

# Technical Report

## Central Coast Vietnam

## Regional Tourism Product Development

**August 2015**

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# **SECTION 1: BACKGROUND ANALYSIS**

## THE CENTAL COAST REGION

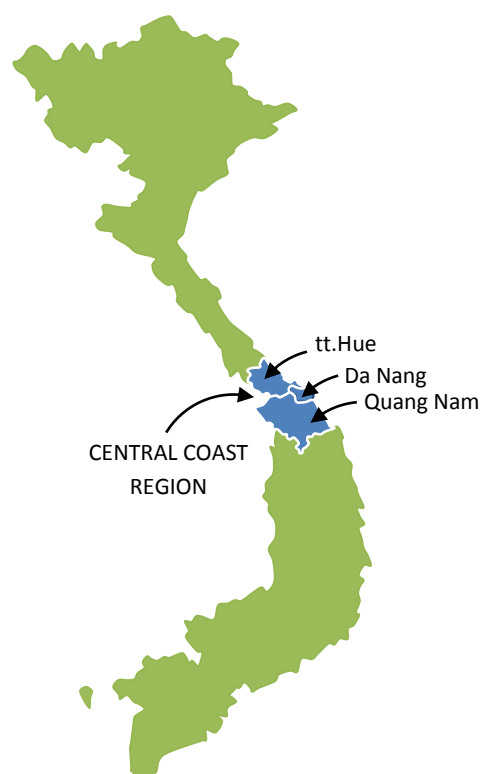
### Location

In this report, the Central Coast region of Vietnam encompasses the three provinces of Thừa Thiên - Huế (tt.Huế), Da Nang, and Quang Nam (see *Figure 1*). Using Da Nang as the central point, the region is located almost squarely between Ha Noi in the north (764 km) and Ho Chi Minh City in the south (964 km).

*Figure 1 Location of Central Coast region*

### Accessibility

Within the broader region, the Central Coast is within a 1.5 hour flight to capital cities in Laos (Vientiane), Thailand (Bangkok), and Cambodia (Phnom Penh), and within a 3 hour flight to capital cities in China (Beijing, Hong Kong), the Philippines (Manila) and Myanmar (Yangon). Malaysia (Kuala Lumpur) and Singapore are just more than 3 hours flight away. The region is also connected to the national train network linking it to Hanoi (13 hours to Hue; 15.5 hours to Da Nang) and Ho Chi Minh City (17 hours to Da Nang; 20 hours to Hue) (see *Figure 2*).



### Geography

The Central Coast region can be generally separated into three distinct geographic regions, a mountainous central and western region (Southern Annamites), a hilly and lowland plains region running down the middle, and a coastal region to the east characterised by rivers, lagoons and beaches. Separating the north and south of the Central Coast is the Truong Son North mountain range which contains many peaks over 1,000 metres high.

### History

In the north, it is understood that civilisations settled within the region some 2,800 years ago. Key historical events that have shaped the region include the reign of the once glorious Indianised Champa Kingdom from the southern (Quang Nam area) from about 875 to about 1000 AD, a period of Chinese colonial rule (mostly in the north) interspersed with Vietnamese dynastic rule from about the 2<sup>nd</sup> Century until the 15<sup>th</sup> Century. Most recently, the region like much of the country, was influenced by some 100 years of French colonial rule from the mid-19<sup>th</sup> to mid-20<sup>th</sup> Century, and finally, suffered brutally from the events of the American war, much of which played out in the Central Coast due to its strategic location between the north and the south.

## Economy

The Central Coast region is strongly driven by the export of agricultural products, forestry products and fishery products as well as manufacturing (e.g. textiles, wood work, fabric, furniture, paper, pottery, food products). Services and trade while growing are overall comparatively small contributors to overall GDP in the region.

## Climate

The Central Coast region has a particularly complicated climate as it forms a transitional zone between the north and south of Vietnam. In general, the region is dry and hot in summer and cool and wet in winter. The dry season is roughly from March to August, with average monthly temperatures of about 30°C. The rainy season is from September to February, although most rain falls between late September and December. During this time storms, typhoons and flooding can also afflict the region's coastal areas while its highland areas can experience freezing conditions.

Figure 2 Proximity of Central Coast to regional capital cities and markets by air



## Tourism products

The Central Coast region has some of Vietnam's most popular and most visited tourism attractions that form a core component of the itineraries of new and repeat visitors alike. The key product lines of the region are summarised below.

### Cultural heritage

There is a range of tangible and intangible cultural heritage spread throughout the Central Coast region, although these are most significantly concentrated in tt.Hue and Quang Nam. Some of the region's key cultural heritage highlights include a World Heritage complex of palace buildings, royal temples, and tombs from the Nguyen dynasty (Hue Citadel), a perfectly preserved South East Asian trading port (Hoi An), and the remains of ancient World Heritage Cham temples (My Son).

### Beaches, lagoons and islands

The region is blessed with beautiful coastal products from north to south although the beaches in the central area of southern tt.Hue, Da Nang, and north Quang Nam are

arguably the most beautiful and are more developed. Highlights include South East Asia's largest lagoon (Tam Giang-Cau Hai), long stretches of internationally acclaimed white sandy beaches (Lang Co Beach, Da Nang Beach, Cua Dai Beach), and coral fringed islands (Cham Islands).

### Natural areas

There are some significant natural areas within the Central Coast that contain important biodiversity and ecological processes (Bach Ma National Park, Ba Na Hills, Son Tra Peninsula). Many of these places also offer visitors good leisure and recreational opportunities including treks to waterfalls with swimming holes, tours of mysterious caves, hikes to spot charismatic, opportunities to soak in natural hot springs, wildlife tours to spot endemic, rare or charismatic flora and fauna, and walks to regional lookouts with panoramic views.

### Rural, minority & craft villages

The Central Coast region contains an interesting mix of rural, ethnic and / or craft villages, with tt.Hue and Quang Nam offering the most options for visitors. The villages may specialise in a specific craft such as pottery or wood carvings (Thanh Ha, Kim Bong), represent an interesting ethnic minority cultural group (A Luoi), or alternatively simply provide an attractive rural village atmosphere (Thanh Toan, Thuy Bieu, Triem Tay).

### MICE

With its strong mix of cosmopolitan river city products including restaurants, bars, beach resorts, international golf courses and a casino, Da Nang is fast becoming a competitive MICE destination for local and regional business related events.

### Spiritual places

Temples and pagodas can be found throughout the region. While these places attract domestic spiritual pilgrims most often at the time of a temple festival, some of the more architecturally interesting temples and pagodas or those that might be located in a spectacular or unusual location, such as the towering mountain top Son Tra Quan Am and the temples and pagodas of Monkey Mountain, also attract non-spiritual visitors.

### Events

There are a number of high profile events in the region that attract a strong amount of domestic visitors as well as international visitors curious to see how the locals celebrate their local culture. Of most significance are the biennial Hue Festival which honours the cultural identity of Hue and the nation through a programme that includes artistic performances, traditional games, and representations of historical events. The Da Nang Fireworks Festival also held every two years, attracts people from all around to watch spectacular firework displays and musical interpretation.

## Rivers

Due to the Annamite mountain along the western edge of the region contains numerous rivers, with the most significant being the Perfume River in tt.Hue, the Han River in Da Nang, and the Thu Bon River in Quang Nam. Many of the region's key tourism products such as the Hue citadel complex, Da Nang city, and Hoi An town are located beside a river which adds another dimension of interest to the visitor experience and enables exploration by boat.

## Cuisine

Central Vietnamese food is often described as being spicier than the north while still retaining some of the French flavours and techniques that are popular towards the south. In particular note is the decorative and colourful food of Hue reflecting the influence of ancient Vietnamese royal cuisine. In Da Nang, fresh and inexpensive seafood is on the top of the 'To Do' list most visitors, while in Hoi An is noted for a number of delicacies such as white Cao Lau (a noodle dish) and white rose (a Chinese style dumpling).

# TOURISM MARKET ANALYSIS

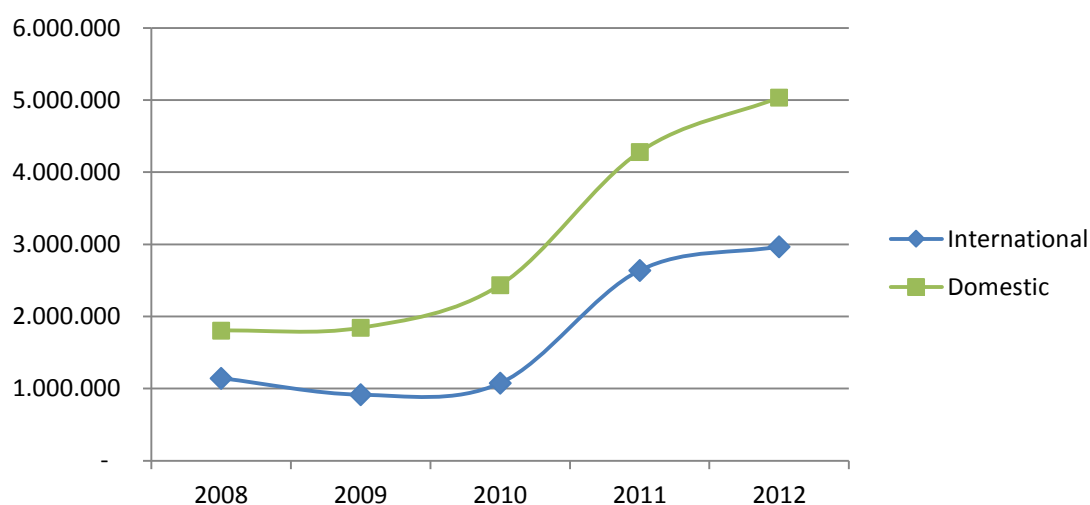
## **Arrivals**

The Central Coast region has enjoyed good growth in international tourism in recent years, growing from some 1.1 million international visitor arrivals and 1.8 million domestic visitor arrivals in 2008, to just short of 3 million international visitor arrivals and just over 5 million domestic visitor arrivals in 2012 (see *Figure 3*).

This represents a total growth of about 160 percent and 180 percent for international and domestic visitor arrivals respectively over the five year period. It should be noted however, that no statistics were provided for Quang Nam between 2008-2010, which would potentially increase the results further.

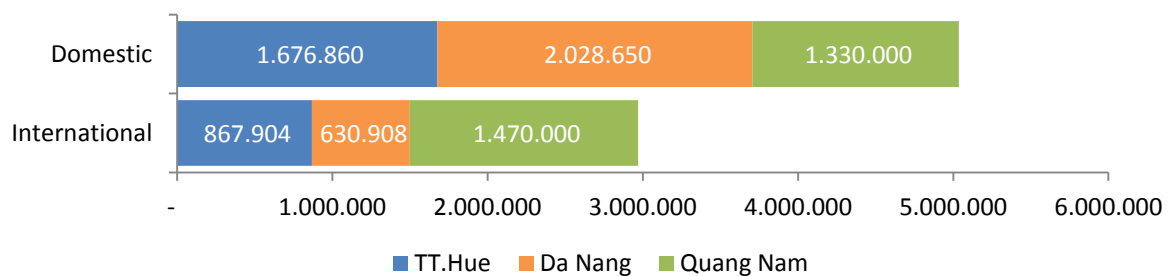
In the more recent years of 2011 to 2012, there has been strong average annual growth of about 13 percent for international visitor arrivals and 18 percent for domestic visitor arrivals.

*Figure 3 Total visitor arrivals to region (combined three provinces) 2008-2012*



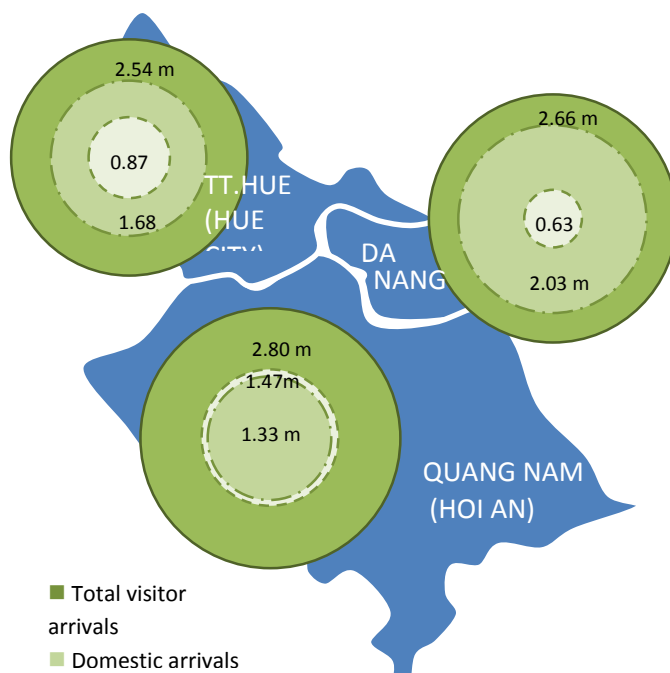
A comparison of international and domestic visitor arrivals to the Central Coast region in 2012 is provided in *Figure 3* *Figure 4*. Like most tourism destinations in Vietnam, domestic visitor arrivals by far outweigh international visitor arrivals. The combined total of visitor arrivals to the region was just over 8 million visitors in 2012 of which just under two-thirds (63 percent, 5.0 million) were domestic arrivals, and one-third (37 percent, 3 million) were international arrivals.

*Figure 4 International vs. domestic visitor arrivals to region (combined three provinces) in 2012*



In relation to arrivals according to each of the three provinces, there is a fairly even split, with tt.Hue receiving about 2.54 million visitors, Da Nang receiving about 2.66 million visitors, and Quang Nam receiving about 2.8 million visitors in 2012 (see *Figure 5*). Of more interest is the domestic-international split, with Quang Nam clearly attracting more international visitors (about 50 percent of all international arrivals to the entire region), while tt.Hue and Da Nang are stronger for domestic visitors (about 75 percent of all domestic visitor arrivals to the entire region).

*Figure 5 Visitor arrivals according to province 2012*



## Length of stay<sup>1</sup>

There is distinct variation in the length of stay for visitors to the region, with Da Nang and Hoi An both receiving a considerably higher portion of day trippers (16-18 percent), while only about 2 percent of visitors to Hue are on a day trip.

Overall, Da Nang is achieving the highest visitor length of stay, with domestic overnight visitors staying an average 3.3 nights and international overnight visitors staying an average 6.0 nights. Although domestic overnight visitors to Hoi An stay an average of just 1.8 nights, international overnight visitors more than compensate, staying an average of 5.6 nights. In Hue there is room for improvement, with the average length of stay for domestic and international overnight visitors being just 2.4 nights.

