

THE KINGDOM OF THAILAND
THE TOURISM AUTHORITY OF THAILAND

HUA HIN, CHA-AM

**THE TOURISM DEVELOPMENT STUDY ON
THE HUA/HIN / CHA-AM BEACH AREA
IN THAILAND**

FINAL REPORT

VOLUME 2: MAIN TEXT

DECEMBER 1992

JAPAN INTERNATIONAL COOPERATION AGENCY

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PREFACE

In response to a request from the Government of The Kingdom of Thailand, the Government of Japan decided to conduct the Tourism Development study on Hua Hin/ Cha-Am Beach Area in Thailand and entrusted the study to the Japan International Cooperation Agency (JICA).

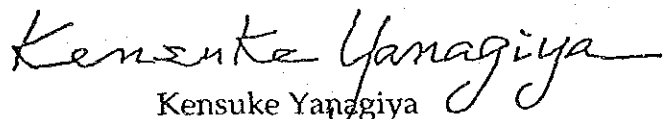
JICA sent to Thailand a study team headed by Mr. Kazunari Makino, Pacific Consultants International, three times between January and October 1992.

The team held discussions with the officials concerned of the Government of the Kingdom of Thailand, and conducted field surveys in the study area. After the team returned to Japan, further studies were made and the present report was prepared.

I hope that this report will contribute to the promotion of the projects and to enhancement of friendly relations between the two countries.

I wish to express my sincere appreciation to the officials concerned of the Government of the Kingdom of Thailand for their close cooperation extended to the team.

December, 1992



Kensuke Yanagiya
President

Japan International Cooperation Agency

ABBREVIATIONS

ASEAN	Association of South-East Asian Nations
Baht	25 Baht = 1 US Dollar
BOD	Biochemical Oxygen Demand
CIM	Coefficient of Inverse Matrix
COD	Chemical Oxygen Demand
CTC	Conversion Coefficient of Construction Price to Economic Prize
dITA	Incremental Tourist Arrivals
DO	Dissolved Oxygen
dTRV	Incremental Tourism Revenue
EDP	Tourist Expenditure per person per day
EIRR	Economic Internal Rate of Return
EPD	Tourist Expenditure per Person per Day
EXP	Rate of Tourist Expenditure
FIRR	Financial Rate of Return
GDP	Gross Domestic Product
GRP	Gross Regional Product
IDB	Indirect Benefit
IMA	Ratio of Intermediate Input to Value of Construction Industry
IRR	Internal Rate of Return
JICA	Japan International Cooperation Agency
LDC	Land Development Corporation
LST	Average Length of Stay
Master Plan 1987	Master Plan for Tourism Development of Phetchaburi Province and Prachuap Khiri Khan Province, prepared by TISTR and TAT
NESDP	National Economic and Social Development Plan
PCB	Polychlorobiphenyl
pH	Hydrogenion Concentration
PSD	Private Sector Developers

RIB	Rate of Indirect Benefit
RVA	Rate of Value Added
Thai Government Organizations:	
DEQP	Department of Environmental Quality Promotion
DOH	Department of Highways
DPC	Department of Pollution Control
EGAT	Electricity Generating Authority of Thailand
FAD	Fine Arts Department
MOS	Ministry of Science
MSTE	Ministry of Science, Technology and Environment
NEB	National Environment Board
NESDB	National Economic and Social Development Board
OARD	Office of Accelerated Rural Development
OPEP	Office of Policy and Environmental Planning
PEA	Provincial Electrical Authority
PWA	Provincial Water Authority
PWD	Public Works Department
RID	Royal Irrigation Department
SRT	State Railway of Thailand
TAT	Tourism Authority of Thailand
TOT	Telephone Organization of Thailand
TI	Ratio of Transfer Cost
TISTR	Thailand Institute of Scientific and Technological Research
TSP	Total Demand
TTC	Travel Time Cost
VAT	Value Added
VOC	Vehicle Operation Cost

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1. INTRODUCTION

1. INTRODUCTION

1.1 Objectives, Study Area and Scope of the Study

1.1.1 Objectives of the Study

The objectives of the Study are described as follows:

1. To prepare a Tourism Development Master Plan for the Study Area with target year 2006, based on the existing Master Plan for Tourism Development of Phetchaburi Province and Prachuap Khiri Khan Province, prepared by the Tourism Authority of Thailand (TAT) and the Thailand Institute of Scientific and Technological Research in November 1987 (Master Plan 1989).
2. To carry out feasibility studies on priority projects which are fundamental for future tourism promotion of Hua Hin / Cha-Am Beach Area and its surroundings.
3. To propose a set of institutional arrangements to prevent progress of disorderly tourism development in the Study Area.

1.1.2 The Study Area

The Study Area includes Hua Hin / Cha-Am Beach Area and its surroundings, covering the total area of Phetchaburi and Prachuap Khiri Khan provinces. Figure 1.1-1 shows the location of the Study Area.

1.1.3 Scope of the Study

The scope of the Study included the following components (refer to Appendix 1):

1. Data Collection and Analysis

The Study Team conducted field surveys, collected data and reviewed existing studies. Also, the Study Team carried out a socioeconomic survey and water quality survey to obtain data and information on the attitude of local people toward tourism development and on the water quality in the Study Area respectively.

2. Identification of the Tourism Demand

The Study Team collected information on trends in the tourism market and conducted a tourism survey in the Study Area, based on which the future tourism demand was forecasted.

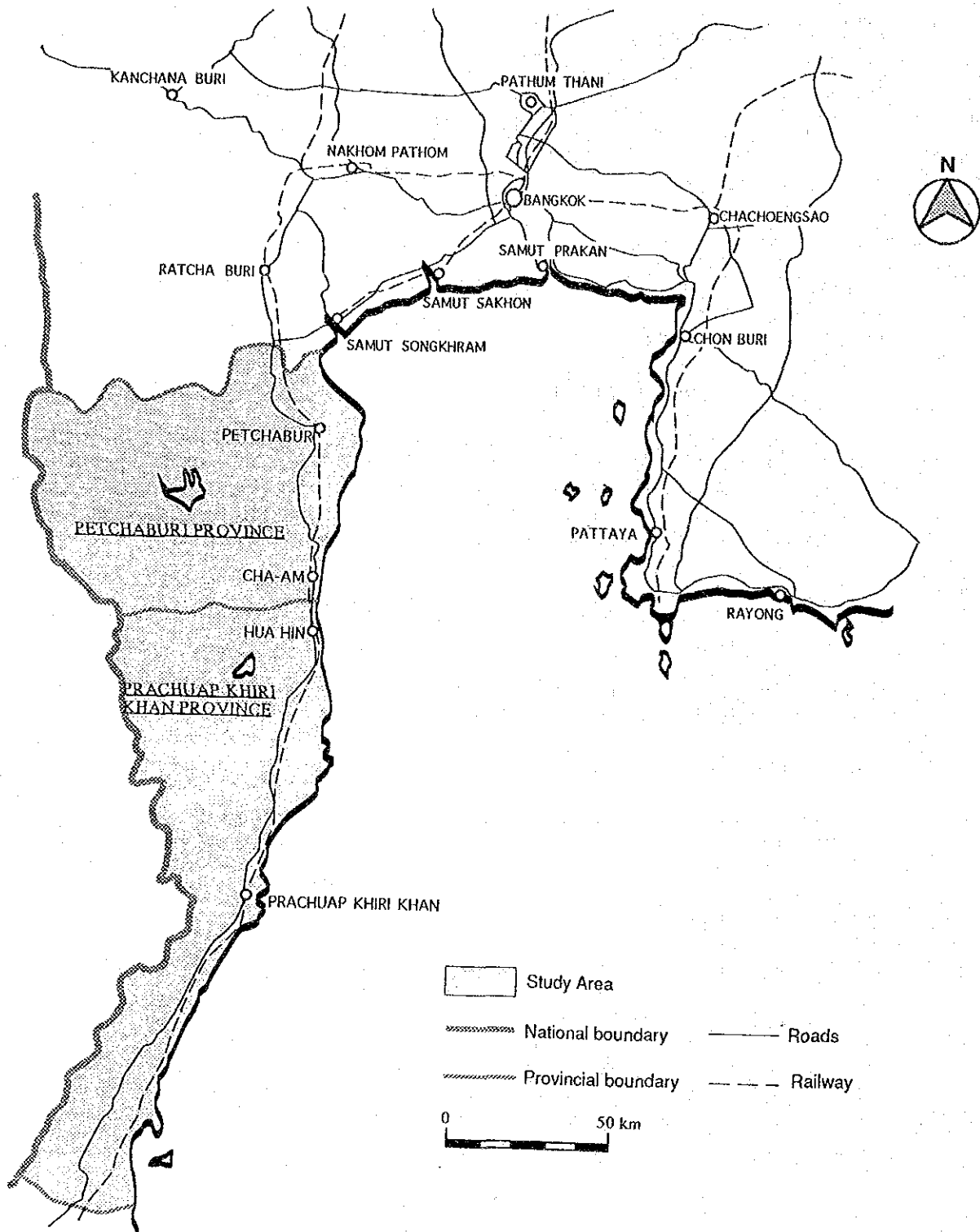


Figure 1.1-1 Location of the Study Area

3. Preparation of a Tourism Development Master Plan for the Study Area

After analysis of the collected data, the Study Team formulated the strategy and designed the framework for further tourism development, which were subsequently elaborated in a Tourism Development Plan for the Study Area.

4. Feasibility Study on Priority Projects

Based on the evaluation of projects proposed for implementation, and after discussion with TAT and relevant agencies, the Study Team made a selection of priority projects. Subsequently the Study Team conducted feasibility studies for the selected projects, including detailed descriptions of the projects and their technical and economic evaluation.

5. Proposal for Institutional Arrangements

A set of institutional arrangements to prevent progress of disorderly tourism development was proposed, including rules and regulations for investment, land transaction control and environmental protection and monitoring.

6. Conclusions and Recommendations

The results of the Study are compiled in this Main Report of the Final Report. Chapters 1: Introduction and 2: Tourism Development Strategy contain findings from data collection and analysis and include the framework for further tourism development in the Study Area. Chapter 3 describes the Tourism Development Plan including the proposal for institutional arrangements. In Chapter 4 the feasibility of the Tourism Development Plan is evaluated and Chapter 5 contains the results of the feasibility studies conducted for the priority projects.

1.2 Current Circumstances of the Study Area

1.2.1 Physical Conditions

The Study Area is located at a distance of roughly 200 km. south of Bangkok and includes Hua Hin / Cha-Am Beach Area, which is renowned as royal resort and has been developed as an upper-market resort in the last 50 years.

The Study Area covers an area of approximately 7.87 million rai (12,593 sq. km), 3.89 million rai (6,225 sq. km) in Phetchaburi Province and 3.98 rai (6,368 sq. km) in Prachuap Khiri Khan Province. The Study Area measures 260 km. in the north-south direction, 110 km. across its widest and 12 km. across its narrowest part which is also the isthmus of Thailand. The Study Area is bounded by Ratchaburi and Samut Songkhram Provinces to the north, Chumphon Province to the south, the Gulf of Thailand to the east and Myanmar to the west.

The coastline of the Study Area stretches over 315 km. (90 km. in Phetchaburi Province, 225 km. in Prachuap Khiri Khan Province), and its many beaches form the most important tourism resources in the Study Area.

The topography of Phetchaburi and Prachuap Khiri Khan provinces is classified into 3 categories, i.e. plains, rolling plains, and hills and mountains. The plains stretch along the coastline in the east, on the west side bordered by the rolling plains. The hills and mountains form part of the Tanao Si range which reaches

altitudes of approximately 1,000 m. and extend along the border with Myanmar in the western part of the Study Area.

Table 1.2-1 gives an overview of the land use in the Study Area.

Table 1.2-1 Land Use in the Study Area

Type of Land Use	unit: 1,000 rai, (...) sq.km					
	Phetchaburi Province		Prachuap Khiri Khan Province		Study Area	
	Area	Share	Area	Share	Area	Share
Urban and Built-up Land	47	1	36	1	83	1
Paddy Land	565	15	12	0	577	7
Field Crops	382	10	1,057	27	1,439	18
Tree Crops	164	4	741	19	905	11
Fishery	6	0	0	0	6	0
Forest Land	2,429	62	2,052	52	4,481	57
Water Body	39	1	14	0	47	1
Miscellaneous Land	265	7	68	2	334	4
Total	3,891 (6,225)	100	3,980 (6,368)	100	7,871 (12,593)	100

source: Land Development Department
note: Phetchaburi 1987, Prachuap Khiri Khan 1980

More than half of the Study Area is classified as forest land, the majority of which is located in its mountainous part, and 36% is in use for agriculture. Rice cultivation is dominant in Phetchaburi Province, and in Prachuap Khiri Khan most of the agricultural land is in use for field crops. This high percentage of cash crops in Prachuap Khiri Khan Province explains its comparatively strong performance in the primary sector. The urban and built up area covers only 1% of the Study Area.

1.2.2 Population

Table 1.2-2 shows the population trend of the Study Area compared with the Western Region, the Whole Kingdom and Bangkok and Vicinities for the period from 1986 to 1991.

