

You're welcome? Hong Kong's attitude towards the Individual Visit Scheme

Abstract

This paper used a mixed-method approach, combining cluster analysis and member-checking interviews to understand Hong Kong residents' attitudes towards the "Individual Visit Scheme" (IVS) policy for mainland Chinese tourists. Three distinct clusters were identified, which grew significantly more positive with advancing age and higher income levels of the respondents. Interviews showed that these two factors substantially position residents' attitude towards IVS through social exchange and social representations. Younger, lower-income Hong Kongers tended to rely largely on social representations, such as values and preconceptions, while older and higher-income earning residents were found to build more widely upon more rational social exchange principles.

Keywords

Resident attitudes; Hong Kong; Visa policy; Social Exchange; Social Representations; Mixed method approach;

INTRODUCTION

The growth of outbound tourism from China has been phenomenal (Siu, Lee & Leung, 2013), making it the highest spending outbound tourism market in the world. In 2013 more than 98 million Chinese travelled abroad (China National Tourism Administration, 2014) and the total outbound spending of Chinese tourists was more than 128 billion USD in 2013, making a 26.8% increase from the previous year. At the same time, the World Tourism Organization (as cited in Chan & Yeung, 2009) has projected that China will be the world's most visited destination by the year 2020, further highlighting the importance of the country for the tourism industry.

Mainland China also constitutes the largest inbound tourism market to the Hong Kong Special Administrative Region (SAR), accounting for more than 70% of the total visitors, with

more than 40 million annual arrivals. In contrast to this growing market, traditionally strong inbound numbers from both Japan and the USA have declined in recent years (Hong Kong Tourism Commission, 2016). As a result, tourism from mainland China has gained increasing attention from both, academics and practitioners in Hong Kong.

Interestingly, although Chinese tourists traditionally travel in groups, roughly 80% of mainland travelers visit Hong Kong alone. According to the Hong Kong Tourism Commission (2016), 58.1% of mainland Chinese tourists were same day visitors, while 67.4% came to Hong Kong through the *Individual Visit Scheme* (IVS), a travel policy that allows mainland visitors to visit Hong Kong by themselves.

The IVS was introduced in 2003 as a mutual agreement between the Hong Kong SAR and the People's Republic of China to make individual visits by Chinese tourists easier (Legislative Council Secretariat, 2014). Through the extension to other cities, almost 60% of mainland Chinese day-trip tourists visit Hong Kong on IVS (Census and Statistics Department, 2014). This rapid development has not been without consequence.

Hong Kong residents have repeatedly protested against IVS (Wong, 2015), voicing concerns that IVS is mainly used for parallel trading of goods. This has spurred the Central Government in Beijing to take action against the increasing number of visitors engaged in these activities. These protests have been blamed for the subsequent decline of mainland visitors in the last months of 2015 (Steger, 2015). The authorities of Hong Kong have subsequently initiated discussions with the mainland Chinese government about IVS, particularly on its possible improvement, setting a ceiling to the number of tourists and limiting the reliance on IVS visitors by attracting more long-haul markets (Hong Kong Department of Commerce and Economic Development, 2014).

Zhang, Decosta and McKercher (2015) examined Hong Kong as a post-colonial tourism destination, revealing how the "One Country, Two Systems" approach has helped Hong Kong develop its own identity. They suggest that Hong Kong has used its relationship with China's culture to develop "myths" about its own culture, enhancing its destination appeal. However, the

views of Hong Kong residents about mainland Chinese tourism is poorly understood and current revisions of IVS by the Hong Kong government do not directly address this issue. In particular, the Hong Kong Government is rumored to intend expanding the scheme to tourists from more mainland cities, despite growing antagonism among residents (Fung, 2016). In general, Hong Kong residents' attitudes towards mainland tourism are thought to be both antagonistic and money-driven (Yip, 2013), with older generations perceiving it more as beneficial, while younger generations – who have lived through the pro-democracy “Umbrella Revolution”, rely on ideology in their antagonism (Wassler, Petrick, Hung & Schuckert, 2016). Due to the economic impact of Chinese visitors upon Hong Kong, and the ongoing tensions between the SAR and the mainland, it is believed that a locals' point of view on the IVS is much overdue.

Thus, the goal of this study is to gain a general understanding of Hong Kong residents' attitudes towards IVS and the way it impacts upon mainland Chinese tourism. This is done through a new approach, which employs cluster segmentation and qualitative member-checking interviews. This makes it possible to (1) segment Hong Kong residents based on their attitude towards IVS, and (2) gain a deeper understanding of the underlying factors on which their attitude is based. It is hoped that the findings of this research will assist both academics and practitioners in better understanding Hong Kong residents' attitudes towards tourism from mainland China, and specifically the impact of IVS. This should ease future planning processes for policy makers in the SAR and elsewhere and offer an understanding of the underlying principles which form residents' attitudes towards tourism policies.

LITERATURE REVIEW

Residents' attitudes towards tourism policies

Understanding general residents' attitudes towards tourism has become a crucial issue for tourism planners and policy makers (Ritchie, Shipway & Cleeve, 2009; Williams & Lawson, 2001). As such, the examination of residents' attitudes towards tourism policies has received much

attention (e.g. Brida, Disegna, & Osti, 2011; Choi & Sirakaya, 2005). At the core of this issue is that understanding residents' attitudes can significantly aid governing bodies in developing local support for the tourism industry through planning and communication strategies (Presenza & Sheehan, 2013). In addition to this, residents also heavily shape tourists' experiences at their respective destinations (Carmichael, 2006; Henderson, 2000; Tasci & Kozak, 2006). Therefore, a more favorable residents' attitude can both directly and indirectly influence tourist satisfaction, through interactions with locals.

Conversely, negative resident attitudes can lead to disagreements and confrontation with the industry. Such issues can possibly be managed by adapting policies and strategies at different levels, if the host community is properly understood. Aguilo Pérez and Rosselló Nadal (2005) argue that, for example, local resorts in the Balearic Islands have offered sustainable development programs to dampen complaints of the host community.