Table 1 Visitor length of stay according to province

	DOMESTIC			INTERNATIONAL		
	Hue	Da Nang	Hoi An	Hue	Da Nang	Hoi An
<b>Day trippers</b>	4.8%	6.3%	34.0%	2.2%	15.8%	18.0%
<b>Avg. o/night stay</b>	2.4 nights	3.3 nights	1.8 nights	2.4 nights	6.0 nights	5.6 nights

## Destinations visited<sup>2</sup>

Overall, both domestic and international visitors are most strongly attracted to the region's cultural heritage sites with mausoleums, temples, and ancient villages being the most commonly visited destinations across all three provinces. Beaches and islands are the second most type of destination visited in the region. In Hoi An, coastal destinations feature most strongly with beaches and islands visited by about half of all visitors, although Cham Island is of much stronger interest to the domestic market. In Da Nang, there is greater diversity in the types of destinations visited once cultural heritage and coastal places are taken out of the equation. In Da Nang, visitors are also attracted to seeing the Han River Bridge and visiting the nature / leisure destination of Ba Na Hills.

Table 2: Most visited destinations in region according to province

	Domestic	International
<b>Hue</b>	<ul style="list-style-type: none"> <li>• Mausoleums</li> <li>• Shopping</li> <li>• Lang Co Beach</li> <li>• Religious places</li> </ul>	<ul style="list-style-type: none"> <li>• Mausoleums</li> <li>• Hon Chen temple</li> <li>• Phuoc Tich ancient village</li> </ul>

<sup>1</sup> Statistics have been sourced from a comprehensive survey conducted by ESRT in 2014 of visitors in key destinations in Hue City, Da Nang city, and Hoi An. The sample included over 600 respondents from each destination (at least 300 domestic and 300 international respondents).

<sup>2</sup> See previous

<b>Da Nang</b>	<ul style="list-style-type: none"> <li>• Han River Bridge</li> <li>• My Khe Beach</li> <li>• Ba Na Hills and Non Nuoc Stone Village</li> </ul>	<ul style="list-style-type: none"> <li>• Pagoda / temples</li> <li>• Beaches</li> <li>• Han River Bridge</li> </ul>
<b>Hoi An</b>	<ul style="list-style-type: none"> <li>• Hoi An ancient town</li> <li>• Cua Dai Beach</li> <li>• Cham Island</li> <li>• My Son</li> </ul>	<ul style="list-style-type: none"> <li>• Hoi An ancient town</li> <li>• Cua Dai Beach</li> <li>• My Son</li> <li>• Cham Island</li> </ul>

### Activities undertaken<sup>3</sup>

Not surprisingly, with cultural heritage sites being the most visited destinations in the region, most activities undertaken by visitors relate to touring cultural heritage sites or enjoying a cultural performance.

Enjoying the local cuisine also features prominently. This is particularly the case for Hue, with enjoying the local cuisine appealing strongly to both domestic and international visitors, whereas only domestic visitors are strongly engaging in enjoying the local cuisine in Da Nang and Hoi An.

Coastal leisure and recreation are also popular activities (e.g. swimming, diving, snorkelling), in particular in Da Nang and then Hoi An.

In Hue enjoying a boat cruise is also a popular activity for both domestic and international visitors. There is thus some room for Da Nang to improve its performance in relation to boat cruises, given the Han River is a strongly visited destination yet undertaking a boat cruise is not a highly popular activity.

Table 3: Most popular activities undertaken by visitors according to province

	<b>Domestic</b>	<b>International</b>
<b>Hue</b>	<ul style="list-style-type: none"> <li>• Tasting local cuisine</li> <li>• Huong River Boat cruise</li> <li>• Enjoying royal court music performance</li> <li>• Visiting traditional house</li> </ul>	<ul style="list-style-type: none"> <li>• Tasting local cuisine</li> <li>• Huong River Boat cruise</li> </ul>
<b>Da Nang</b>	<ul style="list-style-type: none"> <li>• Swimming</li> <li>• Tour of Marble Mountain temples and pagodas</li> <li>• Tour of Son Tra peninsula</li> <li>• Tasting local cuisine</li> </ul>	<ul style="list-style-type: none"> <li>• Tour of Marble Mountain temples and pagodas</li> <li>• Swimming</li> </ul>
<b>Hoi An</b>	<ul style="list-style-type: none"> <li>• Tasting local cuisine</li> <li>• Tour of World Heritage sites</li> <li>• Scuba diving / snorkelling</li> </ul>	<ul style="list-style-type: none"> <li>• Tour of World Heritage sites</li> <li>• Getting tailor made clothes</li> </ul>

<sup>3</sup> See previous

## Visitor preferences<sup>4</sup>

Good quality nature / landscape is the most important requirement for both domestic and international visitors to the region, followed by ensuring an attractive atmosphere. Given the key activities and destinations attracted to the region's visitors, it can be assumed that this primarily relates to the region's ocean, beaches, islands and rivers. Good dining, ensuring value for money and a nice climate and also important requirement for both domestic and international visitors. Meeting these expectations will be critical to ensuring continual visitor satisfaction in the region.

Table 4: Top 5 most important visitor requirements of tourism in region according to province

		<b>Domestic</b>	<b>International</b>
<b>Hue</b>	1.	Nature / landscape	Atmosphere
	2.	Dining	Nature / landscape
	3.	Value for money	Dining
	4.	Atmosphere	Accommodation
	5.	Climate / weather	Value for money
<b>Da Nang</b>	1.	Nature / landscape	Nature / landscape
	2.	Climate / weather	Atmosphere
	3.	Value for money	Climate / weather
	4.	Dining	Dining
	5.	Atmosphere	Value for money
<b>Hoi An</b>	1.	Nature / landscape	Nature / landscape
	2.	Atmosphere	Atmosphere
	3.	Dining	Dining
	4.	Climate / weather	Accommodation
	5.	Value for money	Climate / weather

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<sup>4</sup> See previous

## **SECTION 2: IDENTIFICATION & ASSESSMENT OF PRIORITY TOURISM PRODUCTS**

## PRIORITY PRODUCTS

As a result of round table meetings with industry and the Departments of Culture, Sports and Tourism (DCST) of tt.Hue, Da Nang and Quang Nam, a number of key product lines were selected to be prioritised for each province at the regional level, these are:

Table 5 Top 5 product lines as prioritised by tt.Hue, Da Nang and Quang Nam DCSTs

Rank	tt.Hue	Da Nang	Quang Nam
1.	Cultural heritage	Beaches	Cultural heritage
2.	Beaches & lagoons	Cultural heritage	Beaches & islands
3.	Natural areas	Natural areas	Natural areas
4.	Rural, ethnic & craft villages	Rivers	Rural, ethnic & craft villages
5.	Spiritual places & events	MICE	Cuisine & festivals
6.	Rivers		

As can be seen, all three provinces have identified cultural heritage, beaches / lagoons / islands and natural areas as top three product lines, with rural / ethnic / craft villages, rivers, and festivals / events also featuring as key product lines for two provinces (Quang Nam, tt.Hue).

Within the five product lines, each of the three provincial Product Development Technical Working Groups (TWGs) next evaluated their strongest products in order to identify the products which should be considered as “Primary” and “Secondary” at the Regional level. The identified products were then tested to assess commercial viability with tourism industry stakeholders in three separate industry roundtable meetings held in each of the three provinces in mid-July 2015. From this, the following Primary products were identified (see Table 6).

Table 6: Regional level primary tourism products identified from three-province DCST and industry roundtable meetings

	PRODUCT	PROVINCE
<b>Coast &amp; Islands</b>	My Khe & Pham Van Dong Beach	Da Nang
	Cua Dai & An Bang Beach	Quang Nam
	Cham Islands	Quang Nam
<b>Culture</b>	Hue Heritage Complex (including Royal Music)	tt.Hue
	Perfume River tombs & temples	tt.Hue
	Marble Mountains	Da Nang
	Cham Museum	Da Nang
	Hoi An Town	Quang Nam
	My Son Sanctuary	Quang Nam
	Hue cuisine	tt.Hue
	Thanh Tan Hot Springs	tt.Hue
<b>Nature &amp; CBT</b>	Son Tra Peninsula	Da Nang
	Ba Na Hills	Da Nang
	Thu Bon River Craft Villages*	Quang Nam
	Thanh Toan Village	tt.Hue

\*Includes: Thanh Hà, Kim Bồng, Trà Quế, Làng Trầm Tây

The remaining products that were not identified as Primary were then designated Secondary status at the Regional level. Secondary products include:

- **Coast & islands:** Lăng Cô Beach (tt.Huế)
- **Culture:** Thánh Duyên Temple (tt.Huế), Huế Ancient Garden House (tt.Huế), Cultural & religious festivals (tt.Huế, Đà Nẵng, Quảng Nam), Huế Temple (tt.Huế), Phước Tích Cultural Village (tt.Huế), Đà Nẵng Museum (Đà Nẵng), Hội An Cuisine (Quảng Nam), Chu Lai War Site (Quảng Nam)<sup>5</sup>
- **Nature & CBT:** Hải Vân Pass (Đà Nẵng), Than Tai Hot Springs (Đà Nẵng),<sup>6</sup> West Quảng Nam Nature Area (Quảng Nam), Bho Hoong Cultural Village (Quảng Nam),<sup>7</sup> Phu Ninh Lake (Quảng Nam),<sup>8</sup> Bach Ma National Park & Nam Dong Cultural Village (tt.Huế)<sup>9</sup>
- **Rivers:** Hàn River (Đà Nẵng)
- **MICE:** Products and services catering to business travellers (Đà Nẵng)

## PRODUCT ASSESSMENTS

The tourism products that have selected for assessment are primarily based on the results of the DCST Round Table discussions and the Industry Round Table discussions (i.e. the regional Primary products). As the assessment methodology is based upon evaluating tourism products that are “destinations”, cuisine and festivals have not been included. The evaluations are based upon site visits conducted by the consultants in May - June 2015, prior visits made by the consultants on other occasions, prior product assessments conducted by other stakeholders, and the consultants’ own desk research.

Assessment of the tourism products was conducted using the ESRT Responsible Tourism Product Assessment Criteria. This approach considers the following criteria:

- **Core product features:** Accessibility, attractions, activities, amenities, supporting services
- **Characteristics:** Authenticity, distinctiveness, variety, seasonality, product function, lifecycle stage
- **Market considerations:** Key target markets, market size, market trends and influence
- **Commercial viability:** Market-based planning, private sector engagement, supportive regulatory context, necessary supporting resources

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<sup>5</sup> Added to list by consultants, considers industry feedback from Roundtables

<sup>6</sup> See previous

<sup>7</sup> See previous

<sup>8</sup> See previous

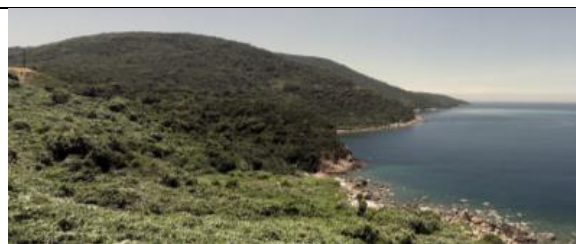
<sup>9</sup> See previous

- **Sustainability:** Economic, environmental, socio-cultural, institutionalisation, sector functioning
- **Local benefits:** Equitable sharing of costs, benefits and access, local involvement/ownership, poverty reduction
- **Human resources / capacity:** Public Sector, businesses, local communities

## Son Tra Peninsula

### Summary

The perfect get-a-way from Da Nang City. At Son Tra visitors can explore narrow jungle roads by motorbike, hike through the jungle in search of the Red Shanked Doucs, relax at a number of picturesque beaches, or visit the soaring Linh Ung pagoda and take in its spectacular 180 degree views.



### Location

Da Nang City, Da Nang Province

### Core product features

- Highly accessible by road in good condition (10 km from Da Nang city). However numerous sections of the road in peninsula can be difficult / dangerous to drive (e.g. narrow, no safety barriers / road lines, steep gradients, jungle overgrowth).
- Very high quality core attraction of natural environment combined with spectacular setting / location (panoramic views of beaches, ocean, Da Nang City, inland mountainous rainforests). Taken in via a coastal driving route with basic lookouts, and a 4-5 hour jungle walking trail.
- Reasonable range of supporting attractions and activities, most notable are its beaches (bai's) for swimming, snorkelling, picnics and fishing (Bai But, Bai Rang, Bai Nam, Bai Con, Bai Bac, Tien Sa Beach), flora and fauna (including the rare but relatively easily spotted Red Shanked Doucs), and soaring mountaintop Linh Ung pagoda. Some war history but only limited physical remains.
- Basic range of ancillary services including 2 international standard resorts, a number of local seafood restaurants and cafes, and some very basic snack and souvenir stalls. No welcome / interpretive centre, high quality restaurants.

### Characteristics

- Iconic, flagship (primary) product for Da Nang. Defines Da Nang skyline. Nature in good condition. Quite unique nature escape in increasingly urbanised coastline.
- Mix of attractions and activities (trekking, motoring, swimming, picnicking fishing, etc.) add some depth to the experience, but significant room for improvement and enhancement.
- Wet season restricts many outdoor activities and also can make driving dangerous.

### Market

- Attractive to significant and growing domestic day trip / weekend break markets (Da Nang city, Quang Nam, and tt.Hue), as well as Hanoi and Ho Chi Minh city family holiday market. Strong appeal to international markets ("Classic" package travellers, as well as nature and adventure travellers from North America and Europe).

### Commercial viability

- There is a comprehensive strategic vision developed for Son Tra that outlines development (land and water based activities, infrastructure, etc.), however currently limited significant funding / investor to bring the plan into reality.
- Signs of good interest by the private sector, with 2 international standard resorts already operating. With the nature officially under conservation, investor interest in developing other nature-based tourism projects appears good.
- While Son Tra is well supported as a priority product in provincial tourism master plan, a military base and telecommunications infrastructure restrict freedom of movement of visitors and limit full development potential.

### Sustainability

- Limited local population in area so no significant negative socio-cultural issues. Designated protected area helps control development and visitor impacts. Bai's with restaurants, resorts and public beaches susceptible to litter and pollution (solid waste and waste water). Physical damage to seating and shelters noticeable at lookouts and Banyan Tree. Critical to implement impact assessments and sustainable operation regulations for all future investment projects, as well as develop and implement an M&E plan with indicators and thresholds of acceptable change.

### Local benefits

- No formal plan to support participation and benefit of local community in operation of nature reserve. Benefits restricted to employment in 2 resorts, operation of a few local seafood restaurants and mixed businesses, and operation of a number of snack food and souvenirs stands.