Table 1.2-2 Population Trend of the Study Area, Western Region, Whole Kingdom and Bangkok and Vicinities (1986-1992)

Area	units: 1,000 persons, %						Av. Annual Growth
	1986	1987	1988	1989	1990	1991	
Study Area	818.0	825.9	832.6	843.5	852.8	861.2	1.1
Western Region	3,146.2	3,177.3	3,217.4	3,269.2	3,305.1	3,336.9	1.2
Whole Kingdom	52,969.2	53,873.2	54,960.9	55,888.4	56,303.3	56,961.0	1.5
Bangkok and Vicinities	8,031.4	8,292.0	8,509.4	8,728.3	8,538.6	8,701.4	1.7

source: Population Data Base Center, Ministry of Interior

The population of the Study Area was 861,212 in 1991 and shows an average annual growth of 1.1%, which is slightly lower than the growth rates for the Western Region (Kanchanaburi, Nakhon Pathom, Prachuap Khiri Khan, Phetchaburi, Ratchanaburi, Samut Songkhram, Samut Sakhon and Suphan Buri

Provinces) and the Whole Kingdom. The population of the Study Area contributes 25.8% to the population of the Western Region, and 1.5% to that of the Whole Kingdom.

Phetchaburi and Prachuap Khiri Khan provinces share the population of the Study Area with approximately 50% each. Both provinces are characterized by a predominantly rural population with a share of 62.7% and 64.3% for Phetchaburi and Prachuap Khiri Khan provinces respectively. 12.5% of the population of Phetchaburi Province and 11.7% of Prachuap Khiri Khan Province live in the municipalities and 24.8% and 24.0% respectively in sanitary districts.

Population trends for the various districts in the Study Area are shown in Tables 1.2-3 and 1.2-4 for Phetchaburi and Prachuap Khiri Khan provinces respectively. Table 1.2-5 holds information concerning population share and density for each district.

In Phetchaburi Province 75% of the population lives in Phetchaburi City and the surrounding districts of Ban Laem, Ban Lard and Tha Yang, which are also the most densely populated areas in this province. Noteworthy is the decreasing trend in the population of Phetchaburi Municipality. Cha-Am District and Cha-Am Municipality both show a relatively high average annual growth rate with 2.0% and 2.1% respectively, due to considerable tourism development in recent years.

The most populous district in Prachuap Khiri Khan Province is Pranburi District which accounted for 24.6% of the province's population in 1991. Compared with Phetchaburi however, the population is more evenly spread over the province. Like in Cha-Am, substantial tourism development has been taking place in Hua Hin in recent years, leading to a relatively high average annual growth rate for both Hua Hin Municipality and Hua Hin District with 2.1% and 2.6% respectively.

Table 1.2-3 Population Trend in Phetchaburi Province (1986-1991)

District	units: persons, %						Av. annual growth
	1986	1987	1988	1989	1990	1991	
Phetchaburi	109,180	109,845	110,640	110,798	111,127	111,574	0.4
(Phetchaburi Municipality)	(34,268)	(34,173)	(33,379)	(31,595)	(31,154)	(30,677)	(-2.1)
Cha-Am	51,527	52,177	53,674	54,680	56,013	56,765	2.0
(Cha-Am Municipality)	(19,987)	(20,301)	(20,972)	(21,298)	(22,085)	(22,084)	(2.1)
Tha Yang (incl. Kang Krachan)	100,386	101,574	100,603	102,451	103,837	104,809	0.9
Khao Yoi	35,962	36,158	36,577	36,904	37,270	37,545	0.9
Ban Laem	56,444	56,895	57,657	58,384	58,658	58,751	0.8
Ban Lard	48,318	48,457	48,741	49,242	49,857	49,974	0.7
Nong Ya Plong	10,520	10,640	10,879	11,130	11,223	11,307	1.5
Total Province	412,337	415,746	418,771	423,589	427,985	430,725	0.9

source: Population Data Base Center, Ministry of Interior

Table 1.2-4 Population Trend In Prachuap Khiri Khan Province (1986-1991)

District	units: persons, %						Av. annual growth
	1986	1987	1988	1989	1990	1991	
Prachuap Khiri Khan	63,581	64,476	64,982	66,105	66,338	66,818	1.0
(Prachuap Khiri Khan Municipality)	(14,531)	(14,498)	(14,729)	(15,050)	(14,292)	(14,252)	(-0.4)
Hua Hin	56,361	57,843	59,422	61,455	62,763	63,763	2.6
(Hua Hin Municipality)	(31,889)	(32,442)	(33,184)	(34,241)	(34,846)	(35,263)	(2.1)
Pranburi	101,903	101,900	101,858	102,499	103,793	105,813	0.8
Bang Saphan	60,729	61,639	62,496	63,219	63,668	64,377	1.2
Tub Sakae	50,898	50,934	50,771	50,731	50,719	50,854	0.0
Kuiburi	45,245	45,777	46,261	46,931	47,504	48,079	1.3
Bang Sapannoi	26,904	27,548	28,078	29,005	29,981	30,783	2.9
Total Province	405,621	410,117	413,868	419,945	424,766	430,487	1.2

source: Population Data Base Center, Ministry of Interior

Table 1.2-5 Population Share and Density by District for Phetchaburi and Prachuap Khiri Khan Provinces

District	Share 1991	Population Density 1991	units: %, persons/km ²		
			District	Share 1991	Population Density 1991
Phetchaburi Province	100.0	68	Prachuap Khiri Khan Province	100.0	67
Phetchaburi	25.9	385	Prachuap Khiri Khan	15.5	64
(Phetchaburi Municipality)	(7.1)		(Prachuap Khiri Khan Municipality)	(3.3)	
Cha-Am	13.2	84	Hua Hin	14.8	70
(Cha-Am Municipality)	(5.1)		(Hua Hin Municipality)	(8.2)	
Tha Yang (incl Kang Krachan)	24.3	32	Pranburi	24.6	69
Khao Yoi	8.7	86	Bang Saphan	15.0	73
Ban Laem	13.6	303	Tub Sakae	11.8	88
Ban Lard	11.6	164	Kuiburi	11.2	64
Nong Ya Plong	2.6	10	Bang Saphan Noi	7.2	43

source: Study Team

1.2.3 Economic Situation

In 1989 the GRP at 1972 constant prices amounted to 8,447 million baht in the Study Area, with 3,670 million baht (43%) for Phetchaburi Province and 4,776 million baht (57%) for Prachuap Khiri Khan Province. The Study Area contributed

27.1% to the GRP in the Western Region, and 1.5% to the GDP of the Whole Kingdom. GRP of the Study Area in comparison with corresponding figures for the Western Region and the Whole Kingdom are presented in Table 1.2-6.

Table 1.2-6 GRP of the Study Area, Western Region, Whole Kingdom and Bangkok and Vicinities (1989)

units: million baht (GRP), baht (GRP per Capita) at constant 1972 prices, % (..)

Area	Primary Sector		Secondary Sector		Tertiary Sector		Total		GRP per capita
	GRP	Share	GRP	Share	GRP	Share	GRP	Share	
Phetchaburi	712	(19.4)	704	(19.2)	2,254	(61.4)	3,670	(100)	8,664
Prachuap Khiri Khan	1,920	(40.2)	924	(19.3)	1,932	(49.6)	4,776	(100)	11,372
Study Area	2,632	(31.2)	1,628	(19.3)	4,187	(49.6)	8,447	(100)	10,008
Western Region	8,508	(27.3)	7,848	(25.2)	14,845	(47.6)	31,201	(100)	9,545
Whole Kingdom	92,386	(16.1)	179,228	(31.2)	302,521	(52.7)	574,195	(100)	10,274

source: National Statistics 1991

The composition of GRP by major industry group shows that the Study Area, thanks to Prachuap Khiri Khan Province and in comparison with the Western Region and the Whole Kingdom, receives a relatively high percentage of its income from the primary sector. The tertiary sector is relatively strongly represented in Phetchaburi Province, but both provinces show a relatively weak performance in the secondary sector. With 10,008 baht in 1989 GRP per capita of the Study Area was a little higher than the corresponding figure for the Western Region, and roughly the same as GDP per capita for the Whole Kingdom. GRP per capita in Prachuap Khiri Khan province is relatively high, due to its strong performance in the primary sector.

Table 1.2-7 shows that GRP of the Study Area increased 1.79 times from 1981 to 1989, roughly the same as the growth of GDP and higher than the growth of GRP of the Western Region during the same period.

Table 1.2-7 Trend of GRP (1981/1989)

unit: million baht, at 1972 constant prices

Area		Primary Sector		Secondary Sector		Tertiary Sector		Total	
		GRP	Growth 81/89	GRP	Growth 81/89	GRP	Growth 81/89	GRP	Growth 81/89
Phetchaburi	1981	608		311		1,311		2,230	
	1989	712	1.17	704	2.26	2,254	1.72	3,670	1.65
Prachuap Khiri Khan	1981	1,124		315		1,040		2,479	
	1989	1,920	1.71	924	2.93	1,932	1.86	4,776	1.93
Study Area	1981	1,732		626		2,351		4,709	
	1989	2,632	1.52	1,628	2.60	4,187	1.78	8,447	1.79
Western Region	1981	5,538		4,057		9,039		18,634	
	1989	8,508	1.54	7,848	1.93	14,845	1.64	31,201	1.67
Whole Kingdom	1981	65,093		91,005		162,341		318,439	
	1989	92,386	1.42	179,228	1.97	302,521	1.86	574,195	1.80

source: NESDB

Although the secondary sector showed a relative high growth ratio compared with the Western Region and the Whole Kingdom, its performance is still relatively weak as is indicated in Table 1.2-6.

1.3 Tourism in the Study Area

1.3.1 Tourism Market

International tourist arrivals to Thailand increased dramatically in the 1980s and amounted to 5,298,860 in 1990, as is shown in Table 1.3-1. The growth accelerated after 1986 resulting in an 88% increase until 1990. This figure is remarkable when compared with the world total growth rate of 33% during the same period. In 1991, the Gulf War caused serious damage to the expanding world tourism and Thai tourism was no exception. International tourist arrivals to Thailand declined to 5,140,000 in that year (preliminary figure), a 3.0% decrease over the previous year. This damage, however, is supposed to be temporary and the market is expected to recover after 1992.

Table 1.3-1 International Tourist Arrivals in Thailand

Year	Tourist Arrivals	units: persons; %
		Growth over Previous Year
1986	2,818,092	15.6
1987	3,482,958	23.6
1988	4,230,737	21.5
1989	4,809,508	13.7
1990	5,298,860	10.2
1991*	5,140,000	-3.0

* preliminary figure
source: Tourism Authority of Thailand

Table 1.3-2 presents data on tourist arrivals to Hua Hin / Cha-Am Beach Area. Although figures for the whole Study Area were not available, it is assumed that the figures roughly represent the tourist arrivals to the entire Study Area, since the area derives its popularity from Hua Hin / Cha-Am Beach Area.

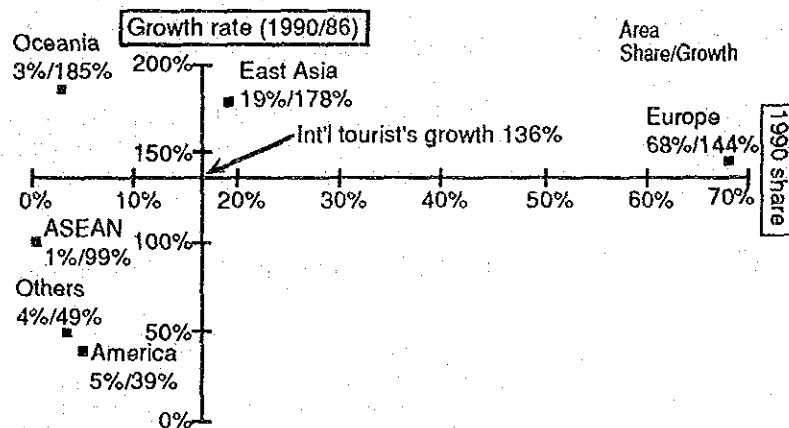
Table 1.3-2 Domestic and International Tourist Arrivals in Hua Hin / Cha-Am Beach Area (1986-1990)

Year	Thai Arrivals		International Arrivals		Total Arrivals	
	Number	Share	Number	Share	Number	Share
1986	1,445,004	93	111,905	7	1,556,909	100
1987	1,738,414	92	155,430	8	1,893,844	100
1988	1,038,144	86	166,956	14	1,205,100	100
1989	1,069,510	81	248,627	19	1,318,137	100
1990	1,217,597	81	278,600	19	1,496,197	100
1991*	1,303,000	83	276,000	17	1,579,000	100

source: Tourism Authority of Thailand
* preliminary figures

The estimated tourist arrivals to Hua Hin / Cha-Am Beach Area were 1,496,197 in 1990, showing an increase of 13.5% compared with the previous year. The table further shows that Thai tourists accounted for 81% of the total tourist arrivals. However, international tourist arrivals have increased considerably in the last 5 years, suggesting a shift from local beach resort to international tourist destination.