Past studies have approached this topic in several ways and conceptual ambiguity persists (Chen & Raab, 2012; Eusébio, Vieira & Lima, 2018). Most commonly, investigations have focused on causal relationships between certain positive or negative levels of attitudes and a series of antecedents. Faulkner and Tideswell's (1997) distinction between "intrinsic" and "extrinsic" factors influencing host community attitudes, has been highlighted in numerous related studies (e.g. Del Chiappa & Atzeni, 2015; Fredline & Faulkner, 2000; Fredline, Deery, & Jago, 2006; Hritz & Ross, 2010). According to Sharpley (2014), intrinsic factors are based on the heterogeneity of the host community and consist of aspects such as individual age, gender and personal dependency upon tourism. Extrinsic factors, on the other hand, look at the resident community as a whole and can include: seasonality, overcrowding and stage of development of a tourist destination.

Fredline and Faulkner (2000) summarized the main variables that have been investigated in studies considering intrinsic factors as: (1) geographical proximity to activity concentrations (e.g. Brougham & Butler, 1981; Pizam, 1978) and (2) involvement in tourism (e.g. Ap, 1992; Pizam, Milman & King, 1994; Smith & Krannich, 1998). Demographic variables such as age and gender,

on the other hand, have been found to have only a limited impact on residents' attitudes (Belisle & Hoy, 1980; Fredline & Faulkner, 2000; Liu & Var, 1986; Madrigal, 1995; Pizam, 1978; Ryan & Montgomery, 1994; Williams & Lawson, 2001), although this has been debated (Harrill, 2004). Studies of extrinsic factors influencing resident attitudes have commonly looked at: (1) the stage of tourism development for a destination (e.g. Butler, 1980; Doxey, 1975; Sheldon & Abenoja, 2001), (2) seasonal patterns (e.g. Belisle & Hoi, 1980), (3) cultural differences (e.g. Butler, 1975), and (4) tourism impacts (e.g. Perdue, Long & Allen, 1987).

Accordingly, Williams and Lawson (2001, p. 274) state that, although related research is largely heterogeneous, the most consistent factor in terms of statistical significance throughout past studies is that "*residents who derive financial benefit from tourism are more in favor of it*". However, this relationship has probably been oversimplified (Harrill, 2004).

Despite inconsistent findings among the related studies, various cataloging models and frameworks have been developed to explain residents' attitudes toward tourism on a broader scale (Siu et al., 2013).

One of the most frequently used of such frameworks is the social exchange (SE) process model developed by Ap (1990, 1992). Echoing the importance of personal benefits in regard to resident attitudes proposed by Williams and Lawson (2001), the SE model proposes that residents who receive personal benefits which outweigh the associated costs are more likely to perceive tourism in a favorable manner (Murphy, 1983). The theory, albeit in a rather simplistic way, thus advocates that attitudes towards tourism result from an internal cost-benefit analysis (Gibson, 2006; Sharpley, 2014). Subsequently, the SE model has been used to investigate positive and negative attitudes from an individual as well a community level and remains relevant today (e.g. Perdue, Long & Allen, 1987; Sharpley, 2008; Siu et al., 2013).

Yet, the use of the SE model has been met with substantial criticism (Fredline & Faulkner, 2000). Pearce, Moscardo and Ross (1996) highlighted three main issues with the use of SE to explain residents' attitudes towards tourism. First (SE) assumes that humans process information

systematically, while in reality residents often do not care enough about such an issue to think deeply about it and likely base their attitudes on personal and social values. Second, individual knowledge is often more a derivation of social norms than of direct individual experience, and third, societal and historical contexts are crucial for the formation of resident attitudes and should not be ignored. Another common perspective is that residents are largely aware of positive and negative impacts of tourism (Ap, 1992; Andereck et al., 2005; Sharpley, 1994; 2014). This is problematic as many residents typically have no direct contact with tourism or tourists (Sharpley, 2014) and judgement often predates personal experience (Woosnam, 2012).

As a result, Pearce et al. (1996) propose the use of social representation (SR) theory to explain resident attitudes. Accordingly, in addition to the cost-benefit consideration, residents are believed to rely on social representations, i.e. images, values and preconceptions embedded in cultural meanings, to explain the events around them (Moscovici, 1961; 1988; 2001). The use of the term “social” to explain these attitudes is based on the belief that these representations help a community not only to communicate and behave, but also to make sense of various aspects of their world and the world at large (Fredline & Faulkner, 2000; Moscovici, 1963; Moscovici & Nemeth, 1974).

Gibson (2006) highlights two significant advantages that SR Theory has over SE in order to understand residents’ attitudes. She suggests that it allows for non-rational reactions based on personal and social values rather than cognition and it also proposes that representations are socially transmitted, allowing individuals with less personal experience to make judgements based on what their relevant social group or the media tell them. Boley, McGehee, Perdue and Long (2014, p.37) add that SE only considers “*formal rationality*”, i.e. maximization of economic advantage and they propose that non-economic needs be included in residents’ attitude studies, referring to philosophical and moral values aimed at societal improvement. However, SR theory in tourism lacks methodological guidelines, ranging as it does from clustering (e.g. Andriotis & Vaughan, 2003; Fredline & Faulkner, 2000) to qualitative or mixed methods (e.g. Dickinson & Robbins,

2007; 2009; Schliephack & Dickinson, 2017). Furthermore, most studies based on SR theory tend to be largely descriptive (Sharpley, 2014).

Several guidelines can be taken from the existing confusion on how to approach resident attitude studies. In order to best understand residents' attitudes (towards policies or in general), a valuable starting point is to look for a consensus on residents' relevant attitudes using segmentation (Andriotis & Vaughan, 2003; Harrill, 2004; Pearce et al., 1996). It is further suggested that the most efficient way of doing so is by segmenting residents into attitude clusters, as this takes account of the heterogeneity of the host community, as well as the existence of groups of like-minded individuals (Presenza & Sheehan, 2013). Such a segmentation of a resident community can be a priori, i.e. based on the researcher's prior knowledge, or a posteriori, based on attributes that are found to differ among respondents (Calantone & Mazanec, 1991). Several examples are shown in the literature as follows.

