

8.5.10 Phu Yen Province

Provincial Context

Socio-economic and Tourism Conditions 1999

Socio-economic condition		Tourism Conditions	
Population: person	787,000	Major Tourism Resources	<ul style="list-style-type: none"> • Nhan Tower (Champa Archeological Site) • Deo Ca Hon Nua Cultural-Historical Site • Mon Beach, Bang Beach • Krong Trai Nature Reserve • Dai Lanh Cape, Hon Nua Island
Population density: person/km ²	149		
GRDP per capita: US\$	260		
Sector GRDP: agriculture (share %)	33.4		
: fishery, forestry	9.4		
: industry	17.4	Hotel Guests (international guest)	64,368 (4,291)
: services, retail	39.8	Hotel Bed-nights (ave. length of stay)	64,368 (1.0)

Source: Statistical Year Book 1999, General Statistical Office, Phu Yen Province.

Tourism Product and Target Market Direction

Tourism Product Formulation and Market Preference

Product Category	Major Tourism Product to be formulated	Market Preference		
		International	Chinese	Domestic
Nature Tourism and Soft Adventure	Nature Reserve wildlife expedition	○ (SIT)	—	○
	Da Rang River cruising tour	—	—	⊗
	Mountain nature, Dam recreation tour	—	—	⊗
	Hot spring recreation tour	○ (SIT)	—	⊗
	Coastal area sightseeing tour	—	—	⊗
Beach Recreation /Resort	Beach recreation in Song Cau district	○	—	●
	Beach recreation in Tuy Hoa district	○	—	●
Cultural Historical Sightseeing Tour	Champa Archeological sites visit	○ (SIT)	—	○ (SIT)
	Vietnam War's memorial places	○ (SIT)	—	●
	Vung Ro Bay/Deo Ca Hon historic tour	—	—	●
	Ethnic Minority Villages tour	○ (SIT)	—	⊗
Event Festival	Village traditional festivals	⊗ (SIT)	—	●

Note: ● = First Priority, ⊗ = Secondary, ○ = Tertiary, — = Low priority, SIT = Special Interest Tours

Source: JICA Study team.

Development projects and programs

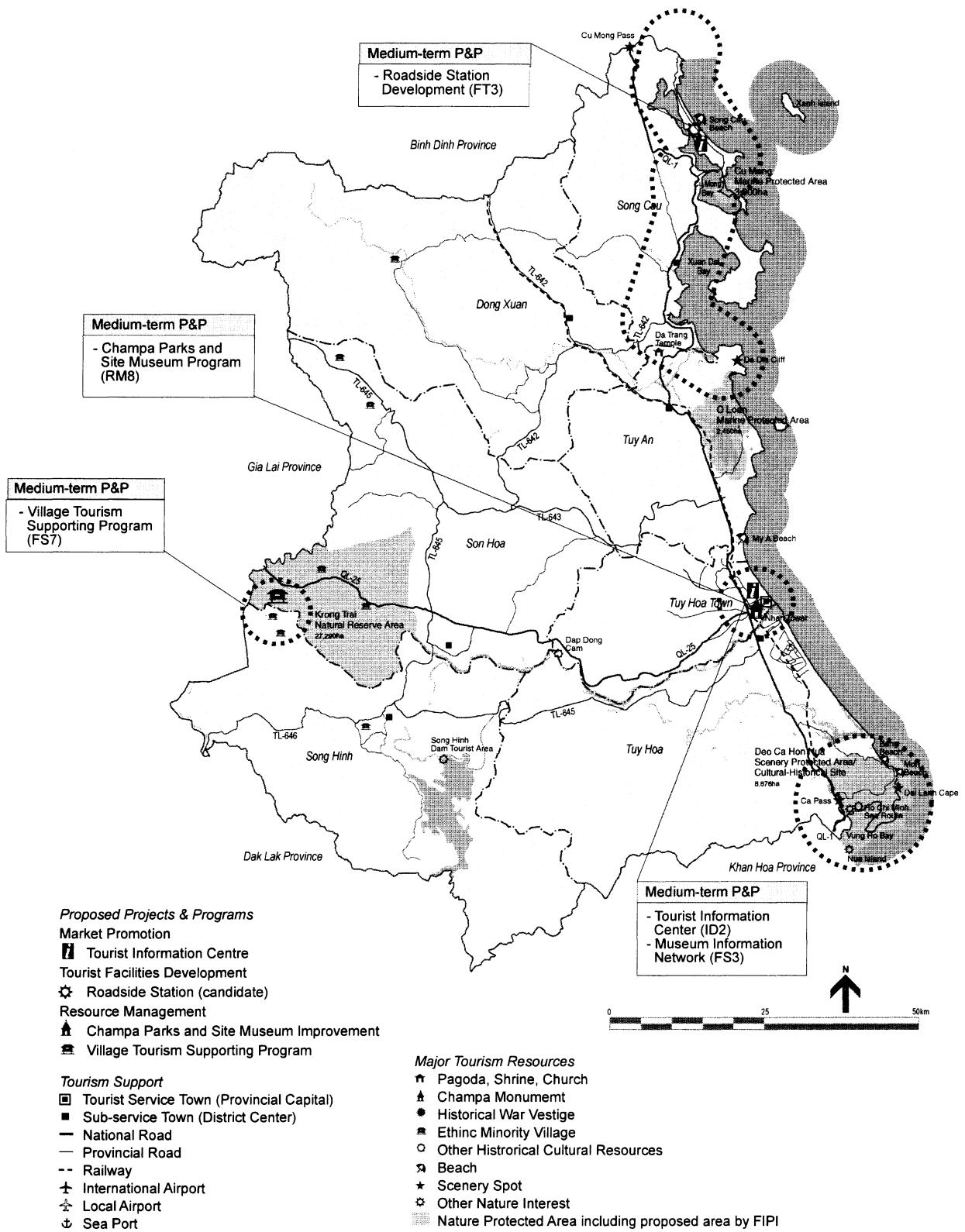
Proposed Development Projects and Programs