### Human resource development

- Local businesses and community members could benefit from training in product development, customer service, English speaking, and F&B service. Local authorities could benefit from training in protected area planning, M&E, community co-management planning

## Marble Mountains

<p><b>Summary</b> Located in outer districts of Da Nang city, the small collection of low rising peaks that comprise the Marble Mountains contain several Buddhist and Hindu sanctuaries built from the 7-19<sup>th</sup> Century. Visitors can explore the mountains through a network of caves and tunnels and also take in panoramic views of Da Nang city and the coast.</p>	
<p><b>Location</b> Ngu Hanh Son Ward, Da Nang City, Da Nang Province</p>	
<p><b>Core product features</b></p> <ul style="list-style-type: none"> <li>Highly accessible by road in good condition (9 km south from Da Nang city). A glass walled elevator provides good access for less mobile visitors, although there are still many steps to be climbed from the elevator. Steps are wide but slippery in wet weather. Sufficient parking area.</li> <li>Reasonable main attraction of a cluster of low rising mountains featuring caves as well as ancient and more recently built pagodas and temples.</li> <li>Relatively limited range of supporting attractions and activities that can only keep visitors interested for a few hours; most notable being visiting marble factories / stores, enjoying district and coastal views (somewhat spoilt by urban sprawl) and attending spiritual festivals. Some war history but no physical remains.</li> <li>Basic range of ancillary services on-site and nearby including low quality local restaurants and cafes and some very basic snack and souvenir stalls. No welcome / interpretive centre.</li> </ul>	<p><b>Commercial viability</b></p> <ul style="list-style-type: none"> <li>Managed by a Marble Mountains Managing Board and supported in provincial tourism master plan encourage private sector investment.</li> <li>Reasonable support from private sector mostly evident through the promotion of package tours to the mountains, operation of marble factories / souvenir shops around the mountains and the vending of snack foods both on- and off-site. A number of adventure tour operators also offer rock climbing experiences on the mountains.</li> </ul>
<p><b>Characteristics</b></p> <ul style="list-style-type: none"> <li>Although highly promoted and overall well-preserved, the mountains are neither unique nor iconic, with bigger and more ornate caves, mountains and temples found elsewhere.</li> <li>Urban sprawl around the foot of the mountains and aggressive local vendors selling generic, sometimes over-priced marble products (with questionable local authenticity) risk tarnishing the experience for international visitors. The ramshackle parking and retail area around the main entrance detracts first impressions.</li> <li>During peak season crowding is an issue and in the low season rain both detracts from the experience and may place visitor safety at risk.</li> </ul>	<p><b>Sustainability</b></p> <ul style="list-style-type: none"> <li>During the peak season there are issues of overcrowding, noise and litter. These can also create safety issues. Managing capacity will be an increasing issue as visitation grows. No apparent socio-cultural issues, although the local vendors are employing aggressive sales techniques which may affect enjoyment by some visitors.</li> <li>Initiatives have been implemented to control negative visitor impacts such as provision of brochures that communicate messages that ban activities such as inscription and damage to cave walls, littering, and extraction of flora and fauna. During the site visit however, these initiatives were not evident.</li> <li>Will be important for managing board to develop and implement an M&amp;E plan with indicators and thresholds of acceptable change.</li> </ul>
<p><b>Market</b></p> <ul style="list-style-type: none"> <li>Attractive to the significant domestic self-organised family group holiday makers from Hanoi and HCMC, as well as club / association / company (MICE) package tour groups. More limited interest to international markets ("Classic" package travellers, cultural heritage travellers, (half) day trippers from Da Nang and Hoi An.</li> </ul>	<p><b>Local benefits</b></p> <ul style="list-style-type: none"> <li>No formal plan to support participation and benefit of local community. Some employment of local people as guides. Most opportunities relate to sale of marble / souvenir products and snack food on- or off-site.</li> </ul> <p><b>Human resource development</b></p> <ul style="list-style-type: none"> <li>Local businesses and community members could benefit from training in product development, and customer service. Local authorities and staff could benefit from training in on site guide training and English speaking skills, heritage site M&amp;E, and heritage site interpretation.</li> </ul>

## My Son

### Summary

Mỹ Sơn is a cluster of abandoned and partially ruined Hindu temples constructed between 4-13<sup>th</sup> Century AD by the kings of Champa dedicated to the worship of the god Shiva. UNESCO world heritage classified My Son was the religious and political capital of the Champa Kingdom for most of its existence and thus the most important archaeological site in Vietnam.



### Location

Beside Duy Phú Village, Duy Xuyên District, Quảng Nam Province

### Core product features

- Reasonable accessed by road in good condition (69 km from Da Nang, 38 km from Hoi An). Excellent high capacity parking area. Good sealed, wide footpath from car park to archaeological site. Access around the site is reasonable along dirt and sealed paths.
- Excellent main attraction being the archaeological Champa temple ruins which although damaged, are being sensitively preserved. Supporting the attraction are an excellent visitor information centre, a nature trail, and a cultural performance centre. There is also a local restaurant and café / souvenir shop on site. Some tours from Hoi An include a boat trip to get to the destination which add to the overall experience.

### Characteristics

- Highly authentic UNESCO world heritage site of centre of the Champa Kingdom identified with “Outstanding Universal Value”. A masterpiece of brick construction of the period (construction technology, intricacy / design).
- While monuments have suffered damage over time, restoration has been sympathetic, and they remain in the original natural setting. Challenges in competing with higher profile and more extensive temple ruins in region, most notably Angkor Watt.
- Not supported by significant range of other attractions nearby which could create a fuller / deeper overall experience.

### Market

- Highly attractive to all international travellers to Vietnam, including “Classic” package tour market as well as short stay beach holiday market in Cui Dai Beach and Da Nang.
- Also of excellent appeal to large domestic market (Hanoi, HCMC) holiday in Da Nang and Hoi An as a day trip.

### Commercial viability

- Excellent uptake by travel agents and hotels promoting package tours to My Son from Hoi An and Da Nang, or as a part of “Classic” whole-of-Vietnam tours.

- Investors are well-assured of the long-term viability of the product by its comprehensive management system that involves co-ordination between the provincial DCST and the People’s Committee of Duy Xuyen District (through the My Son Management Board of Relics and Tourism). Guidance for sensitive management and development of My Son is provided in the Nation Plan for the Development of Tourism, the General Plan for the Socio-Economic Development of Duy Xuyen District, and a site specific conservation masterplan.
- Limited development of supporting services by private sector around the site (e.g. international level restaurants, handicraft market, cultural village, etc.)

### Sustainability

- Major threats include illegal looting, deterioration from exposure, overall decay, vegetation overgrowth and annual flooding. Rural buffer zone needs protection from inappropriate development. Increased crowds, noise and litter in peak season and mornings. Good conservation and management plan but can improve on visitor management (use of barriers, clearly marked trails, sufficient security staff). Capacity building and awareness raising programmes have been run on importance of heritage conservation.

### Local benefits

- Strategies to promote participation and benefit of local community have been developed although benefits currently appear limited to employment in on-site cultural performance show, on site guides, and through the licencing of operation of an on-site snack food / souvenir shop and restaurant.

### Human resource development

- Site authority management staff could benefit from training in heritage M&E, and on-site guiding / interpretation. Local businesses could benefit from training in small entrepreneur skills / CBT product development. Local communities could benefit from training in handicraft development.

## Hue Heritage Citadel

### Summary

The Imperial City of Hue was a capital city of the Nguyen Dynasty for 140 years from 1805-1945. The city encompasses three walled enclosures: the Exterior Enclosure, or Citadel, the Yellow Enclosure, or Imperial City, within that; and, in the very centre, the Forbidden Purple City, where the emperor lived. The Citadel area is enclosed by a square 2km long wall, 7m high, 20m thick, with 10 gates.



### Location

Hue City, Thua Thien Hue Province

### Core product features

- Excellent access, located in Hue City with international airport and national train connections to Hanoi, HCMC and Da Nang. About 100km (2.5 hours) by sealed road from Da Nang. As the centre of Hue City is within the walls of the Citadel, there are excellent means to get around.
- Excellent main attraction comprised of distinct sections, the most notable being the Imperial Enclosure, a 37m-high Flag Tower (Vietnam's tallest) and nine Holy Cannons.
- Also includes several important ritual sites in outlying areas (Temple of Literature, Esplanade of Sacrifice to Heaven and Earth, Royal Area, Temple of the Roaring Elephant, Celestial Lady Pagoda).
- Within the area there are also supporting attractions such as a museum, conservation centre, and other buildings and houses of national significance.
- As the centre of Hue city is located within the walls of the Citadel there are ample ancillary services including souvenir shops, hotels, restaurants, general stores, etc. that meet all standards and budgets.

### Characteristics

- Highly authentic UNESCO world heritage site of the imperial capital of the Vietnam Empire in the 19<sup>th</sup> and 20<sup>th</sup> Centuries. Unique layout and design with basic architectural and landscape features intact since original construction. Layout of tombs and temples according to geomantic principles which have aesthetic beauty and symbolic significance.
- Whilst some structures are now in ruins, most of the significant existing monuments have been partially restored sympathetically. Beautiful setting against the Perfume River.

### Market

- Highly attractive to all international travellers to Vietnam being one of Vietnam's World Heritage sites, especially European, Australian and American market. Reasonable appeal to domestic market as Hue city was the capital of Vietnam during 1802 – 1945 under Nguyen Dynasty

### Commercial viability

- Excellent uptake by travel agents with Hue Citadel on almost every "Classic" Vietnam tour itinerary.
- Investors well-assured of long-term viability with site well-protected and managed by the Hue Monuments Conservation Centre as directed by an Adjusted Planning Framework for the Complex of Hue Monuments (2010-2020). Further protected under international and national protocols and provincial regulations.
- Commercial viability evidenced through good private sector involvement in the offering of supporting services (e.g. hotels, restaurants, souvenir shops, etc.)

### Sustainability

- Major threats that could affect authenticity of the site include increasing urbanisation and development of infrastructure. Climate change and flooding are other potential problems for long-term management, although this is being addressed through construction of upstream dams and drainage systems within and around the Citadel. Litter and waste management is an increasing problem issue during peak season.

### Local benefits

- Most significant areas of community participation and benefit are in the operation of micro-enterprises within the key tourism areas of the Citadel (e.g. souvenir shops, cafes, budget accommodation, etc.). Significant employment of local staff in administration, customer service / tour guide, and other positions (e.g. ticketing, grounds maintenance, etc.) within management authority.

### Human resource development

- Site authority management staff could benefit from training in on-site guiding / heritage interpretation and English speaking skills, heritage M&E. Local businesses and community will benefit from training in performing arts related to royal court music, theatre, dance and rituals through school system, handicraft product development.

## Bach Ma National Park

### Summary

Bạch Mã NP is a well-located protected area with an excellent mix of unique and / or rare flora and fauna, a panoramic lookout, a range of walking trails to waterfalls and swimming holes, and interesting and well-maintained French colonial buildings that house an international standard accommodation and restaurant facilities.



### Location

Incorporating Phu Loc, Nam Dong and Dong Giang Districts, Thua Thien Hue Province

### Core product features

- Extremely accessible to tourism markets in Hue (45 km drive) and Da Nang (60 km drive) on major highway. Steep and winding road to Mount Bạch Mã summit (21km) may become dangerous in wet season. Motorbikes prohibited from travelling to summit, may reduce full potential of domestic visitation.
- High quality protected area in good condition and containing significant flora (a so-called “centre of plant diversity in Vietnam”) and fauna (more than one-third of the bird species of Vietnam).
- Good range of supporting attractions including a panoramic lookout, trails to waterfalls with swimming holes, war history, and colonial heritage buildings. Nam Dong cultural village in need of assistance to develop and improve CBT products. Excellent level of ancillary services including international level hotel, camping ground, local restaurants, and pavilion. Ecotourism centre in need of urgent upgrade.

### Characteristics

- Highly quality protected area containing significant conservation values as well as recreational values. Recent road and accommodation upgrades place the protected area in a good position for the future.
- Considered one of the best bird watching destinations in Vietnam for range of birds as well as access to unique and rare species.
- Long wet season however significantly affects the many outdoor activities on offer. Not supported by significant range of other attractions nearby.

### Market

- Very strong domestic market, in particular from nearby region (Hue city, Da Nang). Of interest to American war veteran market and French cultural heritage market due to war and colonial history. Strong interest to domestic and international bird-watching market. Katu village (Nam Dong) of interest to International market and to a lesser extent, domestic travellers.

### Commercial viability

- Well known and promoted by local tour operators in Hue as well as international tour operators, in particular operators focusing on nature tours and bird watching. Popular destination for local regional day trippers in summer due to its waterfalls with picnic areas and swimming holes.
- Private sector showing some interest, with accommodation sub-contracted. Local micro-enterprises operate at local swimming hole.
- While park planning and management is guided by a 5-Year protected area management plan, management tends to be more based upon year-to-year operational plans. Tourism activities in particular are highly dependent on the motivations of the private investor operating the Park’s tourism accommodation, restaurants, etc.

### Sustainability

- Major threats include wildlife poaching, extraction of non-forest timber products, and population growth, intensive agriculture and poverty in the buffer zone. There is no official baseline survey of wildlife and ecosystems, M&E plan / programme, or defined limits of acceptable change.

### Local benefits

- Local community participation and benefit is largely restricted to operation of homestays in the Nam Dong cultural village, operation and employment in small food and beverage stalls at the local swimming hole, and employment as tour guides and in service positions within the Park authority.

### Human resource development

- Park guides and local guides could benefit from training in tour guiding skills. Within the buffer zone a conservation awareness raising programme should be implemented to minimise sustainability challenges. In Nam Dong cultural village training should be provided in local guiding, and the development of cultural products (performances, handicrafts, F&B etc.).

## Hoi An

### Summary

Hội An Ancient Town is an exceptionally well-preserved example of a South-East Asian trading port dating from the 15-19<sup>th</sup> Century. The town's complex of timber frame buildings are attractively arranged side-by-side in tight, unbroken rows along narrow pedestrian streets. Today, the town contains an eclectic mix of hip bars, fine dining restaurants, and stores selling colourful silk and artistry products.



### Location

Hội An, Quang Nam Province

### Core product features

- Highly accessible to Da Nang with international airport and national train line (30 km drive) on sealed road. Town is prone to flooding in wet season causing some issues for accessibility in the destination.
- High quality historical trading port in excellent condition. Core attraction is town's collection of historical buildings and laneways perfect for strolls. Particular places of note include a Japanese covered bridge, the Assembly Hall of the Fujian Chinese Congregation, and numerous ancient houses and temples.
- The town is a known shopping haven and contains bustling markets and tailor shops specialising in silk. The popular local cuisine is experienced through an excellent range of restaurants and cooking classes.
- Excellent level of ancillary services including international level hotels, resorts, restaurants, bars, visitor information centre, etc.

