

AN ADVISORY SERVICES PANEL REPORT

# Sanya, China

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Urban Land  
Institute

# **Sanya, Hainan Province, China**

**Strategies for Becoming a World-Class Resort Community**

September 10–16, 2000  
An Advisory Services Panel Report

ULI—the Urban Land Institute  
1025 Thomas Jefferson Street, N.W.  
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# About ULI—the Urban Land Institute

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**U**LI—the Urban Land Institute is a non-profit research and education organization that promotes responsible leadership in the use of land in order to enhance the total environment.

The Institute maintains a membership representing a broad spectrum of interests and sponsors a wide variety of educational programs and forums to encourage an open exchange of ideas and sharing of experience. ULI initiates research that anticipates emerging land use trends and issues and proposes creative solutions based on that research; provides advisory services; and publishes a wide variety of materials to disseminate information on land use and development.

Established in 1936, the Institute today has some 17,000 members and associates from 60 countries, representing the entire spectrum of the land use and development disciplines. Professionals repre-

sented include developers, builders, property owners, investors, architects, public officials, planners, real estate brokers, appraisers, attorneys, engineers, financiers, academics, students, and librarians. 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 America's most respected and widely quoted sources of objective information on urban planning, growth, and development.

This Advisory Services panel report is intended to further the objectives of the Institute and to make authoritative information generally available to those seeking knowledge in the field of urban land use.

Richard M. Rosan  
*President*

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# About ULI Advisory Services

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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, brownfields 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 panel teams are interdisciplinary and typically include several developers, a landscape architect, a planner, a market analyst, a finance expert, and others with the niche expertise needed to address a given project. ULI teams provide a holistic look at development problems. Each panel is chaired by a respected ULI member with previous panel experience.

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 and a half of hour-long interviews of typically 80 to 100 key community representatives; and a day and a half of formulating recommendations. Many 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. At the request of 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 stake-

holders 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, academicians, 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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The panel would not have been possible if it were not for the guidance and passion of Keming Bao, former executive vice governor for Hainan Province, who was the first supporter of this ULI panel.

And finally, the panel would like to thank the city staff and citizens of Sanya City who met with the panel and provided ideas and insights on how to make Sanya City a world-class destination resort.

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# Summary

The government of Sanya, a tropical and beach-lined city on the southern tip of Hainan Island, which is situated off the southern coast of mainland China, invited the ULI panel to help the city develop strategies for becoming a world-class resort community. The panel was asked to evaluate the tourist market, recommend marketing strategies, suggest planning and design considerations for resort development (including the proposed coastal road), and suggest how development efforts can be financed.

The panel is very excited about the potential of Sanya. It has a tropical climate, extensive natural resources, and energized leadership. The panel believes that the city can realize its vision to become an international tourist destination of the highest quality. The panel also believes that the city should expand its vision to include becoming a center of scientific research, especially in the areas of marine biology and agriculture. Pursuing both goals would provide the balance needed for sustainable success into the future.

The panel also sees a city at a crossroads—an especially critical and sensitive time. Some serious problems, such as the high number of vacant buildings, must be overcome. Important first steps, some very basic, must be taken now.

Among the panel's key conclusions and recommendations are the following:

- The potential exists for Sanya to become an international tourism destination of the highest sensitivity and quality as well as a center for scientific research. Pursuing this dual strategic vision would foster both balance in the economy and prosperity.
- The city needs to develop a master plan that will allow the vision to be realized and ensure environmental quality and a strong economy. This report contains recommendations for Hai-





Long stretches of beautiful beaches abound in the region.

tang Bay, Sanya Bay, and Yalong Bay, as well as old Sanya City and the airport area.

- The city needs a process to make successful what assets are already in place. This report contains recommendations for some critical short-range steps as well as longer-range initiatives.

This report has four main sections. The first describes market opportunities and a marketing plan for Sanya. The second outlines planning and design considerations for the downtown and the coastal area. The third discusses development strategies that will help Sanya become a world-class resort community, and the fourth section covers implementation tools.

The panel hopes that ULI can continue to play a role in Sanya's future.

# Market Potential

**S**anya has set a vision for itself as a model for ecological resort development. The panel believes that this vision is achievable and that it should be expanded.

## The Panel's Perspective

Sanya (and Hainan Province), in the panel's view, exhibits a number of important characteristics related to its future as a resort community. It is

- a microcosm of China: the land, mountains, sea, and air;
- potentially a window on the world where east meets west;
- centrally located within five hours of 50 percent of the world's population;
- China's tropical paradise, positioned to serve the rapidly growing Asian middle and upper classes;
- of manageable scale in terms of geography and population; and
- a vibrant fishing village and agricultural center that offers a unique character and ambience for a 21st-century community.

China faces the formidable task of providing food, shelter, and a high quality of life for the largest population in the world as the wealth and purchasing power of that population grows. This purchasing power, if handled under the western model, could deteriorate the health of China's environment—its land, sea, and air—and the health of its people. Sanya represents a real opportunity to create not only a center that would be a model for ecological tourism, but also a center for scientific research and education—focused on ecological approaches in marine-based industries, agriculture, building, and tourism—that would be a model for a sustainable China.

Around the world, the increasing emphasis on wellness and health for the environment and people indicates major societal shifts. Growing support for sustainable development, green building, and environmental protection and growing markets for natural foods, ecotourism, healthy living, and contemplative experiences represent fundamental core changes, not just trends.

The panel believes that Sanya has built the foundation for developing in a way that will contribute to the future economic, environmental, and social health of Hainan and China. The city's real challenge is to build on the base of its investment in its infrastructure, while maintaining, over the long term, a high-quality natural environment.

The issue is one of balance and staging. No successful economy can be based on a single industry. Sanya has a number of major impediments to address as it builds its economic future, including:

- a low level of education;
- overbuilding and consequent investor concern;
- lack of a clear identity and of a comprehensive marketing plan or program;

Fishermen practicing traditional harvesting methods. Many residents rely on Sanya's bountiful natural resources for their livelihood.





The harbor commercial district proposed by the panel would relate retail opportunities to the colorful local fishing industry.

- a significant inventory of unfinished public and private development projects;
- few and expensive scheduled flights to Sanya; and
- a difficult investment environment for foreign capital.

### Assets in Place

Sanya also has fundamental assets in place that the panel believes will allow the area to become economically sustainable in the long term. These include:

- a diverse, strong, and growing agriculture sector;
- a support infrastructure that allows for significant population and tourism growth;
- a substantial inventory of vacant housing units;
- high-quality tourist attractions;
- a major fishing fleet operating from the urban center;
- an extensive river and sea shoreline in the urban center;
- the emergence in China of homeownership and resale opportunities;
- a large undeveloped coastal resource;
- a healthy and diverse marine environment;

- low development density compared with other places in China with a favorable year-round climate;
- an island environment (Hainan’s disconnect from the mainland reduces the risk of experimentation and testing of ecological ideas.); and
- no visa or language impediments for tourists from mainland China.

### The Panel’s Plan

The panel envisions the Sanya region as a vibrant city providing primary, resort, and retirement housing and featuring research and education institutes that focus on sustainable technologies for the agriculture, marine biology, hospitality, and building industries. These research and education centers would support existing as well as emerging businesses, which would locate manufacturing facilities and offices in the planned communities that will be developed in Sanya.

Major elements of the panel’s plan for the city include:

- a revitalized urban core focusing on the fishing fleet and fishing-dock environment as core assets;
- access to the waterfront;
- integrated transportation—light rail, small buses, water ferries—connecting urban, resort, and tourist destinations;
- guidelines for environmentally sustainable building and management;
- a freeze on hotel development, with the exception of unique niche products with an international following;
- resort development focused in Yalong Bay and Sanya City, with all other shoreline locations (including the islets) reserved for world-class, sustainable ecotourism destinations;
- coastal shoreline, coral reef, and marine protection programs to ensure long-term environmental health and tourism value;

- some local agricultural activities incorporated into tourist activities; and
- redevelopment of western Sanya Bay into a mixed-use community for affordable tourism, housing, and clean industry.

### Center for Research

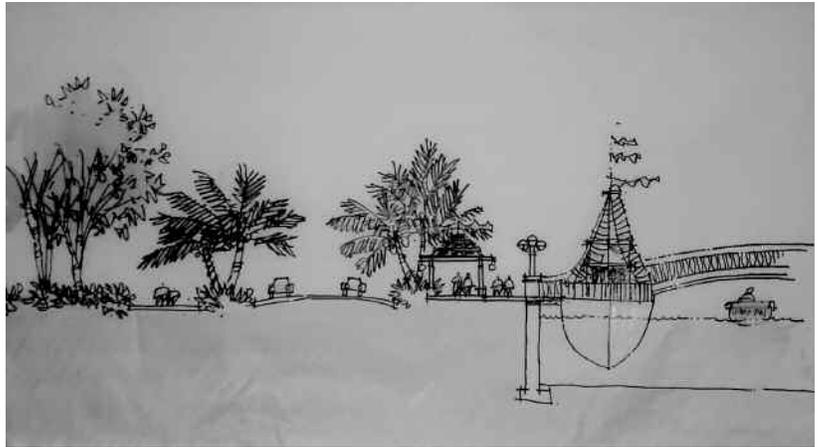
The panel believes that there is a market for one or more research facilities in Sanya devoted to sustainable marine industries, sustainable agriculture, and sustainable tourism. The research institutes would partner with international foundations, Chinese universities, and world-class universities specializing in these scientific and product areas. A center for graduate interns in these specialties could be created and housing in downtown could be allocated for this purpose.

Such a center would support Sanya's position as an international model community. These institutes and the proposed Sanya campuses of participating universities would attract Chinese educators, scientists, and researchers (and their families) to Sanya. The presence of this core group could cause further investment and improvement in Sanya's educational environment.

The remaking of Sanya as a research center could begin with a series of international conferences using the region's extensive hotel resources. High-tech conference capacity should be built to serve corporate- and science-meeting markets, which would expose business and science leaders to Sanya, leaders who, over time, may decide to invest or locate in the Sanya region because of the high-quality environment.

### Reaching the Vision

Sanya should put its primary efforts into attracting visitors from mainland China, Hong Kong, Macao, and Taiwan, while building expertise to serve the international tourist market. The international market is moving more and more toward eastern cultures, herbal and healing techniques, and spiritual traditions. Great tourist centers build on the unique history and attributes of their settings and are developed in ways that enhance the tourist experience. They also provide opportunities for the interaction of local inhabitants and



tourists, which helps to increase the vitality of the tourist experience.

In light of these factors, an internationally experienced marketing and management consultant should be employed to evaluate Sanya's competitive position, develop a marketing program and strategy, and manage implementation. All tourism resources need to be coordinated in a master plan. For Sanya to become a great tourist center, it must first address two fundamental infrastructures that, if ignored, will undermine the region's ability to reach its objectives of growing its economy and becoming a world-class environmental center.