Category	Plans & Programs	Location	Development Phase			Implementation Body
			Short	Medium	Long	
ID2	Tourist Information Center (TIC)	Tuy Hoa City	□	■		Phu Yen (PY) Ps'C
FT3	Roadside Station Development	Phu My district	□	■		PY Ps'C/ MOC
FS3	Museum Information Network	Tuy Hoa Museums	□	■		PY Ps'C/ MOCI
RM2	Village Tourism Supporting Program	Handicraft villages selected	□	■		PY Ps'C/ MARD
RM8	Champa Parks and Site Museum Program	Nhan Champa Sites	□	■		PY Ps'C/ MOCI

Note: □ = Preparation, ■ = Implementation, ID = Institutional Development

Source: JICA Study team.

Figure 8.5.8 Proposed Development Plan for Phu Yen Province



Source: JICA Study team

8.5.11 Khan Hoa Province

Provincial Context

Socio-economic and Tourism Conditions 1999

Socio-economic condition		Tourism Conditions	
Population: person	1,031,300	Major Tourism Resources	<ul style="list-style-type: none"> • Po Nagar (Champa Archeological Site) • Thap Ba Festival at Po Nagar • Nha Trang Beach, Dai Lanh Beach • Hon Mun Marine Protected Area with Islands • National Institute of Oceanography
Population density: person/km ²	196		
GRDP per capita: US\$	378		
Sector GRDP: agriculture (share %) : fishery, forestry	13.9		
: industry	40.3	Hotel Guests (international guest)	344,414 (100,987)
: services, retail	35.8	Hotel Bed-nights (ave. length of stay)	695,304 (2.0)

Source: Statistical Year Book 1999, General Statistical Office, Khan Hoa Province.