### Characteristics

- Well preserved South East Asian trading port with high level of authenticity in the retention of its traditional wooden architecture, townscape, and intact historical surrounding landscape.
- A mature destination that is included in every Classic Vietnam tour itinerary. Beginning to grapple with capacity issues in peak season. Wet season can bring flooding.
- Supported by strong mix of nearby attractions including UNESCO classified My Son, craft villages, and coastal beaches and islands (An Bang, Cua Dai, Cham Islands).

### Market

- Very strong domestic market, in particular family holiday breaks from Hanoi and HCMC, as well as self-organised groups whose main interest is enjoying the local nature, the town atmosphere, and interacting with the local people. Although smaller in size, the town is highly attractive to longer staying and spending international visitors (all segments) who enjoy taking in the local sites

and who enjoy taking in the local sites and atmosphere, interacting with the local people, and enjoying the local cuisine.

### Commercial viability

- National level attraction promoted to all inbound visitors and also popular with domestic market.
- High level of private sector engagement of tour operators, hotels, restaurants, etc., demonstrating a highly commercially viable product.
- Guided by a comprehensive framework of plans, regulations and strategies at various levels of governance, with the People's Committee Hoi An Center for Monuments Management and Preservation responsible for direct implementation of regulations.
- Revenue from entrance tickets invested directly in management, preservation and promotion of the property. Some confusion over new old town entrance fee system. Regular conservation programmes.

### Sustainability

- Some issues of increased cost of living expenses (e.g. food, transport), and commercialisation undermining heritage significance. Tourism is helping promote traditional crafts and traditions. Issues of crowding, litter, noise in peak season. Good conservation management plan to preserve heritage.

### Local benefits

- Local community participation and benefit is largely through employment and income derived from working in the town's hotels, restaurants, cafes, retail shops (clothing, souvenir, handicrafts) and tour agencies. Owners of ancient houses have access to finance derived from entrance fees to maintain their properties.

### Human resource development

- Generally good capacity of the local people to manage and operate tourism services. Could be strengthened through awareness raising of retailers in good salesmanship / customer service, and M&E for heritage site planners.

## My Khe & Phan Van Dong Beach

### Summary

The white sandy stretch of My Khe and neighbouring Phan Van Dong Beach are amongst Vietnam's most picturesque. Home to a growing number of 5 star resorts, the beaches have maintained sections for public access where numerous restaurants, hotels, and spas can now be found. With Da Nang city at its door step, the destination is becoming an urban beach with an exciting mix of “city life” attractions.



### Location

Da Nang City, Da Nang Province

### Core product features

- Highly accessible neighbouring beaches along the same stretch of sand about 6km from central Da Nang city on sealed road. Good parking.
- Good quality core attraction of a white sandy beach that provides opportunities for visitors to relax, picnic, and swim.
- Supporting attractions and ancillary services include rapidly expanding restaurant (often specialising in seafood), hotel / resort and bar area behind the beach. 5 star resorts take up the southern section with restricted access for the public. To the north is a designated fishing beach which is less attractive for swimming. There is good provision of changing areas, toilets and showers.

### Characteristics

- Beaches are generally in good condition. Rapidly emerging product that is becoming an increasingly popular holiday destination, in particular for domestic market.
- Although the beaches are not greatly distinct within the context of the entire regional coastline, the accessibility, infrastructure and services make the beach a much more attractive destination. As interest continues to boom, capacity issues will become an increasingly significant issue.
- Supported by good mix of nearby attractions. Most notable are Da Nang city and river dining and shopping scene, Marble Mountains, Son Tra Peninsula, 5 star golf courses, and historic Hoi An. Sections of unattractive abandoned construction sites.

### Market

- Very strong domestic market, in particular family holiday breaks from Hanoi and HCMC, as well as self-organised groups, in particular corporate groups (incentives). Significant international luxury market staying in 5 star resorts in southern section of beach. In particular, the beach destination is of most interest to Australia, Russia, North East Asia, North America markets.

### Commercial viability

- High level of private sector engagement most evidenced in rapidly growing number of hotels and restaurants beside the beach.
- The beach area is prioritised under the Da Nang Urban master plan towards 2030 with a vision to 2050, with the focus being on accelerating growth, with emphasis placed on resorts, hotels, villas, parks, restaurants and entertainment areas. This is highly conducive for private sector investment.
- The beaches have good supporting infrastructure that is continually improving such as roads, green spaces, parking areas, toilets, waste management services, etc. Gaps in provision of simple / basic services such as snack food shops to service beach goers (mostly restaurants, bars, hotels). Strong currents can make swimming dangerous at times.

### Sustainability

- Some issues of crowds, traffic, noise, and litter particularly in the early morning and late afternoon. Resorts are restricting public access to the beach for recreational visitors as well as fishermen, creating more crowding in the sections of public beach. Natural coastal barriers (sand dunes, mangroves / trees / bushes) have been removed for development increasing impacts from natural events such as flooding, typhoons.

### Local benefits

- Local community participation and benefit is largely through employment and income derived from working in the hotels, restaurants and cafes along the beach.

### Human resource development

- Indications that there may be a need for training of hospitality staff in restaurants, hotels, etc. along the beach, in particular in areas of customer service, F&B service, and English speaking skills.

## Cham Museum

### Summary

Located in Da Nang City, the Cham Museum contains the largest collection of Cham sculpture and artwork in the world. Housed in an interesting French colonial building, the museum contains more than 300 pieces of altars, lingas, garudas, apsaras, Ganeshas and images of Cham culture.



### Location

Da Nang City, Da Nang Province

### Core product features

- Highly accessible for all kinds of transport, about 4 km from the airport / Da Nang centre (5 minutes) and 30 km from Hoi An. Good parking.
- Good core museum attraction containing up to 500 artefacts from Cham temples and worshiping sites from about the 4th - 15th Century including pedestals, statues of gods, holy animals and symbols, and architectural decorations. Limited use of electronic media or interactive displays.
- Standard museum tours only provided for 5 pax or more. Multi-lingual audio tours available but limited headsets at peak times. Limited interpretive print material / signage. Cham / Apsara dance shows arranged on demand.
- Simple on-site drinks stall (operated by DCST). No food / snacks. Not conducive for staying longer. Reasonable souvenir shop selling products connected to Cham culture. Toilets on site.

### Characteristics

- Highly authentic museum. Collections valuable and rare. Arguably largest collection of Cham artefacts in the world. Mature product (operating 100 years). Included in itineraries of almost all first time visitors to Da Nang. Will require investment to update services and facilities to ensure continued visitation and/or growth.
- Interesting French colonial building but in need of repairs / maintenance to keep at international standard. Some artefacts damaged from cementing to walls. Good use of rooms to display artefacts from different regions and periods.
- Cultural connections to My Son, but not connected through ticketing. Highly limited range of activities and attractions on site (e.g. presentations, demonstrations, scheduled performances, etc.), but range of other attractions around Da Nang and Hoi An.

### Market

- Good core international market, in particular from Australia, Europe and N.America. Growing markets from Japan, Korea and Singapore.

- Relatively smaller domestic market (about 30%) mostly from Hano and HCMC, but attractive to first time visitors to region.

### Commercial viability

- Strategically managed by Cham Museum Management Board (under Da Nang DCST). Benefits from strategic long term plan.
- Limited private sector engagement. Mostly from travel agents including in package tours (Da Nang City Tour, Classic Heritage Tour). Single cultural performance group contracted for on-demand shows. A few street vendors sell maps and souvenirs outside.
- Government authority has established good systems to facilitate tour groups (no cash, free parking, FOC for tour leader) however no special rates for group bookings.

### Sustainability

- No major sustainability concerns as located in the city although being solely government funded can be restrictive to innovation and development. Some (limited) instances of visitors touching artefacts which will cause damage in long term.

### Local benefits

- Little to no local community participation and benefit – only through employment as staff in administrative, sales or tour guide positions. Some sole entrepreneurs benefit from sale of maps outside. No formal programmes to support local people such as residents of local area, the poor, minorities, children, etc.

### Human resource development

- Sufficient human resources provided by the government authority to manage the site. On site tour guides are professional and have good interpretive knowledge and skills although could become more demand for guides who speak foreign speaking guides, in particular Russian, Korean, Japanese, and German.
- Performance group is highly professional, no need for training.

## Cửa Đại & An Bang Beach

### Summary

Cua Dai Beach is one of the region's original beach hotel / resort destinations. Coastal erosion is however a constant threat and requiring ongoing management. Further north is the new beach destination, Cua Dai Beach. With wind surfing, kayaking and jet skiing, restaurants and beach bars to the south, and 5 star resorts to the north, the beach has something for everyone.



### Location

Cam An and Cua Dai Communes, Hoi An City, Quang Nam Province

### Core product features

- Highly accessible for all kinds of transport, about 30 km from Da Nang airport / Da Nang centre (about 35 minutes) and 8 km from Hoi An centre. Parking for Cua Dai is within the resorts (for guests). Only small parking area for An Bang beach.
- Core attraction is coastal white sand beaches that are located along the same coastal strip. An Bang is public beach and Cua Dai is restricted to the guests staying in the adjacent resorts. Small nature strip located behind the beach consisting of grass and trees.
- Visitors mostly engage in activities such as relaxing by the beach, swimming, fishing, enjoying seafood by the beach. Jet skiing, paragliding also available for public. Visitors to the beaches can also enjoy massage and spa experiences near to the beach.
- Both beaches are generally only serviced by 4-5 star resorts along the beach and 1-2 star hotels inland. There are many local restaurants (mostly seafood). Showers, changing room, toilets, etc. available in the restaurants, resorts and also a public facility. Limited provision of surf rescue services outside the resorts.

### Characteristics

- Beaches are more natural compared to many of the beaches near to urban areas. However, more than half of Cua Dai beach is highly affected by erosion, reducing the size of the beach. Barriers to prevent erosion are also decreasing attractiveness.
- Cua Dai is a mature beach destination dating back some 15 years. An Bang has only been operating in tourism for about 10 years. For most international visitors the beaches are a supporting product to Hoi An (with the exception of high-end beach holiday makers). For local Hoi An residents the beaches are a primary product.
- Medium level of activities and services. Focuses mostly on high-end or low-end. Limited restaurants and cafes for middle-income level. An Bang strip of beachside restaurants are simple and need improvement. Limited to no shopping opportunities.

### Market

- About 50% of the visitors to the beaches are domestic. Apart from the local residents who use the beaches for recreation in the mornings and afternoons, the beaches are visited by holiday makers from Hanoi and HCMC (peak season May – September). This market is growing but not

- The other 50% of visitors are international holiday makers who typically stay one night or more and are from USA, Europe and Australia (peak season October – April). This market is not growing strongly. Growing more strongly are visitors from Korea, China, Japan, Singapore, Malaysia and Hong Kong (visit all year round).

### Commercial viability

- Beaches are prioritised in the provincial Quang Nam Tourism Master Plan providing some confidence to investors.
- Very good private sector investment to date, demonstrated in particular by the development of many high end resorts and hotels. Dozens of local restaurants and cafes are also making relatively good business along the beach strip.
- Government in the process of developing a long term solution to the beach erosion problem; the biggest issue for the private sector. However, action will need to be fast, decisive and adequate to instil confidence.
- Plans to open up south Hoi An beaches for development poses could attract investment away from Cua Dai and An Bang and poses a longer term challenge to the beaches, particularly if the erosion problem is not resolved.

### Sustainability

- Apart from the significant issue of erosion the beaches other challenges are waste management – both solid waste (litter) primarily around the public areas, as well as maintaining water quality of the sea adjacent to the beaches from the waste water (sewerage) outfalls. The public beach areas are also crowded during peak times of day / season, often with only limited life guards.

### Local benefits


- Community is highly involved in tourism in the destination, in particular through operation and / or employment in resorts, hotels, restaurants, cafes and the sale of souvenirs.


### Human resource development

- More life guards are needed, and existing could benefit from further training to strengthen their surf rescue and first aid skills.
- Local restaurants along An Bang could benefit from skills training in F&B service, small business management, and customer service.

strongly.	
<b>Cầu Thanh Toàn Village</b>	
<p><b>Summary</b></p> <p>Eight kilometres from Hue city lies peaceful Thanh Toan village, home to one of two covered bridges that remain in Vietnam. With bicycle riding a popular form of transport to get to the village, visitors also can enjoy the sight of attractive green fields, rural markets, and local temples. Other exciting activities include a visit to the Agriculture Museum and interacting with the locals</p>	
<p><b>Location</b></p> <p>Thuy Thanh Commune, Huong Thuy District, tt.Hue</p>	
<p><b>Core product features</b></p> <ul style="list-style-type: none"> <li>Easily accessible to all kinds of transport (taxi, bicycle, motorbike, etc.), about 7km from Hue centre. However, road to village from main road is in poor condition (not suitable for large vehicles), so short walk may be required from main road. Limited off-street parking.</li> <li>Core attraction is an historic bridge built in the 18<sup>th</sup> Century during the reign of Emperor Le Hien Tong. It has been maintained by the village ever since and is currently in reasonable condition.</li> <li>Key activities are walking over the bridge and visiting a nearby agricultural museum. Many tours operators promote visiting the village by bicycle from Hue as the road passes through pretty countryside. This adds significantly to the overall experience which is otherwise relatively limited. Some tours also include a boat trips on the canal, a visit to nearby Tôn Thất Thuyết temple, a farm visit to learn about rice cultivation, a rice wine production house, and lunch with a local family.</li> <li>Services are highly limited in the village. There is a small makeshift marketplace selling typical products and snack food. There is no accommodation and only basic local cafes.</li> </ul> <p><b>Characteristics</b></p> <ul style="list-style-type: none"> <li>Destination remains highly undeveloped. Covered bridge is highly authentic (national heritage) and one of only two such bridges in the Central Coast. Reasonable condition, but could benefit from repairs / maintenance. No fees helping to generate funds for maintenance. No written interpretation or organised on-site guide service. Agricultural museum is basic and requires better written interpretation. Market is unattractive and not special. Highly limited activities in the village requiring tour operators to package activities on the way / return. Town / village while in a pretty rural setting, is not unique.</li> </ul> <p><b>Market</b></p> <ul style="list-style-type: none"> <li>Most attractive to international market, in particular backpackers and cultural enthusiasts. Relatively low numbers compared to total international visitation to tt.Hue. The market to Cầu Thanh Toàn is not growing significantly.</li> <li>Also some visitation from domestic market, in particular, the guests from Hanoi &amp; Hochiminh City</li> </ul>	<p><b>Commercial viability</b></p> <ul style="list-style-type: none"> <li>Cầu Thanh Toàn has been identified as one of the province's priority CBT destination by tt.Hue DCST which sets a favourable environment for potential investors. At the local level, there is also some basic organisation of the community for the development of tourism and some NGOs provided tourism training to community members.</li> <li>To date, there has been very limited external interest shown by the private sector to invest in the destination which indicates limited commercial viability of the destination in its present state.</li> <li>Most involvement is restricted to Hue based tour operators. A handful of community members sell souvenirs, snack food and other products to visitors at the small marketplace.</li> </ul> <p><b>Sustainability</b></p> <ul style="list-style-type: none"> <li>Due to the limited number of visitors there are no significant sustainability concerns in the destination related to tourism. In general, the community have done a good job maintaining the bridge over time although there is still room for further improvement. Economic benefits are not yet being captured through the charging of a village or bridge entrance / access fee.</li> </ul> <p><b>Local benefits</b></p> <ul style="list-style-type: none"> <li>Currently there is little to no local community participation and benefit from tourism in the village. A few families benefit from farm visits and the provision of lunches to tour groups. Vendors at the local market make very modest income from the sale of products to visitors. There are a few local community members staffing the agricultural museum.</li> </ul> <p><b>Human resource development</b></p> <ul style="list-style-type: none"> <li>Currently not a highly visited destination making tourism not a priority industry, and those working in it often lacking in formal qualifications.</li> <li>Local community members could benefit from training in small entrepreneur skills, CBT product development, hosting skills, local services, etc.</li> </ul>