The first and most important of these infrastructures is the region's academic and technical education resources. There needs to be a long-term strategy for providing educational facilities and programs to serve all people in Sanya. Sanya needs a well-educated population to attract and retain the talent needed to foster a growing and balanced economy. The panel does not know enough about economic, political, or cultural impediments to education in the region to make specific recommendations. However, it does believe that a partnership among government, business, and education interests could be established to creatively address this need.

The second infrastructure issue needing attention is Sanya's capacity to implement the vision outlined by the panel. Sanya must have world-class talent to create a world-class place. Establishing a creative partnership linking the best design and development firms in the world with talent from

The panel's plan for downtown envisions a mix of transportation modes—walking, driving, and boating—along the waterfront.

Right: Downtown Sanya is a vibrant urban area. Far right: The ULI panelists being briefed on the operations of the Sanya airport.



the region could provide the immediate ability to begin. The objective of a capacity-building effort should be to develop a local base of professional talent that can serve as a resource for the rest of China in designing and building ecologically and environmentally balanced communities.

## Market Opportunities

Based on its assessment of the location's market characteristics and supply and demand conditions in the market, the ULI panel identified the following opportunities.

### Tourism

There is a strong opportunity to develop Sanya into a world-class resort destination with a heavy emphasis on the quality of the environment. The destination would cater to domestic as well as foreign audiences.

Market opportunity exists for hospitality facilities at every level, from simple inns to five-star resorts. An appropriate level of visitor-oriented attractions, activities, and services should support each hospitality market segment.

The panel suggests the following criteria for locating the various market segments:

- Small inns and one-, two-, and three-star hotels serving mostly domestic visitors should be located near tourist-oriented attractions and activities; with access to shopping opportunities, restaurants/ bars/discos, and urban areas; and with beach access.
- Business-class and three- and four-star hotels catering to business clientele and meeting

attendees and also nonbusiness travelers should be located in downtown; near the airport; and near concentrations of business parks.

- Luxury facilities and four- and five-star resorts catering to high-level meetings for domestic and international business groups and the high-end tourist market should be located within a development plan incorporating secluded sites; within a planned environment that includes on-site amenities and activities, such as golf and archery; and on the beachfront.

“Get what is here healthy” is a short-term imperative for attracting visitors and developing Sanya into a world-class resort focused on the region's unique environmental qualities. In the following lists, the panel recommends various improvements in access, visitor services, and tourist facilities and activities, and a variety of initiatives for marketing Sanya in order to maximize its opportunity in the marketplace.

### Access:

- Improve air connections to mainland China and southeast Asia.
- Create a rail/ferry connection to the mainland.
- Increase cruise ship activity.
- Improve the expressway on Hainan Island.
- Improve express transport options to the airport and tourist destinations in Sanya.
- Provide options for water transportation, for public and event-oriented transportation, and for individual use.

**Visitor Services:**

- Increase the level of professionalism at all tourist-serving facilities. These include but are not limited to transportation facilities (airport, rail, bus, taxi, car rental, and boat); hotels, restaurants, and other hospitality facilities; and gated and ungated tourist destinations.
- Train local people for positions in the tourist industry.
- Improve the foreign-language proficiency of people employed in tourism.

**Tourist Destinations:**

- Where necessary, improve the quality of existing facilities, including sites related to high-tech agriculture.
- Complete Aquatic Park and Citizens Park.
- Create destinations along Victory and Liberation Streets at which local residents can interact with visitors.
- Create an ungated attraction in the harbor area to include local businesses related to the shipyard as well as restaurants, bars, and retail facilities oriented to cruise ships.
- Concentrate upscale shopping opportunities in a single location that is attractive, offers ease of vehicular access, and is accessible—but not connected—to tourist areas.

**Tourist Activities:**

- Based on the marketing plan, create an aggressive program to draw tourists to Sanya's attractions. This should include gated and ungated attractions and other activities at tourist destinations; activities such as diving/snorkeling, surfing, jet-skiing, sailing, and excursion boating at river- and sea-oriented sites; interpretive tours of environmentally sensitive areas (such as virgin forests and rock forests) and high-tech agriculture sites; and tours for riders, bicyclists, and users of other alternative modes of transportation such as all-terrain vehicles (for use in designated areas).
- Organize festivals that attract broad audiences. An annual orchid festival would celebrate

Sanya as the world's primary grower of this flower; food festivals could be based on Sanya's wealth of agricultural resources, and so forth.

- Focus on the agricultural assets of Sanya and Hainan by organizing educational tours of agricultural production, processing, and related research activities.
- Expand facilities for golf and tennis vacations.
- Create family-oriented children's activities at suitable tourist sites.

**Marketing to the World:**

- Fully empower an entity with sole responsibility for marketing Sanya and Hainan as a tourist destination.
- Identify the specific target markets, including geographic origin, age, income, family configuration, lifestyle, and the depth of market.
- Identify each target market's specific travel-related needs and wants and the means of marketing that will reach each target market.
- Define the specific strengths and weaknesses of the competition—in China, in the region, and worldwide—and identify the capture potential of Sanya within this competitive context.
- Identify strategies for maximizing Sanya's opportunity in the competitive context.
- Create financing mechanisms for conducting an aggressive marketing campaign.
- Conduct the marketing campaign in targeted locations.
- Diversify the target markets as they relate to geographic origin, tourist type (business groups, individual travel), family configuration, and so forth.
- Focus on conventions and other large-meeting groups.
- Increase off-season activities.

In the short term, activities should be focused on completing the development of currently successful areas, such as Yalong Bay. In the long term,



The port represents an important component of the region's economy.

the area has boundless potential for attracting domestic and foreign visitors and opportunities will open for the development of areas beyond the current envelop of activities. The city should keep the east and west extremities of the city available for such long-term opportunities. The capacity for market responsiveness is valuable in this era of dramatic, rapid market changes.

Also, certain areas should be left undeveloped so that the environmentally conscious use of the land can be planned and executed with the most up-to-date information and technologies available. These concepts are discussed in detail in the planning and design section of this report.

### A Balanced Economy

To ensure the economic health of the region, the cyclicity of the tourist industry needs to be counteracted by strengthening other existing sectors of the economy and introducing new industries that represent a high level of market opportunity for Sanya. The panel's recommendations for activities that have the potential for balancing the local economy include the following.

**High-Tech Agriculture, High-Tech Aquaculture, and Related Light-Industrial Opportunities.** As a famed fishing port and one of the world's largest producers of tropical flowers, the Sanya region can build on existing strengths to establish a high-tech agriculture and aquaculture sector that researches, produces, and processes tropical fruits, vegetables, and grains as well as various domes-

ticated and wild land and sea life. A strong environmental orientation to the activities and a focus on "feeding the world" will not only create a healthy local industry but also will have the potential to attract significant domestic and foreign investment.

To address the specifics related to developing agriculture and aquaculture industries to their full potential, the panel recommends that the following activities be undertaken.

- Identify opportunities.
- Develop and implement programs and plans.
- Line up investment.
- Recruit expert staff.
- Market the region's resources worldwide.

The ideal location for the processing and research facilities that will be developed is near the airport and downtown. Expressway access is a must.

**Educational Facilities.** To ensure an educated work force for the tourist and high-tech agricultural industries, improved educational opportunities from elementary grades through college have to be provided. Better educational opportunities for young children will help attract educated families with children to move to (and work in) Sanya. The development of institutions of higher education will in itself create a significant amount of stable jobs in the region.

A focus of higher education in Sanya should be on areas that relate to the local economy. Specifically, the panel suggests the following areas for expanded higher education opportunities:

- hospitality;
- cooking/culinary arts;
- environmental sciences;
- social ecology;
- holistic medicine;
- horticulture;
- high-tech agronomy; and
- marine sciences.

The development of higher education opportunities can help balance the local economy, as attendance at colleges and professional schools is typically countercyclical—that is, when jobs are scarce, people tend to go back to school to prepare for new challenges as the economy turns around. A strong focus on environmental issues in all studies would ensure attention from foreign industries and become a unique marketing angle: the area’s environmental education would be in itself a tourist attraction.

**Primary Housing.** The further development of the tourist economy, the development of educational facilities, and the growth of high-tech agriculture businesses will create a need for primary housing. A well-housed local population is important for the health of the tourist industry, and the panel recommends that the following steps be undertaken to ensure adequate housing:

- Assess the need for primary housing on a yearly basis. The panel’s quick review of local projections indicates a much slower current population growth rate (1.5 percent) than is likely to occur should the tourist and high-tech agriculture industries and educational endeavors meet their potential.
- Identify appropriate locations for residential and mixed-use communities.
- Study related service needs.
- Market the availability of housing as well as the environment to attract top talent to Sanya.

The construction of primary housing will be a strong contributor to a balanced economy. So too will be the growth of supporting services, including governmental services (such as security and fire protection), health services, educational facilities, and local retail and other household services—in all cycles of the economy.

**Second-Home Market.** The panel identified a significant opportunity for developing second-home communities targeted primarily to the fast-growing affluent segments of the domestic market. To take advantage of this opportunity, the panel recommends the following steps:

- Identify the depth of market demand at various price levels, addressing various lifestyle and demographic profiles.
- Identify locations for such developments. Remember that segmentation in the second-home market means that some homes may be located close to urban areas and others near luxury resorts, where they may be part of the resort’s service umbrella.
- Develop product criteria that will address the needs of each market segment.
- Identify and attract developers that have successfully developed products meeting those criteria in other locations.
- Create joint ventures for the development of second-home communities.

The construction of second homes will create jobs. However, second-home communities will contribute more substantially to balance in the economy by bringing an affluent segment of the domestic population to Sanya on an ongoing, yet periodic basis. The presence of an affluent seasonal population will reinforce the image of the region as a place to visit, and also create a need for a high level of local services and thus contribute to the health of the local economy.

### Unoccupied Building Inventory

Sanya has a large inventory of unoccupied residential and commercial properties. For Sanya to reach its market potential, to attract investment, to develop into a world-class resort destination, and to recruit the educated labor force that is needed to staff high-tech agricultural and educational enterprises, it will have to put these nonperforming assets to economic use or tear them down. The panel strongly recommends that the city focus on the problem of the nonperforming building inventory by taking stock of and marketing these assets as described below.

#### Taking Stock:

- Identify the marketing strengths and challenges of each area of concern, including downtown and Sanya Bay.
- Identify individual properties of concern in otherwise healthy areas.

The many unfinished commercial and multi-family buildings found throughout Sanya need to be inventoried and evaluated for their future development potential.



- Evaluate the physical strength of all unoccupied properties.
- Identify highest and best uses for areas of concern in general and for specific properties of concern in particular. For example, the panel's preliminary analysis identified the potential for the reuse of downtown structures for residential, office, retail, and educational uses. And along Sanya Bay the panel's analysis identified potential for the development of a master-planned, mixed-use environment that would include primary and second homes, office and retail uses, and hospitality uses, the latter catering mostly to domestic visitors.

#### **Marketing:**

- Empower an entity with sole responsibility for analyzing and marketing the distressed properties.
- Identify target markets for reuse—for example, residential, commercial, light industrial, and hospitality—and determine the depth of each target market for the reuse of distressed structures. Focus on target markets that will contribute to a balanced economy.