Tourism Product and Target Market Direction

Tourism Product Formulation and Market Preference

Product Category	Major Tourism Product to be formulated	Market Preference		
		International	Chinese	Domestic
Nature Tourism and Soft Adventure	Hon Mun Marine Area sightseeing tour	●	⊙	●
	Hon Mun Marine diving / fishing tour	● (SIT)	—	○ (SIT)
	Ben Goi - Nha Phu Bay sightseeing tour	○	—	⊙
	Thap Ba hot spring sanatorium	○	○	●
	Cai River cruising trip	○	○	●
	Mountain nature (stream, falls) recreation	—	—	●
Beach Recreation / Resort	Nha Trang beach resort-recreation	●	●	●
	Doc Let , Dai Lanh beach recreation	●	—	⊙
	Ben Goi Bay diving / fishing tour	○ (SIT)	—	○ (SIT)
Cultural Historical Sightseeing Tour	Po Nagar Champa site visit	●	⊙	●
	Modern Historical Expedition tour	—	—	●
Event Festival	Thap Ba Festival at Po Nagar	○	○	●
	International Marine Sports Event	⊙ (SIT)	⊙ (SIT)	●
	International Convention and Exhibition	⊙ (SIT)	⊙ (SIT)	⊙ (SIT)

Note: ● = First Priority, ⊙ = Secondary, ○ = Tertiary, — = Low priority, SIT = Special Interest Tours

Source: JICA Study team.

Development projects and programs

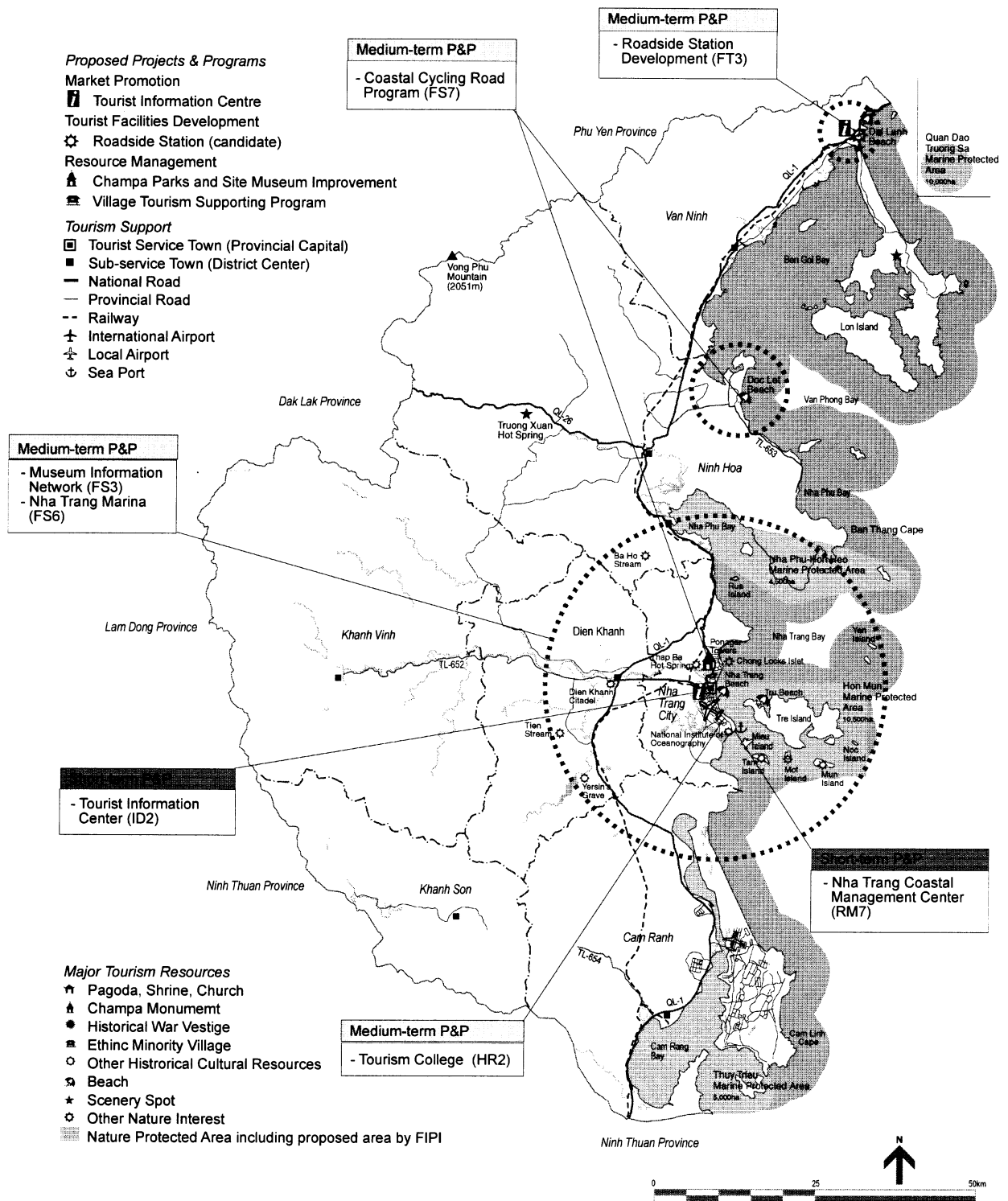
Proposed Development Projects and Programs