Europe forms the major share of the total international arrivals to Hua Hin / Cha-Am Beach Area with 68% as shown in Figure 1.3-1. East Asia comes on a second place with 19%. The share of European tourists visiting Hua Hin / Cha-Am Beach Area is far higher than its 23% share for the whole of Thailand. This would suggest the relatively immature market awareness of the Study Area in other international markets. The high growth rate for East Asia and Oceania is common with the general market trend recognized in Thailand.



source: Tourism Authority of Thailand

Figure 1.3-1 International Tourist Arrivals to Hua Hin / Cha-Am Beach Area by Origin (1986-1990)

Table 1.3-3 shows tourist arrivals at major destinations in Thailand in 1990, Table 1.3-4 shows the market share of Hua Hin / Cha-Am Beach Area compared with other major beach destinations in the country and Table 1.3-5 shows the market share of overnight tourists at major beach destinations. Comparison of the popularity of Hua Hin / Cha-Am Beach Area with other major beach destinations in Thailand, and especially with Pattaya, shows that:

1. Hua Hin / Cha-Am Beach Area receives 21% of the tourist arrivals at major beach resorts, only second after Pattaya, which receives 35%.
2. Yearly domestic arrivals in Hua Hin / Cha-Am Beach Area are comparable to the corresponding figures for Pattaya and Rayong. These destinations enjoy a share of 29%, 25% and 30% of the tourist arrivals to the major beach resorts respectively.
3. Few international tourists visit Hua Hin / Cha-Am Beach Area. Amongst major beach destinations the area receives only 9% of the foreign tourist arrivals compared with 49% for Pattaya and 26% for Phuket. Ko Samui follows with 14%, which amply exceeds the share of Hua Hin / Cha-Am Beach Area, although the latter has been recognized and marketed

internationally well before promotion activities for Ko Samui had started, and despite its poor transportation link with Bangkok.

4. As expressed above, domestic tourists form the majority of the total tourist arrivals in Hua Hin / Cha-Am Beach Area with 81%. This percentage is considerably higher than the 41% and 40% share of domestic tourists in Pattaya and Phuket respectively, indicating the area's relative immaturity as an international beach resort.
5. Compared with other major beach destinations the number of tourists staying overnight is with 62% of the total tourist arrivals relatively low in Hua Hin / Cha-Am Beach Area. Figures for Pattaya and Phuket are 72% and 99% respectively. However, this difference is merely caused by the proximity to Bangkok and the low share of international tourists in Hua Hin / Cha-Am Beach Area. When the figures for domestic and international overnight tourists are considered separately, their shares for Hua Hin / Cha-Am Beach Area are similar to the corresponding figures for other beach resorts close to Bangkok with around 50% for domestic and 90% for international tourists.

The figures presented should be interpreted in the national context that this study highlights five internationally recognized beach destinations and does not cover the beach of Ban Saen located close to Pattaya and very popular among Thai tourists.

Table 1.3-3 Tourist Arrivals at Major Destinations in Thailand (1990)

Area	units: persons, %					
	Overnight		Day trips		Total	
	Thai	International	Thai	International	Thai	International
Cha-Am	436,429	116,278	324,799	11,765	761,228	128,043
Hua Hin	234,593	146,882	221,776	3,875	456,369	150,757
Sub-total Hua Hin/ Cha-Am	671,022	263,160	546,575	15,640	1,217,597	278,800
Pattaya	475,520	1,275,735	542,859	153,334	1,018,379	1,429,069
Rayong	824,832	55,032	402,149	2,169	1,226,981	57,201
Phuket	482,564	752,463	17,310	1,878	499,874	754,341
Ko Samui	146,327	331,687	28,581	71,742	174,908	403,429
Sub-total Beach Destinations	2,600,265	2,678,077	1,537,474	244,763	4,137,739	2,922,840
Chiang Mai	1,803,376	584,087	387,515	8,693	2,190,891	592,780
Chiang Rai	299,815	212,525	60,662	20,343	360,477	232,868
Pitsanulok	592,613	90,126	370,823	13,150	963,436	103,276
Nakhonratchasima	737,476	43,669	729,813	4,125	1,467,289	47,794
Ubolratchathani	510,283	2,589	216,583	-	726,866	2,589
Khon Khaen	559,017	9,320	386,024	-	945,041	9,320
Udonthani	639,820	8,577	451,799	-	1,091,619	8,577
Nakhonpanum	138,854	1,082	12,494	-	151,348	1,082
Bangkok	7,132,534	5,177,540	5,179,369	370,993	12,311,903	5,548,533
Trad	165,445	17,059	40,716	839	206,161	17,898
Kanchanaburi	800,913	71,456	917,021	100,850	1,717,934	172,306
Hat Yai	1,011,037	729,703	471,326	130,881	1,482,363	860,584
Sungai Kolok	100,121	255,346	9,295	30,388	109,416	285,734
Surathani	477,116	8,164	77,770	2,020	554,886	10,184
Total	17,568,685	9,889,320	10,848,684	927,045	28,417,369	10,816,365

source: TAT Statistics

Table 1.3-4 Market Share of Major Beach Destinations In Thailand (1990)

units: persons; %

Area	Thai Arrivals		International Arrivals		Total Arrivals	
	Number	Share	Number	Share	Number	Share
Hua Hin / Cha-Am	1,217,597	29	278,800	9	1,496,397	21
Pattaya	1,018,379	25	1,429,069	49	2,447,448	35
Rayong	1,226,981	30	57,201	2	1,284,182	18
Phuket	499,874	12	754,341	26	1,254,215	18
Ko Samui	174,908	4	403,429	14	578,337	8
Total	4,137,739	100 (15)	2,922,840	100 (27)	7,060,579	100 (18)

source: Tourism Authority of Thailand

note: (...) = share of total major tourist destinations in Thailand

Table 1.3-5 Market Share of Overnight Tourists to Major Beach Destinations In Thailand (1990)

units: Persons; %

Area	Thai Overnight Tourist Arrivals		International Overnight Tourist Arrivals		Total Overnight Tourist Arrivals	
	Number	Share of Total Thai Arr.	Number	Share of Total Int'l Arr.	Number	Share of Total Arrivals
Pattaya	475,520	47	1,275,735	89	1,751,255	72
Rayong	824,832	67	55,032	96	879,864	69
Hua Hin/Cha-Am	671,022	55	263,160	94	934,182	62
Phuket	482,564	97	752,463	100	1,235,027	99
Koh Samui	146,327	84	331,687	82	478,014	83
Total	2,600,265	63	2,678,077	92	5,278,342	75

source: Tourism Authority of Thailand

1.3.2 Tourism Resources

The Master Plan 1987 includes a list of 81 tourism resources identified in the Study Area, divided into Natural Attractions (N), Historical, Religious and Architectural Resources (H), and Cultural and Handicraft Resources (C). Based on assessment of the resources, they were classified into 4 categories in terms of their tourism potential ranking from the classification "highly important" (A), "important" (B), "moderately important" (C) to "little important" (D).

Based on a field survey carried out by the Study Team in March 1992, 10 additional tourism resources were identified, which together with the 81 previously identified resources were re-assessed and rated using the same classification method as used in the Master Plan 1987.

Cha-Am and Hua Hin Beaches were given an "A" rating in the Natural Tourism Resources group, Khao Luang and Khao Wang in Phetchaburi in the Historical, Religious and Architectural Resources group and Khao Wang Confectionery in the Cultural and Handicraft Resources group. The assessment shows that the Study Area is especially rich in Natural Attractions such as scenic beaches, National Parks and Forest Reserves, hills and mountain scenery, and that it also offers various interesting resources in the Historical, Religious and Architectural Resources group such as temples and caves.

The following contains a description of these and some other prominent tourism resources in the Study Area. Numbers in parenthesis refer to Figure 1.3-2, which shows their location. Comparative tables including the rating of the identified tourism resources are presented in Appendix 2.

(1) Natural Attractions

1. Kang Krachan National Park: Kang Krachan Dam and Reservoir, Khao Mai Ruak (N7, 8)

Dam and township are surrounded by lush greenery, and the visitor center at Khao Mai Ruak is well maintained. It is the best attraction in this cluster.

2. Cha-Am Beach (N16)

Together with the beach in Hua Hin, Cha-Am beach forms the most important tourism core in the Study Area.

3. Hua Hin Beach (N17)

Hua Hin beach is the most important international tourism core in the Study Area, with its distinct and prestigious image as royal holiday resort.

4. Khao Hin Lek Fai (N23)

Hin Lek Fai hilltop offers a splendid panoramic view extending from Hua Hin beach to Khao Ta-kiap.

5. Ta-kiap Beach, Wat Khao Ta-kiap, Wat Khao Klailat (N18, H21, 22)

Khao Ta-kiap with Wat Khao Ta-kiap is the most conspicuous landmark in the Hua Hin cluster, and can be combined with Ta-kiap beach and Wat Khao Klailat.

6. Sam Roi Yot National Park: Khao Daeng, Hat Laem Sala (N28-34)

The existing park headquarters located at Khao Daeng has a fairly well-maintained visitor center. Khao Daeng viewpoint offers a panoramic view of the scenic splendor of Sam Roi Yot with its limestone rock formations.

7. Ao Prachuap, Khao Chong Krachok (N36, 37)

Khao Chong Krachok with its temple and natural archway (sky bridge) commands a spectacular view of Prachuap bay, which is dotted with tiny islets. These two attractions are the key tourist feature of Prachuap Khiri Khan cluster. Next to the beach promenade at the foot of Khao Chong Krachok a small fitness park is located.

8. Ban Saphan Beach (centered at Hat Mae Ramphung) (N42-46, 49)

Quiet and unspoiled beaches on the Ban Saphan Coast, e.g., Ao Bo Thonglang, Ao Mae Ramphung, Hat Chamuang, Hat Pak Praek, Hat Fang Daeng and Hat Ban Boet appeal to those tourists, both Thai and foreign, who do not like popular, commercialized beaches.

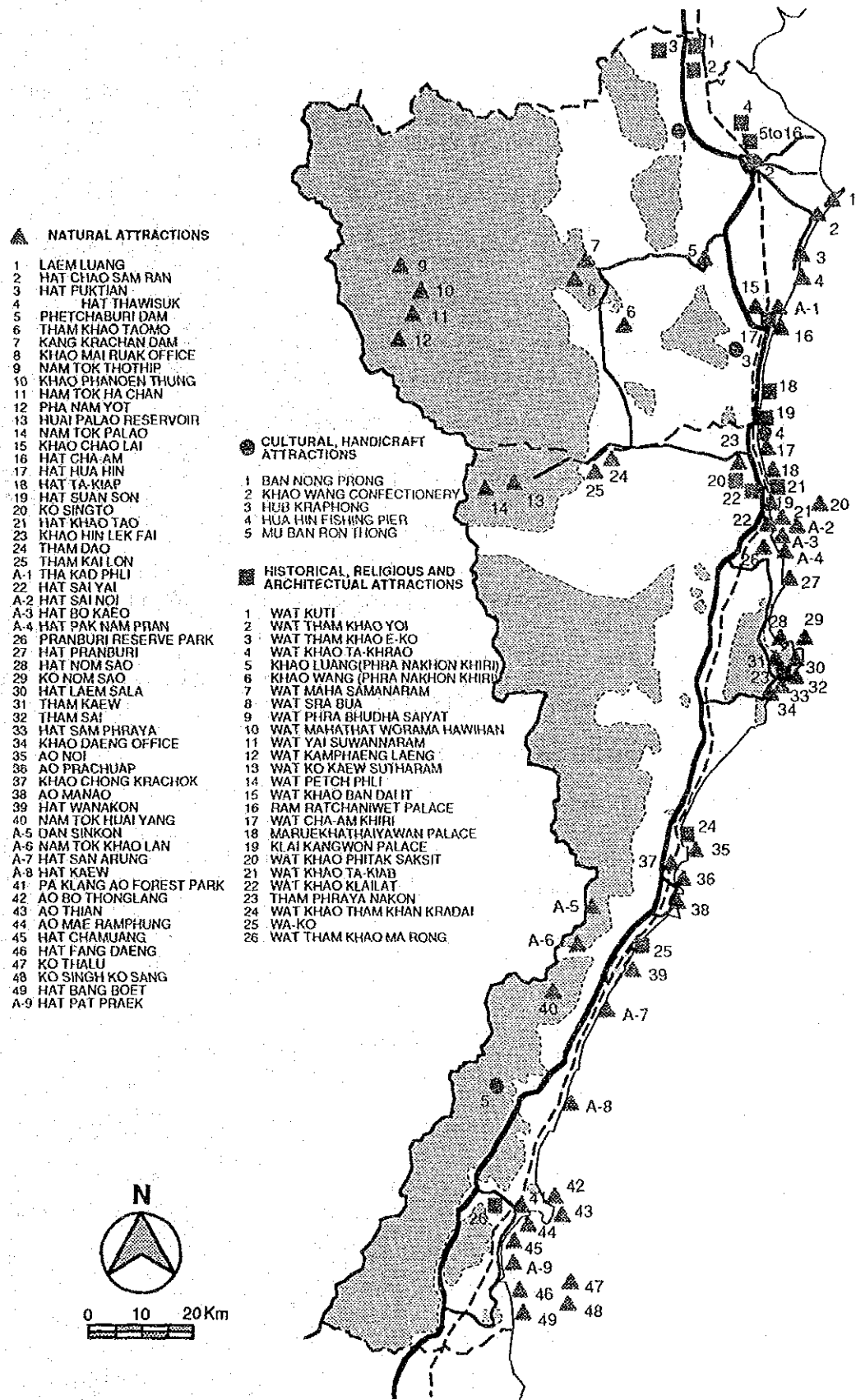


Figure 1.3-2 Existing Tourism Resources

9. Ko Thalu (N47)

Ko Thalu is one of the few coral island identified in the Study Area and has two small, white sand beaches, where local fishermen from Ban Saphan engage in seasonal fishing activities.