## Cham Islands

<p><b>Summary</b> Lying 18km offshore from Hoi An, the Cu Lao or Cham Islands, consist of eight islands, with the largest supporting a population of some 3,000 inhabitants; most of whom make a living from fishing. The islands are a popular day trip from Hoi An, and are noted for good snorkelling / diving opportunities. Visitors to the islands can also enjoy delicious seafood lunches, go fishing, see traditional crafts, and visit local villages and markets.</p>	
<p><b>Location</b> Tân Hiệp Commune, Hội An city, Quảng Nam Province</p>	
<p><b>Core product features</b></p> <ul style="list-style-type: none"> <li>Highly accessible coastal island. About 25 minutes by speed boat from Cua Dai or 1.5 hours on local boat. Can be difficult to access during rainy season (Oct-Jan/Feb) due to high waves.</li> <li>Consists of 8 small islands, which form part of the UNESCO Cu Lao Cham Marine Park Biosphere Reserve.</li> <li>The core attraction is the main (inhabited) island. The key activities for most visitors are to relax on the beach, and go swimming, snorkelling or diving at the nearby reefs. Other popular activities include experiencing local life (visiting temples / pagodas, the local market, fishing villages), fishing, and enjoying local seafood.</li> <li>Basic level of services are including local restaurants and cafes, general stores, some basic homestays, a few guesthouses / mini-hotel, souvenir shops, speciality food stores, some motorbike taxi (xe-om) services, etc.</li> </ul> <p><b>Characteristics</b></p> <ul style="list-style-type: none"> <li>As a tourism destination, the islands have been open for more than 15 years. Reasonably developed as supporting a residential population. However, mostly due to the long rainy season, the level of tourism services has remained relatively stagnant.</li> <li>While there are no well-developed walking trail networks, tourism services are well developed on the island and it is easy for visitors to organise activities such as fishing, trips to other beaches, visiting the birds nests, seeing pagodas, etc.</li> <li>Main island is quite unique in Vietnam as it is one of only a few islands inhabited by people with an interesting fishing history and culture that can be told.</li> <li>Main island has 2 fishing villages (with mostly modern concrete buildings). The rest of the island (about 90%) remains as primary forest. About 10 beaches although most are now privately owned and only accessible through a tour.</li> </ul> <p><b>Market</b></p> <ul style="list-style-type: none"> <li>The main market (about 80%) are domestic visitors from Hanoi and HCMC who stay in Da Nang and Hoi An and visit the island on a day trip. This market is still growing but not as strongly as over the past few years.</li> <li>Whilst in comparison smaller, the island is also attractive to international travellers, in particular, from China and Korea, as well as international</li> </ul>	<ul style="list-style-type: none"> <li>Small niche market of international divers mostly from USA, Europe and Australia. This market is not growing strongly (and may potentially decline with the emergence of other stronger diving destinations).</li> </ul> <p><b>Commercial viability</b></p> <ul style="list-style-type: none"> <li>Tourism is well planned and managed under the Cu Lao Cham Marine Protected Area Management Board and Hoi An City Culture and Tourism Department.</li> <li>Government provides incentives and policies to encourage private sector investment but significant private sector investment in tourism not greatly achieved, mostly due to the long rainy season and challenges in developing necessary infrastructure such as the roads.</li> <li>Private sector engagement is mostly in the operation of tours from Hoi An. Private sector also highly engaged in restaurant operation as most visitors are on day trips.</li> </ul> <p><b>Sustainability</b></p> <ul style="list-style-type: none"> <li>The main island is experiencing capacity pressures from its large residential population and high volumes of tourists during the peak season. Key impacts include damage to the coral reefs, crowding on beaches, challenges in waste management.</li> </ul> <p><b>Local benefits</b></p> <ul style="list-style-type: none"> <li>Engaged and benefiting in employment and income from operation / staffing of businesses (restaurants / cafes, guesthouses, souvenir shops, selling local products, farming, renting bicycle / motorbikes and through local boat trips, etc. Some challenges to ensure a good balance between outside investors and keeping opportunities for the local community.</li> </ul> <p><b>Human resource development</b></p> <ul style="list-style-type: none"> <li>Relatively limited human resources available to manage strategic planning and development of the island. Could benefit from training in areas such as tourism management, environmental protection, sustainable development and managing carrying capacity.</li> <li>Businesses: boat operator training for professional driving / safety, training of local on-site tour guides, F&amp;B staff training in customer service and hygiene, front desk and housekeeping training</li> <li>Community: Local people generally not able to obtain high levels of education as no High Schools or Universities / Colleges are on the island and it is costly to send them to Hoi An.</li> </ul>

backpackers. The international market is growing strongly.	
<b>Lang Co Beach</b>	
<p><u>Summary</u></p> <p>A good day stop along National Highway No. 1 between Hue and Danang / Hoi An, Lang Co Beach is a sweeping expanse of sand good for dipping your toes in and taking a rest. Lying at the northern end of Hai Van Pass, the sands of Lang Co begin at the end of the mountains. Behind the long stretch of beach is a large lagoon.</p>	
<p><u>Location</u></p> <p>Phu Loc District, Thua Thien Hue Province</p>	
<p><u>Core product features</u></p> <ul style="list-style-type: none"> <li>Highly accessible by road (about 30 km from Da Nang city, 70Km from Hue city). There are 2 ways to go there from Danang: by Hai Van Pass with magnificent views but the road is a little bit steep, or by the Hai Van tunnel</li> <li>Very high quality core attraction of natural environment combined with spectacular setting / location (panoramic views of beaches, ocean, lagoon, inland mountainous rainforests, local village). Taken in via a coastal driving route with basic lookouts</li> <li>Reasonable range of supporting attractions and activities, most notable are its beaches for swimming, snorkelling, picnics and fishing (Lang Co, Canh Duong, Chan May), beautiful sand dunes, and very good scenery with Hai Van Pass and Phu Loc Lagoon. This area is also famous for fresh seafood.</li> <li>Basic range of ancillary services including famous Bayan Tree properties (Laguna, Angsana resorts) and many 1-4 star local hotels. Reasonable number of local seafood restaurants and cafes, some basic snack and souvenir stalls. No welcome / interpretive centre.</li> </ul> <p><u>Characteristics</u></p> <ul style="list-style-type: none"> <li>Iconic, flagship (primary) product for Lang co – Bach Ma – Canh Duong area. Very unique with the combination of beaches, sand dunes, mountains, pass and lagoon. Natural area in good condition (benefits from conservation order).</li> <li>Mix of attractions and activities (swimming, snorkelling, sand skiing, picnicking, fishing, etc.) add some depth to the experience, but significant room for improvement and enhancement.</li> <li>Very seasonal with rainy time from October to February. The area is quite despite of high season. Busiest time is from May to end of August with full of domestic tourists.</li> </ul> <p><u>Market</u></p> <ul style="list-style-type: none"> <li>Attractive to travellers as a rest stop between Hue and Da Nang / Hoi An (and vise-versa), weekend break markets (Da Nang city, Quang Nam, and tt.Hue), and Hanoi and Ho Chi Minh city family holiday market.</li> </ul>	<p><u>Commercial viability</u></p> <ul style="list-style-type: none"> <li>There is a comprehensive strategic vision developed for Lang co that outlines development (land and water based activities, infrastructure, etc.), however currently only a few projects are on the way (Laguna &amp; Angsana resorts), some remaining projects remain as empty land.</li> <li>Signs of good interest from the private sector, with Bayan Tree international standard resorts already operating. With the surrounding nature under conservation, investor interest in developing other nature-based tourism projects appears good.</li> <li>As a famous rest stop on National Highway No.1 (especially from Hue to Da Nang / Hoi An and vice-versa), the local people and enterprises can make good profit for their seafood restaurants, cafe, souvenir shops, etc.</li> </ul> <p><u>Sustainability</u></p> <ul style="list-style-type: none"> <li>Economic: Good for community as they can earn their living by providing products and services for tourism industry (hotels, resorts, restaurants, cafe, souvenirs, etc.)</li> <li>Socio-cultural: Relatively unaffected by negative tourism impacts with this mostly Christian community who moved from the North of Vietnam to stay in this village from 1954.</li> <li>Environmental: Reasonably well-preserved natural environment, some pollution in the Lagoon from fish farms.</li> </ul> <p><u>Local benefits</u></p> <ul style="list-style-type: none"> <li>Good benefits for the local community in employment hotels and resorts, as well as through the operation of many local seafood restaurants and mixed businesses, snack food and souvenirs stands.</li> </ul> <p><u>Human resource development</u></p> <ul style="list-style-type: none"> <li>Local businesses and community members could benefit from training in product development, customer service, English language skills, and F&amp;B service.</li> <li>Local authorities could benefit from training in protected area management, M&amp;E, community co-management planning</li> </ul>



## Perfume River tombs and temples

### Summary

As the geographical and spiritual centre of the Nguyen Dynasty, it should be of no surprise to learn that the surrounding area is home to numerous imperial pagodas and tombs, many of which are located close to the Perfume River. Most notable include Thien Mu Pagoda, Ming Mang Tomb, Khai Dinh Tomb, Tu Duc Tomb and Gia Long Tomb.



### Location

Hue City, tt.Hue Province

### Core product features

- Good accessibility from Hue city; about 6km by road to the nearest of the temples and tombs, Thien Mu Pagoda, and 13km to the furthest, Ming Mang Tomb. Many cruise boats are available to travel to the sites from Hue City.
- Arguably the most popular and core attraction is Thien Mu Pagoda, although its close proximity to Hue may be contributing to this. The tombs are well preserved and have been restored over time.
- Main activity is walking around the tombs and temples to enjoy their ornate and elaborate construction and learn about Vietnamese history and spiritual life. A core part of the experience is getting to the sites which may be by vehicle or bicycle through pretty rural countryside, or by boat along the Perfume River. Boat tours often include lunch.
- Supporting services include souvenir shops, stores selling worshipping products, and basic snack food stalls around the entrance to the sites. Due to the region's close proximity to Hue there is little or no accommodation or restaurants at the various sites.

### Characteristics

- All sites are highly authentic and unique in Vietnam, being excellent examples of the Dynastic period of Vietnamese history. The sites have been lovingly restored and appear in good condition. Each tomb / temple reflects the individual style and personality of the emperor that it was built for.
- The collection of tombs and temples is a well-established tourism destination and at least one of the collection of sites is visited by almost all visitors to Hue.
- In respect to the past emperors and the historical and spiritual importance of the sites, few supporting activities and attractions have been developed in the sites (just one pagoda offers scheduled cultural performances). However, supporting activities and attractions outside the temples and pagodas are also minimal which tends to limit the overall experience (e.g. boat tours are generally simple, interpretation is limited, no good restaurants / cafes along the way, etc.).

### Market

- Highly attractive to all international travellers to Hue, and generally included in all Classic tour itineraries.
- High appeal to domestic market, in particular visitors from Hanoi and HCMC, due to the significant historic and spiritual importance of the sites.

### Commercial viability

- Protection and promotion of the complex of tombs and temples is prioritised at the national and provincial level, with good strategic planning and management mechanisms (plans, strategies, etc.) which provides good foundations for the private sector involvement.
- There is excellent private sector involvement in the operation of bus, boat, bicycle tours to the complex of monuments, although there is a need to strengthen regulations / controls to ensure quality tours and more satisfying experiences which can negatively affect the reputation of the whole destination and experience for all stakeholders.

### Sustainability

- Some issues of crowding in peak season. Wet season can cause flooding of the Perfume River making boat trips less safe. Some of the sites may also become flooded. In general, good waste management and visitors showing good respectful behaviour in the sites. Tourism is helping preserve Vietnam's rich cultural and spiritual life. All sites guided by good management plans. Ongoing challenges funding conservation and maintenance work.

### Local benefits

- Local community mostly benefiting from employment and income in the provision of boat tours. Some community members also benefit from the sale of souvenirs and worshipping products around the sites. Overall, the actual level of economic benefit derived from these two activities appears relatively limited, particularly since the boat tours are generally operated as a partnership with large tour companies who take the largest margin of profit in the value chain.

### Human resource development

- Biggest need is in training of boat tour operators and crew in interpretation, customer service, hygiene, F&B service, etc.

## Thu Bon River craft villages

### Summary

The Thu Bon River flows all the way from Hoi An to the Cua Dai estuary, at which point it joins the sea. Along the banks of the river and a short distance inland a number of traditional villages can be found, the most notable of which include Thanh Ha pottery village, Kim Bong carpentry village, Cam Thanh coconut village, Tra Que vegetable village, and Triem Tay eco-village.



### Location

Hoi An City, Quang Nam Province

### Core product features

- Highly accessible, with all 5 villages within a 4km radius of Hoi An Old Quarter. Visitors can easily catch a taxi or join a bus tour to Thanh Ha, Cam Thanh and Tra Que villages. Kim Bong and Triem Tay are easily accessible by boat from Hoi An. In the rainy season accessing Kim Bong and Triem Tay can be difficult if the Thu Bon river is flooded.
- The most core attraction for visitors is to observe the skilful production of traditional crafts (pottery, woodworking), get an insight into agricultural life (coconuts, vegetables), and interact with Vietnam's rural people.
- Main activity is taking a guided tour of one or more of the villages, which normally includes observing a demonstration of the craft / agriculture production, a hands-on experience producing a craft or working with the agricultural product, and a village tour. Boat tours tend to offer an extension to the Cua Dai estuary. Generally there will also be an opportunity to purchase the craft or agricultural products. Going by bicycle or boat to the villages enhances the experience.
- In general there are very limited ancillary services supporting the product in the villages (basic stores / souvenir shops, only simple village level eating places, limited to no accommodation, no quality public toilets, etc.). There are no welcome / interpretive centres.

