

Research on layout and construction performance of cultural and creative industry parks in Xihu District of Hangzhou

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Abstract. Combing the current situation of cultural and creative industry parks in Xihu District of Hangzhou, analyzing the supporting elements of its layout, cultural and creative industry Parks in Xihu District have the characteristics of obvious group block distribution and the dominant function of each park is obviously influenced by the supporting elements. This paper selected four municipal cultural and creative industry parks for the investigation of their operating conditions. It is found out that the park construction performance of different construction foundation, positioning, development model is quite afferent. Therefore, it suggests that the creative industry park should be integrated with urban life, commerce, business and other functions. The park with weak ecological foundation should optimize the image of the park by means of urban renewal, and the policy should be inclined to retain talents and so on.

1. Introduction

At present, Hangzhou has entered the stage of transforming to an innovative city, and cultural and creative industry has developed into the leading industry in Hangzhou in the period of facing challenges and opportunities. The essence of creative industry is not only consumer service industry, but also producer service industry. The cultural and artistic design, information service design and educational consulting services provided by creative industry will become an indispensable part of traditional advantage industries and new industries. According to the Statistical data in 2017, the value added in all Cultural and Creative industries in Hangzhou has increased by 304,100,000,000 yuan, with a year-on-year increase of 19% accounting for 24.2% of the GDP. The industry achieved sustainable development and the Cultural and Creative Industry has become a pillar industry in Hangzhou. The cultural and creative industry park is the platform of large-scale industrial agglomeration, its layout and optimization is conducive to promote industry development.

Xihu District is one of the earlier districts to have proposed vigorously develop cultural and creative industries in the city. In view of a strong cultural atmosphere, unique ecological environment and other factors that attract industrial cluster in Hangzhou, there are about 37% of the cultural ceative industries gathering in Xihu District, and there are nearly 40% cultural and creative industry parks mainly distributed in Xihu District^[1]. In 2017, the added value of Xihu District's cultural and creative industries increased by 38,976,000,000 yuan, with a year-on year increase of 12.8%, accounting for 36% of the GDP. Now it has been selected for the list of the key counties (cities and districts) for



cultural industries in Zhejiang Province. Therefore, this paper selects Xihu District as the research area, investigates the construction status and layout characteristics of the cultural and creative industry park in Xihu District. It selects four municipal creative industry parks at the same level and compare the construction performance of them so as to explore the law of the development in cultural and creative industry parks.

2. Analysis of the layout of the cultural and creative industry parks in Xihu District

2.1. Basic conditions of the park construction

In Xihu District, there are 1 park of national level, 4 parks of municipal level, 9 parks of district level and 3 parks of other level (table 1). The construction time of the four municipal creative parks is early. Among them, Hangzhou Digital Entertainment Industry Park, Xixi Creative Industry Park and Zhijiang Cultural and Creative Park belong to the first 10 key Cultural Creation Parks in Hangzhou (granted in 2008). And the "467 Creative Alliance" belongs to the third batch of municipal cultural and creative industry parks (granted in 2014).

Table 1. Summary of the basic situation of cultural and creative industry parks in Xihu District

No.	Industry park	Level	Leading industry	Area covered (ha)	Planned construction area (10,000 m ²)	Built-up time
1	Hangzhou Digital Entertainment Industry Park	Municipal level	Software development, animation and game industry	8.3	8.95	2004
2	Xixi Creative Industry Park	Municipal level	Design service industry	95	2.6	2008
3	Zhijiang Cultural and Creative Park	Municipal level	Comprehensive industry	156	24.7	2008
4	467 Creative Alliance	Municipal level	Design industry	8.7	12.5	2008
5	Hangzhou Xihu Advertisement Industry Park	National level	Design service industry	130	146	2012
6	Thome Furnishings Industry Park	District level	Design Service Industry	4.5	15	2009
7	Zidong Creative Design Industry Park	District level	Design service industry	0.7	2	2011
8	China Academy of Art Landscape Architecture Design Park	District level	Design service industry	6	6	2011
9	Xixi Legu Cultural and Creative Industry Park	District level	Modern media industry	1	1.7	2014
10	Huanglong Sports Cultural and Creative Industry Park	District level	Culture leisure and tourism industry	4.2	3	2010
11	Dongxin • Hechuang Park	District level	Design service industry	8.2	5	2014