(2) Historical, Religious and Architectural Resources

10. Phra Nakhon Khiri complex: Khao Wang Palace and Khao Luang Temple (H5-6)

This landmark attraction is the most salable tourist product in Phetchaburi, both for the domestic and international market. This complex houses Khao Wang palace and Khao Luang temple, located on top of a limestone hill.

11. Temples and Ram Ratchaniwet Palace (H7-16)

Phetchaburi abounds in many interesting temples with distinctly different features, e.g., Wat Yai Suwannaram with mural paintings, Wat Kamphaeng Laeng with Lopburi-style stupas and Wat Phra Buddha Saiyat with its sleeping Buddha.

12. Sam Roi Yot National Park: Tham Phraya Nakhon, Tham Sai, Tham Kaew (H23)

Limestone caves are the principal tourist feature of the National Park, of which Tham Phraya Nakhon is the most popular.

(3) Cultural and Handicraft Resources

13. Khao Wang Confectionery

The many souvenir shops and stall along Highway No.4 selling confectionery and local agricultural products are especially popular among Thai tourist on their way back home.

2. TOURISM DEVELOPMENT STRATEGY

2. TOURISM DEVELOPMENT STRATEGY

2.1 Opportunities and Constraints for Tourism Development

2.1.1 Opportunities

The increasing tourist arrivals to the Study Area and the growing share of foreign tourists, together with the Study Area's following characteristics offer considerable possibilities for its further development as an international resort (refer to Figure 2.1-1).

(1) Proximity to Bangkok

Bangkok is the major source of domestic tourists and its market potential is huge due to the recent economic growth. It is also the most important gateway for international tourists to Thailand. Laem Luang is located at a distance of only 135 km. south of Bangkok, Cha-Am at a distance of 160 km., Hua Hin of 185 km., and Pranburi at 260 km. The proximity of these areas of Bangkok contribute to their potential to offer an easy and welcome escape form this big and bustling city.

For Thai tourist living in Bangkok the possibility of visiting the Hua Hin / Cha-Am Beach Area on day and weekend trips - only 55% of the domestic tourists to Hua Hin / Cha-Am Beach Area stay overnight - makes the area a very attractive destination for them. For international tourists the proximity of the Study Area to Bangkok offers opportunities to combine the capital's cultural and historical tourism resources with the natural environment of the Study Area. In this context the Study Area also has potential to function as accommodation base for overnight trips to Bangkok.

(2) Potential for Multi-type Development

Apart from the Study Area, Ban Saen, Pattaya, Rayong, Kanchanaburi and Khao Yai are major tourist destinations which are located close to Bangkok and heavily depend upon the capital as their main source market. The first three destinations are characterized as beach resorts, and the latter two as mountain resorts. Proximity to Bangkok allows them to combine their attraction with the cultural-historical resources of the capital.

Generally speaking, famous tourist destinations around the world thank their reputation to the combination of at least two types of tourism attractions, e.g. "Beach and Culture", "Beach and Mountain" or "Mountain and Culture". The Study Area offers various natural resources, including both beaches and mountains, and also includes some interesting cultural-historical attractions.

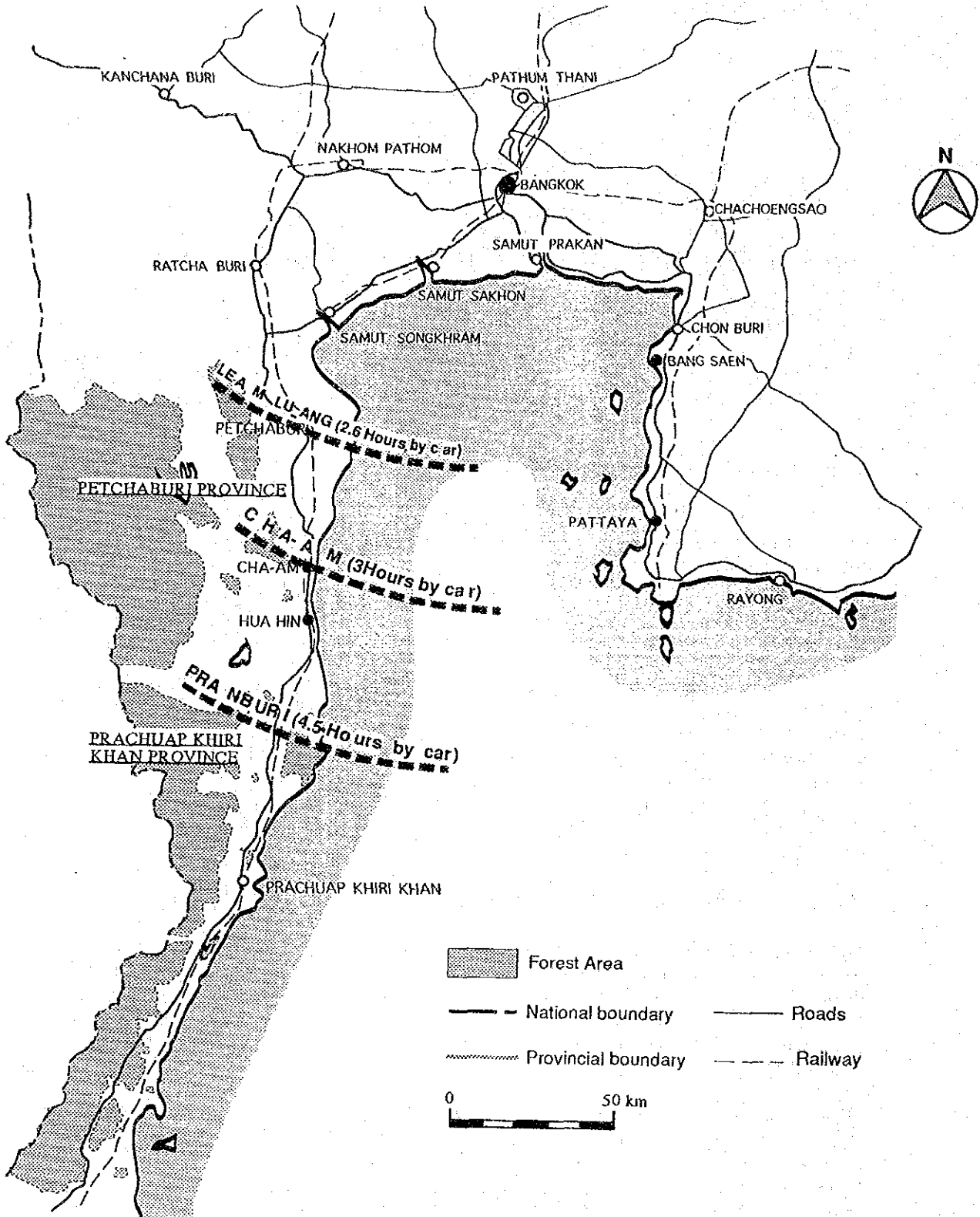


Figure 2.1-1 Development Potential

In combination with the cultural-historical appeal of Bangkok, the Study Area has potential to develop into a prominent international destination by combining "Beach", "Mountain" and "Culture".

(3) Historical Beach Resort

Hua Hin / Cha-Am Beach Area is renowned as "royal resort" since the beginning of this century, and has developed as an upper-market resort during the last 50 years. Compared with Pattaya beach resort, which was developed rapidly during the Vietnam War, Hua Hin/Cha-am's natural environment and quiet atmosphere are relatively well conserved.

(4) Rich Natural Resources

The Study Area offers a wide variety of natural resources including several types of beaches, cliffs, hills and high mountains, which offer splendid scenery and ample possibilities for nature oriented recreation, such as bird watching and hiking.

Beaches include extended sand beaches, e.g. in Cha-Am and Hua Hin, and many small scale and relatively undeveloped beaches in other parts of the Study Area. The beaches north of Cha-Am are interspersed with small streams along which some mangrove forests remain. In the southern part of the Study Area the coast is lined with small beaches bounded by limestone hills and tiny islets just of the coast, offering interesting scenery.

The heavily forested mountainous area in the western part of the Study Area offers splendid mountain scenery, wildlife, waterfalls and a dam and reservoir in Kang Krachan National Park.

(5) Other Tourism Resources

Apart from its rich natural resources, the Study Area includes some interesting historical and cultural attractions, such as palaces of successive kings, temples and religious attractions located on hilltops or in caves.

Most of these attractions are concentrated in and around Phetchaburi City, and include Phra Nakorn Khiri Palace, the religious attraction Khao Luang and various temples in the city. Improvement and linkage of these attractions may add a cultural-historical flavor to tourism activities in the Study Area.

Ram Ratchaniwet Palace, Wat Khao Tha-kiap and Wat Khao Klailat are worth mentioning for Cha-Am and Hua Hin, and the famous Phraya Nakorn Cave is located in Sam Roi Yot National Park.

The primarily rural area lying between the coast and the mountains in the western part of the Study Area has potential to offer small scale additional tourist attractions.

2.1.2 Constraints

The Study Area offers ample opportunities to develop into a internationally recognized tourist destination, but to prove successful its potential will have to be put to use in an adequate manner. In this context the following constrains for future tourism development are distinguished in the Study Area.

(1) Tourist Attractions

As shown in the previous chapter, the Study Area is rich with tourism resources, but interviews conducted by the Study Team with the travel trade, learned that many attractions lack distinctive appeal. Besides, analysis of tourism resources showed that many tourist attractions in the Study Area require improvement to cater for international tourists.

(2) Tourism Facilities and Promotion

In interviews with travel agents and tour operators conducted by the Study Team, lack of middle to upper-middle class accommodation was reported to be a weakness of Hua Hin / Cha-Am Beach Area compared with Pattaya.

Moreover, market awareness of the Study Area in Asian countries, such as Japan, Taiwan and South Korea was reported limited in the interviews, expressing the need for more adequate tourism promotion.

(3) Infrastructure Requirements

Ongoing tourism development in the Study Area and its indirect effects such as increasing population and economic activities, require expansion and improvement of the existing infrastructural network.

1) Transportation

The Study Area is endowed with various tourism resources and facilities, but many of them are scattered without proper transportation linkage to allow formation of sight-seeing tours.

Although the improvements which presently are taking place on Highway No.4 will significantly benefit road access using the private car, public bus services are still limited and their related facilities need to be upgraded.

Rail access is available, but train services are infrequent. Hua Hin Airport is small and offers only very limited air access, and at the moment there is no sea link between the Study Area and Bangkok.

2) Water Supply

In interviews with local residents water shortage due to an increase in water demand resulting from land development projects was frequently mentioned, urging the need for expansion of the water supply capacity. Furthermore, potential sites for water resources development are limited, and the division of administrative control hampers development of an efficient integrated water supply system for the Study Area.

3) Sewerage and Solid Waste Disposal

The development of sewerage and solid waste management systems in the Study Area lags behind, leading to environmental deterioration such as sea water pollution. Especially in Hua Hin / Cha-Am Beach Area, which has seen large scale tourism development in recent years, improvement of sanitary conditions is essential.

4) Power and Telecommunication

Increases in power demand expected as a result of ongoing tourism development are covered by development plans of the Electricity Generating Authority of Thailand (EGAT) and the Provincial Electrical Authority (PEA). However, the telephone line and cable capacity is not expected to meet the domestic and international demand, even after completing of the 6th development plan of the Telephone Organization of Thailand (TOT) by the end of 1992.

(4) Impact on the Environment

Recent substantial investment in the tourism industry, accelerated land speculation and the soaring land prices. Continued uncontrolled development could easily result in further deterioration of the natural environment of the Study Area impairing its attractiveness both for tourists and residents.

1) Natural Resources

The area of mangrove forests located in the coastal zone of the Study Area has decreased enormously in recent years due to various developments. Actions are required to guarantee conservation of the remaining 50,000 rai of mangrove forests in the Study Area.

As described in Chapter 1, more than half of the Study Area is covered with forests which are managed by the Royal Forestry Department (RFD). Although preservation of natural resources in the National Parks and Forest Reserves is RFD's primary policy, environmental problems occur due to insufficient management and illegal settlement.

2) Water Quality

Sea water pollution is mainly caused by the discharge of untreated waste water to the sea. At some beaches close to built up areas in the municipalities, the sea water quality is presently not suitable for sea bathing. Unless adequate sewerage will be developed, this problem is expected to only increase with ongoing tourism development.

3) Beach Erosion

Beach erosion occurs along almost the entire coastline of the Study Area, but especially threatens the beaches in Cha-Am and Hua-Hin municipalities. Immediate countermeasures are required to sustain the popular beaches of Hua Hin and Cha-Am.

4) Littering

Littering at beaches is common. Presently systematic garbage collection is carried out in the municipalities. However, for sanitation purposes in general and to enhance the image of the Study Area, such a system will also be required for the beaches.

5) Aesthetics

Large scale development and land speculation practices have led to the construction of many high rise buildings in the Study Area, impairing its visual attractiveness. To prevent further damage the Interior Minister and Director of the Public Works Department have introduced a Zoning and Building Regulation to the Study Area.