- Identify each target market's needs and wants as they relate to structural layouts and the means of marketing that will reach each target market.
- Define the strengths and weaknesses of the competition as it relates to the target markets—in Sanya, on the island, in China, and in the region—and identify the capture potential of the various properties within this competitive context.
- Create a marketing plan to identify strategies for maximizing each area's or property's opportunity in its competitive context.
- Create financing mechanism for conducting an aggressive marketing campaign, including special incentives for future users.
- Conduct the marketing campaign in targeted locations.

A cleanup of the nonperforming assets should be done early. Cleaning up is a short-term activity, while reuse and replacement will take a long time. A cleanup effort will clearly signify movement toward solving the problem and thus will make a significant contribution to the health of the economy.

# Planning and Design

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**T**he plan proposed for Sanya City and the surrounding area is based on what the panel learned from the briefing materials provided by the sponsors; the briefing organized by the city; extensive tours of the area; and interviews with local government representatives, citizens, and business owners. The plan is designed to achieve a variety of goals:

- Recognize and actively acknowledge Sanya's unique assets.
- Increase the quality of life for Sanya's permanent residents.
- Make Sanya a place of memorable experiences to which visitors will want to return.
- Encourage economic development beyond tourism.
- Increase occupancy at existing hotels and, in time, expand the hotel base.
- Prioritize projects for both the public and private sectors to help make Sanya a place, not just a series of projects

This planning and design section of the panel's report builds on the market potential section ("the what") and defines "the where" for the ideas presented. It describes the planning conditions, the various infrastructure and planning issues that need to be addressed, and specific activities that will help make Sanya a place like no other in the region and perhaps the world.

To help Sanya develop into a prominent resort community, the city needs to take several actions from a planning perspective, pertaining to roads and public transportation, environmental issues, and design standards.

## Assets

Sanya's numerous and valuable assets, as discussed next, form the foundation of the panel's proposed plan.

## Climate

Sanya is the only tropical city in China. Located on the southern tip of Hainan Island, it enjoys year-round warmth and good weather.

## Natural Resources

Without argument Sanya possesses some of the most spectacular natural resources in southeast Asia and the world. With 209 kilometers of coastline, Sanya has the longest continuous shoreline of any city in China, perhaps in all of Asia. While some of the beaches have been developed, most of the coastline is unspoiled and provides incredible opportunities for swimming, snorkeling, bird watching, and simply enjoying water views. Most of the beaches experience minimal surf all year and are suitable for swimming. Several coral reefs within easy access of Sanya offer an opportunity for snorkeling and scuba diving.

The literal English translation of Sanya is "three fingers." These fingers are the city's three rivers—the East River, the West River, and the Sanya River—all of which empty into the South China Sea. These natural waterways form Sanya harbor and also provide extraordinary opportunities for enjoying the water. Mangroves line the rivers, providing habitat for birds, fish, and amphibians. Along the developed portions of the rivers, avenues and promenades provide waterfront access for residents and visitors.

## Agricultural Conditions

Good agricultural conditions in the region allow for the cultivation of a wide variety of crops. The region is known for its agricultural production and is the only place in China that has a year-round growing season.



Half Moon Bay (above), west of the Sanya City center, is one of Asia's most beautiful beaches. Lu Hui Tou (Deer Looking Back) Park (right) is a popular tourist attraction near the heart of downtown Sanya.



### Developable Land

A significant portion of Sanya is undeveloped. Because of unique environmental characteristics and ecological value, portions of this undeveloped land should be left in its natural state. Also, some of the land currently in agricultural production should be left in agriculture because of the importance of this land use to the economy. However, still significant portions of land are available for near-term and mid-term development, including the Haipo area west of the city center, the area around the airport, and the undeveloped portions of Yalong Bay

Haitang Bay, Half Moon Bay, and some of the islands off the coast may be appropriate locations for projects in the future. However, due to the environmental value of these areas, any development needs to be carefully considered and

planned. These places present opportunities for special projects—an environmental research facility, ecotourism experiences, nature centers. The panel recommends that these areas not be developed in the near term, and that they should be developed only according to comprehensive development plans that meet the goals of the city and ensure preservation of their unique environmental and cultural resources.

### Infrastructure

As far as infrastructure is concerned, the city has planned for its growth. The water system, sewers, electricity supply, port, and airport all have excess capacity and can accommodate growth into the foreseeable future. This is an attractive situation for developers, because they will not be responsible for infrastructure improvements.

### Vision of the City Leaders

The panel is impressed by the vision of the city leaders, and their desire to elevate Sanya into a world-class city. They recognize and value its assets and are willing to do what it takes to make Sanya a better place for residents as well as visitors. Their understanding and commitment are demonstrated by the projects they have initiated and the plans they have made.

### What Is a Resort Community?

When the panel talks about Sanya becoming a world-class “resort community,” it is referring not to a single resort development, but to the community represented by the whole city of Sanya—its residents and institutions and the individual resorts. The local and resort components of the community should work together—their different requirements are not in conflict. A successful local community will work well for resort visitors. Other characteristics of successful resort communities include the following:

- *Positive image.* Successful resort communities convey a positive image to the outside world, and potential visitors are aware of that image. (Sanya needs to improve in this respect.)
- *Opportunities to mix.* With some exceptions (remote, exclusive resorts, for example), successful resort communities are not tourist

ghettos. Tourists tend to want to mingle with local residents.

- *Well-satisfied residents.* Successful resort communities tend to be in cities that are popular with their own residents, in cities that meet the needs of their permanent residents.
- *Attractive waterfronts.* Visitors are attracted to waterfronts. (Sanya is fortunate to have a long coastline and potentially attractive frontage along its rivers.)
- *Memorability.* Successful resort communities are places about which stories are told. They provide experiences that stimulate visitors to tell stories when they return home.
- *Diversity of activities.* Successful resort communities offer a range of activities, including recreation and shopping. Family visitors need a variety of activities for children.
- *Positive congestion.* A bit of congestion adds vitality. But resorts do not have to be as congested as Bangkok. Lahaina, a resort community in Hawaii, is a better example.
- *Pedestrian friendliness.* Successful resort areas are walkable. Walking is a favored means of travel within resort communities.
- *A variety of transportation choices.* Generally, tourists resist being locked into a single means of access and they tend to be more amenable to a variety of transportation modes than they are in their own hometowns. Successful resort communities offer a range of transportation choices to visitors who have a range of transportation needs.
- *Airport access.* Successful resort communities tend to have access to a convenient airport with major markets within two flight segments of this airport.

## Areas of Opportunity

Sanya has many assets, as mentioned. The city can establish a positive image for itself in the near future by focusing on performance in a few key

areas. Among the opportunities for early action are the following:

- *Port of Sanya.* The port is a vibrant activity center for both local residents and tourists, and at least some of the activities that take place there should be retained. The approach along Victory Street is active and of attractive scale. Adding commercial activity related to the fishing industry would be of interest to tourists. Moving the cargo ship activity to another location, as is currently planned, would open this space for harbor-tour vessels and water taxis. If adequate water depth can be provided, cruise ships could potentially berth here.
- *Yalong Bay.* Before new areas are opened for resort development, Yalong Bay should be built out.
- *Liberation and Victory streets.* Liberation Street and Victory Street appear to be active, successful retail streets. Improvements should be limited to ones that enhance the streets' activity for the merchants and local residents. If this area remains popular with local residents, tourists will be attracted to it.
- *Completion of projects underway.* Among projects underway that should be completed are Citizens Park and Aquatic Park, which will be valuable additions to the inventory of activities available for visitors (and residents).
- *Year-round activities.* Sanya needs more year-round activities for all age groups. These could include, for example, movie theaters, shopping centers, theme parks, playgrounds, walking and hiking trails, bicycle trails, and fitness courses.
- *Visitor transportation.* Mobility for visitors both within resort complexes and among activity centers should be improved. Details are provided in the section on transportation issues that comes next.
- *Design standards.* Cohesive physical development guidelines should be formulated for guiding future development.

Bicycles and motor scooters are popular forms of transportation year round in Sanya's warm climate.



- *Environmental protection guidelines.* Specific environmental guidelines should be formulated for guiding further development.
- *Detailed master planning.* The panel's recommendations are concepts. Detailed master planning will be required.

## Transportation Issues

Sanya currently enjoys a surplus of transportation capacity. However the anticipated growth of the resident population and the visitor population could use up this capacity and lead to some specific problems:

- *Roadway system.* The popularity of personal automobiles and their increasing affordability have led to an explosive growth of auto travel—at rates several times higher than population growth rates—in locations throughout the world. Gains in mobility have resulted, but so have strains, sometimes to the breaking point, in the roadway systems of cities throughout the Far East. If Sanya were to follow the patterns of many other cities, its surface transportation system could be soon overwhelmed.
- *Road intersections.* Today's relatively undisciplined operational patterns may break down at key intersections and traffic circles when traffic volume grows.
- *Roadway maintenance.* Heavier road use—particularly by the heavier vehicles associated with construction and service—may cause road

maintenance problems to increase exponentially over time.

## Roadways

The panel has a number of recommendations relating to the coastal road, traffic monitoring, and the regulation of vehicle emissions that address the problem of a growing volume of cars.

**The Coastal Road.** The coastal road should be completed in selected locations only. A continuous coastal road along the entire 209 kilometers of oceanfront is unnecessary and would be unwise. It could encourage through traffic at volumes high enough to interfere with enjoyment of the waterfront and with natural beachfront processes. In addition, completion of a continuous coastal road could be expensive, particularly through mountainous areas.

In selected locations, the coastal road should be designed for local traffic only by means of the following characteristics:

- no more than two lanes, one in each direction;
- speeds not to exceed 40 kilometers per hour; and
- elements that discourage through traffic, such as traffic islands, speed tables, narrow sections, and roadway discontinuity.

The portion of coastal road west from downtown Sanya past the airport should be realigned to make a continuously curving roadway and be lined with a strip public park of varying width.

Other developing areas on the coast should be served by through streets that are set back from the oceanfront by at least the depth of appropriate development parcels plus an adequate landscaping belt. In no case should new coastal road sections be built in locations that would interfere with beach sand movement, drainage, or habitat. However, through-traffic routes that meet these requirements should be provided with occasional, enticing views of the ocean.

**Traffic Monitoring.** Traffic volumes should be monitored at least annually and compared with roadway and intersection capacities. New development proposals should be subject to detailed traffic analysis to identify new capacity requirements.

Required capacity should be completed simultaneously with or in advance of new development.

**Motor Vehicle Emissions.** Motor vehicles with unacceptable emissions should be gradually phased out by regulations over a long enough period of time to prevent undue hardship. Hainan and Sanya in particular should set an example in this respect: enjoying the benefits of individual motor vehicles without suffering poor air quality.

### Resort Community Connections

The panel has a number of recommendations concerning internal circulation within the resort community. All of the resort transportation services recommended by the panel should be designed as part of the vacation experience. The importance of employee training and of a helpful, friendly attitude on the part of transportation-service drivers cannot be overemphasized.

