

在担任城市土地学会的海湾海岸联络员之前，从1994年1月至2005年12月墨菲曾担任三届匹兹堡市市长。在此期间，他启动了一个公/私伙伴关系战略，将超过45亿美元的资金用在匹兹堡的经济发展中。在墨菲的领导下，通过种种努力，保证并监督10亿美元的资金用于两个专业体育设施和一个新会议中心的开发，该会议中心是美国经过认证的最大的绿色建筑。他建立战

略伙伴关系来将1000多英亩遭到破坏、被遗弃的工业大厦改造成新的商业、住宅、零售和公共用途，同时他监督了25多英里新河滨自行车道和城市绿地的开发。

从1979年到1993年，墨菲加入了八届宾夕法尼亚州大会众议院。他专注于将宾夕法尼亚州西部从传统工业转型到创业经济的立法活动，并撰写了要求宾夕法尼亚州联邦养老基金投资创业资金的立法。此外，他还撰写了创立富兰克林技术合作机构（Ben Franklin Technology Partnership）的立法，该机构致力于推进宾夕法尼亚州在经济中对技术的重视，同时他撰写了鼓励工业土地再利用和将废弃的铁路道路用地改造成自行车道和绿色空间的立法。

1970年到1972年，墨菲在驻巴拉圭的和平部队服役。他是哈佛大学肯尼迪政府学院提供的新市长计划93届的毕业生。他持有亨特学院城市研究理科硕士学位和约翰·卡罗尔大学生物学和化学学士学位。

他是美国景观建筑师协会的名誉会员、宾夕法尼亚城市与都会联盟董事会成员，以及国家铁路改步道管理局的董事会成员。他获得美国市长大会颁发的2002年城市宜居性杰出成就奖，并被匹兹堡向量公司（Vectors Pittsburgh）评为2001年匹兹堡年度人物。

## Karmi Palafox

### 凯米·帕拉福斯

菲律宾马卡蒂市

帕拉福斯是一名环境规划师和城市设计师，是帕拉福斯设计师事务所的高级城市规划师和合伙人，帕拉福斯设计师事务所是世界上最大的建筑事务所之一。

她领导一个完整的建筑师、工程师、设计师、规划师和行政人员团队。目前，她正在参与整个菲律宾和其他国家社区、度假村、商业区、公园和其他混合用途开发项目的规划和设计。

作为城市规划和设计的负责人，她领导城市用地和分区计划、街景设计、总体规划、旅游发展规划以及岛屿、农村社区和大城市、省和区域场所创造项目。

帕拉福斯获得亚洲太平洋大学产业经济学硕士学位和牛津布鲁克斯大学城市规划城市设计专业理科硕士学位。她还完成了远东大学战略管理与创新证书课程，以及牛津大学萨依德商学院的创业证书课程。2008年，她成为注册环境规划师，在国家级考试中名列第六。她也是英国皇家城市规划学会的特许规划师。

在她进入城市、区域和环境规划领域长达九年的经历中，都是与本国的顶级房地产开发商、土地所有者以及房地产的政府领导人合作，涉及最佳和最可持续土地使用、开发建设中的最佳实践、环境政策和创建有价值的场所等方面。每个项目都坚持帕拉福斯设计事务所所恪守的绿色城市化的做法，这使其有别于其他事务所。

她领导的一些项目包括邦劳岛生态旅游开发计划；地铁北伊罗戈重点区域旅游开（抱威湖、Kapurpuraon白岩、沙丘、红树林和博加得岬）；长滩岛长滩综合旅游区总体规划、卡拉包岛和Buruanga、马来和纳巴斯市；以及宿雾索戈一个海滨社区的总体规划。

除了在帕拉福斯设计师事务所的工作，她还是菲律宾环境规划师协会的活跃成员，并在2011年到2012年期间担任董事。她是一所公寓公司的受托人，是城市土地学会菲律宾顾问委员会的会员。她是国际商业及职业妇女联合会菲律宾分会的创始成员之一。



## Ken Rhee 李建学

中国上海

李建学在中国大陆房地产领域拥有丰富的投资经验与知识。他维护着一个强大的、由中国开发商以及境内外投资人组成的人际网络。

在2011年11月创立沪汉商务咨询公司之前，李建学在摩根士丹利工作了5年多，先后担任副总裁与执行董事。在摩根士丹利期间，他成功牵头完成了一些中国顶级房地产开发商的首次公开募股和公司债发行。此外，他还发起了许多成功投资，包括开发商上市前融资、投资硬资产与开发中项目等。

在加入摩根士丹利之前，李建学在上海市政府下属的上海盛融投资公司担任投资运营部副总裁。在此期间，他主导了许多房地产与不良贷款的投资，这些投资涉及的股本合计约3亿美金。在此之前，他在摩根大通集团香港的投资银行部工作，参与了一系列亚洲区域内的并购和融资项目。

李建学还担任城市土地学会（ULI）中国大陆首席代表。他致力于会员招募、活动组织和内容创作等工作，包括于2012年、2013年分别在北京和上海举行的ULI亚太区峰会。李建学拥有美国加州大学洛杉矶分校经济学学士学位，以及美国芝加哥大学MBA学位，主修会计与金融。

## Robert Wilson 罗伯特·威尔逊

澳大利亚墨尔本

威尔逊是3R酒店的创始人之一，并且自2010年4月担任常务董事，3R酒店是一家总部设在澳大利亚墨尔本的泛亚洲咨询公司。3R酒店为酒店管理公司、酒店业主及机构投资者提供业务发展咨询服务。此前，他是全景酒店的总裁，兼任总部设在东京的摩根士丹利资本公司的执行董事。

威尔逊是总部设在东京的摩根士丹利地产酒店资产管理组创始成员和负责人。他监督该集团的发展情况，并负责将其转变成一个独立的专门机构全景酒店，自公司注册成立起就一直担任该公司的总裁。在他领导下，全景资产管理及经营亚洲和欧洲价值为55亿美元的49家酒店的投资组合。投资组合主要包括洲际、凯悦、希尔顿、喜来登、威斯汀、万豪、文华东方和皇冠假日酒店品牌旗下的高档酒店。在2008年和2009年期间，他在伦敦负责摩根士丹利欧洲总部的业务。

在成立全景以前，1999–2003年期间，威尔逊是万豪国际华美达国际事业部亚太区的副总裁。

1998年期间，他负责澳大利亚和新西兰的巴斯酒店及度假村（现洲际酒店集团），公司设在悉尼。1994年至1997年间，他担任日本、韩国、密克罗尼西亚巴斯酒店及度假村的总裁，公司设在东京。

从1989年到1993年，他是总部设在香港的寰球假日酒店亚太区销售和营销副总裁，并是该公司全球市场营销指导委员会的成员。在此之前，他在澳洲及香港担任过各种公司与酒店级别的职位。

威尔逊任职日本领先的酒店行业杂志《Hoteles（酒店）》以及总部位于上海的中国精品酒店集团的顾问委员会。同时，他也是坦普尔大学的旅游与酒店学院东京校园的顾问委员会成员。

# A ULI Advisory Services Panel Report



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