Category	Plans & Programs	Location	Development Phase			Implementation Body
			Short	Medium	Long	
ID2	Tourist Information Center (TIC)	Nha Trang City	■			Khanh Hoa(KH)Ps'C
HR1	Tourism College	Nha Trang City	□	■		VNAT/ KH Ps'C
FT3	Roadside Station Development	Dai Lanh coast area	□	■		KH Ps'C/ MOC
FS3	Museum Information Network	Museums in Nha Trang City	□	■		KH Ps'C/ MOCI
FS6	Nha Trang Marina	Nha Trang City	□	■		KH Ps'C / MOT
FS7	Coastal Cycling Road Program	Nha Trang, Doc Let Beach	□	■		KH Ps'C / MOC
RM7	Nha Trang Coastal Management Center	Nha Trang City	■			KH Ps'C / MOSTE
RM8	Champa Parks and Site Museum Program	Nhan Champa Sites	■	■		PY Ps'C/ MOCI

Note: □ = Preparation, ■ = Implementation, ID = Institutional Development

Source: JICA Study team.

Figure 8.5.9 Proposed Development Plan for Khanh Hoa Province



Source: JICA Study team

8.5.12 Ninh Thuan Province

Provincial Context

Socio-economic and Tourism Conditions 1999

Socio-economic condition		Tourism Conditions		
Population: person	505,200	Major Tourism Resources	<ul style="list-style-type: none"> • Po Klong Garai (Champa Site) • Kate Ceremony at Po Klong Garai • Ninh Chu – Binh Son Beach, Ca Na Beach • Vinh Hy Bay, Rung Kho Nature Reserve • Nature Reserve 	
Population density: person/km ²	196			
GRDP per capita: US\$	290			
Sector GRDP: agriculture (share %)	30.9			
: fishery, forestry	11.6			
: industry	13.1	Hotel Guests (international guest)	28,958 (4,050)	
: services, retail	44.4	Hotel Bed-nights (ave. length of stay)	45,525 (1.6)	

Source: Statistical Year Book 1999, General Statistical Office, Ninh Thuan Province.

Tourism Product and Target Market Direction

Tourism Product Formulation and Market Preference

Product Category	Major Tourism Product to be formulated	Market Preference		
		International	Chinese	Domestic
Nature Tourism and Soft Adventure	Nature Reserve wildlife expedition	○ (SIT)	—	○
	Cai River cruising tour	—	—	⊙
	Tan my A Hot spring recreation tour	○ (SIT)	—	●
	Vinh Hy bay sightseeing tour	○	—	⊙
Beach Recreation /Resort	Ninh Chu-Binh Son beach recreation	○	—	●
	Ca Na beach recreation / resort	⊙	○	●
Cultural Historical Sightseeing Tour	Po Klong Garai Champa sites tour	●	⊙	●
	Porome, Hoa Lai Champa site visit	○ (SIT)	—	⊙
	Handicrafts village expedition tour	○	—	⊙
	Cham Ethnic Minority Villages tour	○ (SIT)	—	⊙
Event Festival	Kate Ceremony at Po Klong Garai	○ (SIT)	—	●
	Village traditional festivals	⊙ (SIT)	—	●

Note: ● = First Priority, ⊙ = Secondary, ○ = Tertiary, — = Low priority, SIT = Special Interest Tours

Source: JICA Study team.