Davis, Allen and Cosenza (1988) are recognized as pioneers in this area of study. Using cluster analysis, they identified five segments of Florida residents based on their attitudes, interest and opinions toward tourism. Their resulting clusters were named (p.4) (1) "haters" who strongly opposed tourism, (2) "lovers" with strongly positive opinions, (3) "cautious romantics" who considered tourism positively, but were also aware of possible negative impacts, (4) "in-betweeners" who were moderate in their opinions, and (5) "love'em for a reason" who favored tourism mainly for its economic benefits. Davis and colleagues (1988) did not find any significant differences in demographic variables, but most haters were found to have a low level of knowledge regarding tourism. Lovers, on the other hand, tended to have a high level of knowledge.

In a British context, Ryan and Montgomery (1994, p. 364) identified three clusters, which they named (1) "enthusiasts" supporting tourism moderately, (2) "somewhat irritated" with negative attitudes, and (3) "middle-of-the-roaders" showing a more neutral attitude. Demographic variables were again not found to be statistically significant in explaining the resultant attitudes.

Resident attitude clusters towards tourism ranging from very negative to very positive have been confirmed in follow-up studies by several scholars (Brida, Osti & Barquet, 2010; Evans, 1993; Madrigal;1995; Fredline & Faulkner 2000; 2001; Williams & Lawson, 2001; Aguilo Pérez & Rosselló Nadal 2004; Inbakaran & Jackson 2006; Small 2007; Zhou & Ap 2009; Zhou, 2010). Fredline and Faulkner (2000) highlighted that, while it is easy to find congruence among the most extreme clusters in terms of positive and negative attitudes, it is not possible to fully match clusters across studies as residents from different places in destinations have different contexts. It is this contextual and collective reality that SR theory takes into account (Moscovici, 1961; 1963). Qualitative insights on the identified attitude segments can thus further aid the understanding of resident attitudes.

Hong Kong and the Individual Visit Scheme

Hong Kong is an attractive destination for travelers from mainland China for many reasons, and the Chinese tourism outbound wave is rising steadily (Law, To, & Go, 2008).

In addition to an exotic appeal due to its British-colonial background, many mainland Chinese tourists perceive the quality of products in Hong Kong as better than their own and have more trust in Hong Kong's corporations and brands (Choi, Liu, Pang, & Chow, 2008). In addition, Hong Kong has been suggested to have a larger variety of brands and products, priced lower than comparable products in Mainland China (Cai, Lehto, & O'Leary, 2001; Li & Carr, 2004; Wang & Qu, 2004; Law et al. 2008).

Food is suggested to be more important than anything else during Chinese vacations (Dunlop, 2005). Thus, the reputation, quality and variety of food, restaurants and supermarkets in Hong Kong can be considered additional pull factors for visiting the destination (Law et al. 2008). World-class attractions such as Ocean Park, Disneyland and the Avenue of Stars with the famous Hong Kong skyline, have also turned Hong Kong into a very attractive destination to many Chinese tourists (Zhang & Lam, 1999).

Under the doctrine “one country - two systems”, Hong Kong is part of the People's Republic of China, but keeps a “hard” border, which requires mainland Chinese travelers to have a visa-like permit if they want to travel to Hong Kong. Tour groups make travelling to Hong Kong easier for travelers from the mainland, as a guided tour facilitates obtaining necessary permits and guarantees the visitors’ return back to their homes.

Introduced in 2003, IVS is seen as a tourism liberalization measure between Hong Kong and the mainland of China, making it easier for tourists from the mainland of China to visit Hong Kong individually as previously they were only allowed to visit in group tours or business visas (Legislative Council Secretariat, 2014). The scheme started in 2003, with neighboring cities to Hong Kong in the Pearl River Delta including: Dongguan, Foshan, Huizhou, Guangzhou (Canton), Jiangmen, Shenzhen, Zhongshan and Zhuhai, as well as both Shanghai and Beijing.

In the following years, more provincial capitals and main cities were also allowed to participate. In 2004, major cities from the Guangdong province were added as well as cities from the Southeastern part of China, while in 2005 central and eastern Chinese provincial capitals were allowed to join. Subsequently, in 2006 the capitals of provinces neighboring Guangdong joined and in 2007 more central and eastern Chinese cities were added. This raised the total number of cities allowed to travel via IVS to 49 and had a severe impact on tourism to Hong Kong. Between 2002 and 2013 tourist numbers rose from 16.6 - 54.3 million and the market share of tourists from mainland China increased from 41.2% to 70.0% (Hong Kong Tourism Board 2014).

Within this large number of travelers from mainland China, only 7.9% were travelling individually on IVS in 2003 while in 2013 67.4% were doing so. According to the most recent statistics, almost two-thirds of IVS travelers visit Hong Kong as day trippers and come mainly to shop for cosmetics, clothing or medicines, the majority (89%) being repeat visitors (Census and Statistics Department, 2014; Rating and Valuation Department, 2014). Thus it could be argued that Hong Kong has become a “shopping mall with a border station” for mainlanders.

The huge influx of mainland Chinese tourists in the wake of IVS presents Hong Kong with both opportunities and challenges. On the positive side it can be considered to have increased tourism related jobs by 3.1% and added 1.3% to the GDP (Commerce and Economic Development Bureau, 2013). Conversely, it has had a negative impact on the destination and its infrastructure and has resulted in price rises and shortages for locals in products and services and has further increased shop rentals and property prices (Ye, Qiu, Shen, & Go, 2014). The overcrowding and, lifestyle changes that it has created for local residents has caused social tension among the Hong Kong population (Sung, 2014) compounding existing political tensions between the SAR and the mainland.

One of the very few extant studies dealing with IVS is that of Ye et al. (2014), which examined the roles played by social identity and perceived cultural distance in forming the attitudes of Hong Kong residents toward the impact of the IVS and its various extensions. They did this by conducting 24 face-to-face interviews with local Hong Kong residents, finding that the perceived positive and negative impacts, social identity and perceived cultural distance were important in explaining their attitudes toward tourism development. They further found that perceived cultural distance influenced both the perceived negative impacts and the social identity of residents, which, in turn, affected their attitudes toward mainland Chinese tourists and tourism development.