**Yalong Bay.** Circulation within Yalong Bay, with its growing visitor population, should be improved. One approach would be for the Resort Hotel Association to provide a fleet of small, colorful vehicles that carry four to eight passengers for service within Yalong Bay only. These vehicles could be an improved version of the three-wheeled pedicabs that are found in Sanya today or small, open jeeps. They should be powered by low-emission or no-emission systems, and provide free service to hotel guests. Scheduled service could be provided during certain hours, supplemented by on-demand service at other times.

**Connections to Sanya City.** Growth in Yalong Bay and other areas of the resort community will increase the need for connections to Sanya City. Small buses could provide the necessary service, on either an on-demand or scheduled-service basis. Bus service could be provided by either individual resorts or the Resort Hotel Association. The latter approach would have the advantage of allowing frequent service—a bus every ten minutes would be desirable at not unduly high costs.

**Water Taxi.** Water-taxi service among activity centers of the resort community would be an appealing transportation alternative. A relatively leisurely trip from Yalong Bay to downtown Sanya, for example, would take about one hour and could



be a positive part of the day's activities. Individually owned vessels operating under specific service guidelines could provide water-taxi services.

The resorts at Yalong Bay provide visitors with a choice of activities and accommodations.

### Public Transportation

As the resident and visitor populations grow, public transportation systems will continue to play an important role in maintaining mobility, particularly for residents. Tourists will also use public transit to some extent. The panel makes the following recommendations related to public transportation issues:

- *Low-emission vehicles.* Low- or no-emission transit vehicles should be phased in gradually, making Sanya an example of responsible public transportation provision.
- *Transit lanes.* Today's bus riders have widely scattered origins and destinations, requiring



When planning for the future of Sanya, both its natural resources and human resources are important.

service on many roads and streets. However, major movements may evolve over time, encouraged by the long, linear nature of the Sanya community. Transit movements should be monitored to identify locations where special transit lanes may be justified. Some aspects of innovative bus services in Curitiba, Brazil, may be instructive.

- *Transfer facilities and shelters.* Growing demands may justify development of one or more transit centers in central Sanya, providing for convenient transfers and sheltered waiting areas. Improved shelters should be provided at other locations.
- *Internal light rail.* The proposed internal light-rail system in Sanya could provide an appealing visitor experience and may provide supplemental transit service for residents. However, funding for light rail should not require sacrificing improvements in bus service, which are more important.

## Environmental Issues

Everyone recognizes that Sanya has incredible natural resources and that if the region wants to become a world-class resort community it will have to preserve these resources. While the natural resources are still in good condition, there are signs of degradation. The frequency of river dredging has increased from every five years to

every three years, mostly likely because of the increasing amount of sediment flowing into the rivers from development and agriculture. The beaches are littered with trash and need to be cleaned on a regular basis. While it is improving, the quality of the water in the rivers is poor.

These are situations that can be fixed now, but there is a great potential for irreparable damage if development occurs at anticipated rates with no environmental protection policies in place. The following sections on environmental education, erosion control, garbage management, native planting, pesticides and fertilizers, beach protection, and environmental monitoring contain detailed recommendations on how Sanya can protect its most significant asset, its environment.

Much research has been done in China and abroad on low-cost environmental protection techniques; the city should contact universities and research centers to learn about the most appropriate environmental protection methods. The research facilities proposed by the panel can also provide information on techniques to preserve resources and provide monitoring data for evaluating environmental conditions.

## Environmental Education

The citizens of Sanya know that their livelihood depends on a clean, healthy environment. However, some do not know how direct an impact certain of their actions can have on the environment. For example, throwing waste into the rivers can degrade the quality of the water to the point where nothing can live in it; and when this polluted water flows out to the sea it degrades coastal resources.

Offering alternatives for trash and sewage disposal and teaching people not to throw waste into the rivers would help maintain the progress that has been made in cleaning up the rivers. If people know that they are having a negative impact on the environment, they will try to change their ways to reduce the impact.

Sanya should develop an environmental education program for residents and visitors that includes elements such as the following:

- “do not litter” and “no trash or sewage in the water” signs along the waterways, along with trash receptacles, which are emptied daily, at regular intervals along the streets;
- age-appropriate study units for all school students on the importance of environmental resources and their protection;
- literature prepared especially for and distributed to hotel guests, on the uniqueness and importance of Sanya’s environment and ways they can protect it; and
- classes and seminars for construction workers on how they can reduce their impact on the environment, such as picking up their waste, controlling erosion, and protecting sensitive areas during construction.

### Erosion Control

During the interview process, the panel was told that the frequency of dredging for the harbor has increased from once every five years prior to 1994 to once every three years. This is probably due in part to exposed sediment washing off construction sites and farms into the rivers and harbor during rain storms.

Soil erosion also causes increased turbidity in the coastal waters, which in turn threatens certain near-shore habitats, such as coral reefs and sea-grass beds that need clear, clean water to survive. The increased sediment in the water can smother these habitats, severely degrading or even killing them. Loss of the coral reefs means loss of a tourist draw: no one will come to Sanya to explore degraded reefs. Because most fish species spend part of their life cycles in sea-grass beds, loss of these beds can mean fewer fish, which will put a strain on the important fishing resources of the city.

A number of simple and low-cost techniques can be applied to help prevent soil erosion. These techniques include:

- placing straw bales around the perimeter of construction sites to catch eroded sediment before it leaves the site and ultimately enters surface waters;
- phasing the clearing of construction sites so that soil is exposed only on the portions of the

site needed for development and the vegetation is left on the remaining portions of the site until they are to be developed; and

- leaving a perimeter of natural vegetation around agricultural fields that can trap sediment that may run off during rainstorms.

Sanya should develop erosion- and sediment-control requirements and standards for all new construction and provide guidelines for developers to follow when building new projects. An erosion- and sediment-control plan for projects should be approved before construction approvals are given. Farmers should be educated on how to control erosion and strongly encouraged to practice erosion control on their fields.

### Garbage Collection and Disposal

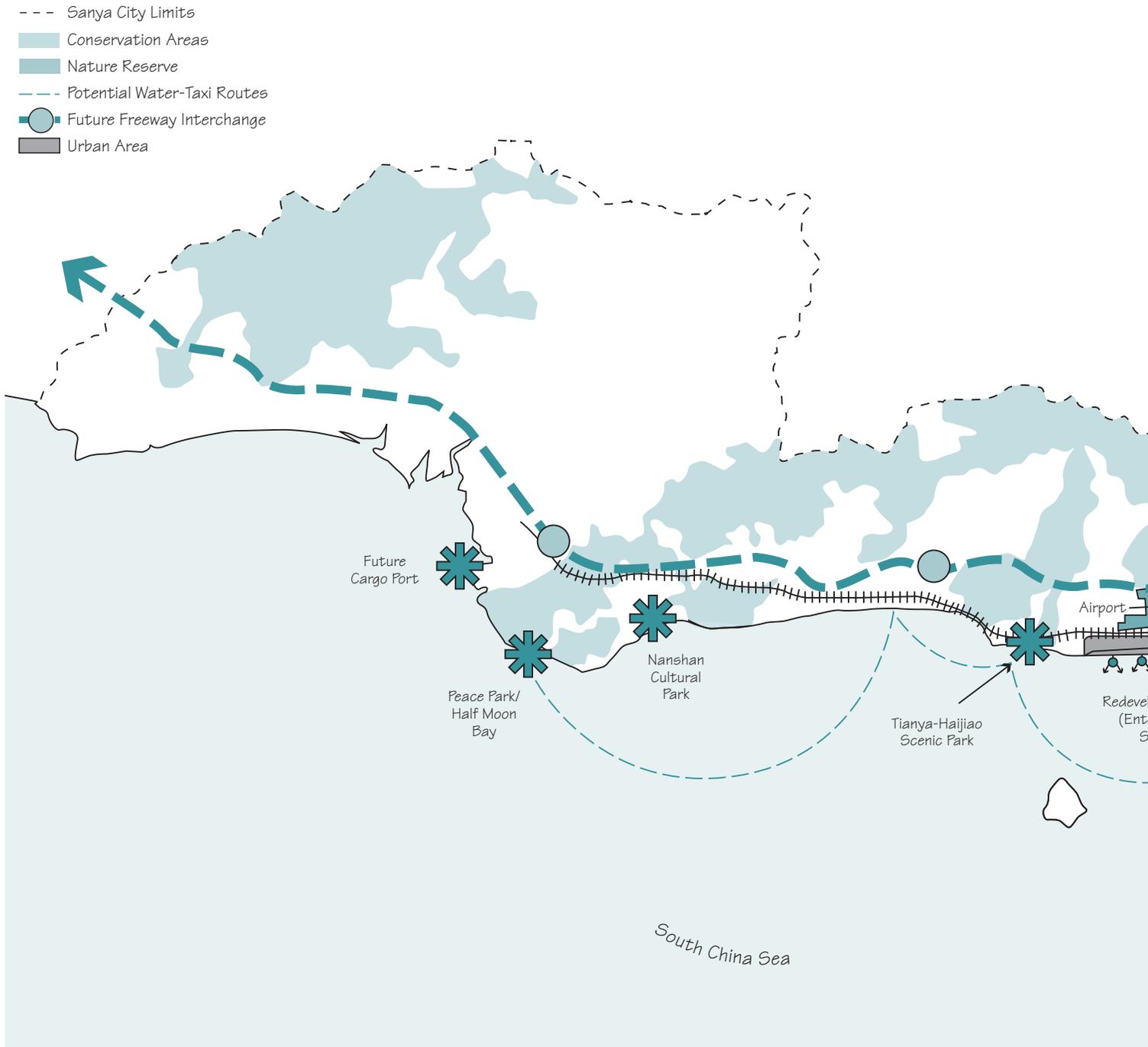
One of the inevitable effects of more people is more trash. In areas with a limited amount of land, especially islands, garbage disposal becomes a challenge. The city needs to plan for the increase in garbage that will inevitably occur. If not disposed of properly, trash can end up in the streets, roadways, and waterways—causing health problems and degrading the environment.

In addition, areas littered with garbage diminish the visitor experience. While touring Sanya, the panel saw several areas where garbage was piled up but not contained. The city should strive to centralize garbage collection in the city center, villages, and rural areas. The city should find sites for and develop landfills that are designed to minimize environmental damage.

### Restrictions on Nonnative Vegetation

Sanya’s anticipated growth and new development mean that much new landscaping will occur around the region. The panel recommends that the city require the use of only native plants in landscaping and it strongly discourages the use of plants that are not native to Hainan.

Hainan is fortunate to be home to a huge variety of plants that grow here naturally and have adapted to the climate. The natural beauty of Sanya can be maintained and even enhanced by using native vegetation for all landscaping.



