

3. Tourism Resources and Products

3.1 Tourism Resources

3.1.1 Tourism Resources in the Central

Outlines of major tourism resources in Vietnam

Vietnam has abundant tourism resources including natural and historical World Heritages, handicraft villages and traditional events, natural scenic places and ethnic villages on various geographical features (coastal area, plain area, mountain area). At present, many efforts have been made to divert tourist flows to major tourist centers in Vietnam especially on a hub gateway of Hanoi and Ho Chi Minh City.

Supporting recent tourism trend such as beach resort and ecotourism, many plans and projects have been already formulated and making the best of potential tourism resources though, many tourism resources has still some disadvantages in encouraging tourism product development due to lack of infrastructure and insufficient tourist services.

The Central Region positions the historical oriented destination in comparison with North and South Regions in terms of magnitude of tourism resources by category as shown in the Table 3.1.1.

Table 3.1.1 Number of Tourism Resources by Tourism Regions in Vietnam

Type of Resources		Tourism Regions			Total	Share (%)
		North	Central	South		
Cultural Resources	Historical	169	137	107	413	31.2
	Urban	136	74	92	302	22.8
	Local	94	55	35	184	13.9
	Sub-total	399	266	234	899	67.8
Natural Resources	Coastal	15	41	21	77	5.8
	Inland	158	83	80	321	24.2
	Sub-total	173	124	101	398	30.0
Others		4	12	12	28	2.1
Total		576	402	347	1,325	100.0
Share (%)		43.5	30.3	26.2	100.0	

Sources: Vietnam Tourist Guidebook, Vietnam Travel Atlas

The Characteristics of major resources in the Central Region

Tourism resources in the Central Region are represented in three historical World Heritages of Hue Former Capital City (1993), Hoi An Ancient Town (1999) and My Son Cham Sanctuary (1999) influenced by Indo-China Culture. On the other hand, another Vietnam Wartime memories with many ruins and French colonial sites are unforgettable assets characterizing this region tourism. These resources in this region formulate tourism pillars of historical cultural resources as follows.

- Champa archeological sites spreading widely in this region,
- Nguyen Dynasty concentrating on Thua Thien Hue (TT Hue) province, and

- Modern era with French colonial sites and Vietnam War memorial sites spreading widely in this region.

Long coastline stretching over 1,100 km with narrow hinterland of Truong Song Mountains and highlands is remarkable feature of this region. There are one of the most important natural resources with endemic flora and fauna in Vietnam.

- Nature protected areas with famous Bach Ma National Park,
- Water front resources as beautiful beaches and coastal nature with estuary, wetland and rivers, and
- Specific nature as hot springs and caves like Phon Nha cave, lakes, etc.

This region embracing colorful ethnic minorities with traditional dress and characteristic life style can be identified in the Central Highland mainly such as Jarai, Bahanar, Sedang, Ede and Cham tribes.

- Ethnic minority village in Pleik, Kon Tum, Khe San, etc.,
- Handicrafts of Nguyen Dynasty and ethnic villages, and
- Event-performance of Nguyen Dynasty and other cultural events, etc.

3.1.2 Inventory and Evaluation of Tourism Resources

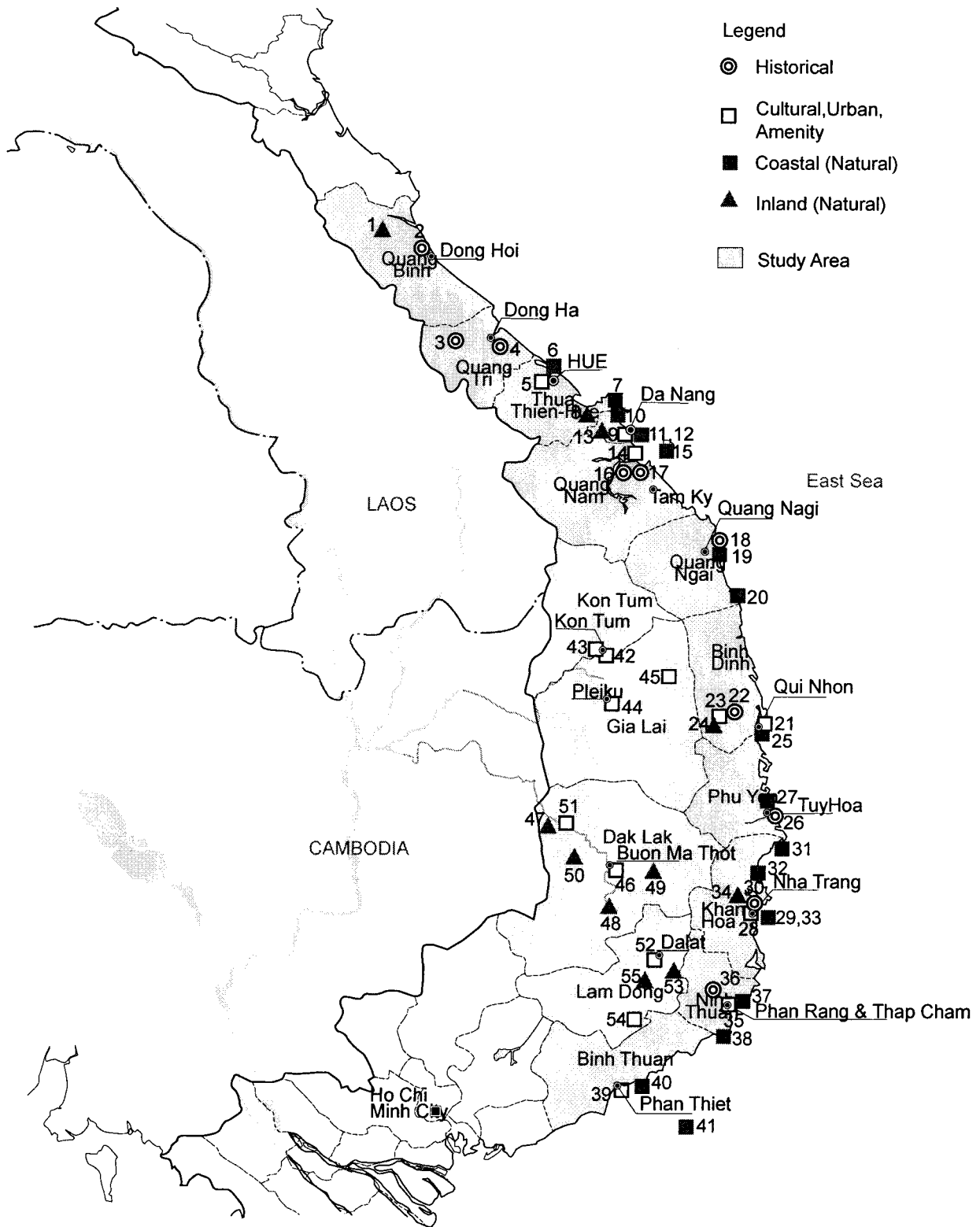
Category and distribution

Tourism resources can be categorized into three types of Cultural Resources, Natural Resources and others (miscellaneous). 1,325 tourism resources identified by VNAT can be categorized and inventoried according to categories above mentioned. The Table 3.1.1 shows number of tourism resources by categories in Vietnam.