### Characteristics

- The craft villages are established destinations and provide a good supporting role to visiting Hoi An town, connecting well to the culture theme.
- The villages themselves however, are not highly unique; most are semi-urbanised, and local industries have become diversified. For example, local communities are no longer strongly specialising in the craft being promoted (unlike many other craft villages in Vietnam). Moreover, the craft products do not tend to be much different to those found in Hoi An town souvenir shops.
- There are no significant supporting activities beyond those offered within the village tours, although in Thanh Ha pottery village an art gallery has been developed with a theme garden of miniature iconic buildings and a coffee shop.

### Market

- Of most interest to international travellers visiting Hoi An, in particular, travellers from America, Europe and Australia. Generally of interest to most segments such as backpackers, Classic travellers, etc. These markets to Hoi An remain strong and are growing, offering good continued opportunities for the villages. Lesser appeal to the domestic market that is often already familiar with the craft or agricultural production techniques and therefore finds it of lesser interest.

### Commercial viability

- Quang Nam DCST identifies the importance of the craft villages at the provincial level which is of reassurance to the private sector that are investing in boats, staff, and marketing to enable tours to the destination.
- In general, private sector involvement has however been limited to operating tours and not direct investment into improving the facilities in the villages, with production / demonstration houses and facilities for visitors such as seating, toilets, etc. still very basic.
- Local communities are sometimes not well organised to plan and develop tourism and could benefit from capacity building (reduces development of stronger tourism destinations).
- No strong controls on urban development in the villages which reduces their appeal as "traditional" rural villages.

### Sustainability

- Some waste management issues from local residents. Wet season can flood the Thu Bon River and make boat trips less safe. Tourism is helping preserve traditional craft skills and generate cultural pride.

### Local benefits


- Some economic benefits but generally restricted only to the local community members directly involved in hosting tours. Significantly greater profits made by tour and to a lesser extent transport operators (e.g. boat owners) in the product value chain. Some income from the sale of crafts and agricultural products.

### Human resource development

- Biggest need is in training of local community members in handicraft product diversification, marketing, on-site guiding (including English language skills) as well as CBT product

	development in order to encourage the development of supporting services such as local lunch places, cultural performances, etc.
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## Ba Na Hills

<p><u>Summary</u></p> <p>A hill resort inherited from the French, lush Ba Na has refreshingly cool weather and gorgeous countryside, natural and city views of Danang. Established in 1919, the resort area once held 200-odd villas, but only a few ruins remain, replaced by a modern complex of Fantasy park, French village, flower garden, pagoda... with Guinness record cable cars, a must place to visit in Danang city, invested by Sun Group</p>	
<p><u>Location</u></p> <p>Hoa Ninh Commune, Hoa Vang district, Danang city</p>	
<p><u>Core product features</u></p> <ul style="list-style-type: none"> <li>Extremely accessible to Da Nang (about 25 km drive) and Hoi An (55 km drive) on good condition road and highway. Very good reception and large car park. Very steep winding road in bad condition to the summit (about 16km) which may be dangerous for some vehicles. Most popular way to the top is via a 15 minute cable car ride.</li> <li>Views all the way to the coast, taking in Da Nang and surrounding areas. While fog banks can obscure the panorama, the interesting cool mountain atmosphere close to a warm coastal location provides some compensation (e.g. 20-25C in Ba Na Hills compared to 35C-40C in Da Nang)</li> <li>Good range of supporting attractions including panoramic lookout, trekking trails to waterfalls, old French villas, buffet restaurants / cafes, Europe square, French village, Morin hotel, Fantasy Park, Linh Ung Pagoda, flower garden, cable car, wine house, golf course, Mo Lake, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Good markets from South East Asia countries which have direct flights and overland to Da Nang such as Thailand, Singapore, Malaysia and Laos. Increasing markets from China, Korea, Japan, Taiwan, Hong Kong with a lot of charter and scheduled flights.</li> </ul>
<p><u>Characteristics</u></p> <ul style="list-style-type: none"> <li>Highly quality protected area containing significant conservation values as well as recreational values. Cable car system and accommodation upgrades place the protected area in a good position for the future, except the top with a lot of modernized properties</li> <li>Very good combination with Danang – Hoi An - Hue destination, the Central coast and World heritages area. Make this area become very attractive with beach, culture and e-co tourism</li> <li>Long wet season however significantly affects the many outdoor activities on offer.</li> </ul>	<p><u>Commercial viability</u></p> <ul style="list-style-type: none"> <li>Very famous and highly promoted by local tour operators in Da Nang, Hue and Hoi An as well as international tour operators</li> <li>Owned by Sun Group, Ba Na Hills is strategically managed through a Master Plan. Sun Group is also undertaking significant marketing efforts to introduce their products to potential markets, especially domestic, so almost all visitors to Da Nang know about and wish to visit Ba Na Hills.</li> <li>New products being constantly being developed.</li> </ul>
<p><u>Market</u></p> <ul style="list-style-type: none"> <li>Very strong domestic market, in particular from Hanoi (and the North), HCMC (and the</li> </ul>	<p><u>Sustainability</u></p> <ul style="list-style-type: none"> <li>Although it has a very good contribution to economic development of Da Nang City, Bana Hills still makes big affect to the environment and history such as significant clearing of forest for development, challenges in water and waste treatment / disposal, etc.</li> </ul> <p><u>Local benefits</u></p> <ul style="list-style-type: none"> <li>Local community participation and benefit is quite good with the restaurants, cafe, shopping, eco-park creating significant employment although does not appear to have any specific policies to prioritise employment of local community.</li> </ul> <p><u>Human resource development</u></p> <ul style="list-style-type: none"> <li>Hundreds of students from Hue Tourism College and some universities in Da Nang contracted as trainees every year. Most training relates to entertainment activities, housekeeping, reception, and F&amp;B service.</li> </ul>

<p>South) and from Central region (Da Nang, Quang Nam, Quang Ngai, Thua Thien Hue). Cool weather attracts many repeat visitors in summer.</p>	<p>Trainees provided with small salary and accommodation.</p> <ul style="list-style-type: none"> <li>Local guides could benefit from training in tour guiding skills.</li> </ul>
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## **SECTION 3: CONNECTING THE PRODUCTS – REGIONAL DESTINATION & PRODUCT DEVELOPMENT**

## APPROACH TO CLUSTERING & CONNECTING THE PRODUCTS

### Clustering products

Market research conducted by ESRT indicates visitors see the three destinations of Hue, Da Nang and Hoi An as a single region. Feedback from industry also confirms that visitors on holiday in the region rarely spend their whole time just in one province, instead, also visiting attractions in one or more of the neighbouring provinces. Developing and marketing tourism products separately without co-ordination and co-operation with the other provinces therefore risks being inefficient and ineffective in relation to market dynamics.

Discussion was held within the Product Development TWG Roundtable meetings as well as the Industry Roundtable meetings about potential options for strategically linking the region's products and focusing product and destination development activities.

Geographically, the region's tourism products can be grouped into three sub-regions: Central Coast North (includes Hue City and surrounds), Central Coast South (includes southern tt.Hue, Da Nang and northern Quang Nam), and Central Coast Hinterland (includes western inland region of tt.Hue, Da Nang, and Quang Nam).

The key products in each of these sub-regions are:

#### Central Coast North

Huế Citadel Complex	Culture	Primary	tt.Huế
Perfume River tombs & temples	Culture	Primary	tt.Huế
Thanh Tân Hot Springs	Nature & CBT	Primary	tt.Huế
Thanh Toàn Cultural Village	Culture	Primary	tt.Huế
Huế Ancient Garden House	Culture	Secondary	tt.Huế
Huế Temple	Culture	Secondary	tt.Huế
Phước Tích Cultural Village	Culture	Secondary	tt.Huế
Thánh Duyên Temple	Culture	Secondary	tt.Huế

#### Central Coast South

Chàm Islands	Coast & Islands	Primary	Quảng Nam
Chăm Museum	Culture	Primary	Đà Nẵng
Cửa Đại & An Bang Beach	Coast & Islands	Primary	Quảng Nam
Hội An Town	Culture	Primary	Quảng Nam
Marble Mountains	Culture	Primary	Đà Nẵng
Mỹ Khê & Phạm Văn Đồng Beach	Coast & Islands	Primary	Đà Nẵng
Mỹ Sơn Sanctuary	Culture	Primary	Quảng Nam
Sơn Trà Peninsula	Nature & CBT	Primary	Đà Nẵng
Thu Bon River Craft Villages	Nature & CBT	Primary	Quảng Nam
Đà Nẵng Museum	Culture	Secondary	Đà Nẵng
Hải Vân Pass	Nature & CBT	Secondary	Đà Nẵng
Hàn River	Rivers	Secondary	Đà Nẵng

Lăng Cô Beach	Coast & Islands	Secondary	tt.Huế
MICE / Business products	MICE	Secondary	Đà Nẵng

### Central Coast Hinterland

Bà Nà Hills	Nature & CBT	Primary	Đà Nẵng
Bho Hoong Cultural Village	Nature & CBT	Secondary	Quảng Nam
West Quảng Nam Nature Area	Nature & CBT	Secondary	Quảng Nam
Bạch Mã National Park & Nam Đông Cultural Village	Nature & CBT	Secondary	tt.Huế

## Connecting products

From the discussions three key messages became clear; that the regional destination and products should be reflective of the regional brand and positioning, that the regional products should be connected and developed according to existing market demands and emerging trends, and that the products should be linked thematically (e.g. nature, culture, coast, CBT, etc.).

To connect the products in these three sub-regions and help focus and prioritise development and marketing efforts at the regional level, three strategies were identified:

### 1. Connect key coastal products into an intra-provincial coastal beach tourism hub

- Highly reflective of existing and emerging market situation. A significant proportion of visitors to the region are staying in the beach areas of Da Nang, Cu Dai and Lang Co on multiple night beach holidays and engage in coastal recreation and entertainment activities as excursions from their hotel / resort.
- These visitors see the region as one destination and tend to use Da Nang as the Gateway.
- Suggested branding: “**Central Coast Vietnam**” (in harmony with existing brand developed by Central Coast Vietnam tourism marketing group)

### 2. Connect key cultural heritage products by strengthening the Heritage Road touring route

- While there is much room for improvement, the Heritage Road is a touring route that has been widely adopted by the industry and is followed in part or in full by a significant number of visitors to the region, in particular international visitors on Classic Tours amongst others.
- These visitors follow a well-worn path through the three provinces that includes visiting the World Heritage sites of Hue Citadel, Hoi An and My Son. Often supporting attractions such as the Marble Mountains, the Hai Van Pass etc., are also visited along the way.
- The Heritage Road also includes an optional extension to the World Heritage caves of Phong Nha-Ke Bang

- Suggested branding: **“Central Coast Heritage Road”** (maintains existing brand that has been adopted by the industry)

### 3. Connect key nature and CBT products by developing a Nature Trail touring route circuit

- Nature and CBT products were ranked strongly by stakeholders during the product prioritisation exercise. Tour operator feedback also indicated significant and growing market demand for CBT and nature experiences in the region for particular market segments.
- Government and stakeholders also identified a broad need for the tourism industry to help contribute to poverty alleviation in inland communities.
- This strategy entails developing a Nature Trail touring circuit that begins in either Da Nang or Hue and loops along the coast and into the inland region passing by many of the key nature and CBT sites of the three provinces.
- Opting for a circuit that includes both coastal and inland regions was considered as a compromise because a sole inland route from Hoi An to Hue would exclude the nature and CBT products of Da Nang, while a coastal based nature route would not connect to some of the important inland nature and CBT products of Quang Nam and tt.Hue.
- Suggested branding: **“Central Coast Nature Trail”** (Central Coast helps visitors to ‘place’ the touring route within the broader context of Vietnam, and nature clearly identifies the theme of the route)

A detailed analysis of the three product development strategies follows.

## **CENTRAL COAST (TOURISM HUB)**

### **Overview**

- A tourism hub of concentrated products coastal and island products that encompasses key destinations of the three provinces into a single destination.
- Includes products located along the coast between Lang Co Beach in tt.Hue in the north, through Da Nang in the centre, and ending in Cua Dai Beach in Quang Nam in the south.
- Also includes secondary and supporting attractions along the coast to approximately 5km inland.
- Visitation to the key products conducted as excursions / day trips with visitors based in a coastal hotel / resort in Da Nang, Lang Co or Cua Dai.
- Primary mode of transport around the region is by vehicle (car, bus, motorbike).

### **Target markets**

International:

- **Family holiday makers.** International family holiday makers from China, Korea, Russia and Japan on package tours and independently organised. Mostly from December - August.

- **Company incentives.** International company incentive groups on package tours from South East Asian countries as well as from China, Korea and Japan. Mostly from November – December.
- **“Classic” travellers.** International Classic travellers from Europe, North America, Australia who travel as families, as couples, or middle-age to older. Mostly from October – April.
- **High-end coastal recreation & entertainment.** Wish to visit the casino or play golf in a coastal / beach destination. Middle-age or older. Wealthy businessmen usually travelling with their family. Year-round for casino but from December – May for golf holidays.

Domestic market:

- **Family holidays.** Domestic family groups during holiday periods. Can be package tour or independently organised. Mostly during Tet and the summer holidays.
- **MICE.** Domestic MICE package tour groups. Can be year-round.

### Priority products

The priority products that have been selected for the Central Coast cluster and should receive priority in development and marketing are:

Product	Province
Cham Islands	Quảng Nam
Cửa Đại & An Bang Beach	Quảng Nam
Mỹ Khê & Phạm Văn Đồng Beach	Đà Nẵng

The secondary level products for the cluster are:

Product	Province
Hàn River	Đà Nẵng
Lăng Cô Beach	tt.Huế
MICE / Business products	Đà Nẵng

Visitors holidaying in the destination can also enjoy other attractions. Key supporting attractions include:

Product	Province
Asia Park & Helio Centre	Đà Nẵng
Ba Na Hills	Da Nang
Bach Ma National Park	tt.Hue
Boat trip Thu Bon River Traditional Villages	Quang Nam
Cham Museum	Da Nang
Da Nang City and River products	Da Nang
Hải Vân Pass	Da Nang
Hội An	Quang Nam
Hue Citadel & Perfume River tombs and temples	tt.Hue

Linh Ung Pagoda / Son Tra Peninsula	Da Nang
Local specialty food	Quang Nam
Marble Mountains	Da Nang
Mỹ Sơn	Quang Nam
Silver Shore Casino	Đà Nẵng

## Key activities

The key activities that are commonly undertaken within the region that relate to the priority products include:

- Relaxing, sunbathing, picnicking, swimming at the beach
- Enjoying seafood and / or local cuisine by the ocean
- Engaging in water sports including jet skiing, sea kayaking, children's inflatable products, parasailing
- Boat cruise to Cham Island
- Snorkelling and / or diving on Cham Island
- Recreation and entertainment by the beach, in particular playing golf and visiting the casino
- Enjoying a spa, therapeutic massage treatment
- Enjoying city lights, cafes, restaurants and bars on Da Nang river
- Undertaking day / half-day tours to nearby cultural heritage and nature sites (e.g. Ba Na Hills, Hoi An, Hue citadel and tombs, Marble Mountains, Cham Museum, My Son, Son Tra Peninsula, etc.)