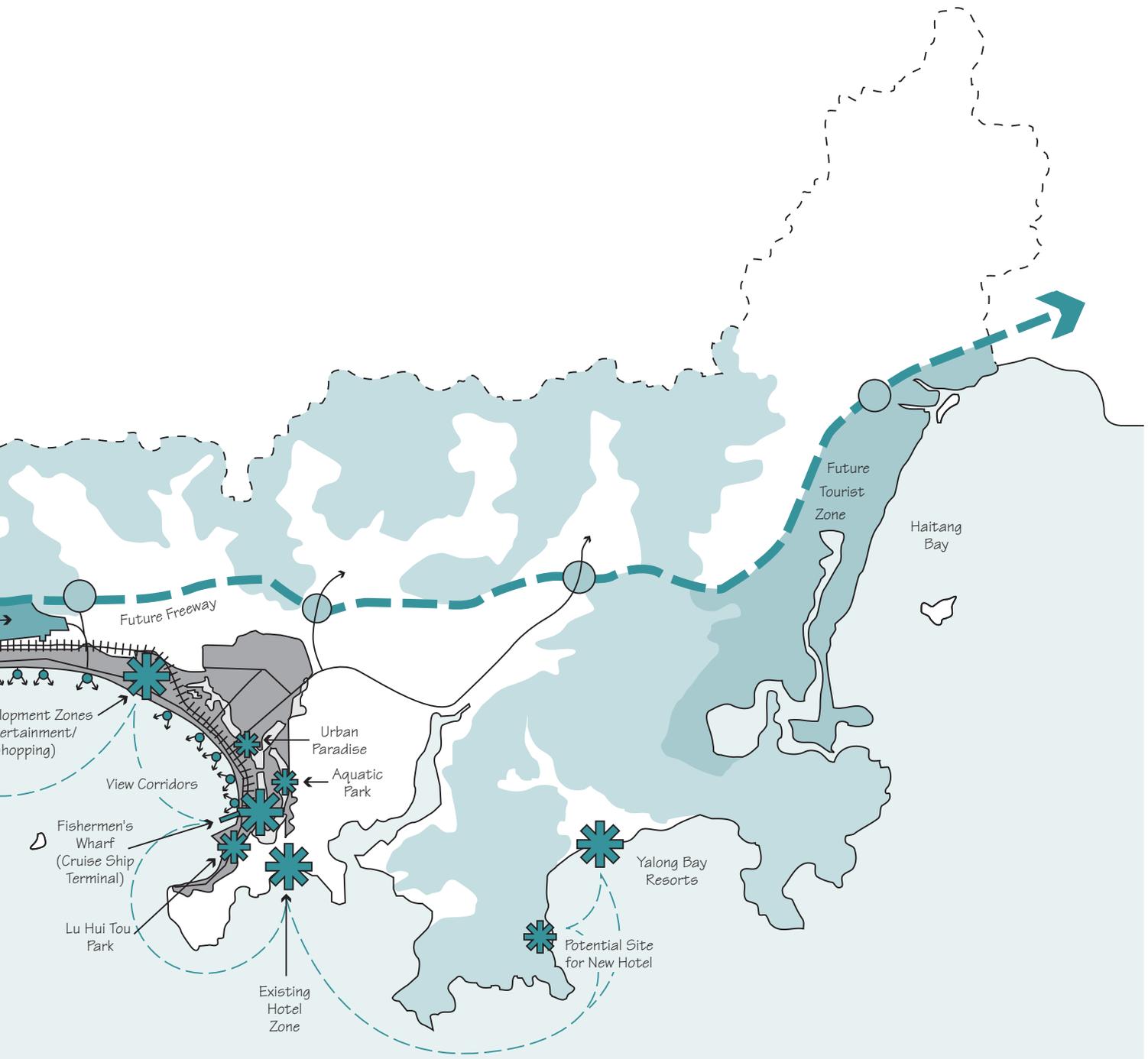
Nonnative plants may be invasive and displace native vegetation. Also, nonnatives may be less resistant to local pests and thus require the application of pesticides, which can be a pollution problem.

#### **Pesticide and Fertilizer Application**

The developed areas of Sanya are beautifully landscaped, providing a memorable experience for visitors and a pleasant living environment for residents. However, landscaped areas, including golf courses, often require pesticides and fertiliz-

ers to stay lush and healthy. While fertilizers and pesticides can be safely applied, their overuse may result in chemical runoff into rivers and coastal areas, which can cause harm to the coral reefs offshore.

Landscapers should be educated on the environmental impacts of pesticides and fertilizers. The city should assemble guidelines for the environmentally safe application of fertilizers and pesticides, and require that the people who maintain landscaped areas follow the guidelines.



Conceptual plan for Sanya City.

Current agricultural practices in Sanya do not require heavy use of fertilizers and pesticides. But as agriculture becomes more intense and high tech in Sanya, the need for pesticides and fertilizers may grow. The city should develop and implement guidelines for the application of pesticides and fertilizers in agricultural areas.

Universities around the world are researching the safe application of pesticides and fertilizers in agricultural areas and would be a good source

of information and guidance. Working with universities can make available to Sanya the best (and most affordable) technologies for maximizing crop production while limiting pesticide and fertilizer use.

### Beach and Dune Protection

Sanya's almost 209 kilometers of coastline provide scenic and recreational value, and the beaches and dunes that make up the coastline provide storm protection for upland properties. Beaches and dunes buffer Sanya from storms. If they are de-

stroyed, development along the coast may be flooded or washed away.

Sanya should not allow development seaward of the dunes, and should require a setback from the dunes of at least 30 meters. To prevent people from trampling the dunes, walkways over them should be constructed at convenient beach access points. Signs telling people to stay off the dunes should be posted along the beach. Where dunes have already been destroyed, native dune vegetation should be planted to help rebuild them.

### Environmental Inventory and Monitoring

Without argument, Sanya has some of the most incredible environmental resources in the world. However, there does not appear to be any qualitative or quantitative inventory of these resources. To better protect its environmental assets, the city needs to know what it has and in what condition. By taking inventory, the city will be able to focus its environmental protection efforts on the highest-quality resources and also to determine where future development will have the least environmental impact.

While taking inventory is not an easy task, it is critical to preserving Sanya's environment. Much research on Sanya's natural resources has been done and the research data can be used as part of this inventory. Many universities would welcome the chance to come to Sanya to complete parts of the inventory.

Once the city knows the extent and condition of its natural resources, it should periodically monitor their health to ensure that development and other activities in the city are not having an adverse impact. The responsibility for monitoring can be shared by the national government, the provincial government, and the city, as well as private developers. As part of the development approval process, the city should require developers with projects near environmentally sensitive areas to monitor the environmental health of those areas to ensure that they are not being degraded. If they are, mitigatory actions should be taken.

## Design Standards

The city should establish reasonable design standards and guidelines directed toward cohesive physical development, guidelines to which all new development should conform. These design standards would be under three major headings:

- *Streetscape.* Design standards for lighting, signing, hardscape, softscape and street furniture would be included in the streetscape category.
- *Urban design/architecture.* The urban design and architecture design guidelines would cover circulation, building heights and setbacks, and the color and materials of structures.
- *Open space/landscape.*

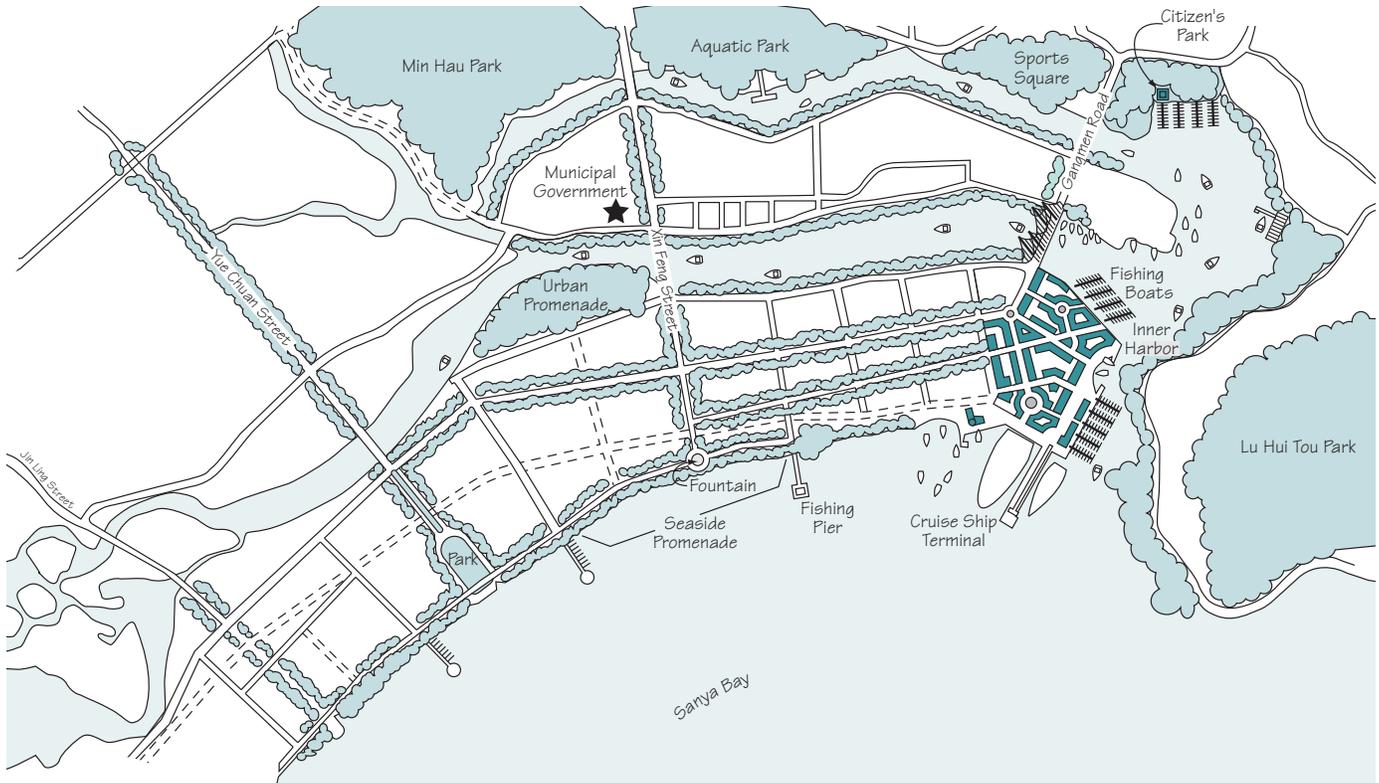
## Development Concepts

In arriving at its conceptual plan for development and redevelopment in Sanya, the panel considered all the wonderful and rare assets found in the region—an extensive coastline, unique natural resources, a vibrant urban community, and significant infrastructure investment. The panel's overall conceptual plan and waterfront conceptual plan are described next.

### Overall Conceptual Plan

In conceiving its conceptual plan for Sanya, the panel looked at five primary areas.

**Haitang Bay.** The Haitang Bay area contains Sanya's largest undeveloped coastal area. It has long beaches and incredible natural resources. There is probably no other place like it in all of China and it rivals some of the most beautiful beaches in southeast Asia. Agricultural activity occurs in this area. Access is not really developed. The panel believes that Haitang Bay should be kept in a natural state for now. Other coastal land with good access and infrastructure already in place is available for development. Haitang Bay would be a potential location for a research facility. It could, in the future, become an ecotourism site. The panel believes that the natural resources in this area are significant enough to require extensive master planning that takes into consideration the natural resources before any development occurs.