538 resources are identified in the Central Region. TT Hue province is the highest number of resources in the Central Regions in terms of quantity. Da Nang, Quang Nam, Khan Hoa and Lam Dong Province (outside of the study area) follow it.

The Figure 3.1.1 and the Table 3.1.2 show the representative tourism resources that are selected from 538 tourism resources in the Central Region through ranking analysis based on positioning criteria of World Heritage class, proximity to gateway and well-known resources listed by guide books.

Figure 3.1.1 Location of Tourism Resources by Category in the Central Region



Source: JICA Study Team

Table 3.1.2 Representative Tourism Resources in the Central Region

Tourism Zone	Province	No	Name of Resource	Rank			Type		Character/Activity	Note (Year of establishment)
				1	2	3	Cultural	Natural		
North Coast Zone	Quang Binh	1	Phong Nha Cave	■				■	Caves	World heritage*/Nature reserve (1986)
		2	Quang Binh Border Gate			■	■		Citadel of Nguyen Dynasty, 1630	Applying the World Heritage
	Quang Tri	3	DMZ (Demilitarized Zone)		■		■		Remains of American War	
		4	Quang Tri Citadel			■	■		Citadel of Minh Mang King, 1824	
	T T-Hue	5	Complex of Hue Monuments	■			■		Old Capital of Nguyen Dynasty	World heritage (1993)
		6	Thuan An Beach			■		■	Beach resort	
		7	Lang Co Beach/Chan May Cape			■		■	Beach resort/Cape	
		8	Bach Ma National Park		■			■	Mountain/Resort	National park (1986)
Central Coast Zone	Da Nang City	9	Da Nang City		■		■		Capital City/Cham museum	
		10	Hai Van Pass			■		■	Pass/Scenic area	
		11	Non Nuoc Beach			■		■	Beach resort	
		12	Marble Mountain			■	■	■	Mountain/Historical	
		13	Ba Na Mountain			■		■	Highland resort	Nature reserve (1986)
	Quang Nam	14	Ancient Town of Hoi An	■			■		Historical town from Le Dynasty	World heritage (1999)
		15	Cham Islands			■		■	Islands/Resort	Nature reserve (1986)
		16	My Son Sanctuary	■			■		Holyland of Champa Dynasty	World heritage (1999)
	Quang Ngai	17	Tra Kieu/Dong Duong			■	■		Citadel and monastery of Champa	
		18	My Lai Memorial			■	■		Remains of American War	
19		My Khe Beach			■		■	Beach resort		
20		Sa Huynh Beach			■		■	Beach resort		
South Coast Zone	Binh Dinh	21	Qui Nhon City			■	■		Capital city/Cham museum	
		22	Duong Long Cham Towers			■	■		Cham ruins	
		23	Quang Trung Museum			■	■		Museum	
		24	Ham Ho Stream			■		■	River recreation	
		25	Quy Nhon Beach			■		■	Beach resort	
	Phu Yen	26	Nhan Tower			■	■		Cham ruins	
		27	My A Beach			■		■	Beach resort	
	Khanh Hoa	28	Nha Trang City/Beach	■			■	■	Capital city/Beach resort	
		29	Nha Trang Islands			■		■	Islands/Aqua resort	
		30	Po Nagar Cham Tower			■	■		Cham ruins	
		31	Dai Lanh Beach			■		■	Beach resort	
		32	Van Phong Bay			■		■	Bay/Sea resort	
		33	Chon Locky Islet			■		■	Bay/Sea resort	
		34	Ba Ho Spring			■		■	Spring	
	Ninh Thuan	35	Phan Rang-Thap Cham Town			■	■		Capital town	
36		Po Klong Garai Towers			■	■		Cham ruins		
37		Ninh Chu Beach			■		■	Beach resort		
38		Ca Na Beach			■		■	Beach resort		
Binh Thuan	39	Phan Thiet City			■	■	■	Capital city/Beach resort		
	40	Mui Ne Beach			■		■	Beach resort		
	41	Phu Quy Island			■	■	■	Islands/Cham ruins		

Table 3.1.3 Representative Tourism Resources in the Central Region (Continued)

Tourism Zone	Province	No.	Name of Resource	Rank			Type		Character/Activity	Note (Year of establishment)
				1	2	3	Cultural	Natural		
			Kom Tum Town			■	■	Capital town	Altitude 525m, Population 35,000	
		43	Ba Na Ethnic Villages			■	■	Ethnic tour		
	Gia Lai	44	Plei Ku City			■	■	Capital city	Altitude 785m, Population 50,000	
		45	Gia Lai Ethnic Villages			■	■	Ethnic tour		
	Dak Lak	46	Buon Ma Thout City			■	■	Capital city/Ethnic museums	Altitude 451m, Population 70,000	
		47	Yok Don National park		■			Mountain	National park (1986)	
		48	Lac Lake			■	■	Lake resort	Historical-cultural site (1986)	
		49	Coffee Plantation			■	■	Coffee		
		50	Buon Don Elephant Village			■	■	Ethnic tour		
	Lam Dong	51	E De Ethnic Villages			■	■	Ethnic tour		
		52	Da Lat City		■		■	Capital city/Colonial/Waterfalls	Altitude 1475m, Population 125,000	
		53	Ngoan Muc Pass			■	■	Pass		
		54	Di Linh District			■	■	Tea-coffee		
		55	Waterfalls along Route 20			■	■	Waterfalls		
				Total Number	4	6	45	30	30	

Note: The following criteria are used for ranking.

Rank	Definition	Resources/Places
Rank 1	Tourism resources which are registered as the World Heritage and represent those in Vietnam	Hue, Hoi An, My Son Phong Nha Cave (Applying for the registration)
Rank 2	Tourism resources/destinations which represent those in Vietnam and are located near airports, accumulated accommodations	Da Nang, Nha Trang, (Da Lat) Bach Ma, Yok (National Parks)
Rank 3	Tourism resources which represent those in each provinces in the Central Region	Refer to the Table

Source: JICA Study Tea

Provinces having potential tourism resources

Based on the tourism resources inventory, provinces which have potential tourism resources can be identified. The followings are criteria to give the comparative values to provinces in the Central.

- Absolute historical tourism resources potential based on the world class values such as World Heritages,
- Accumulation of tourism resources in close range area each other,
- Beach resort tourism potential based on the climate conditions (sunny days, precipitation, typhoon frequency, etc),
- Absolute nature tourism potential based on the Eco-region Critical Area by UNDP and WWF in the Sub-regional Biodiversity Forum and National Park distribution,
- Ethnic tourism resources potential based on traditional tribe distribution, and
- Proximity to major gateway cities with accessible road network.

As the result, TT Hue, Da Nang, Quang Nam are the most potential provinces in terms of combination of various and attractive tourism resources. Khanh Hoa,

Source: JICA Study team

3.2 Tourism Products

“Tourism Products” contains many aspects of tourism activities, such as tour route, facilities, and services for tourists. In this section, the characteristics of tourism products in Vietnam and in the Study Area are analyzed from the point of view of activities by market.

3.2.1 Tour route by source markets

International tourists

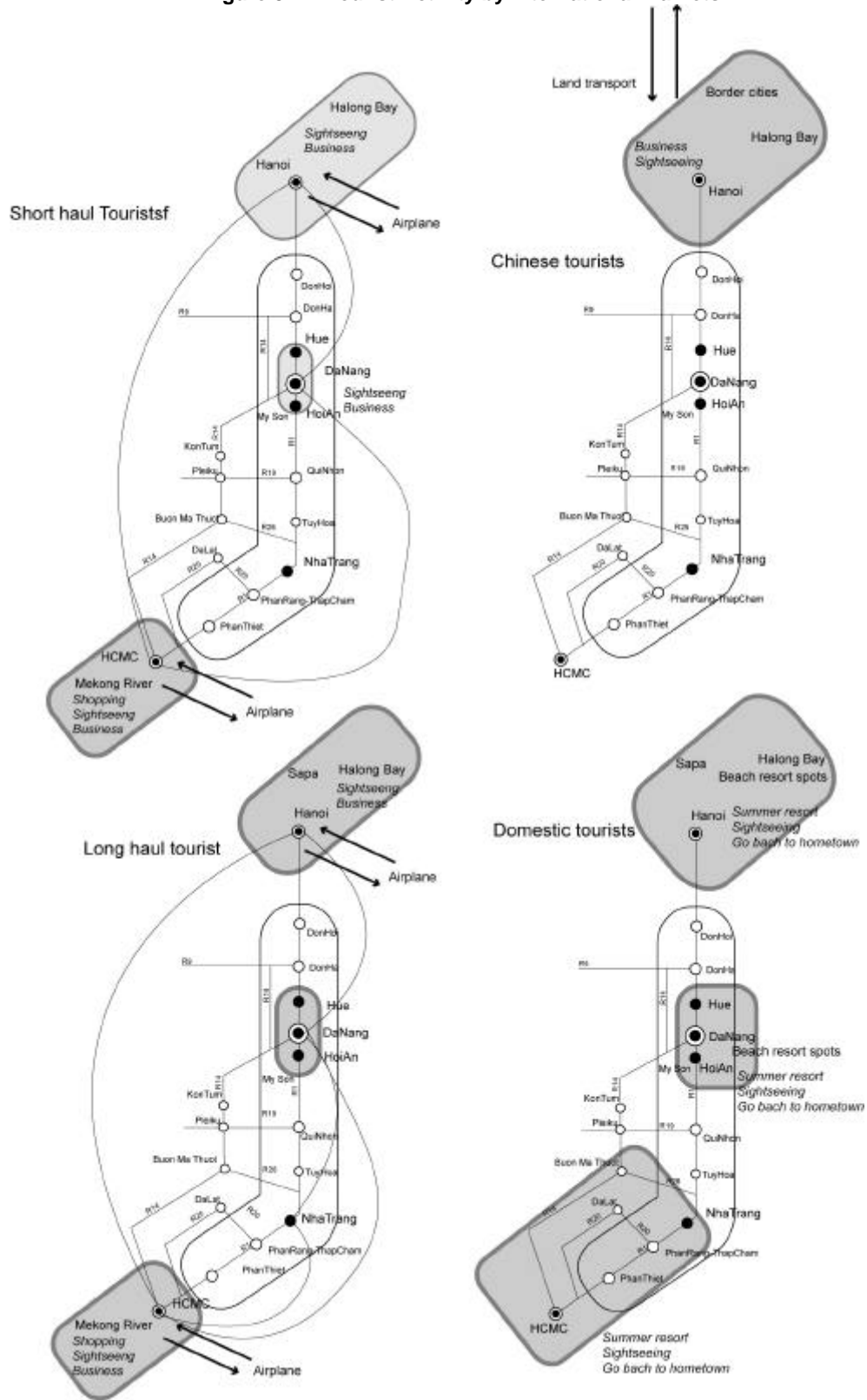
Tourism products for International tourists can be classified into three categories. The first is for long haul tourists, such as French, USA, and other Europeans. The second is for short haul tourists, such as Taiwanese, Japanese and tourists from Asia Pacific countries. The third one is for Chinese tourists. Figure 3.2.1 shows typical tour route for three markets.

Tourists from long haul market stay in Vietnam from 10 days to two weeks. They visit the north, the central and the south region and stay three or four days in each region. Hanoi and Ho Chi Minh City have the roles of gateway and, and Hue and Da Nang have the role of tourist base in the Central. Almost tourists visit two World Heritage site, Hue and Hoi An, and some tourists visit Nha Trang. Some Europeans start visiting Nha Trang and Phan Thiet from October to March.

Almost of tourists from short haul market visit only the South. Their length of stay is from five days to one week. Activities in the South are shopping, sightseeing and Business. Ho Chi Minh City is the only one gateway and tourist base for short haul tourists until now. Some people start to visit tourism destinations such as Hue, Hoi An and Hanoi in the Central and the North now.

The southwest side of the Figure 3.2.1 is tour route of Chinese tourists. Chinese tourists for sightseeing visit only the North until now. They get some kind of ID card at the national borders, and can visit northern than Hanoi. Typical itinerary is to visit Halong Bay, Hai Phong and Hanoi in 3 or 4 days. The other major activity is visiting border cities such as Lao Cai, Mong Cai for sightseeing and business.

Figure 3.2.1 Tourist Activity by International Markets



Source: JICA Study Team

Domestic tourists

Major tour activities of domestic tourists are shown in the southeast side of the Figure 3.2.1. Major source market of domestic tourists is around Ho Chi Minh City in the South, Hanoi in the North, and Da Nang and Hue in the Central. Almost of them visit within their origin regions, and seldom go out of their regions excluding special occasions (for example, honeymoon) and business trip.

There are second peak in domestic tour in a year. First one is the New Year in Vietnam (Tet), and second one is summer. In New Year holiday people go back to their hometown, and in summertime people go to beaches or highlands such as Sapa and Da Lat for summer vacation.

In general companies pay money for the vacation, and workers take their families to the destinations, and stay for three or four days. But in the South, some people start going family trip, and pay themselves.

In the Central, there are two source markets. The first one is Hue and Da Nang, and people visit beach near their cities. The second one is Ho Chi Minh City, and people there make a circuit to visit Nha Trang and/or Phan Thiet.

3.2.2 SWOT Analysis of Tourism Products in the Central

Global analysis of the Tourist Products for the Central Region Tourism is shown in the following the Table 3.2.1.

Table 3.2.1 SWOT Analysis of the Tourism Products for the Central Region

Strength	Unique tourism attractions	Cham remains, Hoi An and historical sites of American war are unique attractions in the Indochina and ASEAN region
	Diversity of ethnic culture	There are 54 ethnic groups in Vietnam and their characteristic cultural features are very competitive attractions in the region.
	Accumulation of tourism products stock	Tourism has been one of the most important social elements and the accumulation of basic tourism system and facilities has been developed all over the country.
	Climate	Central Region has a good climate from December to August and attracts resort tourists who have cold winter.
Weakness	Disadvantage as newcomer country.	As the international tourism has been just started in 1990's, and presentation of destination, skills of guides and service standard are still insufficient for development of international tourism in Vietnam.
	Competition within ASEAN region.	Tough competition within the region, such as Anchor, Bangkok, Chian Mai, Bali and Borobdour, which have been attracting cultural tourists since long time.
	Geographical disadvantage	Far from the national tourist gateways and the tourists have to take very expensive and inexact domestic flights until the Central Region.
Opportunity	Expectable new comer's growth	Fresh impressions of newcomer attract ASEAN and other Asian short haul tourist markets.
	Potential human resources	Human resources in Vietnam have been appreciated as one of the high potential resource of the development.
	Potential extension of length of stay	Geographical diversity of horizontal and vertical changes would give high opportunity to develop various products.
	Expectable growth of Indochina tourism	Vietnam is nowadays a tourism destination for mono destination tour products.
Threatens	Over-development by uncontrolled hotel development.	Each provinces are undertaking resort development without any organized development plan, so that the over development will result danger of good market competition.
	Tourism environment danger by inadequate product development	Unorganized development of tourism products results conflict the tourist market and activities and deteriorate tourism and natural environment.
	Conflict with huge scale development and tourism	Huge shrimp farms and industrial development in the coastal area would affect negative effect to the tourism development and conservation of coastal area.
	Inadequate capacity of transportation.	The expensive and inexact domestic airlines prevent to design the price competitive and attractive tourism products comparing other surrounding tourism destinations.

Source: JICA Study Team, July 2001

3.3 Human Resources

3.3.1 Employment in Tourism

According to data of "Pillars of Development, Vietnam Development Report 2001", employment in hotels & restaurants in Vietnam in 1997 is estimated to be around 520 thousand persons¹. But the figure is seemed to include all restaurants including on the road restaurant for Vietnamese persons.

Human Resource Development Department in Institution for Tourism Development & Research (ITDR) estimated that employment in hotels, tour companies and restaurants for international tourists is about 180 thousand in 2000. The figure is based on the census survey of human resource conducted by Human Resource Development Department of VNAT now, and it is used as

¹ There is no information about employment including private sector in Statistical Yearbook.

the base for formulating the future training plan. This classification of employment is defined as the “Direct & Indirect Employment” in this report.

As shown the Table 3.3.1, direct & indirect employment per hotel rooms is increasing to 2.6 in 2000. The share of Direct & Indirect Employment in the Population of Work Ages is very low level, only 0.2 percent.

Table 3.3.1 Direct & Indirect Employment and the Number of Hotel Rooms

	Unit	1996	1997	1998	1999	2000
Direct & Indirect Employment	persons	98,700	130,000	132,000	150,000	180,000
No of Hotel Rooms	rooms	55,600	56,000	60,300	63,580	68,000
Direct & Indirect Employment per Room	persons	1.8	2.3	2.2	2.4	2.6
Share of Direct & Indirect Employment in Population of Work Ages	percent					0.2

Note: Population of Work Ages is total of persons from 15 years old to 59 years old.

Source: Data from VNAT
Statistical Yearbook
JICA Study Team

JICA Study Team had interview survey to hotel managers in Hanoi, Hue, Da Nang, Hoi An, Nha Trang, Phan Tiet and Ho Chi Minh City, in order to get information about character of hotel guest, procurement of material, utilization of infrastructure, etc. Information on Human Resource Development is also asked in the interview.

The Table 3.3.2 shows the summary of the employment of hotel, defined as Direct Employment, methods of recruiting, and methods of training.

Table 3.3.2 Employment and Training in Hotel

	North	Central	South
Direct Employment	- 0.7 to 1.7. - No relationship between hotel classification and Direct Employment	- 0.9 to 1.6 in class 3 hotels - 0.5 to 0.8 in class 2 and 1 hotels	- 1.1 to 2.6. - High figures in beach resort (Phan Tiet)
Methods of Recruiting	- Staff: graduates from tourism school - Managers: University graduates, both of tourism faculty and other faculties	- Staff: graduates from tourism school - Managers: University graduates, both of tourism faculty and other faculties	- Staff: from local - Graduates of Tourism School operated by Saigon Tourist - Managers: University graduates, other than tourism faculties
Methods of Training	- On the Job Training - Internship	- On the Job Training - Training at tourism school operated by Saigon Tourist	- On the Job Training - Training in international hotel chain system

Source: JICA Study Team

Direct Employment seems to be around 1.3 to 1.5 in general. Hotel managers, especially in the South Region said that staff is recruited from local, from the point of the contribution to the regional economy and the cooperation with local partner. In the South Region, in which severe competitions among state owned hotels, joint venture hotels, and foreign capital hotels occur, hotel managers didn't appreciate tourism schools and tourism faculties of universities very much expecting tourism school operated by Saigon Tourist. And they prefer to

recruit the graduates of other than tourism faculties, and train themselves.

On the job training is the major method of training in three regions, and some international hotel chains utilized their networks for trainings.

3.3.2 Education and Training Capacity for the Sector

Improvement in both the quality and quantity of human resources available in the tourism industry is essential, both nationally and in the Central region. The system is currently well positioned as high levels of literacy and improving education levels provide an excellent base from which to develop the human resources for the tourism industry. However, there are both insufficient levels of trained personnel available to the tourism industry, and there is insufficient training capacity within the system to generate the required trained new entrants, particularly at the management level. The quality level of tourism services is currently low. Higher levels of foreign language competency, as well as professional occupational skills are required.

Human resource development has been identified by the JICA Study Team as a precondition for successful development of the tourism industry in the Central Region. The training demand has been identified as a result of expected employment generation – 194 personnel in hotel management are required for the central region per year during 2000-2010, and 387 per year during 2010-2020. In tour guiding, 241 are required per year during 2000-2010 and 542 per year between 2010 and 2020.

Table 3.3.3 Training Requirement per Annum for Management Level in the Hotel Industry in the Central Region

	Management Level to be trained per annum in the Central Region	
	During 2000-2010	During 2010-2020
Classified Hotels	155	314
Unclassified Hotels	39	73
Total	194	387

Source: JICA Study Team

Training capacity in the Central region is low. VNAT operates three Tourism Training Schools, but only one, Hue, is in the central region. All VNAT schools provide entry-level training in hotel and restaurant operations. The VNAT Hue Tourism School was established in 2001 with funding from the Duchy of Luxembourg. Additional capacity is now required to train middle management in tourism and other non-hotel occupations such as tour guides. In the central region, current capacity for training management is only at bachelor degree level at university and is less than 300 per year (approximately 10%). There is no capacity in the central region for training supervisor to middle-management level.

Table 3.3.4 VNAT Tourism Training School Capacity (graduates 2001)

Course	Level	VNAT Training Schools			Saigontourist School
		Han	Hue	Vung Tau	HCMC
Front Office	1 Yr	200	22	150	198
	2 yr	417	38	190	175
Housekeeping	1 Yr	250	24	120	**
	2 yr	461	-	150	**
Food/Beverage	1 Yr	300	53	150	329
	2 yr	407	58	400	238
Commercial Cookery	1 Yr	*	40		178
	2 yr	*	60		-
Other	1 Yr	100	-	160	53
	2 yr	241	-	-	318
TOTAL		2376	162	1320	1489

Source: VNAT; Saigontourist

Notes: * Hanoi Tourism School combines Food and Beverage and Commercial Cookery in the one course
** HCMC combines Front office and housekeeping in the one course

Senior management training is currently well catered for with 15 universities producing 3,230 hotel and tourism management graduates. Approximately 13,500 students are currently enrolled in tourism-related courses at university level, typically in business administration or management areas. Current enrolment at university level in the Central region is 2,700 students, at three universities, one in Hue and two in Da Nang. Data is not collected on graduate destination.

Table 3.3.5 Current Capacity of Higher Education in Vietnam: Tourism-related graduates in 2001

Degree Course	Location of Higher Education Institute			
	Hanoi	HCMC	Central Vietnam	TOTAL
Tourism/Hospitality Management/Administration	1110	1120	650	2880
Other	340	100	-	440
TOTAL	1450	1220	650	3230

There are very few private tourism training providers at the current time. Private provision of education in Vietnam has a recent history although it is increasing rapidly. One large private tourism school in HCMC has developed, specializing in languages and tour guiding, in addition to some tourism course at the private universities. VNAT sees a major role continuing for the VNAT vocational schools in tourism training setting the standards for the industry. However, many enterprises, especially international standard ones, do not fully utilize the public training schools due to quality concerns.

3.4 Geographical Information Database for Tourism Planning

3.4.1 Purpose of Data Base Preparation

For the data base preparations based on the first field survey, the JICA Study Team identified the following descriptions that explain which part of GIS database is prepared during the Study, and which agencies should be responsible for maintaining GIS database.

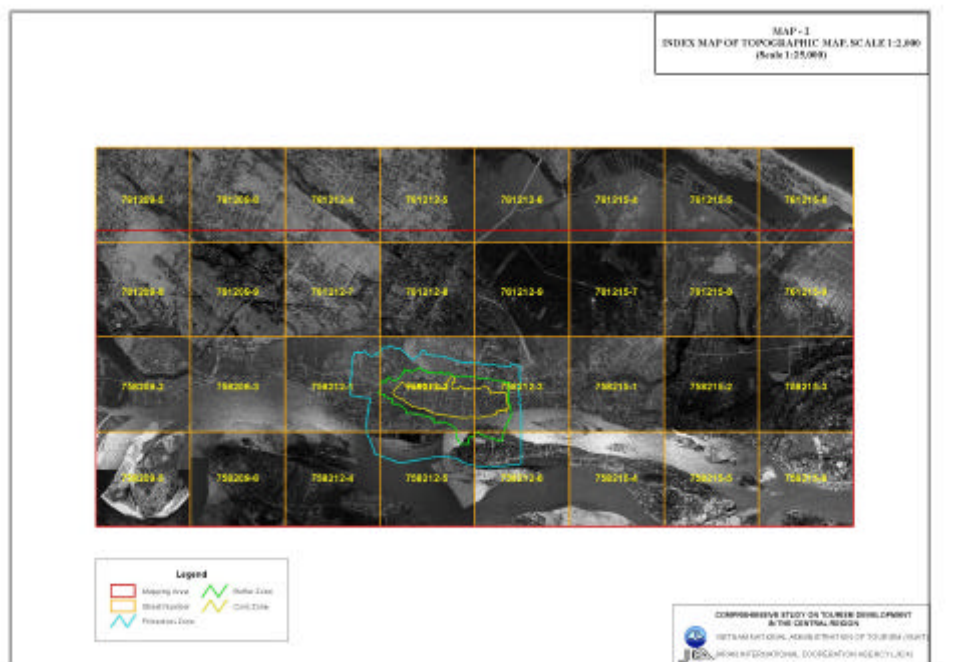
Establishing digital base map, scale of 1:2,000

The study team carried out for digital topographic map of Hoi An town, scale of 1:2,000, established by sub-contract. This digital topographic map is the base for GIS database system. The digital base map plays the roll of fundament to add several attribute information on related fields such as conservation, infrastructure, urban development planning, and so on. The Department of Construction is now making and managing several maps officially. Therefore, the Department of Construction is appropriate to maintain this digital base map.

Establishing GIS data base for monuments management and preservation

The Study Team established GIS database for conservation to support Hoi An Center for Monuments Management and Preservation at the first stage. The Center has been collecting and maintaining inventories of each historical building. Therefore, the Center should be responsible to maintain a part of GIS database related to historical building management. It is important to note that the Study Team will not input all items in the inventory due to limitation of budget and working term.

Figure 3.4.1 Work Area of Digital Topographic Map, Scale of 1:2,000



Source: JICA Study Team

3.4.2 Structure of Data

The Table 3.4.1 is showing GIS database structure.

3.4.3 Database Definition

Digital Base Map, Scale 1:2,000

- Contour line (1m interval)
- Road network (Concrete, asphalt, cart track, foot pass)
- River (River, irrigation canal, well, spring, spillway)
- Existing land use (Existing Land Use Classified Topographic Aspects)
- Other topographic description

Existing Main Infrastructure Layout

- Main electric line
- Water supply main

Land Use Zoning Plan

- Protection plan for the historic town of Hoi An town
- Planning map for reforming and building in the town center of Hoi An town

Outline of Building in Historical Protected Area

- Lot boundary (Core zone)
- Outline of building (Buffer zone, protection zone and others)

Table 3.4.1 Structure of GIS Database Directories

Directories	File Name	Description	Data Source
¥base	¥subject	Small Object	Digital Topographic Map, Scale 1:2000
	¥symbol	Symbol	Digital Topographic Map, Scale 1:2000
	¥height	Spot Height	Digital Topographic Map, Scale 1:2000
	¥contour	Contour Line (1m Interval)	Digital Topographic Map, Scale 1:2000
	¥road	Edge of Roads	Digital Topographic Map, Scale 1:2000
	¥foot pass	Edge of foot passes	Digital Topographic Map, Scale 1:2000
	¥river	Edge of Rivers	Digital Topographic Map, Scale 1:2000
	¥lu2001	Existing Land Use Classified Topographic Aspects in 2001	Digital Topographic Map, Scale 1:2000
	¥index2k	Index Map of Digital Topographic Map, Scale 1:2000	Digital Topographic Map, Scale 1:2000
¥ortho	¥sht_nn.tif	Orthophoto Map made by Aerial photograph taken in 2001	Orthophoto Map, Scale 1:2000
¥boundaries	¥admin	Administrative Boundaries	Hoi An Town's People Committee
	¥district	District (Huyen=Thi Xa Hoi An) Administrative Area	Hoi An Town's People Committee
	¥commune	Commune (Phuong & Xa) Administrative Area	Hoi An Town's People Committee
	¥subcom	Sub-commune (Khoi) Administrative Area	Hoi An Town's People Committee
	¥protection	Protection Plan for the Historic Town of Hoi An Town	Hoi An Town's People Committee
	¥planning	Planning Map for Reforming and Building in Hoi An Town	Hoi An Town's People Committee
¥p_core	¥lot	Lot Boundaries in the Core Center of Protection Plan	Digital Topographic Map, Scale 1:2000
	¥building	Outline of Buildings in the Core Center of Protection Plan	Digital Topographic Map, Scale 1:2000
	¥sss_nnn.jpg	Faced Images in the Core Center of Protection Plan	JICA Study Team
	¥sss_nnn.jpg	Floor Plans and Cross Sections in the Core Center of Protection Plan	Showa Women's University
¥p_buffer	¥lot	Lot Boundaries in the Buffer Area of Protection Plan	Digital Topographic Map, Scale 1:2000
	¥building	Outline of Buildings in the Buffer Area of Protection Plan	Digital Topographic Map, Scale 1:2000
¥infra	¥water	Main Water Supply Lines	Hoi An Town's People Committee
	¥electric	Main Electric Lines	Hoi An Town's People Committee
¥disaster	¥flood	Maximum Height of Historical Flood	JICA Study Team
¥historic	¥historic	Historical Point	Digital Topographic Map, Scale 1:2000
	¥hst_nnn.jpg	Front Snap of Historical Point	JICA Study Team

Source: JICA Study Team

Building characteristics information in historical protected area

- Address
- Type of building use (Public: government office, school, hospital, market, police, emergency, temple/church/chapel and others. Private: hotel, restaurant/bar/coffee, manufacturer, residence and others).

Historical Building

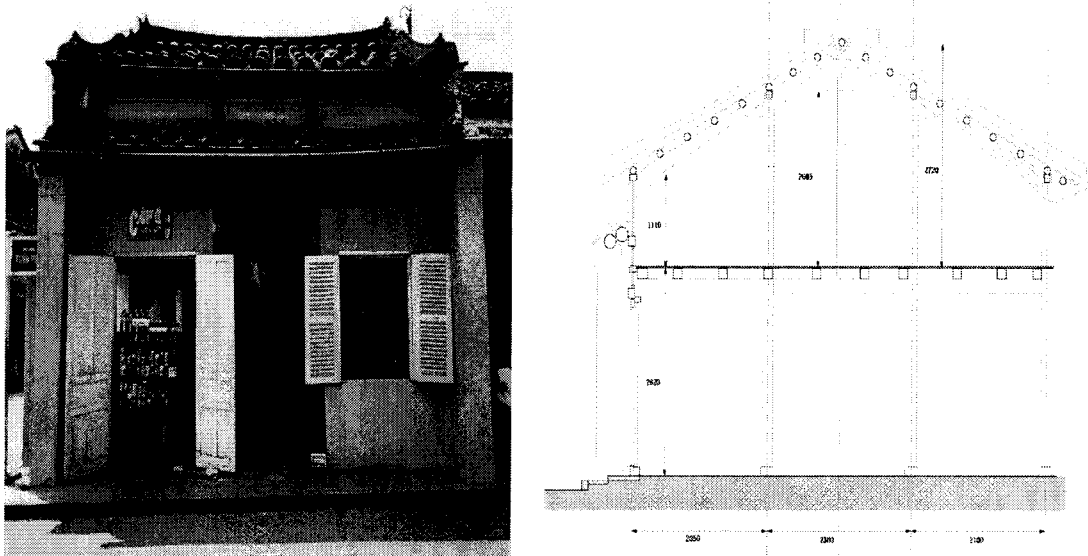
- Rank of historical and architectural importance
- Number of story(s)
- Facade image

3.4.4 Operation and Maintenance Requirement

Providing GIS database for superior administrative agencies

After finishing all processing stages, superior administrative agencies will be provided GIS database by local administrative agencies. They will be able to share information for town management on the GIS database. This database can be used to make several plans not only at the local level but also the national level.

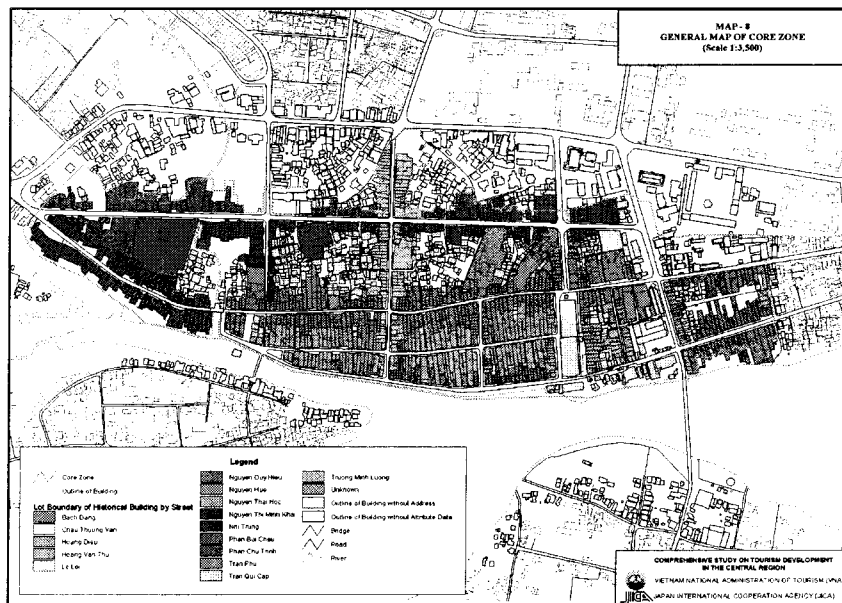
Figure 3.4.2 GIS Work Samples in Tran Phu St. No.53



Source: JICA Study Team

Source: Showa Women's University

Figure 3.4.3 GIS Work Area of Historical and Architectural Importance



Source: Hoi An Town's People Committee

4. Tourism in Greater Mekong Sub-region

4.1 Tourism Market in Greater Mekong Sub-region

4.1.1 Organizations for Tourism Cooperation in GMS

Greater Mekong Sub-region (GMS) consists of Cambodia, Yunnan Province of People's Republic of China, Lao People's Democratic Republic, Myanmar, Thailand and Vietnam. The socio-economic figures and international tourist arrivals in recent years are shown in Table 4.1.1. GMS has the total area of 2.3 million km² and population of 250 million in 1999. The region has a potential of economic development although the some countries have been in stagnation and have not started developing. In general, the living standard of the region is still very low.

Table 4.1.1 Socio-economic Figures and International Tourist Arrivals

	Total area	Total population	GDP per Capita	Growth Rate of Real GDP		Population below poverty line
				%	%	
Unit	000 km ²	Mill persons	US\$	%	%	%
Year		1999	1999	Avg of 97/98	1999	1997/98
Cambodia	181	11.7	254	2.0	5.0	36.1
Yunnan, PRC	394	41.4 ¹	526 ¹	8.7	NA	10.8 ²
Lao PDR	237	5.1	281	5.5	4.0	46.9
Myanmar	677	47.3	NA	5.4 ³	4.5 ³	22.9 ⁴
Thailand	513	62.0	2000	-6.1	4.1	12.9
Vietnam	332	79.3 ¹	354	6.3	4.4	37.0

Note: ¹ Data in 1998.

² Fiscal year ending 31 March.

³ Officially designated as poor in 1997. Population with annual per capita income is below Yuan 640 (about US\$77).

⁴ Refer to another year.

Source: Various ADB Country Assistance Plans 2001-2003, Asian Development Outlook 2000 by ADB, China Statistical Yearbook 1999, and Human Development Report 2000 by UNDP

Since 1992 the GMS economic cooperation program has been conducted with the support of Asian Development Bank (ADB). In order to ensure effective implementation of projects and programs, six countries set up a working group and forums. Tourism is positioned as one of the engines of the growth of economic development in GMS. The Working Group on Tourism is also established and supported by ADB and Economic and Social Commission for Asia and the Pacific (ESCAP) and Pacific Asia Travel Association (PATA). The Agency for Coordinating Mekong Tourism Activities (AMTA) is established in the Tourism Authority of Thailand. The Working Group had 12 meetings by April 2001. In the working group meetings, members discussed cooperation for tourism promotion¹, training of personnel in tourism industry², and regional tourism development. They in particular discussed Mekong/Lancang River Tourism Development and Tourism Development in the East-West Corridor.

¹ AMTA prepares for a printed material "Mekong Tourist Map" for tourism promotion. It prepares for a web site for promote tourism in GMS (<http://visit-mekong.com/i>).

² ESCAP established the Network of Asia-Pacific Education and Training Institutes in Tourism (APETIT) in 1997, with the aim of strengthening the tourism training, education and research institutes in the region.

4.1.2 Market Potential of GMS

As shown in Table 4.1.2, international tourist arrivals in the GMS excluding Yunnan Province were 11.0 million in 1999; 75% of the total visited Thailand. The share of Vietnam is only 14%, however it marked the second rank in the region. Even though international tourist arrivals in the other countries of the region are still low level at present, they have started rapid growth.

In the definition³ by WTO, China as a whole nation is included in the GMS. Therefore, international tourist arrivals to the GMS will account for 185 million, and 130 million will be generated only in China in 2020. This is the reason that international tourist arrivals to China are excluded in Table 4.1.2 and Table 4.1.3.

Table 4.1.2 International Tourist Arrivals in the GMS

(Unit: thou persons)

	1995	1996	1997	1998	1999	AGR (%)
Cambodia	220	260	219	286	368	10.8
Lao PDR	060	93	193	200	259	34.0
Myanmar	117	172	189	201	198	11.1
Thailand	952	7,244	7,294	7,843	8,651	4.5
Vietnam	1,351	1,607	1,716	1,520	1,782	5.7
Total	8,700	9,376	9,611	10,050	11,258	

Note: * AGR means Annual growth rate from 1995 to 1999.
Source: Compendium of Tourism Statistics 2001 edition by WTO

WTO also prepares for forecasts of tourist arrivals in the world, regions and special regions up to 2020. The most recent forecast was published in December 1999. The effect of Asian Financial Crisis was considered in the forecast. International tourist arrivals are forecasted as their special regions, and Table 4.1.3 shows the international tourist arrivals by years estimated by the JICA Study Team.

Table 4.1.3 Forecast of International Tourist Arrivals in GMS

	Units	1995	2000	2010	2020
International tourist arrivals in GMS	mill persons	9	13	27	55
Share in the world market	percent	1.6	1.9	2.7	3.5
Share in the Asia Pacific market	percent	11.1	13.9	13.7	13.9

Note: Italic figures are estimated by JICA Study Team
Source: Tourism 2020 vision by WTO 1999

The share of international tourist arrivals to the GMS in the world will increase from 1.9% in 2000 to 3.5% in 2020. Otherwise, the share in Asia Pacific Region will be constant at the rate of 14% after year of 2000.

4.2 Tourism Attractions and Cross Border Tour

4.2.1 Tourism Attractions and Potentials in GMS

Major tourism attractions and potentials in the GMS are shown in Table 4.2.1.

³ In fact WTO defines six countries as Mekong Countries in "Tourism 2020 vision".

GMS countries already have rich tourism products and potential resources for the future develop. In such circumstance, Vietnam has tourism products and resources as much as Thailand, which has the biggest position in GMS.

Although tourism development in the GMS will support tourism development in Vietnam partly, it may generate new competitions within the GMS countries. Especially, the competition in beach resort tourism and ethnic minority tourism will get intense. In the South East Asia, Thailand, Malaysia and Indonesia were successful in beach resort development and got their position as beach destinations. Thailand has three resorts: Phuket (20,000 rooms in 1999), Samui (8,000 rooms) and Pattaya (24,000 rooms). Malaysia has three: Langkawi (9,000 rooms), Penang (9,000 rooms) and Tioman (9,000 rooms). Indonesia has two: Bali (35,000 rooms) and West Nusa Tenggara (5,000 rooms). Natural condition (climate, etc.), price of tour products and the combination of other tourism products such as historical tourism are the key for beach resort tourism for Vietnam.

Table 4.2.1 Tourism Attractions in the GMS

Country	Tourism attractions	G	C	N	B	O	Resources
Cambodia	Angkor Wat Complex Phnom Penh City Siem Reap						<i>Beach resort</i>
Lao PDR	Luang Prabang Vientiane						Pakse/Wat Phu (C)
Myanmar	Yangon Bagan Mandalay						<i>Ethnic minority tourism</i> <i>Beach resort</i>
Thailand	Bangkok Sukhothai Ayuthaya Ban Chiang Thungyai-Hoaitkhaeng <i>Phuket</i> <i>Samui</i> <i>Pattaya</i>						Chiang Mai (G) <i>Chiang Rai (O)</i>
Vietnam	Hue Hoi An Halong Bay My Son Hanoi Ho Chi Minh City Mekong Delta Nha Trang Sapa						Cham tourism (C) <i>Nha Trang (B)</i> <i>Phan Tiet (B)</i>
Yunnan	Li Jiang Kunming Dali						<i>Ethnic minority tourism</i> Historical & culture tourism

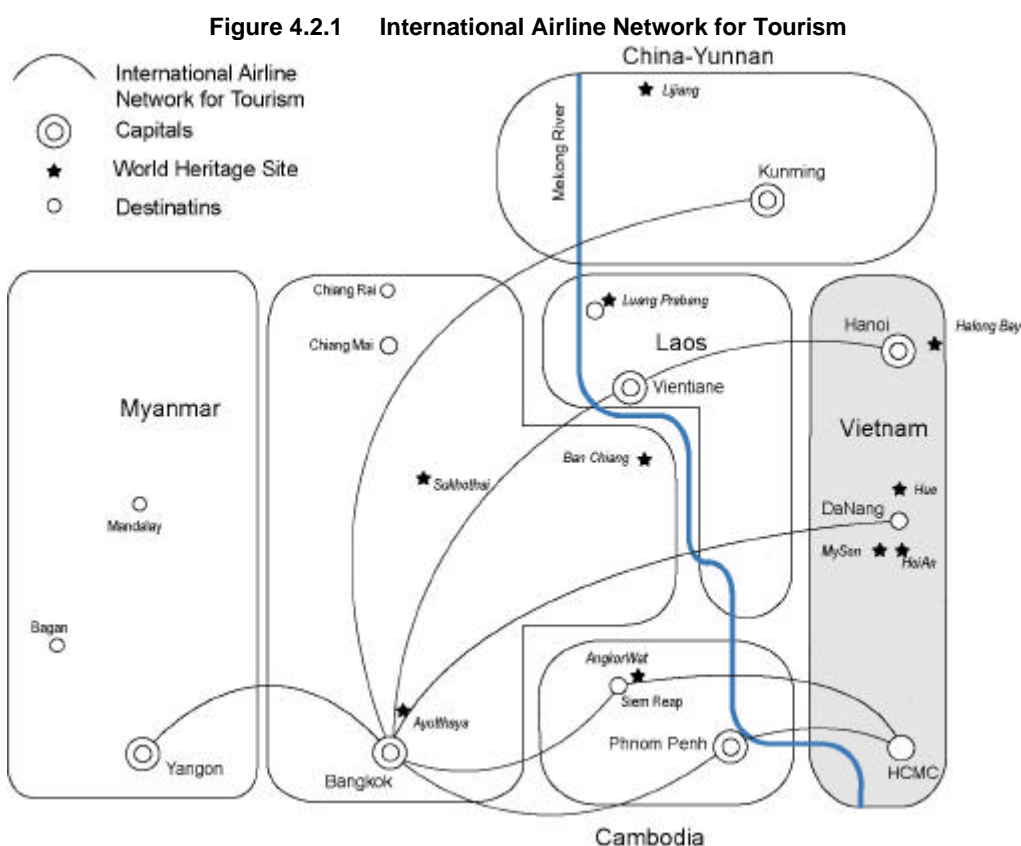
Note: G: Gateway/Urban amenity, C: Culture, N: Nature, B: Beach Resort, O: Other
Bold character means the World Heritage and Italic character means competitor of Vietnam.

Source: Mekong Tourist Map by AMTA

Figure 4.2.1 shows an international airline network for tourism in the GMS based on the analysis of tour programs in each country and multi-countries. Bangkok is working as a gateway of Cambodia, Yunnan, Lao PDR and Myanmar.

On the other hand, an international airline linkage in Vietnam is limited. Some

tour programs are connecting Vietnam with Lao PDR and Cambodia by flights between Hanoi and Vientiane as well as between HCMC and Phnom Penh or Siem Reap.



Source: JICA Study Team

4.2.2 Cooperation and Competition in GMS

As described in the previous chapter, tourism development in the GMS will partly support tourism development in Vietnam and make the competition among the GMS countries intense. The JICA Study Team had interviews with AMTA and a tour company, which plans and sells tour products in the GMS and clarifies the cooperation and competition among the GMS countries more.

(1) Tourism development of Thailand

Tourism in Thailand, which accepts 77 percent of international tourists in the GMS, is formulating the north-south network through Bangkok, Ayuthaya, Sukhothai, Chiang Mai, and Chiang Rai, and will extend to Yunnan, and Myanmar. Bangkok has already been working as a gateway of Yunnan and Myanmar.

(2) Weakness of tourism in Vietnam

In Vietnam most beaches have rainy season from October to March when the European market is in the high season. The number of hotels, in which

international tourists can stay, is very limited, especially in the Central Region.

Fifty percent of long haul international tourists who visit Vietnam go through all over of the country from the north to south or from the south to north, and stay there at least for one week. People who visit both Vietnam and other countries are very limited.

(3) East-West Corridor as a tour product

Development of the East-West Corridor is the most visible regional cooperation in GMS until now. Development and improvement of road and bridge is going on, and regional development will start from now. VNAT is interested in tourism development in the East West Corridor, but tourism development for international market is difficult due to the following matters.

The first one is limited tourist resource in the northeast part of Thailand and central part of Lao PDR. The second one is the issuance of VISA and the limitation of passport control point.

Basically, the East-West Corridor will be used as a trade of goods, materials, etc. Therefore, trading of commodities and materials will be active in the East-West Corridor in accordance with the improvement of a road network and with the regional development. Tourism activity for such trading business has potential.

The other potential in the East-West Corridor is tourism for people in the GMS. The East-West Corridor will connect nations of Vietnam, Lao Republic, Thailand and Myanmar. Vietnam has already arranged a non-visa agreement with Thailand. Expansion of such agreement with other countries and easy passport control in control points are necessary if the GMS countries wish tourism development for the GMS by themselves. Exchanges of personnel and opinions at the local government level are also needed. Agreement of sister cities/towns will be the first step of such exchanges.