Since 2008, after the last extension of IVS, at least three studies have looked at individual tourism to Hong Kong, though IVS scheme itself was not a conceptual part of the analyses. Choi et al. (2008) analyzed the shopping behavior of individual tourists from Mainland China to Hong Kong. Their results revealed a strong increase of tourists from the mainland, significantly affecting the Hong Kong fashion retailing industry. IVS travelers were for the most part independent, flexible, high spenders, and their shopping patterns were consistent with the shopping patterns in their home cities (i.e. they acted like locals, not tourists). They further found that IVS travelers liked local brands as well as foreign luxury brands, and had a tendency to purchase brands new to them when shopping in Hong Kong. Choi et al. (2008) found the most important product attributes to be

price, followed by size, style and cut. In addition, shopping destinations within Hong Kong needed to be conveniently accessible by public transport and to have good product return/exchange policies and payment methods.

Law and colleagues (2008) focused on how mainland Chinese travelers chose restaurants in Hong Kong, by comparing individual travelers (i.e. those using IVS) to package-tour travelers. Their empirical findings, from a survey of 127 IVS travelers and 103 package-tour travelers, showed that respondents in general viewed the included attributes as relatively important. In their study only the attributes: quality and food presentation showed significant differences between IVS and packaged travelers. The higher standards of IVS travelers in this context were suggested to be due to their mostly higher income levels (Law et al., 2008).

Cheng (2012) analyzed the Hong Kong tourism demand from Mainland China, Taiwan, and Japan, using a quantitative approach with an error correction model. They focused on the effects of relaxing the visa requirement via the launch of the IVS. They found that the source markets were income-elastic, considered international tourism to be a luxury good and were sensitive to exchange rate variations. They also found that IVS had a positive effect on the numbers of travelers from mainland China which outweighed the negative impact of SARS on Hong Kong's tourism demand.

METHODOLOGY

In order to best understand Hong Kong residents' attitudes towards IVS, this study employed a mixed method approach. The goal was to gain an overall understanding of Hong Kong residents' attitudes towards the IVS, and to identify the underlying factors on which these attitudes are based. The quantitative part of the study was used to categorize residents on the basis of their attitudes in order to identify possible significant demographic differences among the resultant clusters. A qualitative approach was employed in order to gain a deeper understanding, by identifying the mechanisms underlying attitude formation among Hong Kong residents.

The clustering approach followed the usual process of sampling residents based on their attitudes. This has been criticized for resulted largely in descriptive studies (Sharpley, 2014), but the qualitative approach made it possible to address the underlying factors impacting on the attitudes of the clusters. Consequently, a cluster analysis was performed on data from a survey of 850 Hong Kong Permanent Residents (HKPRs), following which 16 semi-structured member-checking in-depth interviews were conducted with HKPRs to gain insight into the attitudes of the identified clusters.

HKPRs, were identified according to Hong Kong Basic Law, Article 24: (1) Chinese citizens born in Hong Kong before or after the establishment of the Hong Kong Special Administrative Region; (2) Chinese citizens who have ordinarily resided in Hong Kong for a continuous period of not less than seven years before or after the establishment of the Hong Kong Special Administrative Region; (3) Persons of Chinese nationality born outside Hong Kong of those residents listed in categories (1) and (2); (4) Persons not of Chinese nationality who have entered Hong Kong with valid travel documents, have ordinarily resided in Hong Kong for a continuous period of not less than seven years and have taken Hong Kong as their place of permanent residence before or after the establishment of the Hong Kong Special Administrative Region; (5) Persons under 21 years of age born in Hong Kong of those residents listed in category (4) before or after the establishment of the Hong Kong Special Administrative Region; and (6) Persons other than those residents listed in categories (1) to (5), who, before the establishment of the Hong Kong Special Administrative Region, had the right to live in Hong Kong only. In order to best represent Hong Kong residents, the minimum length of stay of seven years for the sample was deemed essential as it assumes a certain degree of familiarity with both, Hong Kong and Chinese inbound tourism.

As the survey was administered online, a quota sampling technique was chosen. Quota sampling is a non-random and non-probability sampling technique which is based on a previously decided number of respondents and subdivides the population in different strata (Sedgwick, 2012). As such, quota sampling has been suggested to be an appropriate technique for large sample sizes

such as in resident studies (Im & Chee, 2011). In this case, HKPRs were sampled according to age, gender and area of residency as proportionate to the total population of Hong Kong (see Table 1). This information was readily available from Hong Kong authorities, as well as being commonly used variables in resident studies (Sedgwick, 2012). The choice of an online panel was made due to the fact that more than 80% of Hong Kong households are active internet-users (Hong Kong Census and Statistics Department, 2013) and online panels allow for a precise and relatively easy way of approaching a target population.

Table 1. Sampling quotas

	Gender	
Age	Male	Female
18-24	7%	7%
25-34	13%	12%
35-44	14%	15%
45-54	13%	18%
	Area of Residency	
17%	Hong Kong Island	
33%	Kowloon	
50%	New Territories and Outlying Islands	

The survey instrument was comprised of 12 items from a scale adapted from Hanafiah, Jamaluddin and Zulkifly (2013). In order to examine the validity of the items, a panel of seven experienced academics with social science backgrounds was used to review the items before launching the survey. An Exploratory Factor Analysis (EFA) with a Varimax rotation was conducted with a pilot test of 200 respondents (residents chosen through the same sampling technique as in the main survey), and showed satisfactory factor loadings, indicating that no items needed to be eliminated. Finally, residents were asked to express their agreement or disagreement with the different items on a seven-point Likert-type scale on a large panel survey. An additional question about the monthly income of the respondents was asked before completing the survey. The main survey was launched during the summer of 2014, and a total of 850 valid questionnaires were

obtained. Once the data was scanned for outliers and missing values, a k-means cluster analysis was employed.

Cluster analysis has been suggested to be a meaningful and useful way to subdivide data into groups, in order to capture the natural structure of the data (Tan, Steinbach, & Kumar, 2006). Accordingly, the goal of a cluster analysis can be described as identifying groups of similar or related objects, while being different or unrelated to other groups. As residents are naturally a very heterogeneous community (Wassler, 2015), clustering can be a helpful first step to highlight this diversity based on the issue of investigation. A k-means algorithm was employed, which is one of the oldest and widest used algorithms in cluster analysis (Tan et al., 2006), and ANOVA, as well as Scheffe's t-tests were used to establish significant differences between the clusters in terms of demographics.