**Yalong Bay.** The Yalong Bay area has been the focus of resort development in Sanya, and the panel thinks that more resort development should occur here. The master plan and infrastructure are in place, as well as various activities, such as golf courses and Butterfly Park.

**Urban Paradise.** Sanya has a strong urban core, a plan to address the empty buildings is needed. Downtown's waterfront area, Liberty and Victory streets and other centers of retail activity, and Lu Hui Tou Park offer visitors an incredible urban experience. (The waterfront conceptual plan described below provides more detail.)

The panel believes that portions of the fishing fleet should stay in the harbor—as a tourist attraction—and that visiting cruise ships should be brought right to the waterfront once the cargo port is moved out to the west part of Sanya. Significant investment has been made in the downtown—parks, waterfront restoration, and so forth—and the panel believes that the city should continue the efforts to improve the downtown and its immediate surroundings.

**Sanya Bay.** Sanya Bay is an area that will allow for extensive access to the coast. The panel thinks that the coastal road in this area should be modified to slow traffic down and make it useful for both cars and pedestrians. Parks, fountains, and other features should be installed along the road to welcome tourists and residents to the coastal area.

**The Western Bays.** The city and private developers have invested significantly in the western side of Sanya. Nanshan Cultural Park, Tianya-Haijiao Park, and other facilities draw tourists to this part of Sanya. However, there should be even more investment in this area to make it a place where people want to spend several days, not just one day. The panel agrees with the city's plan to move the cargo port to the western bays.

### Waterfront Conceptual Plan

The panel developed a conceptual plan for the waterfront, focusing on the port. The panel believes that a portion of the fishing fleet needs to stay in the downtown area. This has been successful in other parts of the world (for example, Fish-

Conceptual waterfront plan.

erman's Wharf in San Francisco) and will attract tourists to the downtown area.

The panel also believes that the proposed plan to build an island for cruise ships should be reconsidered. Ways to build docks for cruise ships in the harbor should be explored. It is important to disembark tourists right into the center of activity that will keep them in the downtown. The cargo

port should be moved out of the harbor to the west as planned.

Other elements of the panel's waterfront plan include promenades and parks along the river and a marina.

# Development Strategies

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In order to achieve the goal of becoming an international environmental/tourist center, Sanya needs to focus its resources in an effective way. Many excellent ideas for development have been proposed, but they cannot all be accomplished at once. Doing a few things well is much more effective than doing many things in a mediocre fashion. Furthermore, vacant buildings and abandoned projects are a blight and deter new development.

Four general principles should guide the phasing of the development strategies:

- Projects should advance the overall long-term objective of making Sanya an international tourist center.
- Resources should be allocated to ensure that Sanya's development is balanced.
- Projects that make use of viable vacant buildings should be encouraged.
- Investing in marketing programs and air transportation capacity is as important as building new projects.

## Tourism Development Strategies

The Sanya government has limited resources available for future development and many projects are not completed. As a result, the investment community is reluctant to finance new projects. Therefore, in general, projects/areas that are under development should be completed before new projects/areas are undertaken. There should be a review of projects and only the most promising should be undertaken during the short term, with the rest postponed to later phases of development. The guidelines for this review should favor projects with the following specific characteristics:

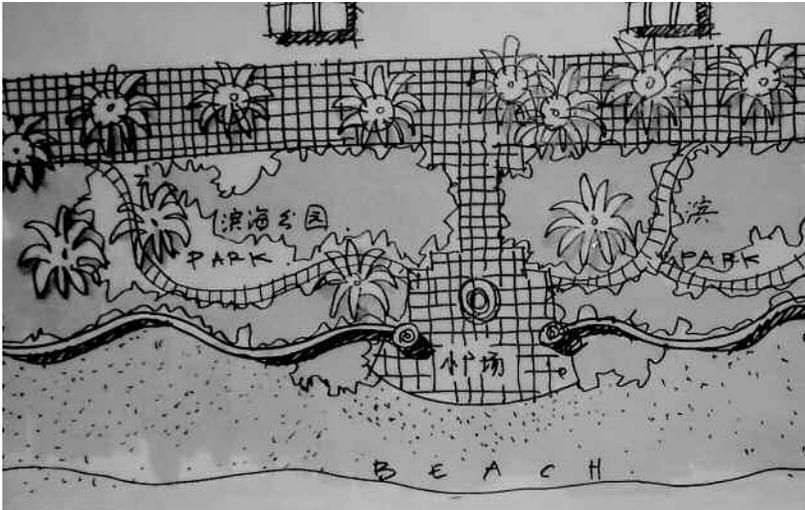
- is located in existing urban/resort areas;
- contributes to the overall image/marketability of Sanya;
- attracts outside investment; and
- supports a balanced economy.

In addition, marketing systems in Sanya are not well developed and an image for Sanya has not been established in the domestic or international marketplace. Limited air access is a significant bottleneck for development.

## Near-Term Development Priorities

The panel's near-term development recommendations by area are presented in the planning and design section of the report under "Development Concepts." These recommendations should be prioritized and the top priorities are as follows:

- Yalong Bay should be encouraged to continue development. The government should consider ways to support the construction of a major conference center at Yalong Bay and the proposed Ocean Park attraction. The government could allow the development of resort properties at Yalong Bay, and this development could become a funding mechanism for the conference center and Ocean Park attraction.
- The waterfront cargo port should be moved, and the area it vacates redeveloped as a retail/entertainment district. This redevelopment along with the development of a high-end waterfront hotel and downtown department store nearby may create the critical mass to begin the redevelopment of downtown Sanya City. Citizens Park and a high-energy Aquatic Park should complement the downtown area as a place for leisure, shopping, and nightlife.



Pedestrian-friendly parks should be developed along the coastal road west of town to provide access to the area's outstanding beaches.

Butterfly Park at Yalong Bay is an attraction that celebrates Sanya's natural beauty.



## New Products for Tourism

With the exception of certain niche projects, the government should try to discourage additional hotel development until the supply/demand situation is more favorable. New products for tourism should be encouraged as follows.

### Resort Residential

Sanya has tremendous potential as a second-home market. The principal markets are: Chinese families from cold climates; Chinese families from South China seeking weekend, short-term get-aways; and families and individuals from Hong Kong and Macao attracted by Sanya's environment and exceptional value relative to prices where they live.

As an alternative to additional hotel construction, the government should encourage the development of second-home projects and long-stay-apartment timeshares. These types of development provide balance to the economy. Compared with hotels, they tend to encourage family visits, longer stays, and more spending in the local community, which will boost the local retail market. In the short term, the best market for timeshare housing and second homes is mainland China. Such projects should be encouraged especially for the city's 70-hectare parcel in Sanya City and the redevelopment of Sanya Bay.

### Tourist Attractions

More active recreation facilities need to be developed to support existing hotels and guest houses. The government currently has a number of projects under consideration, including a botanical garden, a water park, and various theme parks. Rather than try to complete them all, it should focus its resources on a major attraction within the city of Sanya.

As the recreational or cultural activities in the area (the Buddhist Center, Tianya-Haijiao Park, Lu Hui Tou Park, and golf courses) are mostly adult-oriented, the panel suggests that the new major attraction that is developed should be of interest to young people. The panel recommends focusing on the Ocean Park in Yalong Bay and a high-energy attraction at Aquatic Park along the river in Sanya City.

- The Sanya Bay Promenade should be upgraded as a marquee pedestrian corridor suitable for mass tourism, including a high-rise district to the north.
- Nanshan Cultural Park should be developed to offer niche products and accommodations relating to Buddhism.
- Redevelopment studies should be initiated for the Haipo area and long-range planning studies for the outlying bays.
- Development should be restrained in Haitang Bay, on the islands off the coast, and in other areas not mentioned in the panel's recommended development plan.

### Conference Facilities

To attract visitation during the low season (summer), the city in cooperation with the hospitality industry should develop conference facilities focusing on environmental/high-tech clients. The most reasonable location is at Yalong Bay.

### Shopping and Entertainment

Chinese tourists greatly enjoy shopping, dining, and nightlife while on holiday. The panel proposes two major districts in Sanya City, including a waterfront retail district linked to a proposed downtown department store and a riverfront restaurant district. It also envisions three nodes of activity at Sanya Bay Promenade providing a variety of shopping, dining, and nightlife.

### Tourism Marketing

The goal of tourism marketing should be to make Sanya the prime resort destination for Chinese citizens while gradually increasing its appeal to regional and international tourists. Sanya must improve its current marketing program and do a better job of coordinating public and private efforts. The hospitality industry should be included in the planning and distribution of taxes collected from it by the government. The panel strongly advises Sanya to enlist the help of a professional international marketing firm to coordinate marketing efforts. Tourism marketing includes the following elements:

- advertising, including coadvertising;
- public relations and media relations and tours;
- Web-site development and management;
- coordination of the industry, which generally comprises small businesses;
- funding and promotion of special events during off-peak seasons;
- promotion of conferences and incentive group tours during off-peak seasons; and
- lobbying for improved air access and frequency of service.

The implementation section recommends specific steps for marketing and promoting Sanya. For

long-term marketing of tourism the panel recommends the following general strategy:

- Continue to deepen the core market in China by positioning Sanya as the most environmentally attractive location in China.
- Focus next on expanding the regional market, with particular emphasis on Chinese-speaking jurisdictions—Hong Kong, Taiwan, and Singapore—and Chinese overseas minorities in the rest of southeast Asia.
- Begin developing the western tourist market, with emphasis first on northern Europe and then on the United States.

### Transportation

Air transportation is the lifeblood of Sanya. It is imperative to increase the frequency of flights to Sanya and the number of departure cities, both domestic and foreign. The panel recommends the following strategies:

- Conduct an aggressive campaign to increase the frequency of direct scheduled flights and the number of airlines serving mainland cities. The central government should be encouraged to reduce fixed prices during off-peak times in order to fill hotels and stimulate demand for the redevelopment of vacant buildings.
- Seek government approval for increases in scheduled and charter airline service to Hong Kong, Singapore, and Bangkok. These cities are the major hub airports in the region and serve to connect Sanya to the world.
- Begin cooperation discussions with regional airlines—such as Singapore Airlines, Thai Airlines, and Cathay Pacific—that have global partnerships.

Within Sanya, the panel envisions three new transportation systems:

- a light-rail line within the city, which will eventually link to major attractions to the west;
- a water-taxi system linking waterfront retail/entertainment districts; and

- a nonpolluting “fun bus” system linking downtown, Yalong Bay, and other tourist areas.

### **Tourism Service and Training**

The need to improve training for hospitality workers is significant. Their current level of education and language ability is not sufficient to sustain a non-Chinese international clientele. The Sanya government should establish a hospitality training school, which can be funded in part by hotel-room taxes.

### **Environmental Planning**

Maintaining Sanya’s environmental quality will make it possible to capture a larger share of the overseas market over time. Maintaining environmental quality requires following a plan. Sanya needs to develop a second-phase plan for high-end resorts to follow the completion of the Yalong Bay and Nanshan areas.