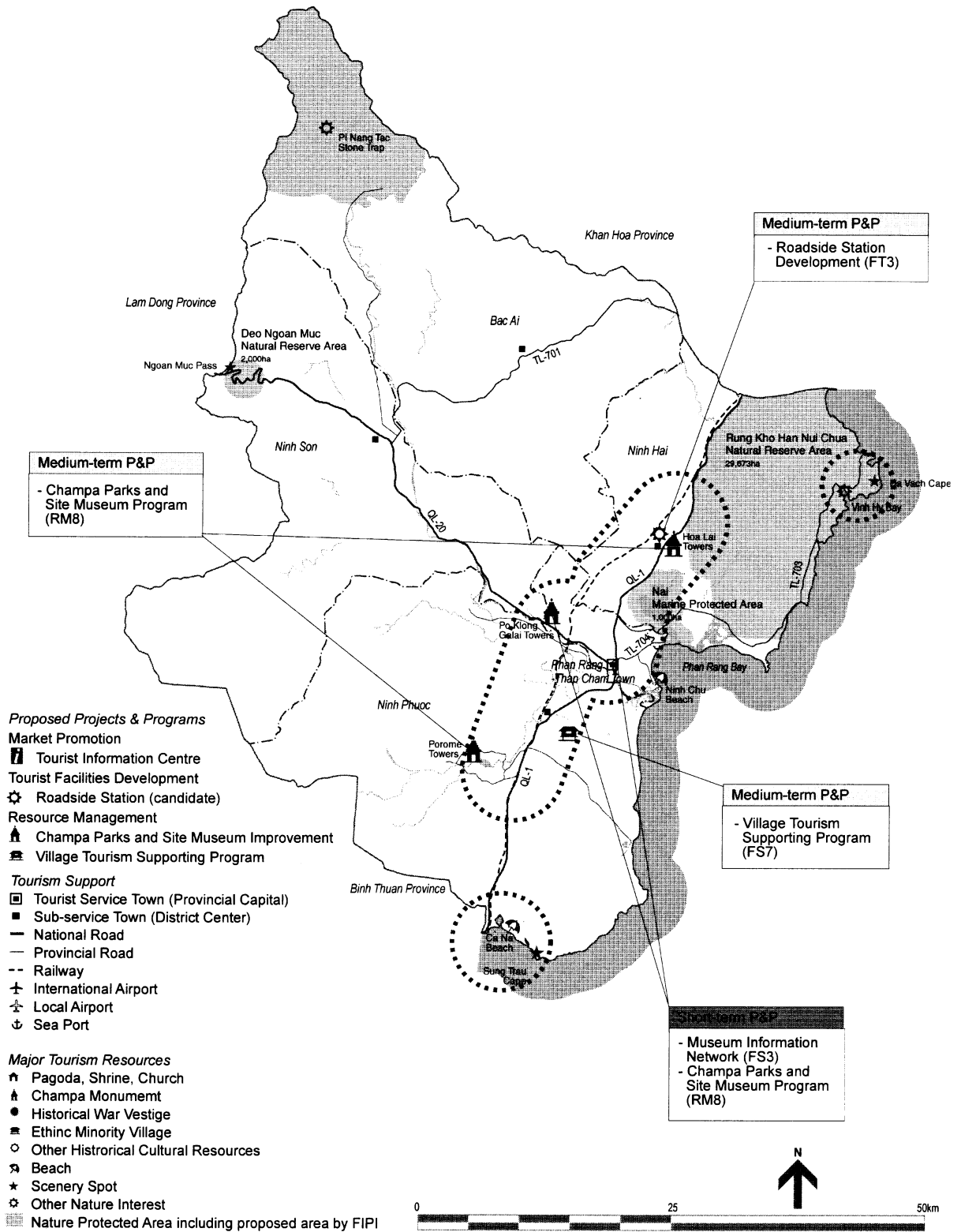
Development projects and programs

Proposed Development Projects and Programs

Category	Plans & Programs	Location	Development Phase			Implementation Body
			Short	Medium	Long	
ID2	Tourist Information Center (TIC)	PhanRang Town ThapCham	□	■		Ninh Thuan (NT) Ps'C
FT3	Roadside Station Development	Hoa Lai site	□	■		NT Ps'C/ MOC
FS3	Museum Information Network	Ninh Thuan Museums	■			NT Ps'C/ MOCI
RM2	Village Tourism Supporting Program	Handicraft villages selected	□	■		NT Ps'C/ MARD
RM8	Champa Parks and Site Museum Program	3 Champa Sites	□	■		NT Ps'C/ MOCI

Note: □ = Preparation, ■ = Implementation, ID = Institutional Development, FT = Transportation Improvement, FS = Service Facilities Development, RM = Resource Management Source: JICA Study team.

Figure 8.5.10 Proposed Development Plan for Ninh Thuan Province



Source: JICA Study team

8.5.13 Binh Thuan Province

Provincial Context

Socio-economic and Tourism Conditions 1999

Socio-economic condition		Tourism Conditions		
Population: person	1,047,000	Major Tourism Resources	<ul style="list-style-type: none"> • Posha Nu, • Cham Royal Family Collection • Rang Beach, Mui Dien - Ke Ga Beach • Ta Cu Nature Reserve, Ta Cu Temple • Cau Island, Ca Na Beach 	
Population density: person/km ²	131			
GRDP per capita: US\$	304			
Sector GRDP: agriculture (share %)	25.7			
: fishery, forestry	16.8			
: industry	12.8	Hotel Guests (international guest)	74,602 (21,745)	
: services, retail	44.7	Hotel Bed-nights (ave. length of stay)	127,396 (1.7)	

Source: Statistical Year Book 1999, General Statistical Office, Binh Thuan Province.

Tourism Product and Target Market Direction

Tourism Product Formulation and Market Preference

Product Category	Major Tourism Product to be formulated	Market Preference		
		International	Chinese	Domestic
Nature Tourism and Soft Adventure	Nature Reserve wildlife expedition	○ (SIT)	—	○
	Ta Cu Mountain, hot springs recreation	○ (SIT)	—	●
	Coastal Dune sightseeing tour	●	⊙	●
Beach Recreation /Resort	Mui Ne coast recreation / resort	●	○	●
	Ca Na-Vinh Hao beach recreation	⊙	○	●
	Ke Ga coast recreation / resort	●	○	●
	Resort sports (Golf, horse riding, etc)	●	○	●
Cultural Historical Sightseeing Tour	Champa sites historical tour	⊙ (SIT)	—	⊙
	Handicrafts village expedition tour	○ (SIT)	—	⊙
	Cham Ethnic Minority Villages tour	○ (SIT)	—	⊙
Event Festival	Village traditional festivals	⊙ (SIT)	—	●

Note: ● = First Priority, ⊙ = Secondary, ○ = Tertiary, — = Low priority, SIT = Special Interest Tourists

Source: JICA Study team.

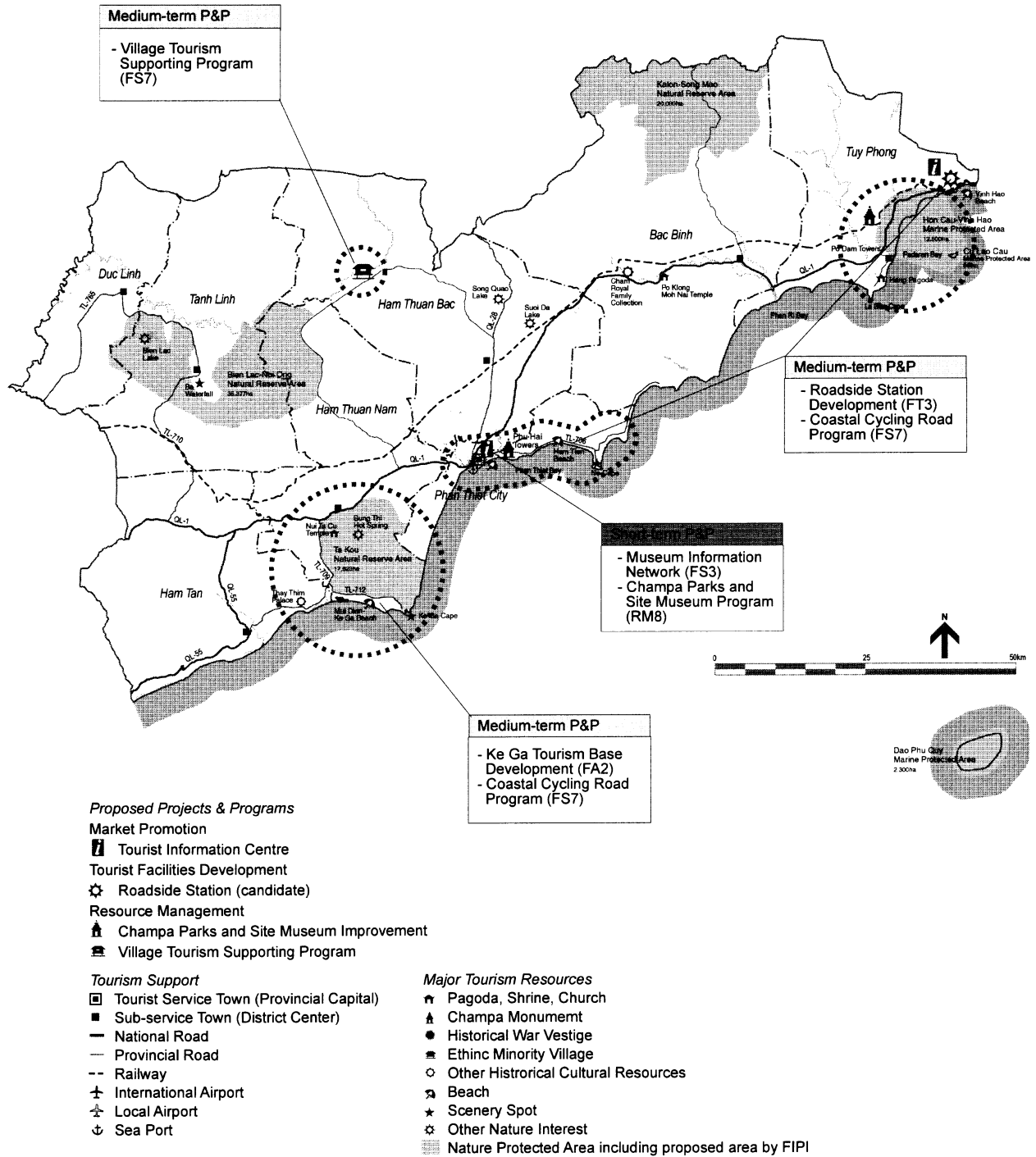
Development projects and programs

Proposed Development Projects and Programs

Cate-gory	Plans & Programs	Location	Development Phase			Implementation Body
			Short	Medium	Long	
ID2	Tourist Information Center (TIC)	Phan Thiet Town	■			Binh Thuan (BT) Ps'C
FT3	Roadside Station Development	Ca Na – Vinh Hao beach	□	■		BT Ps'C/ MOC
FA2	Khe Ga Cape Tourism Base	Ham Thuan Nam distric	□	■	■	BT Ps'C/ Private
FS3	Museum Information Network	Phan Thiet Museums	■			BT Ps'C/ MOCI
FS7	Coastal Cycling Road Program	Mui Ne, Khe Ga Beach	□	■	■	KH Ps'C / MOC
RM2	Village Tourism Supporting Program	Handicraft villages selected	□	■		BT Ps'C/ MARD
RM8	Champa Parks and Site Museum Program	2 Champa Sites	□	■		BT Ps'C/ MOCI

Note: □ = Preparation, ■ = Implementation Source: JICA Study team.

Figure 8.5.11 Proposed Development Plan for Binh Thuan Province



Source: JICA Study team

9. Conclusions and Recommendations

International tourists to Vietnam will total up to 4.2 million persons in 2010 and 8.0 million in 2020. The volume will increase twice in ten years and four times in 20 years. On the other hand, it is estimated that domestic tourist generations are about 10 million in 2000, and this will increase to 50 million in 2020 with an annual average growth ratio of 8.4 percent. Tourist bed nights, including both international and domestic tourists, are estimated to be 28 million in 2000, and it will increase more than four times to 120 million in 2020. As a result, tourism receipts from international and domestic tourists will be also doubled in 10 years from VND 21 trillion to VND 43 trillion.