However, only a part of the coastal area is covered by the Code. Especially in areas where the potential for future development is high, the introduction of development guidelines is essential.

6) Local Communities

In fishing settlements where a close relation exists between the village and the sea, tourism development along the beaches may easily disrupt the socioeconomic structure of the village, by disturbing its access to the sea. This type of villages is especially found along the coast north of Cha-Am Beach.

Generally speaking, local residents react positively to tourism development, mainly because it brings some extra income. However, benefits are marginal because villagers are only engaged in non-skilled jobs with low pay, partly due to their relatively low level of education.

2.2 Tourism Development Strategy

2.2.1 Tourism Development Policy

After careful review of the development policy and strategy introduced in the Master Plan 1987 and additional studies to update and supplement information used for this plan, the following policy is set forth for further, but controlled development of the Study Area into an international tourist destination with a clear identity.

(1) Differentiation from Competitive Beach Resorts

Table 2.2-1 summarizes the position of Hua Hin / Cha-Am Beach Area as an international beach destination among several internationally recognized destinations in ASEAN countries.

Apart from the destinations shown in the table below, Koh Samui should be mentioned as emerging international destination, and Rayong and Ban Saen as major destinations for the domestic market.

Development and promotion of the Study Area should not lead to distraction of tourists from other destinations in Thailand, but should provide supplementary activities enlarging their choice. Therefore, attention should be given to differentiate from especially Pattaya and Bang Saen by providing different activities and creating a distinctive atmosphere. These popular beach resorts are also located in the vicinity of Bangkok and are competitors of the Study Area.

Moreover, in terms of competition in the world travel market, above mentioned destinations have to collaborate and supplement each other to strengthen their image as a whole and to cater for a wider range of tourists.

(2) Tranquil and Natural Atmosphere

Compared with other domestic and international beach resorts, Hua Hin / Cha-Am Beach Area is characterized by its tranquil and natural atmosphere. Further development of the Study Area shall be focused on enhancement of this image, in contrast with the more active character of Pattaya and Bang Saen.

Table 2.2-1 Comparison between Hua Hin/Cha-Am Beach Area and Competitive Beach Destinations in ASEAN Countries

	Hua Hin / Cha-Am	Pattaya	Phuket	Penang	Bali	Cebu
Country	Thailand	Thailand	Thailand	Malaysia	Indonesia	Philippines
Type of beach	One extended	One extended	Cove/ inlet	Mixed	One extended, scattered	Cove/inlet, scattered
Tourism resource						
Natural	Good	Fair	Good	Fair	Good	Good
Historical	Fair/Poor	Poor	Fair/Poor	Fair	Excellent	Poor
Cultural	Poor	Poor	Poor	Fair	Excellent	Poor
Seasonally	All year	All year	Monsoon May-Sept	Monsoon May-Sept	All year	Typhoon Jul-Sept
Tourists' image	Exclusive/ popular Tranquil/ quiet	Popular Active	Popular/ ex- clusive Quiet/active	Popular Quiet/active	Popular/ exclusive Quiet/active	Popular Active
Access from gateway	Bangkok 3 hrs by road	Bangkok 2.5 hrs by road	Phuket 0.5 hrs by road	George Town 0.5 hrs. by road	Denpasar 0.2 hrs by road	Cebu City 0.5-2.5 hrs by road
4/5 star hotel	Provided	Fully provided	Fully provided	Fully provided	Fully provided	Fairly provided
Security	Good	Fair	Good	Good	Good	Fair/good
Service Town	Hua Hin Minimum tourist ser- vices avail- able	Pattaya Full tourist services available	Phuket Full tourist services available	George Town Full city ser- vice available	Denpasar Full city ser- vice available	Cebu City Full city ser- vice available

source: Study Team

In order to maintain and strengthen this tranquil and natural atmosphere, sustained development with deliberate consideration for environment, landscape and impact on local communities will be indispensable.

(3) "Royal Resort"

The image of Hua Hin / Cha-Am Beach Area as "royal resort" shall be enhanced to attract more tourists to the Study Area. This image is one of the strong points distinguishing the Study Area from Pattaya, which was developed as a resort for US military bases in Thailand. It is needless to say that this image will be useful for tourism promotion.

(4) Family Market Orientation

The Study Area is an ideal destination for the family market, both domestic and international, and further development should focus especially on this market segment. Tourists traveling with family members generally prefer lower travel cost per person, shorter travel time, a more peaceful environment and more passive travel activities than usual. The proximity of the Study Area to Bangkok satisfies the first two conditions, and the policy to enhance the tranquil and natural atmosphere of the Study Area meets the latter two.

Results from a tourist survey conducted by the Study Team support the Study Area's suitability for this market. Table 2.2-2 shows that Hua Hin / Cha-Am Beach

Area presently attracts more tourists traveling with "Family and Relatives" and "Friends" compared with Pattaya. It is expected that Hua Hin / Cha-Am's image, with less night life activities, forms the main reason for the higher share of the family market.

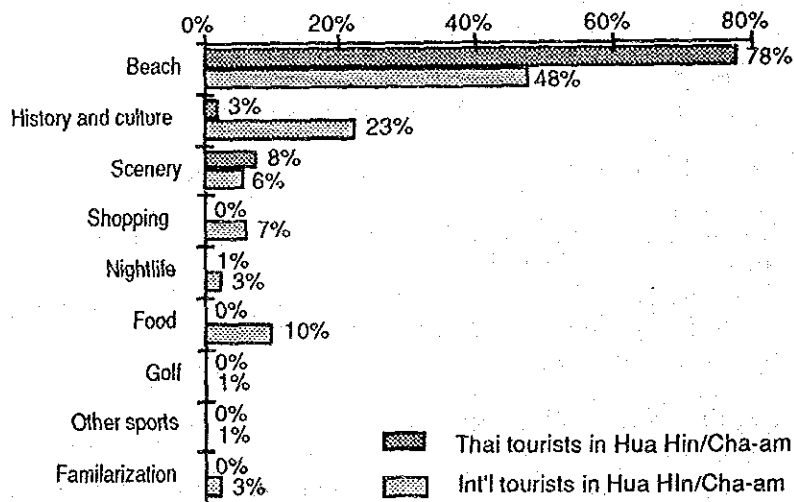
Table 2.2-2 Travel Companions at Hua Hin / Cha-Am and Pattaya Resorts

Travel Companions	Thai Tourists		International Tourists	
	Hua Hin/Cha-Am	Pattaya	Hua Hin/Cha-Am	Pattaya
Alone	2	3	27	25
Spouse	12	19	10	27
Family and relatives	30	24	15	9
Friends	46	35	34	26
Business associates	11	19	12	11
Others	0	0	3	2

unit: %
source: Tourist Survey by the Study Team

(5) Alternative Tourist Attractions

Development of alternative tourist attractions additional to beach related activities is important, especially to strengthen the international market. As beaches in the Study Area may fall behind those of Phuket, Samui and several beaches in ASEAN countries in terms of physical setting and water quality, the Study Area is not very competitive for "Beach-only" tourists. Instead, it should target at those tourists who seek for "Beach and Mountains" or "Beach and Culture". This view is supported by results from the tourist survey, as shown in Figure 2.2-1.



source: Tourist Survey by the Study Team

Figure 2.2-1 Expectation of Trips to the Study Area

Most of the Thai tourists (78%) gave "Beach" as the principal expectation of their trip, but only 48% of the international tourists did so. The figure shows that many international tourists look for "History and Culture" and also "Food", "Shopping"

and "Scenery" are popular activities, especially among Asian tourists. Thai tourists are apart from "Beach" interested in "Scenery". Night life does not form a main incentive to visit Hua Hin / Cha-Am Beach Area.

(6) Strong Link between Bangkok and Hua Hin / Cha-Am Resort

As mentioned previously, Bangkok forms the major source of domestic tourists and is the most important gateway for international tourists to Thailand. However, Bangkok is also the most important cultural destination for tourists who stay in the Study Area. In that sense the Study Area has potential to serve as accommodation base for tourists who prefer a tranquil atmosphere rather than staying in Bangkok. From here they may go on a one day or short overnight trip to the capital. Therefore, strengthening the link between the Study Area and Bangkok will be given high priority.

2.2.2 Tourism Development Targets

Based on analysis of potentials and constraints, the following targets were formulated to develop the Study Area in the direction set forth in above policy.

(1) Development and Improvement of Tourist Attractions for Both Thai and International Tourists

Further tourism development in the Study Area shall be aimed at enhancing the identity of Hua Hin / Cha-Am Beach Area - the core of tourism development in the Study Area - as "Royal Resort" and at strengthening the Study Area's tranquil and natural atmosphere. Diversification of tourist attractions shall focus on "History and Culture" and "Scenery" in reply to preferences expressed by visitors and to gain reputation as international resort by moving from "Beach-only" to "Beach and Mountain and Culture" resort.

Tourism promotion efforts shall be undertaken to enhance the position of the Study Area as appealing destination among other competing regions in Thailand, and to facilitate tourist visitation to and appreciation of the attractions in the region.

Supply of urban amenities such as a variety of food and shopping attractions shall be improved, in particular to attract Asian Tourists.

(2) Development and Improvement of Circulation Roads in the Study Area, and Development of a Sea Transportation Network

Circulation roads shall be developed or improved to form sight-seeing tours, and to link tourism attractions with recreation and sports facilities in the area, e.g., with the many golf courses which are being developed in the Study Area.

Beach related recreational activities shall be integrated by providing sea transportation and marine sports facilities, not only to ease transportation within the Study Area but also to connect the Study Area with Pattaya and Bangkok.

(3) Expansion of the Accommodation Base to Meet the Future Demand

Further development to meet the demand of especially middle to upper-middle class accommodation shall be promoted, but with the following restrictions.

1. To maintain the image of the Study Area as a tranquil and natural beach resort, density and height of buildings shall be low to medium as designated by the Zoning and Building Regulation applied to Hua Hin / Cha-Am Beach

Area. The tourist survey conducted by the Study Team showed that most tourists, especially Europeans, prefer low buildings to high-rise accommodation, which only supports this view.

2. Recent trends show an expansion of tourism development along the coast north of Cha-Am Beach and south of Hua Hin beach. Development further south than Pranburi shall not be supported, because areas closer to Hua Hin and Cha-Am still have room for expansion. Also, increasing distance and travel time from Bangkok will negatively affect the choice to visit these areas in favor of more distant but high quality beaches, such as Ko Samui and Phuket.

(4) Effective Development of Infrastructure in Coordination with Government and Private Sector Plans

Improvement of the access to the Study Area shall be coordinated with circulation road development within the Study Area. Access to the Study Area using public transport shall be improved.

An integrated regional water supply system covering most of the coastal zone, shall be established to guarantee sufficient and adequate water supply in the Study Area.

To prevent discharge of untreated waste water to the sea, sewerage shall be developed in coordination with tourism and land development projects. Priority shall be given to densely populated areas.

Facilities for solid waste disposal shall be improved, and service area coverage shall be expanded.

(5) Enhancement of the Quality of the Environment to Maintain and Publicizes Hua Hin / Cha-Am's Favorable Image as "Royal Resort" with a Tranquil and Natural Atmosphere

Natural resources shall be protected, and landscaping and building control shall be carried out to improve the sense of arrival and to enhance the image of the resort.

Adequate countermeasures shall be taken to control the water quality, coastal erosion and the littering problem, together with institutional arrangements, monitoring systems and enforcement measures to assure and maintain the quality of the environment.

(6) Tourism Development with Consideration for the Local Communities

Tourism development along the coast north of Cha-Am, where many fishing villages are located close to the beach, shall be controlled to coexist with these fishing settlements. Moreover, efforts shall be undertaken to increase the benefits of tourism for the local population of the Study Area.

2.2.3 Tourism Development Strategy

Within the Study Area various parts of different character, hereinafter called Tourism Clusters, can be distinguished. If properly linked in an overall concept, differences between these tourism clusters offer opportunities for the development of the Study Area into a multi-type resort. Therefore, the role of each distinctive tourism cluster needs to be formulated based on and aimed at enhancing its specific characteristics.

After analysis of the present situation, and based on the Master Plan 1987, 7 tourism clusters were distinguished in the Study Area and shown in Figure 2.2-2, based on the following criteria:

1. Tourist attractions located close to each other or linked by the same transportation route, are grouped into a tourism cluster;
2. Each cluster must have at least one major tourist attraction, from which the cluster derives its identity. Tourist attractions within the same cluster should share a common identity;
3. Each cluster must include a tourism service center, from where the attractions in the cluster can be explored; and
4. Administrative boundaries must be taken into account when forming clusters, to facilitate implementation of public investment efforts.

The following 3 strategies are set forth to guarantee harmonious development and adequate links between the various tourism clusters:

1. To improve the access from the major source market Bangkok, considering travel time and distance. Improvement of the transportation system shall mainly focus on land transport.
2. To determine the role envisaged for each tourism cluster within the Study Area and its relation with other clusters.
3. To establish an adequate circulation network, which apart from land transport includes sea transportation, to link the various attractions and tourism facilities in the Study Area.

The role envisaged for each tourism cluster and the relation with other clusters is described hereafter for each cluster.