Once distinct resident clusters had been identified, based on their perceptions of IVS and mainland Chinese tourists, semi-structured interviews were held, permitting member-checking. This qualitative technique makes it possible to determine whether the perceptions of particular informants are congruent with their group membership (Curtin & Fossey, 2007; Doyle, 2007). Member-checking is usually used in purely qualitative studies (Carlson, 2010), but in the present case, cluster members identified from the quantitative part of the study were contacted directly for the interviews.

Because semi-structured interviews allow for freedom of response, as well as having a previously determined structure (Whiting, 2008), they not only address known issues, but also provide new insights (Guion, Diehl & McDonald, 2011). Thus, cluster analysis gave a basic segmentation of residents based on their attitudes, while the purposive-sampled semi-structured interviews provided a deeper understanding of the overall perspective of Hong Kong residents and their underlying attitudes.

Interviewees for the member-checking could not be chosen directly from quantitative sample because contact details were not available due to ethical constraints. Instead the HKPR

population was randomly sampled again and respondents were screened by completing the survey templates used for the cluster analysis. Only respondents matching the cluster means for each item were considered eligible for the subsequent semi-structured interviews.

All of the interviews were audio recorded with the permission of the respondents, transcribed verbatim and coded, using the qualitative research software NVIVO 10. The coding was both inductive and deductive, deductive codes being based on the previously identified clusters, while inductive coding compared the findings of the quantitative and qualitative data (Hennink, Hutter & Bailey, 2010). Finally, the findings of the cluster analysis and interviews were combined in order to understand the attitudes of different segments of HKPRs towards IVS and Mainland tourists.

FINDINGS

Respondent profiles

A total of 94.8% of respondents answered the survey in Chinese rather than in English, reflecting the linguistic distribution of HKPRs in Hong Kong (Hong Kong Census and Statistics Department, 2014). Respondents were quite evenly distributed by gender, and about 60% of them had monthly earnings in the range 10,000 - 30,000 HK\$. About one sixth (16.8%) of the respondents resided on Hong Kong Island, 33.2% in Kowloon and 50.0 % in the New Territories and Outlying Islands. This roughly reflects the larger population distribution (The Hong Kong Census and Statistics Department, 2012).

Table 2: Demographics of survey respondents

Item	Category	Frequency	Percent	Valid Percent	Cumulative Percent
Language	English	44	5.2	5.2	5.2
	Traditional Chinese	806	94.8	94.8	100.0
	Total	850	100.0	100.0	
Gender	Male	400	47.1	47.1	47.1
	Female	450	52.9	52.9	100.0

	Total	651	100.0	100.0	
Age	18-24	122	14.4	14.4	14.4
	25-34	214	25.2	25.2	39.5
	35-44	247	29.1	29.1	68.6
	45-54	267	31.4	31.4	100.0
	Total	850	100.0	100.0	
Monthly income	Below \$7,100	85	10.0	10.0	10.0
	\$7,100 - 9,999	85	10.0	10.0	10.0
	\$10,000 - 12,499	63	7.4	7.4	17.4
	\$12,500 - 14,999	94	11.1	11.1	28.5
	\$15,000 - 19,999	81	9.5	9.5	38.0
	\$20,000 - 24,999	142	16.7	16.7	54.7
	\$25,000 - 29,999	90	10.6	10.6	65.3
	\$30,000 - 34,999	75	8.8	8.8	74.1
	\$35,000 - 39,999	58	6.8	6.8	80.9
	\$40,000 - 44,999	48	5.6	5.6	86.6
	\$45,000 - 49,999	22	2.6	2.6	89.2
	\$50,000 - 59,999	23	2.7	2.7	91.9
	\$60,000 - 69,999	22	2.6	2.6	94.5
	\$70,000 - 99,999	7	.8	.8	95.3
	\$100,000 - 149,999	12	1.4	1.4	96.7
	\$150,000 - 199,999	5	.6	.6	97.3
	\$200,000 or above	1	.1	.1	97.4
	Refused	1	.1	.1	97.5
	Total	21	2.5	2.5	100.0
	Area of residency	Hong Kong Island	143	16.8	16.8
Kowloon		282	33.2	33.2	50.0
New Territories and Outlying Islands		425	50.0	50.0	100.0
Total		850	100.0	100.0	

Cluster Analysis

Exploratory factor analysis using a Varimax rotation was employed to validate the 12 item adapted scale, following which one item “*It is important to manage the growth of tourism in Hong Kong through the Individual Travel Scheme for Mainland Chinese*” was eliminated due to cross-loading. K-means cluster analysis was used to categorize residents on the basis of this questionnaire. Examination of the resulting dendograms and multiple attempts at various cluster solutions as proposed by Petrick (2005), showed a three-cluster solution to be the most appropriate.

All items were found to contribute significantly to the clustering process ($p < .001$). Examining final cluster centers and means per item, Cluster 2 showed the highest score on all items, with Cluster 1 scores in the middle and Cluster 3 scores the lowest on all items. Accordingly, following the definitions of Ryan and Montgomery (1994), Cluster 1 was named “middle-of-the-roaders” ($n=366$), Cluster 2 “enthusiasts” ($n=253$) and Cluster 3 “somewhat irritateds” ($n=231$) (see Table 3).