The panel believes that the Haitang Bay area is the leading candidate for this subsequent development phase, and that it should be planned as a world-class model of sustainable, ecological development. No development should occur in this area until a well-thought-out plan is in place. In the meantime, strict controls to protect the area’s coastline and other natural resources (coral reefs, islands) should be instituted.

### **Development Strategies for a Balanced Economy**

Sanya has expressed an interest in developing a high-tech industry in order to balance its economy. The main impediment to high-tech development is the low skill level of the workforce. Until the skill level is raised, it is unrealistic to assume that Sanya will be able to compete with other locations in China that offer higher levels of education and similar wage structures for traditional high-tech businesses (software development, hardware development).

However, Sanya does have the potential to develop another kind of high-tech industry. Instead of trying to compete in the already glutted computer/software field, Sanya should focus on high-tech applications related to its natural resources, marine industries, and agriculture. In

these areas Sanya has unique advantages, and it can use resource-based economic development to bolster its tourist position.

### **Guiding Principles**

To achieve balance in the economy, Sanya should concentrate on developing value-added agricultural and marine products, such as off-season fruits and vegetables, exotic flowers like orchids, and fish products. Sanya has all these farm and marine items in abundance, but it merely exports them, allowing others to capture the higher values involved in processing them.

As local banks have indicated a strong willingness to finance processing facilities, the government should focus some of its scarce resources in processing industries, rather than concentrating solely on the more seasonal tourist industry. Processing industries will not only create a more stable job base for the local population, but also provide support for infrastructure upgrades—the road, water, and air-travel networks.

Using resources to develop high-value-added agricultural and marine products should not be seen as taking opportunity away from the tourist industry. In fact, economic development based on high-tech applications related to natural, marine, and agricultural resources will help support the tourist industry in Sanya, especially the foreign-tourist market.

A portion of the tax revenues from new agricultural and resource-based businesses can be used to help establish an international conference center that focuses on attracting high-tech firms in the biology, agriculture, and medical fields. Special attention should be paid to marketing to the high-tech sectors in Singapore, Taiwan, and South Korea, and biomedical industries in the United States, Japan, and Europe. With Sanya’s natural environment as a backdrop, these conferences will be a first step toward developing the second-home market and establishing a high-tech sector once the area’s workforce is prepared.

### **Near- and Long-Term Strategies**

In the near term, high-tech processing centers for agricultural and marine products should be developed at the airport and cargo port. Longer-term

strategies include the development of an eco-conference center for the support of international tourism and the development of local high-tech industries.

## Investment in Sanya

In order to successfully attract investment in the competitive southeast Asia market, Sanya must focus development on areas with a realistic potential for returns and, first and foremost, work out or otherwise solve the problem of vacant properties in Sanya.

### Resolving Problems with Vacant and Abandoned Projects

The presence of more than 2 million square meters of unfinished or vacant property in Sanya City and along Sanya Bay is a major impediment to investment. Until a solution is found to this problem, it is unlikely that there will be significant new investment in Sanya.

**Guiding Principles.** The panel makes the following observations related to the issue of vacant buildings:

- For the community to regain investor confidence, resolution of the vacant property problem must be made a top priority.
- The city should focus first on the vacant property in Sanya City.
- An overall plan should be developed for vacant property along Sanya Bay.
- Until this problem is solved, local banks will be reluctant to make new loans, but they should be willing to cooperate in a workout plan as they are under a three-year requirement to do so as a condition of China's membership in the World Trade Organization.

**Sanya City.** The vacant property in Sanya City should be offered on attractive terms for housing and office uses. Also, in the panel's opinion, to the extent that any high-tech activities can be attracted to the area, they should be located in Sanya City rather than at Haitang Bay. However, much of the city's vacant space is best suited for use as training centers for the hospitality indus-



try and scientific/educational centers that focus on Hainan Island's natural products.

**Sanya Bay.** If handled correctly, Sanya Bay can represent a great opportunity. Currently, the frontage road is not attractive and is too close to the sea. Development projects here, both those that are completed and those that are unfinished, are generally very badly done. Frankly, the best way to recognize the full value of this land would be to start over.

While starting over may not be practical, as much of the land as possible should be reclaimed and replanned, with a cooperative solution reached among the government, banks, and development

Peace Park, on the western end of Sanya's extensive shoreline, provides a passive setting from which people may enjoy the coastal area.

Downtown's vibrancy can be a tourist draw, the panel believes.





The city's plan to locate the commercial fishing fleet in a more central position east of downtown makes sense, according to the panel, but a portion of the fleet should remain at the existing port and be integrated into the tourist area.

companies. This area should be offered to major developers (as in Yalong Bay) on attractive terms, for redevelopment as a community providing affordable housing, hotels, and commercial and educational space.

The program for Sanya Bay should be based on a full inventory and analysis of existing products and a master plan for the redevelopment of the area. The government and banks should work jointly on Sanya Bay's redevelopment.

### Attracting New Investment

Sanya must compete for capital in a very competitive market. Its major competitors include many locations in China and southeast Asia. To attract investment, Sanya's government must focus on areas with realistic return potential, such as the harbor, where private developers may be secured by future tax revenue.

Sanya's existing incentives package—tax holidays, lower lease payments, incentives for developing amenities—is adequate provided certain other steps are taken, as follows:

- A clear plan for completing what has been started—particularly at Yaolin Bay and Sanya Bay—is in place.
- A clear plan for the completion of amenities is in place.
- Coordination among government development and planning agencies improves.

- Cooperation among the government, banks, and existing hotel/tourism operators improves.
- A clear campaign for marketing Sanya to the world is in place.
- The banks, government, and hospitality industry develop a joint strategy toward the Chinese central government, a strategy focused on the goals of better airline connections, the relaxation of travel fees, and the easing of visa restrictions, on the one hand, and approval of the Sanya region as a center for environmental and agricultural education, on the other.

The panel suggests that the city accord low priority to attracting capital for the coastal road and high priority to attracting it for the development of Sanya Bay and hospitality amenities as follows:

- *Sanya Bay*. Top priority. Offer development opportunities as an entire package with all incentives. Return for government banks is in the long-term upside potential.
- *Hospitality amenities*. High priority. Offer full package of incentives plus discounted land for future development. Set aside high-quality land for resort-related residential development.
- *Coastal road*. Not a priority. Impractical, costly, and a potential environmental disaster. Focus transportation spending on upgrading existing infrastructure instead.

### Funding City Infrastructure

The issues related to funding infrastructure in Sanya City include the following:

- The city has built a lot of infrastructure—an airport, roads, and so forth.
- There is need for a cargo port and continued road improvements, upgraded sewer and stormwater-drainage systems, and public services for new tourism and residents.

The panel's recommended guiding principles for funding infrastructure include the following:

- Improve the system of local taxes and fees going to local infrastructure.

- Encourage the private development of key pieces of infrastructure.
- Understand the impact of new development on the city's budget.

The panel recommends the following near-term strategies for funding infrastructure:

- Shift the focus of tax collection from development fees to an ongoing tax base.
- Allow developers increased development rights in exchange for infrastructure such as port facilities.
- Prepare an economic impact assessment model for development.
- Consider a gasoline tax for funding improvements to main roads in the city.

The panel recommends the following long-term strategies for funding infrastructure:

- Broaden the tax base to support city services.
- Devise a schedule of impact fees that reflect the economic costs to the city of development.

# Implementation

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**T**he panel's recommendations for implementation actions are presented in a number of categories: incentives for the private sector, government involvement in development, private sector development of public infrastructure, marketing resort real estate, marketing Sanya, and resolving the problem of vacant projects.

## Effective Incentives for Private Investment

The panel recommends a number of actions for the near term that would provide incentives for private investment and development in Sanya, including the following:

- Repackage vacant and abandoned projects through a structure like the Resolution Trust Corporation (RTC).
- Review the domestic and international credit-worthiness of Sanya and Hainan, and improve it if necessary.
- Identify projects that can be financed, such as processing operations for agricultural and marine products.
- Prioritize key development projects and prepare packages of tax incentives and development-rights incentives for them.

## Government Involvement in Development

The panel recommends a number of government actions for the near term related to project development, as follows:

- The government should not directly invest in projects, unless the projects are crucial for tourism or agriculture development.

- Government assets that are better served in the private sector should be privatized.
- The government should strongly promote tourism and development; this is critical.
- The government should prepare planning guidelines for sustainable development.
- The government should identify requirements and funding mechanisms for environmental preservation.

## Private Sector Participation in Public Infrastructure Development

The panel notes that there are several ways to attract private sector involvement in infrastructure development. These include the following:

- Identify key infrastructure projects that have an immediate impact on tourism and economic development.
- Identify compatible commercial land uses and rights that can be granted.
- Identify funding mechanisms for payback, for example, a gasoline tax.

## Marketing Resort Real Estate

In the panel's view, placing emphasis on developing the housing market as opposed to additional hotels would help to market resort real estate in Sanya in the short term. Investors should be offered attractive terms to develop housing in designated housing markets in Sanya City and Sanya Bay. For the longer term, planning should begin for upmarket second-home development along the seacoast and in the mountains. However, before projects get underway, adequate environmental restraints must be in place to ensure compatibility with Sanya's goal of becoming China's premier environmental community.

## Marketing and Promoting Sanya

The panel offers the following recommendations for near-term actions to help the city promote Sanya:

- Create a visitors bureau with a board of directors that includes public and private sector representatives.
- Funnel hotel and other special tourism taxes directly to the visitors bureau.

The visitors bureau, in turn, should start its marketing and promotion efforts as follows:

- Prepare a marketing plan, an events plan, and a development plan for key tourist facilities, such as a conference center and attractions.
- Hire trained staff, obtain information-technology resources, create visitor centers, and attend buyer conferences.
- Create a Web site for providing information on events and accommodations.

## Resolving Vacant and Abandoned Projects

To successfully promote Sanya to the region and the world, it is important to resolve the city's vacant and abandoned projects. The panel's recommendations for near-term actions include the following:

- Inventory, conduct engineering reviews of, and appraise all vacant and abandoned buildings.
- Perform market assessments for various land uses over time and evaluate the positioning of redevelopment areas for market opportunities.
- Determine the city's ability to pursue creditors.
- Categorize and rate projects as of high value, of marginal value, or to be demolished.
- Push projects, loans, and other assets into an RTC style corporation, so as to allow new investors free title.



Panel Chair Smedes York (right) meets with Wang Fuyu, chairman of the Steering Committee for Sanya City.



Panelists Joseph Lalli (right) and Sean Chiao describe the master plan devised by the panel.



Keming Bao (left) and Wang Fuyu listen as the panel presents its recommendations for making Sanya a world-class resort community.

- Retain disposition expertise and develop strategies for properties—sell as is, recondition, or hold.
- Market packages of projects on the international market.