## Branding and positioning

The experiences of the Central Coast destination could be arranged into five key coastal themes:

- **Sun and sand** - Activities and places by the seaside (e.g. beaches, spas, massage, seaside dining, coastal golf courses, casino, etc.)
- **Sea** – Places and experiences in / on the water (e.g. islands, diving, snorkelling, swimming, fishing, other water sports)
- **City life** – Sophisticated coastal city experiences (e.g. restaurants, bars, cafes, shopping, riverside promenades and precincts)
- **Civilisation** – Cultural heritage sites and activities (e.g. tours of historic tombs and temples, pagodas, historical towns and cities, etc.)
- **Scenery** – Nature based places and experiences (e.g. national parks, coastal lookouts, etc.)

## HERITAGE ROAD

### Overview

- A touring route that connects the key cultural heritage products within the three provinces, a significant portion of which are UNESCO World Heritage classified.
- The Heritage Road route was introduced many years ago and is followed formally or informally by a significant number of visitors to the region each year. The proposal therefore is to further strengthen this route.
- Route traditionally begins in Hue and travels south to Hoi An via Da Nang, taking approximately 3-4 days. A significant number of visitors are also using Da Nang as the gateway, travelling south to Hoi An and then up north to Hue, where they may exit the region, or alternatively by returning and exiting in Da Nang.
- Primary mode of transport is vehicle (car, bus, motorbike).
- A popular additional option with some market segments is to add an extension to World Heritage cave, Phong Nha-Ke Bang (Quảng Bình Province).

### Target markets

#### International:

- **Classic travellers.** Mostly from Europe, North America, Australia and Japan on whole of Vietnam package tours. Typically around 2 weeks. Normally families or middle age to older travellers. From October – April.
- **Independent travellers & backpackers.** Often travelling a number of countries in South East Asia. Younger, up to 25 years old. Singles, couples, or small groups of friends. Year round.
- **South East Asia family holiday makers.** Family groups from the region on holiday in Vietnam. Mostly from Thailand, Singapore and Malaysia. Year round.

#### Domestic:

- **Family holiday makers.** Domestic family groups mostly from Hanoi and HCMC. Can be package tour or independently organised. Most likely to include additional leg to Phong Nha-Ke Bang. Mostly during Tet and over the summer holiday period.
- **Returning expats.** Vietnamese holiday makers working overseas who return to Vietnam for a holiday to catch up with family and friends. Often on package holiday. Year-round.

### Priority products

The priority products that have been selected for the Central Coast Heritage Road and should receive priority in development and marketing are:

Product	Province
Chăm Museum	Da Nang
Hội An	Quang Nam
Huế Heritage Citadel & Imperial music	tt.Hue
Marble Mountains	Da Nang
Mỹ Sơn	Quang Nam
Perfume River & tombs	tt.Hue

The secondary level products for the route are:

Product	Province
Đà Nẵng Museum	Đà Nẵng
Huế Ancient Garden House	tt.Huế
Huế Temple	tt.Huế
Thánh Duyên Temple	tt.Huế

Visitors following the touring route can also enjoy other attractions along the way. Key supporting attractions include:

Product	Province
Ba Na Hills	Da Nang
Boat trip to Thanh Ha and Kim Bong craft villages	Quang Nam
Con Ga Church	Đà Nẵng
Cua Dai Beach and Cham Island	Quang Nam
Đà Nẵng Military Museum	Đà Nẵng
Đầm Sam-Chuồn Dress	tt.Huế
Dong Dinh Minority People Museum	Đà Nẵng
Hải Vân Pass	Da Nang
Hue Lifestyle	tt.Huế
Lang Co Beach	tt.Hue
Linh Ung Pagoda / Son Tra Peninsula	Da Nang
My Khe Beach and Phạm Văn Đồng Beach	Da Nang
Phong Nha-Ke Bang	Quảng Bình
Quan The Am Pagoda	Đà Nẵng
Royal meal experience	tt.Hue
Spiritual products	tt.Huế
Tam Giang Lagoon	tt.Hue
Tra Kieu Church	Quảng Nam
Tra Que vegetable village	Quang Nam

## Key activities

The key activities that can be undertaken along the route that relate to the priority products include:

- Walking tour of caves, temples and pagodas atop the Marble Mountains, take in coastal and district views
- Tour of Cham museum to learn about ancient Cham civilisation in Vietnam
- Walking tour of Hoi An ancient town to take in ambience and go shopping
- Walking tour of My Son temple ruins to learn about ancient Cham civilisation in Vietnam and appreciate the ornate stonework, enjoy traditional cultural performance
- Sample local food specialties in Hue and Hoi An
- Enjoy the coastal views from the Hai Van Pass lookout
- Walking tour of Hue Citadel to learn about the life of the last royal Nguyen Dynasty

- Boat cruise of Perfume River in Hue and walking tour of World Heritage tombs and temples
- Enjoy a performance of Royal Court Music at the Hue Citadel

## Branding and positioning

The experiences of the Central Coast Heritage Road could be arranged into four key cultural themes:

- **The Royal dynasties:** Life in the time of Vietnamese dynastic rule from about the 2<sup>nd</sup> Century until the 15<sup>th</sup> Century. Key products: Hue Citadel, Perfume River tombs and temples.
- **The Cham empire:** Cultural heritage sites and stories about life during the time of the Champa empire from about 875 to about 1000 AD.
- **Vietnamese spiritualism:** Sites, rituals, events relating to the spiritual life of the Vietnamese, from past to present.
- **Coastal trading life:** Historical coastal port towns and stories of a golden age of seafaring life and trade in South East Asia.

## NATURE TRAIL

### Overview

- A touring route circuit that connects the key nature and CBT products within the three provinces.
- Builds on and incorporates the “Inland Trail” concept developed by ILO in conjunction and local stakeholders.
- Gateways are either Da Nang or Hue. Route follows the coast between Hue, Da Nang and Hoi An before looping in to the west to connect to the region’s nature and CBT destinations inland.
- Incorporates a range of different forms of transport and experiences integrating sections to that can be best undertaken by vehicle (car, bus, motorbike), by boat or by foot (hiking).
- The coastal section of the loop follows the Heritage Road making the inland section a natural extension.

### Target markets

International:

- **Backpackers & adventure travellers.** Mainly from Europe, North America, Australia and Japan. Usually travel independently but often join locally operated tours. Includes “easy riders” motorcycle tour groups following Ho Chi Minh Trail. Can be single, couple or small groups of friends. Year round.
- **Nature enthusiasts.** Mainly from Europe, North America, Australia and Japan. Higher spend. Older, often retired. Travel in package tours. Usually travel as couples. From October to April.

Domestic:

- **Phuot and student groups.** Mainly from Hanoi and HCMC. Low spend. Young, usually 20-30 years old. Self-organised. Use own motorbike transport. Stay in homestays and guesthouses. Usually on weekends and holidays.
- **Nature enthusiasts.** Mainly from Hanoi and HCMC. Higher spend. Middle-age and older. Travel in package tours or independently. Usually travel as couples, families and with friends. Usually on weekends and holidays.
- **Regional travellers.** From tt.Hue, Da Nang and Quang Nam. Higher spend. Middle-age and older. Travel in package tours or independently. Usually travel as couples, families and with friends. Usually on weekends and holidays.

### Priority products

The priority products that have been selected for the Central Coast Nature Trail and should receive priority in development and marketing are:

Product	Province
Bà Nà Hills	Đà Nẵng
Sơn Trà Peninsula	Đà Nẵng
Thanh Toàn Cultural Village	tt.Huế
Thu Bon River Craft Villages	Quảng Nam

The secondary level products for the route are:

Product	Province
Bạch Mã National Park & Nam Đông Cultural Village	tt.Huế
Bho Hoong Cultural Village#	Quảng Nam
Hải Vân Pass	Đà Nẵng
Phu Ninh Lake	Quảng Nam
Phước Tích Cultural Village	tt.Hue
Thanh Tân Hot Springs	tt.Hue
West Quảng Nam Nature Area	Quảng Nam

Visitors following the touring route can also enjoy other attractions along the way. Key supporting attractions include:

Product	Province
A Lưới Cultural Village	tt.Huế
Cham Island	Quang Nam
Cham Museum	Da Nang
Cua Dai Beach	Quang Nam
Hoa Bac Cultural Village & Cu De River#	Đà Nẵng
Hội An	Quang Nam
Hue Citadel & Perfume River tombs and temples	tt.Hue
Lăng Cô Beach	tt.Hue
Local speciality food	tt.Hue & Quang Nam

Local specialty food	Quang Nam
Marble Mountains	Da Nang
Mỹ Khê Beach	Da Nang
Mỹ Sơn	Quang Nam
Perfume River tombs	tt.Hue

## Key activities

The key activities that can be undertaken along the route that relate to the priority products include:

- Hiking in Bach Ma NP, around A Luoi and Son Tra Peninsula
- Boat tours on Perfume River (to temples and tombs), Tam Giang Lagoon (to homestay villages), Thu Bon River (to My Son and the craft villages), Cu De River (to Hoa Bac CBT village) and to Cham Island
- Bicycling to Thanh Toan Bridge
- Relaxing, sunbathing, picnicking, swimming at the beach
- Enjoying local cuisine of tt.Hue and Quang Nam
- Snorkelling / diving at Cham Island
- Tours of supporting cultural heritage sites (e.g. My Son, Marble Mountains, Hue citadel and tombs, Cham Museum, etc.)
- Enjoying coastal and district views at lookouts.

## Branding and positioning

The experiences of the Central Coast Nature Trail could be arranged into three key themes:

- **Rural and ethnic life:** Rural and ethnic minority culture and traditions, family life, production of local crafts.
- **Mountains and plains:** Mountains, jungles, wildlife, and scenic rural landscapes
- **Coastal charms:** Beaches, peninsulas, islands, rivers, lakes and lagoons

## **SECTION 4: STATE OF THE PRODUCT – THE GAPS IDENTIFIED**

In order to help identify and prioritise key product development requirements in order to strengthen and improve the products and visitor experience a gap analysis was conducted. The analysis draws from feedback obtained from the Product Development TWG Roundtable discussions, Tourism Industry Roundtable discussions, as well as the experience of the authors drawn from site visits and industry experience. The gap analysis focuses on primarily on the key Primary products at the regional level.

## **HERITAGE ROAD: CULTURE PRODUCT GAPS**

### **Historic cities, towns and villages**

The UNESCO classified historic city of Hue and the ancient town of Hoi An are both strong, iconic and core historical / cultural products along the Heritage Road. These two products are both critical to ensuring strong and ongoing visitation to the region as a whole. Key challenges in the management of historic Hue city and Hoi An ancient town for tourism include:

#### *Historic Hue city*

- Urbanisation, modernisation, and / or inappropriate development threatening historic Citadel site authenticity
- Continued threats from flooding, cyclones and insects (in particular termites) causing structural damage, deterioration of decorative elements, and limitations on accessibility (e.g. muddy, flooded pathways)
- Continual challenges of pollution and effective waste management from city residents
- Maintaining the large sprawling gardens and grounds is difficult and expensive.
- Significant issues controlling mould within the inside areas of the Citadel.

#### *Hoi An ancient town*

- Long terms stress, damage and /or physical deterioration of old and fragile heritage sites such as the Japanese Bridge and ancient houses from large volumes of visitors
- Commercialisation of historical heritage affecting authenticity (e.g. almost every house has been converted into a restaurant, bar, souvenir shop, etc.)
- Crowding of narrow streets during peak season, with the arrival of cruise ships and on weekends. Significant traffic around (just outside) the Hoi An Old Quarter.
- Annual flooding of the Old Quarter and long term structure damage to historic buildings in the wet season.
- Insufficient waste disposal options sometimes resulting in piles of waste being burnt near the waterways.

### **Coastal areas and inland waterways**

Along the Heritage Road there are two critical waterways that support the route's heritage products – the Perfume River which passes by Hue and is a critical boating route used by a significant proportion of visitors to access the complex's World Heritage temples and tombs,

and the Thu Bon River which passes by Hoi An town, and is a defining feature of the Old Quarter. Two key challenges for both rivers include:

- Flooding in the wet season making the rivers less attractive for boat cruises and more dangerous and difficult to navigate, creating issues of visitor safety.
- Pollution from visitors and local residents not only causing problems for local fishermen, but also affecting the attractiveness for residents and visitors.

### **Natural areas and scenic rural landscapes**

The natural environment plays an important role in providing a pleasant and in some cases such as My Son, an authentic historical context for the historical / cultural sites found along the Heritage Road. Key challenges in managing the natural areas and scenic landscapes along the Heritage Road include:

- Ongoing urbanisation, modernisation and development of the rural areas immediately surrounding the Hoi An Old Quarter (e.g. developments in the rice fields, river banks and islands).
- Urban sprawl of Da Nang's outer suburbs pushing around the Marble Mountains, reducing appeal of the temples as a peaceful place for meditation and reflection as well as its historical connection.
- Limited formal protection of the scenic rural landscape and forests around My Son which are in much the original condition as the historic site and are therefore important for maintaining site authenticity.
- Limited formal protection of critical areas along the Hoai River from over- or insensitive-development between Hoi An and My Son (a popular boating route between the heritage sites).

### **Public infrastructure**

The Heritage Road passes through a generally highly developed section of the Vietnam coastline, so overall visitors can expect a good level of infrastructure along the way, with good access to roads, transportation options, electricity, water, and telecommunications. There are however, still a number of critical infrastructure gaps that affect the effective functioning of the Heritage Road route for tourism:

- No or limited use of designated tourist attraction signs along key roads and highways
- No use of branded directional road signs along route to enhance and reinforce destination experience
- Sections of unsealed road between Da Nang and Hue (although currently being upgraded).
- Annual flooding causing erosion of roads and problems for larger tour buses.
- Dangerous sections of road around the Hai Van Pass (e.g. a "hidden bend" between the shops / parking area and the lookout, improvements required for safety barriers, road hazard warning signs, etc.)
- Limited provision of lookouts with parking and infrastructure along Hai Van Pass road (e.g. shelters, seating, interpretation, etc.).