(I) Phetchaburi Cluster

1) Characteristics

Within the Study Area, this cluster is located closest to Bangkok. Representative attractions for this cluster are the cultural and historical tourist assets, scattered in and around Phetchaburi City, and Kang Krachan National Park with its dam and reservoir, waterfalls and splendid mountain scenery. Phetchaburi City functions as tourism service center for the cluster.

2) Development Strategy

Phetchaburi City serves as gateway city to the south, not only to the Study Area but to the entire southern part of Thailand. Further tourism development in the city shall focus on strengthening this function.

For Kang Krachan National Park more adequate utilization of its rich natural resources for tourism, in harmony with requirement of nature conservation, is envisaged.

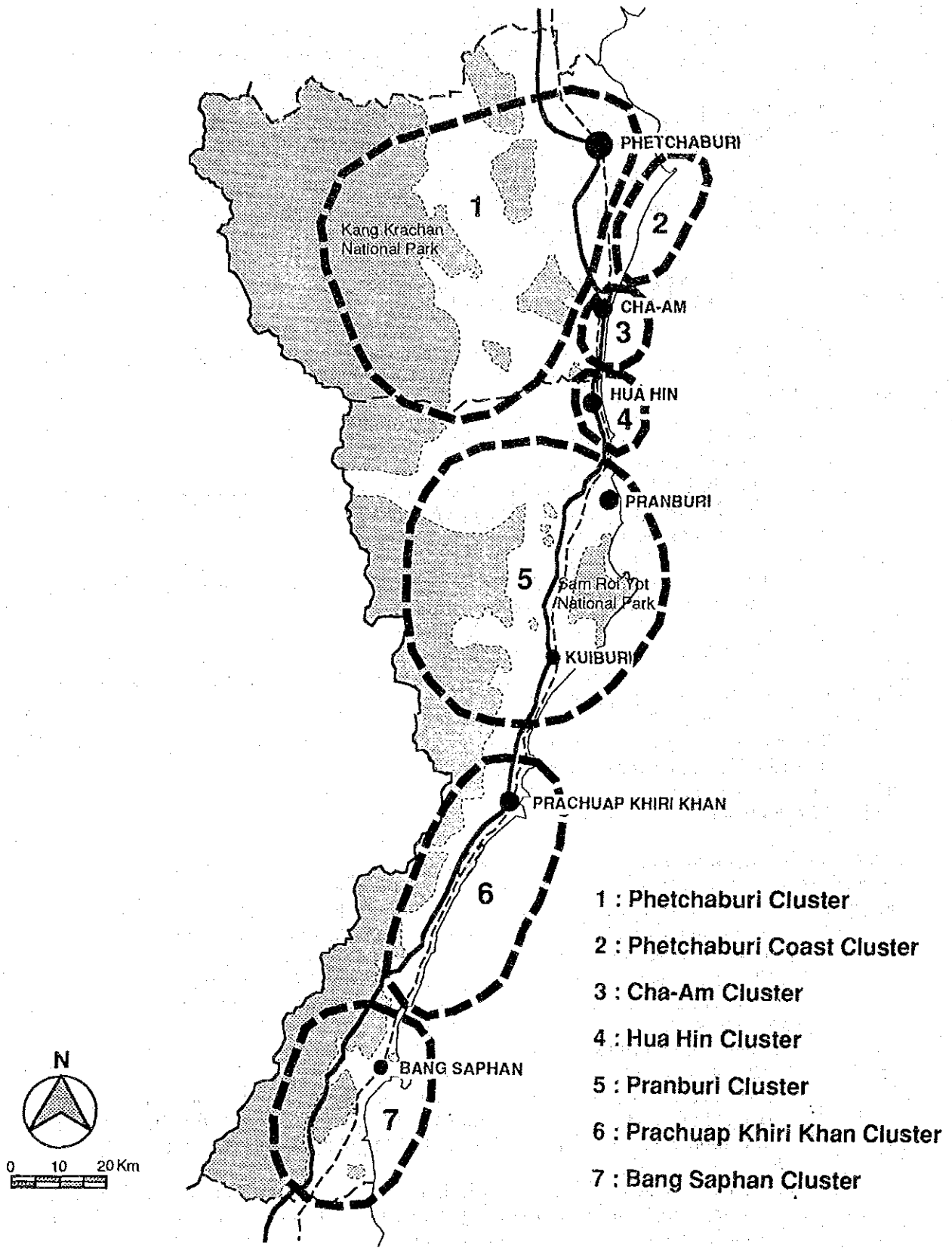


Figure 2.2-2 Tourism Clusters

(2) Phetchaburi Coast Cluster**1) Characteristics**

This cluster is located east of Phetchaburi Cluster, and is characterized by its small relatively undeveloped beaches and the many traditional fishing villages located close to the coast. The cluster may support Phetchaburi City's function as tourism service center.

2) Development Strategy

Tourism development is envisaged for the beaches, but priority shall be given to continued subsistence of the fishing villages. Tourism development in this cluster shall be of a small scale, as subordinate beach resort of Hua Hin / Cha-Am. The accommodations to be developed in this cluster, will support Phetchaburi City's function as tourism service center.

(3) Cha-Am Cluster and Hua Hin Cluster

These 2 clusters form the tourism core of the Study Area and although they based on their characteristics should be considered together, they were recognized as two different clusters because they form different administrative entities. The development strategy is discussed for both clusters together.

1) Characteristics

The clusters are located in the central part of the Study Area and Cha-Am and Hua Hin Towns form the tourism service centers for the respective clusters. Characteristic for these clusters is their long reputation as beach resort. Major market for Cha-Am is formed by Thai tourists, a relatively high percentage of which visits the area on day trips. Hua Hin enjoys the image of "royal resort" thanks to visits of successive king to the area. In both Cha-Am and Hua Hin Clusters international class hotels and condominiums have been developed, and it is expected that further development will progress in both clusters.

2) Development Strategy

Future development of these clusters shall reply to the various needs of its visitors, and firm establishment of the area as international beach resort. Especially, the quiet and relaxing atmosphere of Hua Hin Beach Area shall be enforced. Moreover, the development of new tourism attractions is envisaged for the inland area of both clusters, offering alternative attractions and aiming at extending the period of stay in the Study Area.

Due to the construction of a new bypass, the section of the present Highway No.4 in Cha-Am and Hua Hin Towns will mainly function as access road for visitors to Hua Hin / Cha-Am Beach Areas, and shall be improved to enhance this function.

(4) Pranburi Cluster**1) Characteristics**

Representative for this cluster south of Hua Hin is Sam Roi Yot National Park, located along the coast in the southern part of the cluster. Pranburi

Town may function as the cluster's main service center, with Kuiburi Town as supportive center. The coastal area north of Sam Roi Yot National Park, which includes many beaches, is relatively undeveloped and has potential to function as expansion area for Hua Hin.

2) Development Strategy

The northern part of the cluster shall be developed as subordinate beach resort to Hua Hin, but in Sam Roi Yot National Park tourism development (construction of accommodation) shall be restricted strongly. In this area priority shall be given to conservation of the coastal area with its splendid scenery and rich natural resources. Furthermore, facilities for nature oriented tourism shall be improved in Sam Roi Yot National Park and Pranburi Forest Park, whilst complying with requirements of adequate conservation of the natural resources.

(5) Prachuap Khiri Khan Cluster

1) Characteristics

This cluster is located at the narrowest part of the Study Area, and Prachuap Khiri Khan City functions as its service center. In the western part of the cluster, along the border with Myanmar, Thap Sakae Forest Reserve is located. Representative for this cluster are Wanakon National Park and Huai Yang Waterfall National Park, and the small scale relatively undeveloped beaches.

2) Development Strategy

Environmental Conservation shall be given priority in the entire cluster. Especially tourism resources in Wanakon National Park and Huai Yang Waterfall National Park shall be developed to cater for nature recreation, whilst complying with requirements of adequate conservation of the natural resources. For the beaches small scale, low density tourism development is envisaged, giving due consideration to protection of their natural environment and excellent scenery.

(6) Bang Saphan Cluster

1) Characteristics

This is the most southern cluster of the Study Area with Bang Saphan Town as its tourism service center, and located at a distance of 5 hours by car from Bangkok. The many relatively undeveloped beaches set in a relatively well preserved natural environment with various small islands, form the main attraction of the cluster.

2) Development Strategy

Like for Prachuap Khiri Khan Cluster, environmental conservation shall be given priority in this cluster. Especially the beaches of the small islands in the southern part of the cluster, the only place in the Study Area where coral is still found, shall be protected. For other beaches small scale, low density tourism development is envisaged, giving due consideration to protection of its natural environment and excellent scenery.

2.3 Tourism Development Framework

2.3.1 Population Forecast

NESDB projects a slowdown of the present population growth for Thailand from the present 1.5% to 1.1% in 2006. A similar trend is expected for the Study Area, from the existing 1.2% to 0.9% in 2006. Population forecasts, based on estimated growth rates as projected by the NESDB are presented in Table 2.3-1.

Table 2.3-1 Population Forecast for the Study Area, Western Region, Whole Kingdom and Bangkok and Vicinities (1996, 2001 & 2006)

unit : 1,000 persons								
Area	1991	Av. annual growth*	1996	Av. annual growth*	2001	Av. annual growth*	2006	Av. annual growth*
Study Area	861.2	1.1%	899.8	0.9%	936.5	0.8%	977.8	0.9%
Western Region	3,336.9	1.2%	3,517.5	1.1%	3,693.9	1.0%	3,857.2	0.9%
Whole Kingdom	56,961.0	1.5%	61,045.8	1.4%	64,920.3	1.3%	68,537.8	1.1%
Bangkok and Vicinities	8,701.4	1.7%	9,584.3	2.0%	10,435.0	1.8%	11,273.3	1.6%

* source: Report "Population Projections for Thailand: 1980-2015", NESDB Human Resources Planning Division, June 1991

Within the Study Area NESDB predicts more than average growth for Phetchaburi Province and an only very slightly increasing population for Prachuap Khiri Khan Province. Tables 2.3-2 and 2.3-3 show population forecasts by district for Phetchaburi and Prachuap Khiri Khan provinces respectively. The projections are based on the average annual growth rate from 1987 to 1992, assuming a continuation of the present growth trend based on continuing tourism development, and are proportionally adjusted to NESDB's provincial forecasts.

2.3.2 Tourism Demand Forecast

The number of tourists visiting the Study Area is expected to grow to 4.26 million visitors in 2006, and the share of international tourists is expected to rise to 26.8% in the same year from 17.5% in 1991. The projected tourist arrivals in the Study Area for 1996, 2001 and 2006 is shown in Table 2.3-4.

Table 2.3-4 Projected Tourists Arrivals to the Study Area

unit: persons; %				
	Domestic Tourist Arrivals	Int'l Tourist Arrivals	Total	Share of Thai tourists
1991*	1,303,000	276,000	1,579,000	82.5
1996	1,827,000	508,000	2,335,000	78.2
2001	2,445,000	801,000	3,246,000	75.3
2006	3,121,000	1,142,000	4,263,000	73.2

source: Study Team
* preliminary figures

Table 2.3-2 Population Forecast for Phetchaburi Province (1996, 2001 and 2006)

unit: thousand persons, %

Area	1991	Average Annual Growth	1996	Average Annual Growth	2001	Average Annual Growth	2006	Average Annual Growth
Phetchaburi District	111.6	0.4	116.9	1.0	121.9	0.9	127.4	0.9
(Phetchaburi municipality)	30.7	-2.1	28.2	-1.6	25.7	-1.7	23.5	-1.7
Cha-Am	56.8	2.0	64.1	2.6	72.1	2.5	81.2	2.5
(Cha-Am municipality)	22.1	2.1	25.0	2.7	28.2	2.5	31.9	2.6
Tha Yang (Kang Krachan)	104.8	0.9	112.2	1.4	119.5	1.3	127.6	1.4
Khao Yoi	37.5	0.9	40.2	1.4	42.8	1.3	45.7	1.4
Ban Laem	58.8	0.8	62.7	1.3	66.6	1.2	70.9	1.3
Ban Lard	50.0	0.7	53.0	1.2	55.0	1.1	59.1	1.2
Nong Ya Plong	11.3	1.5	12.5	2.0	13.7	1.9	15.0	2.0
Total Province	430.7	0.9	461.5	1.4*	492.4	1.3	526.9	1.4

source: Study Team

* NESBD Report: "Population Projections for Thailand 1980-2015", June 1991

Table 2.3-3 Population Forecast for Prachuap Khiri Khan Province (1996, 2001 and 2006)

unit: thousand persons, %

Area	1991	Average Annual Growth	1996	Average Annual Growth	2001	Average Annual Growth	2006	Average Annual Growth
Prachuap Khiri Khan District	66.8	1.0	67.3	0.1	67.3	0.0	67.3	0.0
(Prachuap K.K Municipality)	14.3	-0.4	13.4	-1.2	12.5	-1.3	11.7	-1.3
Hua Hin	63.8	2.6	69.1	1.7	74.4	1.5	80.1	1.5
(Hua Hin Municipality)	35.3	2.1	37.4	1.2	39.3	1.0	41.4	1.1
Pranburi	105.8	0.8	105.2	-0.1	104.0	-0.2	102.8	-0.2
Bang Saphan	64.4	1.2	65.4	0.3	66.0	0.2	66.6	0.2
Tub Sakae	50.9	0.0	48.7	-0.9	46.3	-1.0	44.0	-1.0
Kuiburi	48.1	1.3	48.9	0.4	49.5	0.2	50.1	0.2
Bang Sapannoi	30.8	2.9	33.7	1.9	36.7	1.8	40.0	1.8
Total Province*	430.5	1.2	438.3	0.4	444.1	0.3	451.0	0.3

source: Study Team

* NESBD Report: "Population Projections for Thailand 1980-2015", June 1991

The international tourist arrivals in the Study Area was calculated from the forecasted international arrivals to Thailand and the forecasted share of the Study Area. The annual growth rate of international tourist arrivals was based on the figures for 1992 to 1995 presented in the 7th National Plan, and the rate is assumed to drop slightly after 1996. The share of the Study Area is assumed to increase 0.3% annually from 1993 to 1996, based on the past trend, and 0.1% in other years. Refer to Table 2.3-5.