12	Huawai Tongwu Cultural and Creative Industry Park	District level	Art industry	6.6	2.2	2011
13	Hangzhou Zhijiang and Xiangshan Cultural and Creative Park	District level	Art industry	5.55	6.6	2014
14	Hangzhou E-commerce Industry Park	District level	E-business	1.8	4.2	2009
15	Qingzhiwu Qishu Cultural and Creative Park	Other	Design service industry	0.3	0.5	2014
16	Damei Creative Park	Other	Design service industry	2.5	3	2013
17	Zhongchuan Cultural and Creative Industry Park	Other	Culture and media industry	0.3	0.4	2012

Source: Hangzhou cultural and creative industry office and onsite survey

2.2. Diversification of supporting elements

In the process of self-development of culture creative industry, Government guides the layout of industry parks, considering the industry foundation, culture environment, ecological environment, policy guidance and so on. There are 7 different levels of industry parks (Figure 1) with various development forms. Supporting elements of industrial agglomeration and park layout including the following three categories.

2.2.1. Traffic advantage. As is shown in Figure 1, most of the parks are located near the main road in the urban area, especially in the northern part of the region and north of the West Lake Scenic spot. The parks are located along the Zijinggang Road, Wen'er Road and Wenyi Road. The public transport lines are also easy to arrive, and the transportation is very convenient. Originally, the parks in the gathering area of the China Academy of Art were relatively far away from the urban areas. Although they were distributed on both sides of the high speed around the city, it was more difficult to find them in practice. Especially for Huawai Tongwu Cultural and Creative Industry Park, you need to go down the roundabout highway and look closely at the Liusi Road to find the entrance, and it's easy to get lost when you first arrive. With the opening of the Zizhi Tunnel, the traffic between the north and the south of the West Lake region is convenient, and the traffic location of cultural and creative industry parks in the Zhijiang area has also been upgraded. In general, the large proportion (11/17) of these parks is distributed in the area of convenient traffic. To a certain extent, it reflects the direction of traffic conditions in the location selection of industry parks.

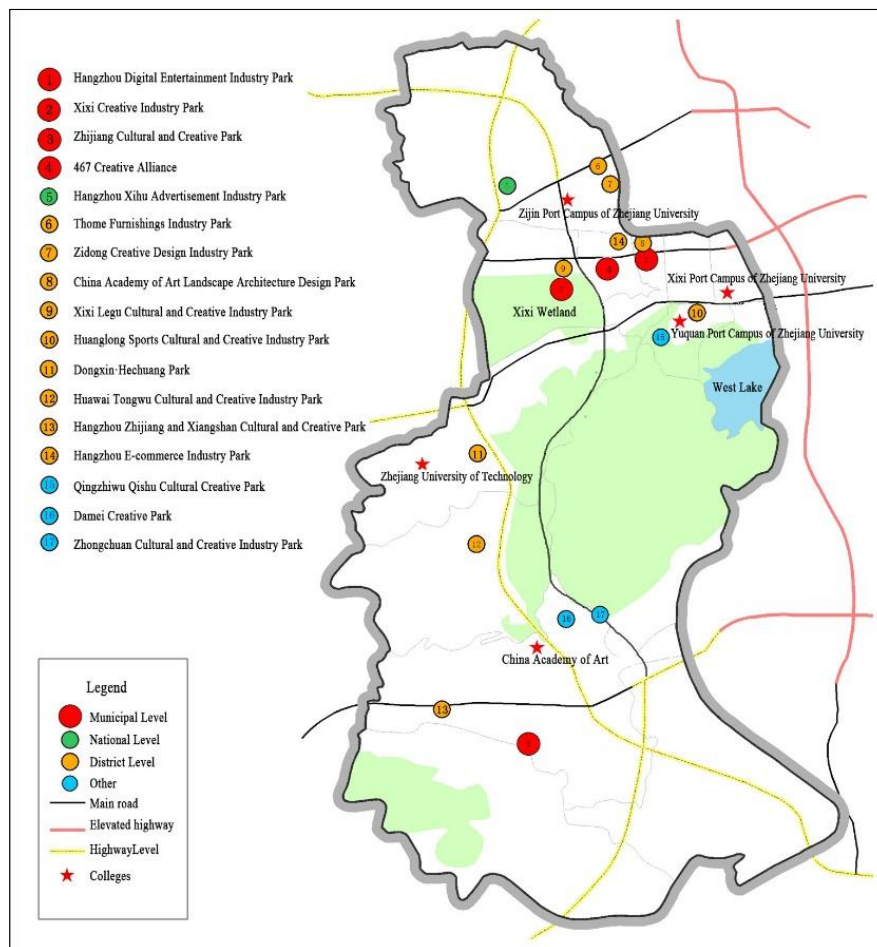


Figure 1. The distribution map of cultural and creative industry parks in the Xihu District.

2.2.2. Eco-environment. In the agglomeration and development of cultural and creative industries, the requirements for regional ecological environment are higher than general industries. Among the six major scenic spots planned and developed in Hangzhou's "Tourism westward", five are in Xihu District, especially the West Lake and Xixi Wetlands, which are the iconic scenic spots in Hangzhou. This undoubtedly plays an important guiding role in the layout of cultural and creative industry parks. Xixi Legu Cultural and Creative Industry Park was built along Xixi National Wetland Park. Thus, Xixi Legu Cultural and Creative Industry Park and Xixi Wetland is separated by the road. Qingzhiwu Qishu Cultural and Creative Park, Huanglong Sports Culture and Creative Industry Park, and Zhongchuan Cultural and Creative Industry Park were built along the West Lake Scenic area. Zhijiang Cultural and Creative Park and Hangzhou Zhijiang and Xiangshan Cultural and Creative Park are built along Hangzhou Zhijiang National Tourism Resort.

2.2.3. Colleges and universities. The core of cultural and creative industry is creativity, which is a typical intellectual industry, which highly depend on knowledge, culture, science and technology [2]. Colleges and universities are good place for high intelligence talent gathering. There are a large number of cultural and creative industry parks gathering around the Zhejiang University and the China Academy of Art in Xihu District. For example, Xixi Creative Industry Park is close to Xixi Wetland and Zijing Port Campus of Zhejiang University. The natural ecological environment and cultural atmosphere are both good. Thus, the leading industries here are cultural and art industry and television media industry. Qingzhiwu Qishu Cultural and Creative Industry Park neighbors Zhejiang university

Yuquan campus in the east, focusing on the development of industrial design, architectural design, product design, space design, visual art, advertising design, art creation, clothing design and other creative industries. The West Lake Creative Valley relies on the China Academy of Art. The enterprises in the park have matched with relative majors in China Academy of Art. At present, the key feature of there is cultural and art industries as the leading industries. And for balance, there are still architecture and landscape design industry and consulting and planning industry. Although the 467 Creative Alliance is far away from universities in space, it also signs a cooperation agreement with the Academy of Art of Zhejiang University of Technology to jointly create the core of the design industry belt.

2.3. Layout characteristics of parks

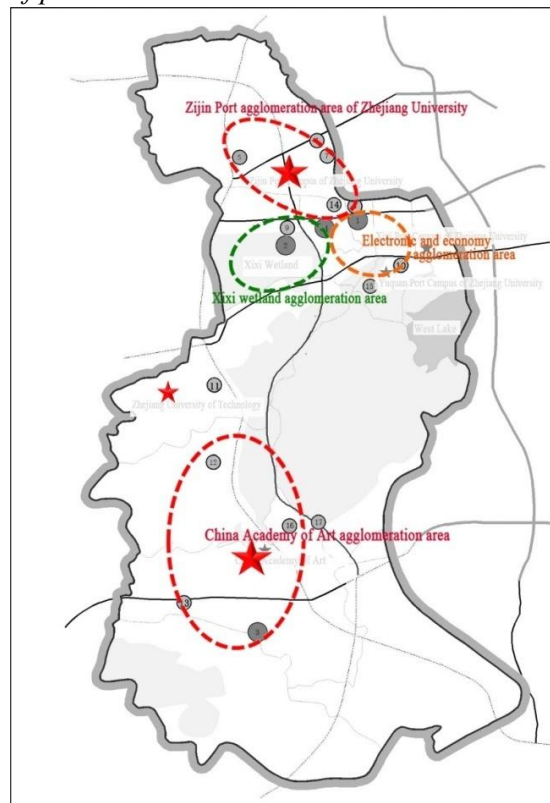


Figure 2. The gathering map of cultural and creative industry parks in Xihu District.

2.3.1. The distributional agglomeration is obvious. Affected by ecological environment, traffic location, industrial base, cultural atmosphere, store rent and other factors, the distribution of cultural and creative industry parks in the West Lake region presents a block distribution, which is divided into four blocks, namely, Zijin Port agglomeration area of Zhejiang University, electronic and economy agglomeration area, Xixi wetland agglomeration area and China Academy of Art agglomeration area (Figure 2). The Zijin Port agglomeration area of Zhejiang University and the China Academy of Art agglomeration area are centered on the two key universities in Hangzhou, and the industrial parks are distributed evenly around them. The Xixi Wetland agglomeration area depends on the unique natural environment of Xixi Wetland to provide a good employment environment for the park. Because the electronic economic agglomeration area accommodates the Wensan Road electronic information district and the old Hangzhou economic development zone, which has strong radiating power in the whole province and even in the Yangtze River Delta region, and it has the unique location advantage and industrial foundation to develop the digital entertainment industry. So it focuses on the cultivation

of Hangzhou Digital Entertainment Industry Park, which has become the only national digital entertainment industry demonstration base in Zhejiang Province.

2.3.2. The leading function of the park is affected by the supporting factors. As can be seen from the gathering map of the cultural and creative industry park in Xihu District, the Zijin Port agglomeration area of Zhejiang University and the China Academy of Art agglomeration area are the two regions with the largest number of parks. Among them, the Zijin Port area of Zhejiang University was built around the Zijin Port Campus of Zhejiang University, focusing on the development of industries with cultural and artistic design as the main type. And the China Academy of Art agglomeration area was built around the China Academy of Art, most of which were affected by the Academy of Art. It takes Zhijiang Culture Park as the focus of the development of the park, commits to the development of cultural and artistic industries and provides design, science and technology for college students and other related innovation platform. The park also contains a variety of industrial types. The overall is more comprehensive. Electronic economy agglomeration area is represented by Hangzhou Digital Entertainment Industry Park, which mainly develops digital entertainment industry, which includes not only the information industry in Hangzhou which is famous in the whole country, but also the animation industry which Hangzhou focuses on the cultivation of it. Xixi Wetland agglomeration area is represented by Xixi Creative Industry Park, focusing on the development of film and television, media, information services and other industries. Cultural and creative industry parks can attract enterprises which are closely related to the original industry and culture, surrounding colleges and universities. The leading function is closely matched with its supporting foundation.

3. Comparison of construction performance of municipal parks

In order to analyze the construction performance of culture and creative industry parks more concretely, we choose Xixi Creative Industry Park, Hangzhou Digital Entertainment Industry Park, Zhijiang Cultural and Creative Park, 467 Creative Alliance to carry on further investigation.

3.1. Basic information of Construction

The overall construction of the four municipal-level industrial parks is earlier than other parks. After a longer construction cycle, the number of enterprises and the park output value are increasing year by year and the leading function is relatively clear. It has been identified as Hangzhou level of cultural and creative industry parks.

Xixi Creative Industry Park is close to Xixi Wetland and Zijin Port Campus of Zhejiang University. Its natural ecological environment and cultural atmosphere are excellent. It basically forms a cultural industrial layout characterized by script creation, film shooting, production, film distribution, and cinema line projection. The West Lake Digital Entertainment Industry Park has the longest construction history with good geographical location, mature supporting facilities, and has formed a creative park with information software as the leading feature. Relying on the former campus of the China Academy of Art, Zhijiang Cultural and Creative Park has transformed the old cement factory, and the enterprises in the park is various. 467 Creative Alliance originated at No. 467 Wensanxi Road, is the first private enterprise in Xihu District to establish and operate a municipal cultural and creative industry park. It positions in the cultivation of industrial design industry, architectural landscape design industry, advertising design industry and tourism planning and design industry and other design services industries (table 2).