In the study area tourist arrivals from both international and domestic will be 3.7 million, and total bed-nights will be 6.8 million. Direct and indirect employment in the study area in 2010 will be 50 thousand employees and 120 thousand in 2020.

The spatial framework for the study area is formulated as follows.

- The northern part of the study area, including Hue, Hoi An and My Son, should be consolidated as historical cultural tourism destination with some resort complementarily, and
- The southern part represented by Khan Hoa and Phan Thiet should be enhanced as coastal resort destination with good accessibility and weather condition.

Major issues for institutional development significant for tourism development in Vietnam and the study area are market promotion and advertisement in conjunction with tourist information dissemination and coordination and integration among various government agencies for tourism development. It is recommended to:

- Promote more visitors to come to Vietnam and have them travel extensively within the country.
- Establish an agency, namely Vietnam Tourism Promotion Board (VTPB) under the direction of VNAT, which undertakes promotion and advertisement at the professional level.
- Establish overseas branches of the agency in key source markets to carry out specific and verified promotional activities in their responsible territories.
- Establish Tourist Information Centers (TIC), under the agency, in the three gateway cities and other popular tourist destinations.

The human resource development in the tourism sector is required to improve effectiveness of tourism education and training system and improve quality and quantity of labor force. In order to ensure that training system meets the needs of industry, it is recommended to upgrade tourism training school management to enable the efficient management of training schools as well as development of research into industry training requirements. Establishment of Tourism

Institute of Vietnam in Da Nang and Nha Trang Tourism Collage is proposed.

Facilities development to support tourism development is one of the keys for future tourism product development and tourism promotion.

The transportation facilities, particularly air access, should be urgently improved. It is also recommended to improve a passenger terminal of seaport for international cruise and operate the tourism train between Hue and Da Nang in terms of product development.

Sanitary facilities in urban areas of major destinations should be also improved urgently. Tourist service facilities such as Tourist Information Center, rest facilities, public toilets and public place for tourists are recommended to be developed in every major destination.

Accommodation should fit into proper type as to location condition and product image. It is recommended to develop the coastal area in principle, taking account of demand and market trend.

Environmental conservation and protection from degradation of tourism resources are the key for their sustainable tourism development. Flood mitigation and reforestation for water resource development are necessary for tourism resource management.

Environmental Assessment System should be enforced and improved effectively to mitigate negative impacts of tourism development.

Visitor facilities are proposed to encourage historical and cultural tourism, not only for tourists but also for all visitors of Vietnamese. Site museum in archeological site, visitor center, and handicraft center are proposed to be developed as visitor facilities.

Village tourism and rural development become one of the key development strategies in Vietnam. The following measures should be taken to mitigate social impacts.

- Establishment of systems to coordinate activities among all stakeholders
- Formulation and utilization of village tourism
- Preparation and implementation of evaluation list for tourism development
- Preparation of regulations and rules to protect the social environment

Prevention from water contamination for Da Nang, Hue, Hoi An, Nha Tran cities, and solid waste disposal system for Da Nang, Hue, Hoi An are identified as an urgent action to be taken to prevent negative impact of tourism development. Establishment of an urban management system in Hue and Hoi An Town, land use control for coastal areas in Da Nang and Nha Trang and preparation for visitor center or places at the major tourist towns are proposed.

Twenty-six (26) priority projects and programs are identified. Especially, establishment of VTPB for national tourism promotion, Tourist Information Center and development of Tourism Institute of Vietnam are closely related to

the jurisdiction of VNAT.

The total investment cost required for tourism development in the study area until 2010 is estimated US\$1.3 billion. This cost includes implementation of the proposed projects and programs in the master plan plus investment cost for the accommodation development. On the other hand, amount of economic effects generated by tourism activities is US\$4.6 billion. The ratio of the increase of Value Added to project cost is 5.4. Investment for the tourism development will contribute to the economic development of the Study Area.

Guidelines for tourism development such as Village Tourism and other tourist facilities development are also proposed.