Table 2.3-5 Projected International Tourist Arrivals to Thailand and the Share of the Study Area (1996, 2001 and 2006)

Year	Int'l tourists to Thailand	units: persons; %	
		Annual growth rate of int'l tourists	Share of the Study Area
1990	5,298,860	10.2	5.3
1991	5,140,000	-3.0	5.4
1992	5,577,000	8.5	5.5
1993	6,051,000	8.5	5.8
1994	6,565,000	8.5	6.1
1995	7,123,000	8.5	6.4
1996	7,622,000	7.0	6.7
1997	8,155,000	7.0	7.0
1998	8,726,000	7.0	7.3
1999	9,337,000	7.0	7.4
2000	9,991,000	7.0	7.5
2001	10,590,000	6.0	7.6
2002	11,226,000	6.0	7.7
2003	11,899,000	6.0	7.8
2004	12,613,000	6.0	7.9
2005	13,370,000	6.0	8.0
2006	14,172,000	6.0	8.1

source: Study Team

Since the figures for domestic tourist arrivals from 1986 to 1990 are not consistent, the future demand was projected from the visitor arrivals in 1990 and the forecasted growth rate of GDP using the formula shown below.

$$N_t = N_{t-1} + (N_{t-1} \times G)$$

N = tourist arrivals in the projected year

G = growth rate of GDP in the Kingdom (estimated by the Study Team)

2.3.3 Projected Accommodation Requirement

To calculate the accommodation requirement for the Study Area, the study team assumed the following conditions based on tourist statistics and the expected changes in the future caused by the Study:

	Domestic	International
- Share of overnight tourists	55%	95%
- Average length of stay	1.8	3.4
- Number of persons per room	1.7	1.7
- Room occupancy rate	60%	60%

Although statistics presented in Chapter 1.3 show that the share of overnight Thai tourists has increased slightly over the past few years, further growth is not expected since improvement of the transportation network will reduce travel time from Bangkok. The average length of stay in the Study Area was also assumed to be constant although it is expected to extend for the whole of Thailand. Shortening of the travel time from Bangkok and the increasing share of Asian tourists as compared to Europeans, are expected to have a diminishing effect on the growth of the average length of stay in the Study Area for domestic and international tourists respectively.

The development strategy for each tourism cluster, as described in Chapter 2.2, envisages expansion of accommodation especially for the northern part of Pranburi Cluster and for Phetchaburi Coast Cluster. As the last named cluster may also serve as accommodation base for Phetchaburi City, only limited expansion is projected for this city. Moreover, the development strategy recommended expansion of especially middle class and high class accommodation. Table 2.3-6 shows the projected distribution of accommodations over the Study Area and the share of high, middle and low class accommodation for each tourism cluster.

Table 2.3-6 Distribution of Accommodations by Tourism Cluster and Accommodation Type (1991, 2006)

unit: %

Tourism Cluster	Distribu- tion in the Study Area	Distribu- tion in the Study Area	Distribution by Accommodation Type (% of total for 1991 and 2006 resp.)					
			High Class		Middle Class		Low Class	
			1991	2006	1991	2006	1991	2006
Phetchaburi	12	6	0	5	13	30	87	65
Phetchaburi Coast	1	11	0	15	11	40	89	45
Cha-Am	46	36	57	50	12	30	31	20
Hua Hin	21	18	51	55	8	25	41	20
Pranburi	11	17	32	40	20	30	49	30
Prachuap Khiri Khan	6	9	0	20	32	40	68	40
Bang Saphan	2	3	0	10	0	35	100	55
Total	100	100	40	39	13	31	47	30

source: Study Team

Based on these conditions tourist nights and accommodation requirements are estimated for 1996, 2001 and 2006 and presented in Table 2.3-7 and Table 2.3-8 and Figure 2.3-1 respectively.

Table 2.3-7 Tourist Nights Forecast for the Study Area (1996, 2001 and 2006)

units: persons, number

Year	Overnight Thai Tourists in the Study Area		Overnight International Tourists in the Study Area		Total Tourists
	Tourists	Tourist Nights	Tourists	Tourist Nights	Nights
1991	717,000	1,291,000	262,000	891,000	2,182,000
1996	1,005,000	1,809,000	483,000	1,642,000	3,451,000
2001	1,345,000	2,421,000	761,000	2,587,000	5,008,000
2006	1,717,000	3,091,000	1,085,000	3,689,000	6,780,000

source: Study Team

Table 2.3-8 Estimated Room Requirement by Cluster (1996, 2001 and 2006)

unit: number of rooms

Cluster	Accommodation Type	Existing Rooms (1991)	Total Required Rooms			Additionally Required Rooms		
			1996	2001	2006	1996	2001	2006
Phetchaburi	High Class	0	0	0	55	0	0	55
	Middle Class	96	149	232	328	53	83	96
	Low Class	645	612	658	710	-33	46	52
	Total	741	761	890	1,092	20	129	202
Phetchaburi Coast	High Class	0	0	139	300	0	139	161
	Middle Class	10	236	498	801	226	262	303
	Low Class	82	424	835	901	342	411	66
	Total	92	660	1,472	2,002	568	812	530
Cha-Am	High Class	1,657	2,126	2,661	3,276	469	534	615
	Middle Class	354	1,000	1,448	1,966	646	448	517
	Low Class	901	953	1,120	1,310	52	166	191
	Total	2,912	4,080	5,229	6,552	1,168	1,149	1,323
Hua Hin	High Class	664	1,063	1,406	1,802	399	343	396
	Middle Class	104	398	593	819	294	195	226
	Low Class	542	516	581	655	-26	65	74
	Total	1,310	1,977	2,580	3,276	667	604	696
Pranburi	High Class	231	488	836	1,238	257	348	402
	Middle Class	143	259	569	928	116	310	359
	Low Class	354	404	647	928	50	243	281
	Total	728	1,151	2,052	3,094	423	901	1,042
Prachuap Khiri Khan	High Class	0	0	152	328	0	152	176
	Middle Class	131	203	413	655	72	210	242
	Low Class	282	307	469	655	25	161	186
	Total	413	511	1,034	1,638	98	523	604
Bang Saphan	High Class	0	0	0	55	0	0	55
	Middle Class	0	0	44	191	0	44	147
	Low Class	158	161	199	300	3	38	101
	Total	158	161	243	546	3	83	303
Total	High Class	2,552	3,678	5,194	7,053	1,126	1,516	1,859
	Middle Class	838	2,245	3,798	5,688	1,407	1,553	1,890
	Low Class	2,964	3,377	4,508	5,460	413	1,131	952
	Total	6,354	9,300	13,500	18,200	2,946	4,200	4,700

source: Study Team

3. TOURISM DEVELOPMENT PLAN

3. TOURISM DEVELOPMENT PLAN

3.1 Outline of the Tourism Development Plan and Zoning

3.1.1 Outline of the Tourism Development Plan

Based on the development strategy and framework presented in Chapter 2, the tourism development plan for the Study Area is described hereafter. The plan comprises 3 components as follows:

1. Tourism Development Zoning Plan
2. Tourism Development Sector Plans
3. Implementation Plan

(1) Tourism Development Zoning Plan

Zoning aims to achieve appropriate implementation of the tourism development strategy envisaged, by introducing guidelines and control measures to sustain the Study Area's natural and social environment. The Zoning Plan is described in paragraph 3.1.2.

(2) Tourism Development Sector Plans

The Sector Plans discuss the present situation and planning issues to be tackled, the development strategy envisaged and projects proposed to realize the strategy set forth for each of the following 4 sectors:

1. Tourism Attractions and Facilities Plan
2. Infrastructure Plan
 - Transportation Plan
 - Water Supply Plan
 - Sewerage Plan
 - Solid Waste Disposal Plan
 - Power Supply and Telecommunication Plan
3. Tourism Promotion Program
4. Environmental Management

The Development Plan for the Study Area, covering all 4 sections, is visualized in Figure 3.1-1, and a list of the proposed projects is shown in Table 3.6-1. An outline of the Sector Plans is given hereafter, and a more detailed description is included in sections 3.2 through 3.5 of this chapter.

1) Tourism Attractions and Facilities Plan

Development and improvement of facilities to enhance the tourism resources of the Study Area and to improve their access for visitors is set forth, including especially:

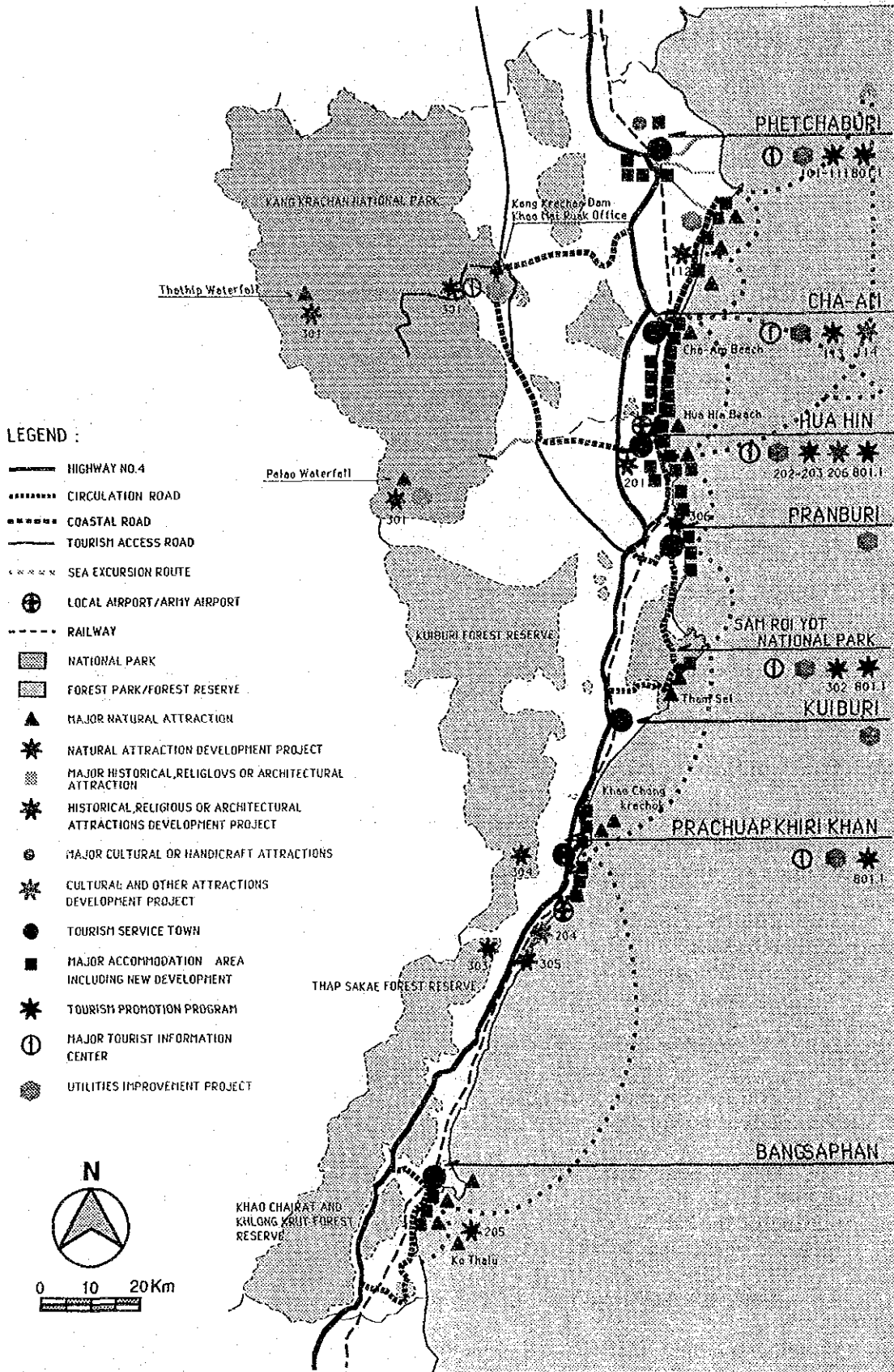


Figure 3.1-1 Tourism Development Plan

- Temples, palaces and other cultural-historical assets in Phetchaburi City and its surroundings,
- Caves, dams, waterfalls, etc. in Kang Krachan, Sam Roi Yot and Wanakon National Parks and Thap Sakae Forest Reserve, and
- Enhancement of beaches and its surrounding areas, including development of parking lots, landscaping, placement of trash boxes, etc.