Table 2. Comparison of the construction of the four major parks in Xihu District

	Xixi Creative Industry Park	Hangzhou Digital Entertainment Industry Park	Zhijiang Cultural and Creative Park	467 Creative Alliance
Built-up time	2008	2004	2008	2008
Park orientation	high-end creative talents gathering and high-end films and TV plays production	obviously for digital and entertainment industry	Three gradient strategy: animation, game, film, design, and art are as core industries; Culture, exhibition and educational&training as assistive industries;information service and creative tourism as supporting industries	cultivate industry, design industry, architecture and landscape design industry, advertisement design industry and tourism planning industry.
forms of supporting	create new area	rely on traditional layout	transform old factories and warehouses	rely on traditional layout
Mode of development	government-leading	government-leading	new model with government-leading and rely on colleges	Private enterprises operation
Location	Xixi Wetland tourist Area	downtown, Hangzhou Wensan Street, information block core area.	Zhijiang National Tourism Resort, ; near China Academy of Art	downtown, near Xixi Wetland
Talent advantages	preferred by many celebrities including painters from famous countries, famous writers, cartoonist, director, and so on.	Zhejiang University, Zhejiang University of Technology, Hangzhou Dianzi University are there. Talents gather here and easy to make start-up elites. Technical talented person, easy to be stable and settle down here.	Mainly rely on Xiangshan Campus of China Academy of Art, Artistic talent-oriented, strong liquidity	Zhejiang University, Zhejiang University of Technology and so on, Make agreement with Zhejiang University of Technology
Infrastructure	beautiful natural environment, convenient transportation, common commercial facilities	transportation, perfect public service facilities and life facilities	beautiful natural environment, surrounding public service facilities need to be perfected	convenient transportation, public service facilities and life facilities are extremely perfect

3.2. Operation and development status

3.2.1. Characteristics of occupancy rate. From the actual investigation (table 3), the cultural and creative industry park belonging to the same city has obvious difference in actual operation. Among them, the occupancy rate of Xixi Creative Industry Park and Hangzhou Digital Entertainment Industry Park is 100%, indicating that the two park is in a good state of operation. Zhijiang Cultural and Creative Park covers a large area, consisting of a plurality of blocks. Phoenix Creative International is the core demonstration area, transformed from the original double cement factory, a well-known enterprise, so the rate is 90.9%; While the Phoenix Creative building located in the Phoenix Creative International North Development Zone as the extension of Zhijiang Creative Park, the occupancy rate is low and this shows that, to some extent, there is differences in the operation of large-scale parks. The 467 Creative Alliance is composed of three scattered buildings with a general environment, and the occupancy rate is only 73.68 because of the difference in incentive policies caused by the establishment and operation of private enterprises.

3.2.2. Characteristics of rent. Further investigation of the park rent situation (table 3), we found that the rent of the ecological environment beautiful Xixi Creative Industry Park and Zhijiang Cultural and Creative Park is the highest, because of the key protection and development, which opened a lot of preferential measures to attract celebrities into the park. The rent of Hangzhou Digital Entertainment Industry Park are generally flat with those of offices in the same location, while the 467 Creative Alliance is on the low side compared with other office buildings in the same location. The operating condition of low rent and low occupancy rate also explains the preference of high-end cultural and creative industry to the park image to some extent. Rather than focusing heavily on whether the rent is the lowest, some companies prefer high-end properties in similar locations to low-rent "old and shabby" cultural and creative industry parks.

3.2.3. Number and scale of enterprises. Overall, there is a positive correlation between the size of the park and the number of enterprises^[3]. Zhijiang Cultural and Creative Park, which has the largest total building area, has the largest number of enterprises; the Xixi Creative Industry Park has fewer enterprises, and most of the buildings are built in wetlands. In terms of the average size of the enterprise, the average space scale of 467 Creative Alliance is the least, and the average size of the employees in the Zhijiang Cultural and Creative Park is the least (table 3), which is basically in line with the situation in the field inspection. These two cultural and creative industry parks around colleges and universities have better creative business incubating function, enterprise development threshold is low, creative people are more active and the environment is better. In the survey we also learned that some brand design enterprises have given up the desire to develop in 467 Creative Alliance, because of the old park image.

3.2.4. Investment and revenue characteristics. Further comparison of the economic benefits of parks, economic performance of parks is not directly related to built-up time, but related to the construction form of dependence. Hangzhou Digital Entertainment Industry Park and 467 Creative Alliance, two industrial parks relying on traditional layout and creativity, have the least investment in the construction of industrial parks, but the business revenue of enterprises is not low, which shows that this construction mode relying on other industrial platforms has the advantages of saving investment and achieving quick results. It can attract more creative people. Xixi Creative Industry Park has the least number of enterprises, and the average construction investment of its enterprises is the highest, corresponding to which the average operating income of the enterprises is much higher than that of other parks. It confirms the feasibility of the relative high-end creative industry park in the edge layout of the city scenic spot.

Table 3. Operation information of municipal-level cultural and creative industry parks in Xihu District

Xixi Creative	Hangzhou	Zhijiang Cultural	467
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	Industry Park	Digital Entertainment Industry Park	and Creative Park	Creative Alliance
Leading industry	Film and cultural industry	digital entertainment, animation and game	Design service, animation and game, art	Design service
Covered area (ha)	95	8.3	156	8.7
Planned construction area (10,000 m ²)	2.46	8.95	24.7	12.5
Area after built (10,000 m ²)	2.46	8.95	13.9	9.5
Area already in use (10,000 m ²)	2.46	8.95	12	7
Occupancy rate of the enterprises (%)	100	100	90.9 (Creative International) 67.2(Creative Building)	73.68
Rent of the industry park	3.5	2. 3	2.5	2.1
Operation revenue in 2017(10,000)	350000	135624	63700	438000
Enterprises occupancy(company)	38	108	267	235
Quantity of employment (staff)	600	3240	1433	3160
Investment Amount of Park Construction (10,000 Yuan)	14000	7885	76000	5560
Average Area of companies (m ² / company)	647.37	828.70	314.61	297.87
Average operation revenue (10,000 Yuan/company)	9210.53	1255.78	238.58	1863.83
Average staff size of companies (staff/company)	15.79	30.00	5.37	13.45
Average construction investment of companies (10,000Yuan/company)	368.42	73.01	284.64	23.66

Source: Hangzhou cultural and creative industry office and onsite survey

3.3. Construction performance characteristics

3.3.1. The construction foundation causes the brand effect of parks to be different. The production of the park is affected by industry foundation, space preference, government guidance and so on. Different construction foundation directly affects the brand and popularity of the park. Xixi Creative Industry Park is located in Xixi Wetland, and Zhijiang Cultural and Creative Park is located in Zhijiang National Tourism Scenic area. It has unique geographical and natural environment advantages with obvious brand effect and high reputation so it can attract a large number of celebrities, large enterprises. On the contrary, the better the environment, the more superior the location of the park and the rent is also more expensive. And it also become the threshold of screening into the enterprise, blocking the entry of low-end, small-scale enterprises. And the rent of Hangzhou Digital Entertainment Industry Park, 467 Creative Alliance is relatively low and suitable for public pioneering.

3.3.2. The positioning of the park determines the quality of the enterprises of occupancy. The development of the park must have a clear brand orientation^[4], and the type of industry that focuses on the development determines the construction performance of the park to a large extent. For example, Xixi Creative Industry Park locates its unique brand with the industry of film, television and entertainment, which is a high-return industry. Its unit enterprise economic performance is very high. The quality of the resident enterprises directly determines the economic performance of the park, only by improving the quality of enterprises can determine the future development of the park. The orientation of Xixi Creative Industry Park and Phoenix Creative International (Zhijiang Cultural and Creative Park) has set a higher threshold for the enterprises to enter, and the enterprises above the scale are obviously more than other parks, and the economic performance is also obviously higher. The 467 Creative Alliance and Phoenix Creative Building (Zhijiang Cultural and Creative Park) contain small and medium-sized enterprises which accommodates many college students to innovate and start their own businesses. The risk of enterprise innovation is large, and the occupancy rate is unstable.