Table 3: Cluster Profiles

Predominant	Middle-of-the-roaders	Enthusiasts	Somewhat irritateds
	n=366	n=253	n=231
Age range	45-54 (32%)	45-54 (39.7%)	25-34 (33.9%)
Average monthly income	15.000-19.999 (16.9%)	15.000-19.999 (15.1%)	15.000-19.999 (17.7%)
Area of residency	New Territories (48.1%) Kowloon (36.3%) HK Island (15.6%)	New Territories (50%) Kowloon (32.9%) HK Island (17.1%)	New Territories (53.2%) Kowloon (28.5%) HK Island (18.2%)

Since resident stakeholders can be markedly heterogeneous, populations are usually examined by demographics, including gender, age, employment status and geographical area (Agresti & Finlay, 2009). Thus, the three clusters were examined for significant differences in terms of age, average monthly income and area of residency, using ANOVA and Chi-Square tests. These revealed significant ($p < .05$) differences between segments in terms of age ($F = 14.551$, $p < 0.5$) and income group ($F = 4.000$, $p < 0.5$), but none ($p > .05$) for area of residency. Post-hoc tests (Scheffe) revealed that the “somewhat irritateds” segment were younger than the “middle-of-the-roaders” who in turn were younger than the “enthusiasts”. The “somewhat irritated” segment was found to have the lowest level of income, followed by the “middle of the roaders”, the highest group being the “enthusiasts”. Pearson’s Chi-square (3.989, $p = .408$) revealed no significant differences among the segments related to area of residency.

Member-checking Interviews

Informant profiles

More than 90 survey respondents were initially scrutinized, of which several were identified as representatives of the previously identified segments and agreed to take part in the interviews. Saturation of information was reached after 13 interviews with Hong Kong residents whose profiles are presented in Table 4. Informants' ages ranged from 25 to 55 years, four falling into the "enthusiasts" cluster, five into the "middle-of-the-roaders" cluster and four into the "somewhat irritated" cluster. The sample included academics, public and private employees. More females (n=9) were interviewed than males (n=4).

Table 4: Interviewee Profiles

Number	Age	Gender	Employment	Cluster
1	25-30	M	Teacher	Somewhat irritated
2	25-30	M	Officer	Somewhat irritated
3	25-30	F	Sales Associate	Middle-of-the-roaders
4	40-45	F	Senior Consultant	Middle-of-the-roaders
5	35-45	F	Merchandising Manager	Middle-of-the-roaders
6	50-55	M	Flight Attendant	Middle-of-the-roaders
7	50-55	F	Senior Manager	Enthusiasts
8	30-35	F	Senior Consultant	Enthusiasts
9	25-30	M	Social Worker	Enthusiasts
10	30-35	F	Shop Manager	Enthusiasts
11	25-30	F	Services Operations Host	Somewhat irritated
12	25	F	School programme administrator	Somewhat irritated
13	36	F	Student (post graduate)	Middle-of-the-roaders

General agreement on clusters

Informants generally agreed with the identified clusters, on the distribution of the sample among the clusters (enthusiasts 30%, middle of the roaders 43%, somewhat irritated 27%) and on the specific cluster to which they had been assigned. They also felt the age and income profile of the clusters was largely accurate. In addition, respondents had explanations for the fact that territorial distribution was not a factor in the cluster segmentation.

Age Gap

The cluster analysis revealed there was a significant gap in age among the identified clusters, with the “somewhat irritated” segment being the youngest, followed by the “middle of the roaders” and “enthusiasts” as the oldest group. Several explanations were offered by the interview informants, which may be divided into two categories.

The first category was directly related to mainland Chinese tourists and in particular, to the increase of tourist numbers due to IVS. Informants highlighted that “*younger people make more use of public spaces in Hong Kong*”. As such, a “somewhat irritated” officer said that younger Hong Kongers often gather in public places such as “*the Mong Kok area*” or “*parks*”. A “somewhat irritated” sales-manager in his 20s, resident in the Tuen Mun (New Territories) district of Hong Kong, stated that “*because of the IVS mainland tourists can travel freely anywhere in Hong Kong, not only where the tour operators take them*” and mentioned issues such as “*rude behavior*”, “*spitting*” or in the worst case, “*urinating*” in public places. Accordingly, areas like Tuen Mun close to the Mainland border have become overcrowded and he said that because of this, his group of local friends do not gather to “*take a stroll around the local malls*” anymore.

A 26-year-old student, in the “middle-of-the road” cluster, noted that older generations were less likely to feel the impacts of IVS as they “*are less mobile*”, “*tend to stay in their close neighborhoods*” and “*use less public transport*”. A case was mentioned in which a “*camping [site] in Lantau island*” suddenly became crowded with mainland tourists, and locals stopped coming there. Informants explained that younger people tended to “*show a higher awareness about the scheme and in particular its impacts*” since they use information technology more and are generally more engaged with politics and public policies. The 26-year-old student mentioned that “*with the increasing of age, Hong Kongers tend to get more pragmatic, especially in terms of how much money we got from Mainland Chinese tourism and the scheme, especially after the SARS crisis in 2003.*”

The second category of explanations concerned informants' general ideological stance towards Mainland China, rather than being directly about Mainland Chinese tourism or IVS. In this case, IVS acted as a catalyst to elicit general perceptions about Hong Kong and the mainland. The generational gap in attitude towards IVS was explained in cultural terms by an "enthusiastic" senior consultant in his 30s, who said *"also my parents came from mainland China, most older Hong Kongers have a relationship with the mainland. They don't feel that the IVS impacts much as they can associate with the behavior of mainland tourists."* If IVS is considered a tool for eliciting attitudes towards the mainland, an "enthusiastic" social worker and a "middle-of-the-road" flight attendant respectively noted: *"younger people in Hong Kong tend to associate tourists with general political issues, often cannot distinguish who comes here for a visit or here to stay."* and *"maybe don't care much about the IVS, but they read on the news it brings more mainlanders, and thus more problems for Hong Kong."*

Income Gap

The cluster segmentation revealed that the "somewhat irritated" segment had significantly lower incomes than the "middle of the roaders" who in turn earned less than the "enthusiasts". Informants also offered several explanations for this income relationship among the clusters.

A middle-of-the road flight attendant in his 50s suggested that the income gap might be related to the previously explained age gap, as *"younger people tend to earn less"* and *"have jobs in the back office and as clerks"*. A middle-of-the road post graduate student specifically mentioned *"the older the people, the more likely it is that they have their own company, also related to the tourism business. They are more established. As such, it is more likely that they earn more and profit more directly from the IVS. This can easily create a positive attitude towards the scheme."*

Interviewees in all clusters noted that not only were low-wage earners less likely to profit from the tourism created by IVS, but also they were more likely to feel the perceived negative impact of the scheme. As such, *"people who don't have money in Hong Kong, especially young people, tend to see mainlanders as their competition in everything. They come to Hong Kong, many*

of them come to stay. Again, we cannot distinguish between tourists and immigrants. They drive the housing prices up, they take jobs here.” A student specifically asked “who makes money from the IVS? People wonder, less money you make, more you concern about the impacts.”

Lack of Gap in Territorial Residency

The lack of any major difference in territorial residency among the cluster of HKPR’s attitudes towards IVS was explained in terms of personal benefits and impacts. Informants said *“generally Hong Kongers think of themselves, how much do I directly benefit from something or feel the negative consequences.”* This characteristic was given as a main explanation for the lack of a territorial gap in the clusters.

Several interviewees mentioned that *“in the New Territories, people feel the most impact, and I am sure you have seen the protests in the news, also because of the parallel trading of goods.”* A “middle-of-the-road” senior consultant in her 50s said *“there [the New Territories] the people also benefit the most from the IVS, people coming over to shop, the subway being improved. That is why they are not more against it.”* It was generally agreed upon that the age and income gap is mostly significant in predicting Hong Kong residents’ attitudes towards IVS, and this gap was explained to stretch throughout the whole of the SAR, not being confined to one specific geographical area.

DISCUSSION

Results showed HKPRs to be divided into three attitudinal segments, of which the largest (43.1%) was the “middle-of-the-road” cluster, broadly accepting the IVS as a tourism policy. “Enthusiasts” for the IVS made up 29.8% of the sample and “slightly irritables” 27.2%, so in principle almost three-quarters (72.8%) of the population are in favor of the effects of IVS. Acceptance appears to be related to age, with the youngest individuals least in favor, and this can to some extent be explained by their generational distance from the Mainland, from which many of their alder relatives may have come. Some studies have found age to have limited impact on

residents' attitudes (Belisle & Hoy, 1980; Fredline & Faulkner, 2000; Liu & Var, 1986; Madrigal, 1995; Pizam, 1978; Ryan & Montgomery, 1994; Williams & Lawson, 2001), although others have found it relevant (e.g. Brougham & Butler, 1981; Cavus & Tanrisevdi, 2002; Tomljenovic & Faulkner, 1999). Interestingly both of these groups span a considerable time period, so generational distance seems unlikely to be the only, perhaps not even the main reason. Considering traditional SE principles of cost and benefit (e.g. Ap, 1992; Kim, Jun, Walker & Drane, 2015), this study found that younger residents were less likely to directly benefit from IVS, but more prone to negative impacts, such as the crowding of public spaces and facilities. However, SR principles were also evident in the way younger individuals formed their attitudes towards IVS. Younger HKPRs were more likely to associate IVS with immigration from the mainland, work force competition, and tended to lack the nostalgic view of older residents toward the PRC.

It is believed this reaffirms the importance of SR principles in the context of resident studies and transcends a linear, rational cost-benefit analysis. Indeed, residents' protests against IVS in 2014 were believed to be fueled not only by the tourism impact, but also by general demands to mainland China for non-tourism related issues, such as democracy (Liren, 2014), the national education curriculum and a perceived loss of local culture (Wong, 2015). Ye et al. (2014) similarly found that social identity and cultural distance play an important role for Hong Kong residents when considering a relaxation of IVS. Findings suggest that these factors play an important role in the negative attitude of younger HKPRs towards IVS, adding to the SE principles of older generations being more likely in receiving the benefits of mainland tourism. Furthermore, Hong Kong youngsters have been raised through, and often participated in, the large-scale public pro-democracy protests that have characterized Hong Kong throughout the last years (Wassler et al., 2016).

However, financial benefit from tourism businesses has been shown to have a very steady influence on positive resident attitude (Jurowski, Uysal & Williams, 1997; McGehee & Andereck, 2004; Pizam, 1978; Williams & Lawson, 2011), and this was also found to be the case for attitudes

towards the IVS tourism policy. Results revealed that higher income groups tended to show a more positive attitude, with the “enthusiastic” cluster showing the highest average income of all three clusters. Respondents suggested that this was because higher-income groups tended to own companies that benefitted from Mainland Chinese tourism, while lower income groups tended to work for employers in other industries, where they received no direct financial benefit from the Chinese tourist wave. This is also the case for students, as confirmed by the earlier research of Wassler et al. (2016). Interestingly, Wong (2015) has already noted that protesters against the scheme consider IVS directly responsible for Hong Kong’s economic slowdown. Parallel trade was accused of damaging the retail sector, an effect that reflects both SE and SR principles, and respondents also mentioned that income in Hong Kong tended to rise with age, thus suggesting a further relationship between age and income in forming attitudes towards IVS.

Spatial factors have often been found to significantly influence residents’ attitudes in tourism contexts (Belisle & Hoy, 1980; Harrill, 2004; Harrill & Potts, 2003; Jurowski & Gursoy, 2004). Also, public protests against IVS have mostly occurred in the northern New Territories of Hong Kong (Wong, 2015). However, this study found no significant effect for area of residency upon the attitude clusters. Informants suggested this may be because the regions of Hong Kong which most benefit from IVS are also more likely to feel its impact. Also, survey respondents were similarly distributed by age and income throughout their regions of residence, suggesting the higher importance of these two factors in forming Hong Kong residents’ attitudes towards IVS and mainland Chinese tourists through a complex interplay of SE and SR principles.

IMPLICATIONS

Theoretical Implications

Findings revealed that resident attitudes towards tourism policies were influenced by both SE and SR principles, which can co-exist, but also be in conflict. Particularly SRs are frequently contradictory and do not always reflect experienced reality (Joffe, 2003; Moscovici & Hewstone,

1983; Schliephack & Dickinson, 2017). In the case of HKPRs' attitudes towards IVS, age and income level were shown as significant in positioning these SR aspects. For instance, HKPRs often associated IVS with their general attitudes towards mainland China and the related socio-political context, although cost-benefit evaluations were also important among older generations. This has particular theoretical implications.