# Conclusion

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**T**he panel believes that Sanya can meet its goal of becoming a world-class resort if it takes the following steps:

- Carefully focus existing resources on finishing key projects and adding active amenities.
- Develop existing agricultural and marine resources into higher-value-added industries.
- Improve marketing and implement cooperation among government, banking, and hospitality industry groups.
- Redevelop the urban core into an area that will attract tourists and provide a unique experience for visitors.
- Limit new development in undeveloped areas until an environmentally sensitive development plan for these areas is in place.
- Balance the tourist industry by developing a second-home market.
- Attract investors with a practical master plan for future development and a realistic package of incentives for investing in the completion of unfinished projects.

# About the Panel

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## Smedes York

*Panel Chair*  
*Raleigh, North Carolina*

A Raleigh native, York is president of York Properties Inc. After graduation from Broughton High School, he received a bachelor's of science degree in civil engineering from North Carolina State University, and a master's of business administration degree from the University of North Carolina at Chapel Hill. He played on the basketball team at N.C. State.

From 1964 to 1966, he served as first lieutenant in the U.S. Army Corps of Engineers, receiving an Army Commendation medal in 1966. York also spent time in elective office, as Raleigh city councilman (District E) from 1977 to 1979, and as mayor of the city of Raleigh for two terms, from 1979 to 1983.

York has spent his professional career in real estate and construction. He has served in a leadership capacity in many organizations in addition to York Properties, including as past chairman of the North Carolina Citizens for Business and Industry, past chairman of the Research Triangle Regional Partnership, past chairman of the Greater Raleigh Chamber of Commerce, past chairman of the Urban Land Institute, and past chairman of the board of trustees at N.C. State University.

## Marta Borsanyi

*San Francisco, California*

Borsanyi is a founder of the Concord Group, a real estate advisory firm based in Newport Beach, California, that provides strategic advice on land use issues and development. She has expertise in market, economic, and financial analyses associated with existing properties as well as developmental opportunities.

Borsanyi has extensive experience in the evaluation of both residential and nonresidential properties. She has participated in numerous efforts to identify the highest and best mix of uses for very large properties. Her approach to value maximization has had broad appeal to public entities interested in identifying specific development scenarios, as well as to developer clients.

Borsanyi has been actively involved with a variety of assignments—some associated with gaming venues—focused on the redevelopment of urban cores and first-generation suburbs throughout the United States, from Richmond, Virginia, to St. Louis, Missouri, and Santa Ana, California.

Borsanyi previously was head of marketing services at the Mission Viejo Company, where her responsibilities included strategic planning, feasibility and acquisition studies, economic and financial analyses, new product development, and merchandising of ongoing as well as new program offerings.

She has held positions on the faculty of the Graduate School of Management at the University of California, Irvine, where she specialized in computerized modeling and scenario analysis. While teaching in the areas of consultative processes and administrative problem solving and decision making, she was involved in the management of consulting engagements for a broad range of clients.

Borsanyi is part of the leadership group at ULI and is a charter member of the advisory board of the Center for Economic Research and Quarterly Economic Forecast at Chapman University. She is a member of the California Building Industry Foundation, an entity that provides scholarships to students in degree programs related to land use and real estate. Borsanyi holds a graduate degree in economics from the University of Budapest and a master's degree in business administration from the University of California, Irvine.

## Sean C.S. Chiao

*Hong Kong*

Chiao, the urban design director of the Hong Kong office of EDAW, is an urban designer and architect with extensive experience in the United States and Asia. His work centers on urban design, master planning, and issues of the built environment.

He has directed various multidisciplinary urban design projects, including the master planning of new towns, the planning of low-density communities, resort planning, and main street design and revitalization. Chiao has worked at regional and city scales on the formulation of policies and strategies for development, and at the local scale with neighborhood community groups on the development of design briefs and guidelines. He has performed urban design and master planning for major public and private institutions, and is experienced in managing the implementation of designs and plans.

Chiao received a master's of architecture degree in urban design from Harvard University and master's of architecture degree from the University of California, Berkeley. He is fluent in Mandarin. Chiao has taught urban design theory and practice at Tsinghua University, Beijing.

## Mary Beth Corrigan

*Washington, D.C.*

Corrigan is an environmental policy analyst and planner with more than 15 years of experience in coastal planning and resource management. She worked for several years as an environmental planner with the South Florida Regional Planning Council. Her responsibilities there included developing natural resource protection policy, reviewing and evaluating the impacts of large-scale development on natural resources, assessing mitigation plans, evaluating the cumulative impacts of small-scale development on coastal resources, and working with local governments to develop growth management plans.

As a private consultant, Corrigan did substantial work with the U.S. Environmental Protection

Agency and the National Oceanic and Atmospheric Administration on federal water quality issues. She developed the urban chapter of the *Guidance Specifying Management Measures for Sources of Nonpoint Pollution in Coastal Waters*, a document developed under the Coastal Zone Act Reauthorization Amendments of 1990 that describes best management practices for protecting coastal water quality.

She also has completed several other studies related to protecting coastal and ocean resources from activities such as coastal and upland development, sewage treatment practices, stormwater runoff, and habitat modification. Corrigan has a bachelor's degree in marine science and a master's degree in coastal resource management. She is currently managing director of ULI's Advisory Services Program.

## William R. Eager

*Seattle, Washington*

Eager is cofounder and president of TDA Inc. He has more than 30 years of experience in the transportation field: as an educator in transportation engineering, as a research analyst on commuter travel characteristics, and as a consultant on projects throughout the United States and abroad.

Eager is a member of the advisory council for the Pacific Asia Travel Association (PTA) and principal of International Tourism and Resort Advisors (INTRA). In the past, he has been chairman of the transportation committees of both the Downtown Seattle Association and the Seattle Chamber of Commerce.

He is a trustee of the Urban Land Institute and currently chairs the Steering Committee on Metropolitan Transportation and Land Use. He also serves as vice chairman of the Research Committee, and as an executive member of the Recreational Development Council.

Eager is an experienced speaker, skilled in presenting transportation and planning-related issues to elected officials, citizen groups, and professional staffs. He holds a bachelor's of science degree in civil engineering from the University

of Colorado, Boulder, and a master's of science degree in civil engineering (transportation) and a Ph.D. in engineering (transportation) from the University of California, Berkeley.

## **John L. Knott Jr.**

*Dewees Island, South Carolina*

Knott is CEO and managing director of Dewees Island, an oceanfront island retreat dedicated to environmental preservation that has been recognized as one of the leading environmental developments in the United States. He is a third-generation builder/developer with extensive experience in the development of planned communities, commercial offices, and hotels; the renovation and restoration of historic properties; and city redevelopment.

Knott's leadership experience has included service as chairman of the White House exchange with the Soviet Union for city redevelopment/historic preservation; national chairman for the remodeling/rehabilitation committee of the National Association of Home Builders (NAHB); national life director of NAHB; member of the NAHB president's council; and faculty member for the Main Street program of the National Housing Partnership.

Knott is the founder and chairman of the executive board of the Harmony Project, a nonprofit foundation in Charleston, South Carolina, that promotes the development of sustainable communities through technical assistance, information exchange, and cooperation. He serves on the national advisory board of *Environmental Building News*.

## **Joseph J. Lalli**

*Fort Lauderdale, Florida*

Lalli, vice chairman and managing principal of EDSA, is a fellow of the American Society of Landscape Architects (ASLA), which is the most distinguished professional achievement in the field. He is widely respected as one of the most creative problem solvers and designers in planning and landscape architecture. As a principal of EDSA

for more than 23 years, he has managed and been principal designer on many of the firm's award-winning projects, including the El Conquistador Resort in Puerto Rico; Treyburn, a new community in Durham, North Carolina; and Pepsico's corporate headquarters in Purchase, New York.

As managing principal of EDSA, Lalli brings an intuitive understanding for planning and design as well as a focus on the main issues that need to be addressed to get a project built. He has had principal responsibility for seeing many projects through from planning to implementation. He has worked on regional-planning, resource-planning, and community-planning projects; as well as resorts, educational and cultural facilities, corporate parks, and urban developments.

Lalli's considerable expertise in international land planning is based on an understanding of different cultural practices in planning, design, and business affairs. He has managed a project office in Europe and directed major projects in the Middle East, France, Greece, Germany, the Caribbean, Dubai, and Saudi Arabia. He has also served as principal-in-charge of numerous U.S. Department of Defense projects in the United States and Europe.

## **Charles Marshall**

*Seattle, Washington*

As senior vice president for Lowe Enterprises, Marshall works extensively throughout Asia. He has served as a consultant to international banks on major mixed-use developments in Hong Kong and China. As Lowe's Asian representative, he is currently advising a banking consortium on a major resort community in Shanghai.

In his capacity as director of group Pacific investments, Marshall has assisted a number of major North American high-tech (telecom, Internet, software) companies in establishing distribution, manufacturing, and programming operations in China and southeast Asia.

In the United States, Marshall has developed major mixed-use, master-planned communities, including several golf/resort communities. He cur-

rently is directing Cascade Gateway, a consortium of builders and developers that is developing high-quality urban/suburban neighborhoods and second-home/resort communities in the Northwest.

## **Chris L. Yoshii**

*San Francisco, California*

In the past 15 years, Yoshii has completed numerous assignments related to commercial recreation and resort development, tourism planning, economic impact analysis, and the economics of mixed-use urban projects. Much of this work has been conducted in northeast and southeast Asia.

Yoshii recently prepared market studies for major theme parks and resorts in Hong Kong, Melbourne, Taipei, Tokyo, Osaka, Singapore, three Chinese cities (Guilin, Gaoyao, and Zhuhai), Macao, Jakarta, Bangkok, and the United Arab Emirates. These studies evaluated the rapidly changing demographics and economies in the region, emerging competition, and domestic and international travel patterns. The studies included market analysis, financial analysis, economic impact analysis, management planning, and investment analysis. Many of these studies were commissioned by the leading entertainment and theme park design companies in the world.

For Era Communications, Yoshii is leading the project team providing concept, market, and financial analysis of a proposed mixed-use complex that includes a film and television studio, a themed attraction, media offices, hotels, and a shopping center. Located in Chiayi, Taiwan, this project represents the next generation of media and leisure convergence in Asia.

In Zhuhai, China, Yoshii conducted a master-planning study for a 26-square-kilometer tourism zone on Hengchin Island neighboring Macao. This study identified the concept and recommended programs for different development areas, ranging from high-activity theme park areas to ecoresorts.

In Taiwan, Yoshii prepared a market study for the Yuemei resort project for Pan Pacific Asia. The resort area included a theme park, hotels, retail center, and special attractions. The market study included an assessment of demographics and income growth, tourism, competitive facilities, and revenue estimates.

In southeast Asia, Yoshii prepared a market feasibility study for the Nirwana Garden Resort for Sembawang Leisure Pte. This resort will be the key strategic resort in a major new tourism destination in Indonesia. Yoshii's market analysis evaluated the demand for various types of hotels, real estate products, retail/entertainment facilities, amusement parks, and golf courses.

Yoshii was project manager for several large-scale retail/entertainment centers in the Philippines for Ayala Land. The entertainment centers are integrated with major shopping malls and incorporate a wide range of attractions for children, teens, and adults including cinemas, nightclubs, and themed attractions.

Yoshii received a bachelor's of arts degree in economics from the University of California, Davis.



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