3.3.3. The difference of the construction performance is caused by the different policy support intensity. Only 467 Creative Alliance of the four parks is run by private enterprises, while the other three are government-led. Under different development models, the strength of policy support for the park has a certain gap. Xixi Creative Industry Park is highly supported, it offers a great number of preferential measures to attract celebrities into the park, for example: five years to create works about Hangzhou can gain the award of rent-free 20 years. Zhijiang Cultural and Creative Park is also strongly supported by the Xihu and Zhijiang management committees: the government of Zhijiang Resort clearly points out that during the "Eleventh Five-Year Plan" period, we should do a deep job of "the economy of Academy of Art". Taking the Xiangshan Central Campus of the Academy and its surrounding areas as the core to plan and build creative industry functional areas, and issue a series of supporting policies to accelerate the development model of Zhijiang Park. The Xihu District also issued a special fiscal policy for Zhijiang Park, talent policy, accelerate the economic transformation of the Tong area. Hangzhou Digital Entertainment Industry Park relies on the policy of digital entertainment industry, there are some incentive policies, financial policies rely on the city level of innovation policy, while the talent policy is mostly based on the city or provincial training policy. The 467 Creative Alliance mostly relies on the cultural creation policy of the city or the provincial level, and its influence on the park is relatively limited. Under different policy support, Xixi Creative Industry Park and Zhijiang Cultural and Creative Park are located at the high- end, high rent, high entry threshold, and pay more attention to brand effect.

4. Inspiration

At present, Hangzhou cultural and creative industry platform has been created in many ways, and the development of creative industry and the construction of the park also need to be further combed and guided. Based on the above analysis of the cultural and creative industry parks in Xihu District, the following enlightenment is formed:

First of all, from the view of the space layout of cultural and creative industry parks in Xihu District, cultural and creative industry parks are highly dependent on transportation facilities at the initial stage of construction, and the operation of the surrounding city functions and supporting facilities are constantly improving requirements. Therefore, while the government has invested a lot of start-up funds to optimize the traffic location and the construction of the park, it should simultaneously consider the functions of the cultural and creative industry park, such as the construction of public environmental facilities, the supporting facilities of life, the comprehensive services, etc. The cultural and creative industry park should be integrated with urban life, commerce, business and other functions, to form a diversified, complex urban comprehensive area.

Secondly, based on the construction performance of each park, the orientation and characteristics of the cultural and creative industry park directly affect the scale and efficiency of the enterprise. West

Lake, Xixi Wetland and other scenic spots are unique to Hangzhou natural landscape. How to adhere to its profound cultural heritage to strengthen the brand characteristics is the first consideration of cultural and creative industry parks operation planning. At the same time, we should also see that there are still many cultural and creative industry parks that rely on non-ecological resources. They are small and scattered, or specialized. It is more worth pondering how to optimize the image of these parks with weak ecological foundation through the means of urban renewal.

Thirdly, in order to promote the development of cultural and creative industries, Hangzhou City has launched a series of preferential fiscal and tax policies and personnel policies, which have played an important role. Special preparation is inclined to large brands, celebrities and other high-end enterprises, such as preferential policies to quickly enhance the popularity of the park, preferential policies of high returns. But at the same time, we can not ignore the talent advantage in Xihu District, which includes the two most important universities in Hangzhou-Zhejiang University and the China Academy of Art. Retaining and attracting talents is also the key thinking and solution of culture and creative industry parks in Hangzhou. The construction of mature park sets a higher threshold for the entry of enterprises, economic performance is also significantly higher. Because the campus near the university town accommodates the small and medium-sized enterprises where the university students innovate and start their own businesses. Although the park industry types are rich, the lack of high concentration and clear characteristics of the industry has become the main reason for its low economic performance. How to provide a good survival and development platform for small and medium-sized enterprises, but also to bring higher economic performance, is the question that industrial parks relying on the university need to think about.

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