2) Infrastructure Plan

1. Transportation Plan

Improvement of access to the Study Area with public transportation is planned, including:

- introduction of a special tourist train to Cha-Am and Hua Hin,
- improvement of bus terminals in Phetchaburi, Cha-Am and Hua Hin,
- improvement of tourist piers in every cluster, and
- improvement of airport and air transportation services.

Road development to improve access to the various tourism resources and facilities within the Study Area and to link attractions to form excursion routes is planned, including the following roads:

- circulation roads in Phetchaburi Province,
- Pranburi - Sam Roi Yot circulation road,
- Prachuap Khiri Khan circulation road, and
- Bang Saphan circulation road.

Road development to improve the access to and safety in major tourist areas within the Study Area is proposed, including:

- Phet Kasem road (existing Highway No.4), and
- Phetchaburi coastal road.

New construction or improvement of piers at 1-2 places in each tourism cluster is recommended, to be used as boat landing for sea access and boat trips.

2. Water Supply Plan

A long term water supply development plan to make optimum use of the Study Area's restricted water resources is formulated.

Linkage of the following areas with the existing regional water supply system is urgently recommended, in order to guarantee continued water supply to the various parts of the Study Area:

- Phetchaburi City,
- Cha-Am City,
- Hua Hin City, and
- Pranburi and Kuiburi Towns.

3. Sewerage Plan

Development of sewerage systems with priority for densely populated and environmentally vulnerable areas is proposed, including:

- Phetchaburi City,
- Cha-Am City,
- Hua Hin City, and
- Prachuap Khiri Khan City.

4. Solid Waste Disposal Plan

Development of systematic collection and haulage systems, procurement of collection trucks and other equipment, and development of sites for sanitary landfill is recommended for the following cities:

- Phetchaburi City,
- Cha-Am City, and
- Hua Hin City

5. Power Supply and Telecommunication Plan

Development plans for power supply have been prepared by the provincial governments of Phetchaburi and Prachuap Khiri Khan provinces, which are expected to adequately solve the existing problems.

Required expansion of telephone lines is expected to be implemented by the Government of Thailand during the 7th NESDP.

3) Tourism Promotion Program

Production of promotion materials (brochures), provision or improvement of tourist signs and information boards, the establishment or improvement of tourist information centers in the Study Area and improvement of the TAT regional office in Cha-Am are recommended.

4) Environmental Management

To sustain the Study Area's natural and tranquil atmosphere and to protect the environment the introduction of environmental standards, monitoring systems and measures for enforcement are recommended concerning the following issues:

- natural resources,
- water quality,
- beach erosion,
- littering, especially on beaches,
- aesthetics, and
- local communities.

(3) Implementation Plan

Implementation of the projects proposed in this tourism development plan shall be carried out in 3 phases, as follows:

- Phase 1: 1992-1996 (under Thailand's 7th Five Year Plan),
- Phase 2: 1997-2001 (under Thailand's 8th Five Year Plan), and
- Phase 3: 2002-2006 (under Thailand's 9th Five Year Plan).

The Implementation Plan is described in section 3.6 of this chapter, and the phasing for each proposed project is shown in Table 3.6-1.

3.1.2 Tourism Development Zoning

Complementary to the development strategy described in Chapter 2 and aiming at its appropriate implementation, five tourism development zones were distinguished in the Study Area introducing guidelines and control measures to protect the Study Area from developments which may cause adverse impact on its natural and social environment. Especially in areas along the beach, where tourism development already has taken place or where opportunities for future tourism development are existing, control measures will be indispensable.

The following five zones were distinguished and are presented in Figure 3.1-2, based on its characteristics and level of tourism development at present, its potential for future tourism development, its environmental and social vulnerability and the presence of areas with outstanding scenery:

1. Traditional Beach Conservation Zone
2. Tourism Development and Historical Beach Conservation Zone
3. Scenic Beach Conservation Zone
4. Forest Conservation Zone
5. Hinterland Development Zone

Since the zoning only regards tourism development, its review by relevant agencies will be required to coordinate with other sector plans.

The guidelines proposed for each tourism development zone are described below. Additional to these guidelines, the introduction of water quality standards, monitoring and enforcement measures under the jurisdiction of the National Environment Board (NEB) are recommended for all beaches in the Study Area.

In September 1991 the Interior Minister, with the Director of the Public Works Department announced a Zoning and Building Regulation for Hua Hin / Cha-Am Beach Area which is presently applicable to the herein described areas. An excerpt of the Regulation is included in Appendix 3.

(1) Traditional Beach Conservation Zone

This zone covers a 1,000 m. wide stretch along the coast, measured from the coastline, in the northern part of the Study Area. The zone is bounded by Laem Luang in the north and Khlong Tian in the south.

Some small scale tourism development has taken place along the coast, and recently some high grade hotels have been completed or are under construction. At present control measures are not applicable in the area.

The zone includes several fishing villages located close to the sea. Although part of the zone is planned to function as additional accommodation base for Phetchaburi City, tourism development in this zone shall preliminary exclude these fishing villages in order to protect their livelihood.

The following guidelines are proposed for the zone:

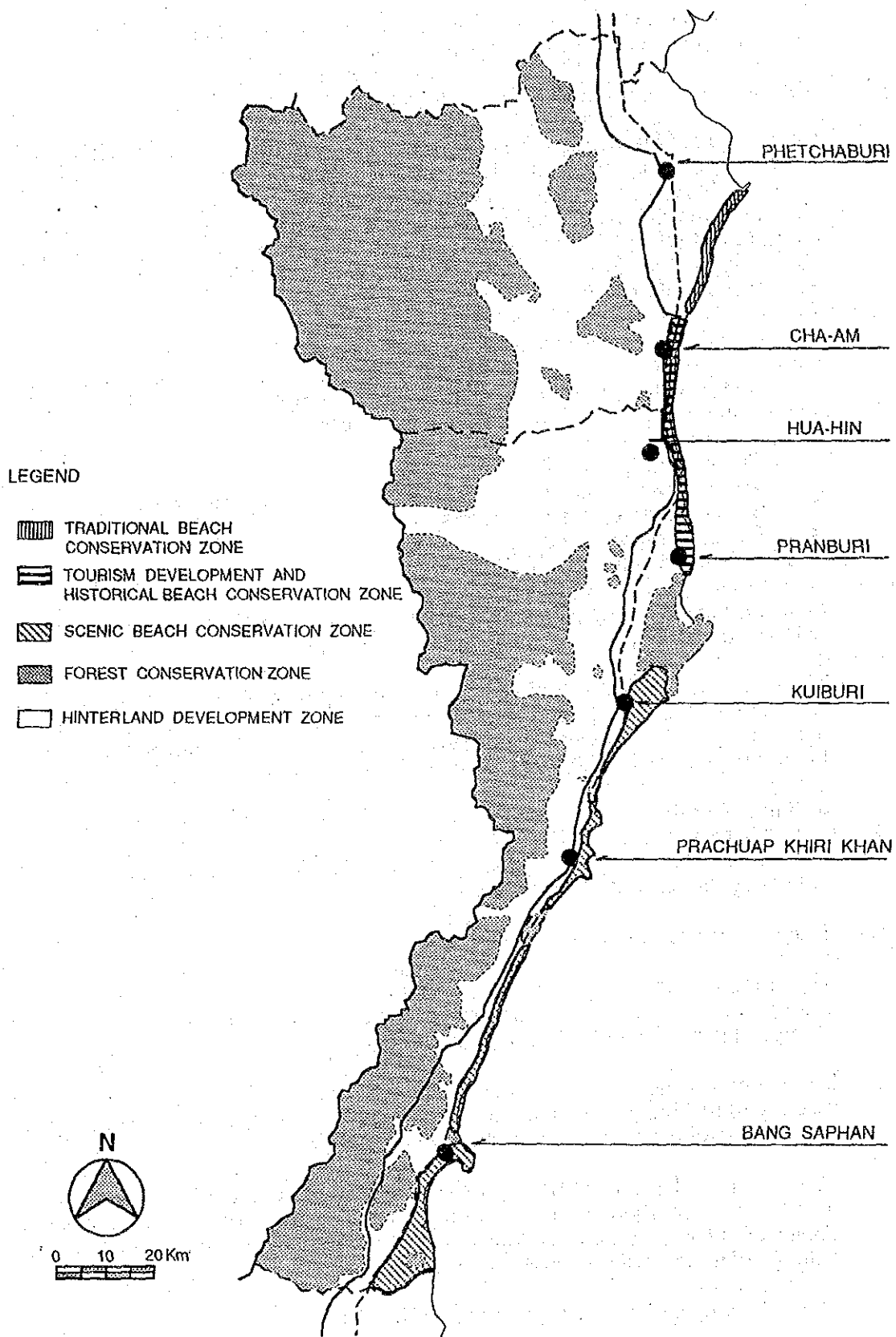


Figure 3.1-2 Tourism Development Zones

- To identify the areas to be designated as Fishing Village Sub-zone. These sub-zones shall include fishing villages and their surroundings, where fishing related activities still determine the village's livelihood. In these sub-zones tourism development shall not be allowed, with exception of small scale development which can be combined with fishing activities and directly benefits to the village.
- To identify environmentally vulnerable areas to be protected under environmental protection laws, e.g. mangrove forests. Tourism development shall not be allowed in these areas.
- To apply "Area 2", "Area 3" and "Area 4" of the Zoning and Building Regulation and the regulations contained herein as introduced in Hua Hin Municipality to this zone, with exception of the Fishing Village Sub-zones and environmentally vulnerable areas described above. For "Area 4" a building height limit of 20 m. is recommended additionally.

(2) Tourism Development and Historical Beach Conservation Zone

This zone covers the coastal area from Khlong Tian in the north to the northern boundary of Sam Roi Yot National Park in the south. The proposed width of the zone is approximately 2,000 m.

The beaches of Cha-Am and Hua Hin, composing the oldest beach resort of Thailand, form the central part of this zone. It also includes Klai Kang Won Palace and King Rama IV Summer Palace to which the Study Area owes its image of "royal resort".

The majority of the zone is characterized by large-scale hotels and condominiums constructed along the beaches, which are interspersed with small scale hotels and guest houses, especially close to the public beaches of Cha-Am and Hua Hin. In the part of the zone located in Pranburi Province tourism development has only sparsely taken place, but its further tourism development is encouraged as described in Chapter 2.

Further tourism development is envisaged for this zone, whilst giving due consideration to scenic and environmental control. To this end the following guidelines are proposed for the zone:

- To apply "Area 2", "Area 3" and "Area 4" of the Zoning and Building Regulation and the regulations contained herein as introduced in Hua Hin Municipality to the entire zone, with exception of areas otherwise designated in the Zoning and Building Regulation. For "Area 4" a building height limit of 20m. is recommended additionally.
- To define the extent of and establish guidelines for an additional stretch beyond the restricted area stipulated in the Zoning and Building Regulation (to the west of "Area 4"), to include areas on both sides of existing highway No.4 in the entire zone. Because these areas offer ample opportunities for future tourism development, development guidelines, such as restrictions on building height, density and maximum building area are highly recommended here in addition to the areas defined in the existing Zoning and Building Regulation.
- In addition to regulations in the existing Zoning and Building Regulation, to establish visual control measures for buildings and guidelines for

landscaping, in terms of design, materials, coloring etc., in order to maintain and enhance Hua Hin / Cha-Am's image of "royal resort".

(3) Scenic Beach Conservation Zone

This zone extends from the northern boundary of Sam Roi Yot National Park in the north to the southern boundary of the Study Area (Bang Saphan Noi), and is bounded by the coastline to the east and the north-south railway to the west.

The zone is characterized by scenic beaches and coconut plantations. Tourism development has hardly taken place and the typical rural character of the Study Area is well maintained in this zone. At present development control measures are not applicable.

Small scale resort development is envisaged for this zone, with high priority for environmental protection and conservation of the zone's distinctive atmosphere. To achieve this the following guidelines are recommended for this zone:

- To identify environmentally vulnerable areas to be protected under environmental protection laws, e.g. mangrove forests. Tourism development shall not be allowed in these areas.
- To identify and define the extent of areas to be designated as Scenic Beach Conservation Sub-zone, including beaches and their hinterland. The regulations applicable to "Area 2" of the Hua Hin Zoning and Building Regulation shall be applied to these sub-zones.
- To apply the regulations for "Area 3" of the Hua Hin Zoning and Building Regulation in the rest of the zone. Additional to "Area 3" regulations a maximum building density of 20-25% is recommended.

(4) Forest Conservation Zone

This zone covers the National Parks, Forest Parks and National Forest Reserves in the Study Area, which are managed by the Royal Forestry Department (RFD).

These parks and reserves include various tourist attractions, such as waterfalls and caves, whose improvement and further development is proposed, in compliance with the guidelines for conservation of the natural (forest) resources in this zone established by RFD.

(5) Hinterland Development Zone

This zone covers the remaining part of the Study Area, i.e. the entire Study Area excluding zones 1 to 4.

This zone includes Phetchaburi and Prachuap Khiri Khan cities, part of Hua Hin and Cha-Am cities, and many villages scattered in this mainly agricultural area. Recently 19 golf courses (approximately 504 holes) have been constructed or will be developed shortly in this zone.

Although for the establishment of development guidelines for this zone coordination with other sector plans and programs is indispensable, from a tourism development point of view the following recommendations are made: