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《陸客鬆綁事件之產業轉型與前推研究》

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附件 2：中英文摘要（短期評估視角）

至 2010 年入境陸客已躍升為台灣旅遊市場之最大宗人流，大陸對台觀光政策時而鬆綁、時而管制，為好壞消息交錯的事件發生屬性，更凸顯未來旅遊相關企業「應權通變」之重要。本研究以各次陸客來台鬆綁事件、市場偏向樂觀認知為觀測期間，評估其可能的流量效應。首先，以焦點團體法建構此一系列鬆綁人流下，其主要的研究主題與相關的論證範圍，接著資料佐證部分，乃針對觀測期間之股價進行即時市場衝擊分析，包括此意念型人流所外擴與延伸之市場反應部分。本文的研究結果發現：第一、本研究以「陸客遊—戶外休閒風—境內體驗行」做事件與產業組織鏈分析，首先發現過往的各批次陸客遊事件，沒有專屬、單一的代表事件；第二、由各次鬆綁事件做分析，仍以人流概念股影響最大，物流概念股居第二位，金流概念股居末位，符合戶外旅遊仍以人流效應為主之一般認知；第三、由持續轉弱的共匯流框架反應，表示此成串發生事件有趨向成熟市場之「重覆型」反應跡象，已漸脫離此類事件理應為「序列型」反應之一般論證，亦顯示原向集團大企業做收斂之共匯流反應，有逐漸發散、轉至偏鄉各地做新匯流跡象。準此以觀，以往以跨境人流與狹義觀光面向所為之市

場評估方式，已到了檢討時刻。更宏觀視角推計未來合宜的產經發展新模式，首先關於新體驗經濟之範圍延伸部分，原五位一體框架可朝更有心流加值之「人流→體驗流」，做新匯流架構強化，其次在因應自由行陸客增加的部分，建議未來新的體驗經濟策略，可鼓勵各地多開創富有在地特色的淺型「文化產業化」業務，期與都會市場共匯流明顯之大型「產業文化化」專案，做有效區隔。

關鍵詞：人流鬆綁事件、新體驗經濟、共匯流市場反應

Since the open policy of Chinese tourists travelling to Taiwan promulgated exponentially, the inbound travel market from Chinese tourists into Taiwan has become the fastest moving-tide beginning to turn. It has steadily become the up-growing number since 2002 and the largest tourists in Taiwan's inbound tourists market in 2010. During a string of de-regulating events and their aftermath on making spots-flying and-landing more convenient, it brings not only anticipant and instantaneous impacts of the related tourism market, but also significantly substantial macro benefits to confront the sequentially growing participants of Chinese tourists to Taiwan. Thus, the purpose of this study aims to derive the feasible converging from the new and specific enterprises as well as their short-run market response addressing from any such visitors and new entering other sense-making measures of facilitating these synthetic benefits. Following established events in series, the empirical results show : First, this study uses the event study approach including the focus group, to capture the event-induced instant volatility of corporate stock price. One finding is that there has no proprietary event amid the sequential de-regulating events and the other is the volatility of markets co-converging conglomeration gradually declines and gains more repeated rather than sequential reactions forecasting along with the up-and-coming events announced. Furthermore, the wide and local industrial organization relationship from conglomeration to fringe is being built through Mainland China deepening the economic, trade, and knowledge ties as well as easing restriction on penetrable travel to Taiwan. Finally, the paper concludes some organizations-converging reflections

about the large-scale business, and prospectively suggests to the differential culture-extending policies of enterprising small-scale business for regional experience to help them steer clear of market obstacles.

Keywords: De-regulating Mover Events, Prospective Experience
Economy, Co-converging Market Response

附件 3：中英文摘要（長期規劃面向）

2006 年雪隧貫穿、蔣渭水國道 5 號通車以來，蘭陽平原的休閒區位更具殊異性，不僅提供山海一線、婆娑舒坦之體驗經濟，又緊鄰現代化程度高的大台北都會區，是產業跨區位規劃理想的實踐場域。目前觀音隧道已經貫穿、蘇花國道也即將通車，國道 5 號延伸至花蓮之後，東北角—宜蘭之中介區位與流轉將更為明顯。未來的宜蘭產業將面臨多變的跨境人流威脅，目前為前推檢視此區域成長模式之關鍵時刻。本文以陸客來宜蘭旅遊之新舊人流變化，為主要的觀測對象，應用「MAP-design」為軸心之混合取向分析程序，做廣泛投產關係之流向與轉化研究。最後，對照於花東的「東海岸」優勢，本文前推得「東北角—宜蘭」的合宜內生成長型態，以補強本區逐漸弱化的磁吸效應，藉由更有虛實流轉與生命週期延展的新休閒專案提出，期能吸

引更多之實質人流入住。

關鍵詞：新流量經濟、成長圖像分析法、區域投產關係

Because the constraints of geographic factors, the development patterns of eastern Taiwan and their re-intermediation strategies in city-to-city were different from western Taiwan. The Lanyang's cross-region move happens enormously after the Shea-San tunnel's opening on national highway 5 in 2006. Furthermore, the Executive Yuan had planned to build Su-Hwa Highway, to achieve balance goals of eastern- western regional development. In the coming year, Yilan will have great expectations of mediating and moderating cross-movers in good news, or terrible trade-offs in bad news. Thus, the purpose of this study aims to derive the feasible converging and integrating local growth from the new and specific culture as well as their cash-flow market response addressing from any such new and expected visitors after Su-Hwa Tunnel's Opening on extended National Highway 5. This research will try to apply the input and output interdependence as well as analytical mapping procedure of bifurcation model, in order to assess the multi-flow growth effects of the mediating Northeast Yilan and Su-Hwa Highway transportation event, via the segmented cyber-physical service systems toward Eastern Taiwan.

Keywords: new flow economy, analytical growth mapping, regional input and output relation