Member-checking interviewees in Hong Kong often, perhaps subconsciously, wander from the specific topic of discussion to issues such as real estate prices and immigration, and Gibson (2006) suggests that these issues often overtake pragmatism in individuals with less personal experience. This was noteworthy among younger respondent groups in the present study. The importance of SRs is thus a key factor in understanding residents' attitudes towards tourism policies, especially for the younger and less experienced generations. The influence of media and community values on less personally accomplished members of society (Gibson, 2006) has shown to be relevant in other areas of research, while it is often overlooked in resident studies. Transcending the specific context of Hong Kong, it is believed that these findings offer further theoretical implications.

Jafar Jafari's platforms (1990; 2001) advocates that tourism research has moved through four distinct stages of thought. The Advocacy Platform (1) places tourism under a spotlight, mainly highlights its economic and socio-cultural benefits. The Cautionary Platform (2) suggests that there are economic and socio-cultural costs of tourism. The Adaptancy Platform (3) proposes community centered and alternative forms of tourism as alternative options. The Knowledge-based Platform (4) argues for a scientific formation of tourism research, for gaining a deeper understanding of the phenomenon.

In 2005 MacBeth proposed two additional platforms, which are Sustainable Tourism (5) and a Value-full Tourism Scholarship (6), advocating that tourism development cannot be determined solely by technical and political aspects, but must take moral considerations into account. While the first five platforms are chronologically descriptive of the tourism phenomenon, the sixth platform is

prescriptive, demanding “an exploration of ethics and praxis, no more, no less” (MacBeth, 2005, p. 980).

It is argued that resident studies in the tourism context have largely followed the paradigmatic order of the platforms. Kim, Uysal and Sirgy (2013) note that many earlier studies involving residents focused on measurable positive and negative impacts on their economic, social, and environmental well-being. However, MacBeth (2005, p. 974) argues that the only way to put true sustainability in practice, is by recognizing and understanding the ethics and values that underly conflicts and contradictions. In particular, tourism studies have often portrayed residents as too heterogeneous to be manageable (e.g. Blichfeldt, 2005; Riezebos, 2007).

The findings of this study show that, both SE and SR factors appear to have caused a shift in pragmatism and idealism in the formation of residents’ attitudes – especially for younger generations. The findings are in line with MacBeth’s (2005) assertion that true sustainability towards residents’ attitudes can only be acquired through transcending Jafari’s (1990; 2001) platforms towards a morally laden understanding of underlying mechanisms of residents’ attitude formation. This study advocates that resident studies in particular need to shift towards a paradigm which acknowledges both, SE and SR principles as underlying factors for attitude formation.

Practical Implications

Practical implications are especially relevant to the governing bodies of Hong Kong, who manage the delicate policies related to mainland tourism. These can be structured based on SE and SR principles. Considering SE factors, younger residents and those with lower incomes are less likely to directly benefit from IVS related tourism (Wassler et al., 2016), but feel the negative impacts. On the other hand, older, better off residents benefited more and were less prone to the negative impacts of the influx of travelers from across the border.

The relationship between practical implications and introduced measures needs to be balanced carefully. Various groups have called for a restriction or suspension of IVS, a measure which might reduce irritation among certain groups of residents, but might also harm the economic development of the city, including who benefit from tourism economically or socially. This includes the ever-tense political relations with the Mainland.

In order to limit the crowding of public spaces, the Hong Kong government could direct the influx of visitors better and designate the areas in which IVS tourists can visit to shop or trade. Restrictions on shopping and the transporting of certain goods, as well the control and enforcement of restrictions would probably lower the attractiveness of Hong Kong in the eyes of day-trading tourists. Existing limitations on physical goods, their value and product types should anyhow be further developed and their impact on the local retail sector should be assessed.

This measure might mitigate the impact of tourism to some areas, though not all irritated residents would necessarily benefit from it, since the irritation is independent of the area of residency within the SAR. Alternatively, the Hong Kong government and tourism industry could create additional shopping malls and trade districts in less inhabited areas close to the border to filter short-term, day-trading tourism from other tourism streams.

Next, practical implications of the identified SR need to be discussed. Beyond managing the flow and capacity of tourism, a dialogue between tourism stakeholders, politicians, and especially the irritated segment of residents might be beneficial in order to raise awareness, as well as understanding and tolerance between residents and tourists. Here, the role of internal marketing and communication in the destination of Hong Kong can be revitalized and strengthened. The Hong Kong government and tourism industry could revive the service quality and attitude initiatives from the early 2000s, which increased the service quality in the city, based on an awareness campaign. On the other side of the border, China's National Tourism Administration in Beijing issued a rulebook to curtail uncivilized behaviour of Chinese travelers abroad. These guidelines on civilized travel outside of China (China National Tourism Administration, 2013) could be used to mitigate

unruly behaviour traveling to Hong Kong. Further studies should take a deeper qualitative look into the issue and enhance the understanding of the underlying SR, as well of the effects of the counter measures identified. In particular, future studies should investigate the social carrying capacity of Hong Kong, residents' perceived crowding of public places, and the influence of general attitudes towards the residents' perception of Chinese tourists. Future research should also examine the perceived relationships and spill-overs of political issues of the Hong Kong/ Beijing relationship on tourism. In this case, more insights are needed to understand how internal marketing and communication between government, tourism industry and residents can more effectively change negative residents' attitudes. The analysis of the economic effects of a negative residents' attitudes on moral, productivity, service quality and guest satisfaction can be considered as a more positivistic approach to this question.

Finally, this study acknowledges several limitations. First, sampling the highly heterogeneous resident stakeholder is a difficult task. This study used a mixed-method approach to limit the impacts of this issue. Quota sampling is a form of non-probability sampling; as such it is not possible to estimate the quota of any single member of the population to be included. Probability sampling could have eliminated some of this possible bias.

Also, the survey was conducted online through an online panel with financial remuneration. As such, older generations, people not owning a PC and lower income groups were likely limited in their participation. Here, it should be acknowledged that not every sub-stratum of the population might have been sampled appropriately.

Hong Kong will exist as a different legal and economic system, with its own currency as well as its people's rights and freedom until 2047, when the inner Chinese border between Hong Kong and the mainland of China is scheduled to disappear. Until then, to be aware, to understand the current situation and to take necessary actions will be important for generations of tourists and residents and will help determine the coalescence of two systems in one country, a process that during the last years has been turbulent at best.

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