- Sections of road with very low speed limits along sections of the route that pass by towns, villages and cities (e.g. Highway 1, Vo Nguyen Giap, and Truong Sa) which are sometimes unnecessarily long and make travel time longer than needed.
- Some small telecommunication “black spots” along the route (e.g. at Son Tra Peninsula and around My Son).
- Parts of Quang Nam have water shortages in summer due to the effects of global warming, and in particular, during El Nino events.
- Roads around Hue Citadel are narrow and sometimes full of traffic. Not enough bridges across the Perfume River for local traffic.

## **Accommodation**

The main accommodation hubs for visitors travelling along the Heritage Road are Hue, Da Nang and Hoi An. One secondary stop is also at Lang Co Beach. While these destinations generally contain a good range of accommodation types from 1-5 stars, there remain a number of key product gaps:

- Seasonality of visitation characterised by strong visitation in the dry season and significantly lower visitation during the wet season creating challenges in operations management (e.g. fluctuating income, human resource management challenges, etc.)
- Limited number of international hotel chains in Hue and room for improvement in the standard of facilities and services of local hotels
- Overall, general skills gaps, with some of the most significant areas being senior level hotel management, F&B service, and in-house event management.
- Oversupply of 3-4 star hotel rooms in Hue and downtown Da Nang, and insufficient supply of 3-4 star resorts along the Da Nang beaches.
- Insufficient volume of skilled graduates to fill current and future expected jobs in accommodation.

## **Attractions and activities**

As a whole there is a strong range of high quality attractions, activities and events that visitors can experience along the Heritage Road including three cultural World Heritage sites, a history museum, temples and tombs, unique cuisine, and traditional cultural performances. There is however still room for improvement for many of these attractions and associated activities. Key product gaps include:

### *Chăm Museum*

- Although there are audio headsets, written interpretation of the Cham artefacts is brief and do not do the fine artefacts justice.
- Museum while significant, has limited supporting onsite services (e.g. quality onsite café, high standard souvenir shop) and activities to engage the visitor and create a deeper learning experience (e.g. scheduled on-site guided tours, presentations by on-site staff, cultural performances, etc.).

- Museum is not well packaged / promoted in combination with My Son, which would help strengthen the experiences of both products.
- Museum building and grounds in need of improvement (i.e. no air-conditioning, some relics displayed outside exposed to the elements, some artefacts damaged as a result of being cemented to the wall, etc.).
- Limited control of visitor behaviour resulting in long term damage to artefacts from visitors' touching them (e.g. touching spiritual relics for good luck).

### *Marble Mountains*

- Destination is in danger of becoming “overhyped”, in particular to international visitors who might not have a spiritual connection like the domestic market, and are widely travelled and have seen more impressive temples, pagodas, caves etc., elsewhere.
- Many and large steps that can become slippery in wet weather
- Overpriced marble products sold by vocal and highly persistent vendors at the base of mountain undermining the overall experience. Products also tend to be generic, and of questionable local authenticity.
- Parking area with market stalls is a makeshift and unattractive entrance to the mountains.
- Limited supporting services / attractions / activities (e.g. cafes and snack food kiosks are basic, no multifunctional welcome / interpretive centre, no scheduled on-site tours, no presentations, etc.)
- Limited written interpretation (limited distribution of printed brochure / information, map, limited interpretive signs at caves and pagodas, etc.).
- Crowds, noise, litter during peak season

### *Mỹ Sơn*

- Interpretation around the ruins is limited and could be improved to enhance the significance of the World Heritage site.
- No scheduled on-site guided tours. Generally need to bring a guide or a guide book.
- Limited shade around the ruins making walking very uncomfortable in summer, particularly from mid-morning until late-afternoon resulting in crowding during the cooler early morning hours.
- Restaurant at parking area is basic and too far removed from the heritage site area, and only a basic café / souvenir shop at the site which is not attractive for spending long.
- The ancient temples while highly significant, do not compete well in the minds of international travellers who have visited other similar sites in the region, most notably, Angkor Wat.
- Limited developed walking trail network with supporting infrastructure in buffer zone to enhance visit.
- No accommodation at My Son. While ILO is assisting to develop homestays, the homestays need further support to develop their products. Also a need to develop different levels of accommodation for different markets.

### *Perfume River tombs and temples*

- Low quality tour boats to tombs and temples (e.g. basic furnishings, peeling paintwork, scattered belongings of boat crew, hot / limited ventilation, noisy, boat fumes entering cabin, interior does not reflect “traditional” looking exterior).
- Poor standards of boat operators and crew (e.g. employing hard sales techniques to sell their souvenirs, stopping at destinations just to get commissions, poor personal appearance and hygiene, undertaking personal / home chores, little or no interpretation, etc.).
- Limited interpretation (brochure, maps, signs, etc.) at many of the tomb and temples requiring visitors to bring a tour guide or a guide book. No or limited provision of English speaking on-site tour guides for international market.
- Limited operation of quality cafes / restaurants near the tombs and temples to break up the journey and provide relief from the heat.
- Little or no provision of hire boats (e.g. kayaks, canoes) for independent or adventure travellers to visit the tombs.
- Limited provision of other supporting activities at tombs and temples beyond taking a walking tour of each site (e.g. cultural performances, night time tours in temples / pagodas, scheduled on site guided tours, presentations / discussions, etc.).

### *Hoi An*

- Confusion over ticketing system to enter Old Quarter resulting in frustration and sometimes anger and thus detracting from overall experience.
- Shopping experience is negatively affected by vendors using aggressive sales techniques, confusion over authenticity of locally made products, and lack of product diversity in stores.
- Old Quarter is in danger of becoming “over commercialised” affecting ambience and historical context.
- Limited guiding and interpretation skills of owners of ancient houses who tend to only give a very brief introduction and then leave visitors to explore by themselves. Limited provision of print information (pamphlets, brochures) at ancient houses. Persistent selling of souvenirs by operators.
- Good information centre but town could benefit from a larger, multi-purpose interpretive / welcome centre as a starting point for exploring the town.
- Sometimes unprofessional cyclo drivers (overcharge, limited / no interpretation, etc.)

### *Hue Citadel*

- Limited interpretation around the Citadel (brochure, maps, signs, etc.) requiring visitors to bring a tour guide or a guide book. Many of the displays within the Citadel (e.g. model of the Citadel) are old and uninspiring, and an area for screening movies / documentaries about the Citadel is also basic and need of significant improvement. There is limited provision of English speaking on-site tour guides for the international market or scheduled guided tours.

- On site guides in Citadel complex are typically included in the ticket price but tour companies often must still pay again (twice) to obtain an on-site guide.
- No central Interpretation / welcome centre providing information and guidance.
- Directional signs are sometimes only in Vietnamese, and navigating the complex can be confusing with no clearly defined walking route to assist visitors.
- Royal Museum has only basic displays, not sufficient interest to keep visitors long.
- Limited activities at night time and the night cultural performance is only on request. Needs better promotion and a review of pricing to attract more visitors.
- Limited quality restaurants and cafes located within the ticketed areas of the Citadel which limits the overall experience.
- Entrance fee is frequently changed and prices can be increased without notice causing problems for travel agents who generally need about 6 months' notice in order to be able to notify their partners.
- Night market is attractive and peaceful but is small and has significant room to be expanded upon.
- Limited provision of other supporting activities at tombs and temples beyond taking a walking tour of each site (e.g. cultural performances, night time tours, scheduled guided tours, presentations / discussions, etc.).
- Souvenir products are highly generic and could be stronger reflection of local history and culture in the souvenir products.
- Sometimes unprofessional cyclo drivers (overcharge, take visitors to places where they can get commission, limited / no interpretation, etc.)
- Royal music performance while authentic and interesting, is not flexible enough to fit into many tours (e.g. don't need to offer the whole performance, just a part of it is enough)

## **NATURE TRAIL: CBT & NATURE PRODUCT GAPS**

### **Cultural, ethnic and craft villages**

The key cultural, ethnic and craft villages along the nature trail that have been selected as primary products are the Thu Bon River craft villages around Hoi An and the Cau Thanh cultural village near Hue citadel. Although attracting fewer visitors, there are also interesting Katu ethnic villages at A Luoi and Nam Dong in tt.Hue, and Bho Hoong in Quang Nam, which have also received NGO and private sector investment in CBT development. All these destinations will need to be carefully managed in order to entice people away from the coastal zone and make the nature trail a long term success. In relation to the two primary products, key challenges for tourism include:

### *Thu Bon River craft villages*

- Modernisation and urbanisation reducing appeal of a “traditional village” (expectations not met). Moreover, in Kim Bong only a few families continue the practice of wood carving, so no longer a specialist “craft village”.
- Urbanisation / development in sections of the fields surrounding Trà Quế vegetable village
- Rubbish and waste management challenges in Thanh Hà village

### *Thanh Toàn Bridge (Thanh Thủy Chánh cultural village)*

- Destination is highly emerging, limited facilities / activities / supporting attractions developed for visitors (only the bridge and a basic agricultural museum)
- Market area is makeshift, untidy and polluted

## **Inland waterways**

Along the Nature Trail there are three critical waterways that support the route’s nature products –the Thu Bon River, Tam Giang Lagoon, and the Cu De River. These rivers play an important role in enabling boating experiences sometimes to CBT villages, and are also important components of the entire “nature package”, so ensuring their protection and sensitive development is imperative. Key challenges for the three rivers in relation to tourism include:

- Flooding of all rivers during the wet season which reduces attractiveness for boat tours and poses increased visitor safety risks. Flooding of the Thu Bon River is also exacerbated due to the need to periodically empty an upstream dam.
- Limited or no formal protection of land surrounding many of the rivers / lagoon to control overdevelopment or inappropriate development that may reduce the attractiveness and viability of the natural areas for tourism.
- Low quality cruise boats operating on the lagoon and rivers due to loose regulations, monitoring and control of standards
- Likewise, broad skill gaps for boat operators and crew, many of whom do not have formal qualifications in tourism, have limited customer service skills, basic English speaking skills, etc.
- Aforementioned issues are more accentuated on the Cu De River as the Cầu Thanh Toàn cultural village is yet to be officially opened to tourism
- Only basic wharf facilities on Tam Giang Lagoon.

## **Natural areas and scenic rural landscapes**

Alongside the critical need to ensure the sensitive development of the region’s CBT products is the need to ensure the sensitive conservation and use of its protected areas such as the Ba Na Hills, Son Tra Peninsula and Bach Ma National Park, as well as providing an attractive “green corridor” along the main route of the Nature Trail itself and key CBT villages. Key gaps of the region’s primary nature products include:

- Ba Na Hills leisure / theme park tends to overshadow the protected area's natural attractions. Promotions to the destination needs to clearly target “soft eco-tourists” rather than the more discerning adventure travellers and nature seeker markets who may have different expectations.
- Ba Na Hills is cold and wet from October to February, highly fluctuating visitation resulting in management challenges (revenue, human resources)
- Limited control of mass tourism at the Slippery Waterfall in Bach Ma NP is resulting in crowding, noise, pollution and overdevelopment of food stalls beside the waterfall.
- Road to top of Ba Na Hills is in bad condition, forces visitors to take cable car which can be an issue for Phuot and student groups
- In Bach Ma National Park there are sustainability challenges of wildlife poaching, extraction of non-forest timber products, population growth, intensive agriculture and poverty creating sustainability challenges in the buffer zone and compromising the ecosystem values of the protected area.
- In Son Tra Peninsula there are numerous sections of road that are difficult / dangerous to drive (e.g. narrow, no safety barriers / road lines, steep gradients, jungle overgrowth).
- Son Tra Peninsula's bays with restaurants, resorts and public beaches as well as the fishing port area are susceptible to litter and pollution (solid waste and waste water)

## Public infrastructure

The Nature Trail loops through the highly developed coastal region with a relatively good level of public infrastructure, as well as a dramatically less developed inland region. The infrastructure gaps along the coastal region have been identified in the Public Infrastructure sections of the Central Coast and Heritage Road. In relation to the inland area of the Central Coast Nature Trail, the following key infrastructure gaps have been identified:

- No or highly limited use of designated tourist attraction signs along key inland roads and highways
- No branded directional road signs along route to enhance and reinforce destination experience
- Road in bad condition (due to flooding), narrow, and / or steep which can restrict access for larger vehicles such as buses, in particular between Hoi An / Da Nang and Bho Hoong.
- Limited provision of multi-purpose rest stops and / or lookouts along the route (also an issue with the coastal section) with parking and infrastructure (e.g. shelters, seating, interpretation, toilets, etc.).
- Significant telecommunication “black spots” along the route, in particular along the Ho Chi Minh Trail
- In general, most villages along the inland area are dealing with issues of poor waste management
- Road from main road to Thanh Toàn Bridge is narrow and not suitable for large busses

## Accommodation

Again, provision and standards in accommodation vary greatly along the Nature Trail between the coastal region (relatively good) and the inland region (relatively poor). The key accommodation gaps along the coast are detailed in the Central Coast and Heritage Road gap analyses. In relation to the inland region, critical accommodation gaps include:

- No accommodation at Cầu Thanh Toàn cultural village. Although the village is near to the many accommodation options of Hue, it could offer short stay visitors in Hue a single night rural experience.
- General ongoing strengthening of homestay standards is needed in A Luoi and Nam Dong, and to a lesser extent Bho Hoong (which has benefited from more recent NGO homestay training as well as relatively more active and ongoing support from the private sector)
- Similar to the coastal region, there are challenges for accommodation providers dealing with strongly fluctuating seasonality between the rainy season and the dry season
- No formally developed accommodation options between Hoi An and Bho Hoong, and between Bho Hoong and A Luoi which could lengthen journeys, facilitate different forms of travel along the Nature Trail (e.g. bicycling, trekking), enable greater exploration of the region, and help spread the economic benefits of tourism.
- Outside of the Ba Na Hills leisure park tourism area there are no accommodation facilities for nature enthusiasts who wish to explore the reserve.
- Also, in the coastal region it should be noted that while Tam Giang Lagoon has some basic homestays, there is no middle- to higher-level accommodation that would be more suitable for (high-end) international and domestic nature enthusiast markets.

## Attractions and activities

While the Nature Trail route region has significant nature and CBT products, there tends to be significant gaps in the development of those products into strong attractions with a range of services and activities to enable more engaging and satisfying experiences. Key gaps in relation to attractions, activities and events along the Nature Trail include:

### *Thu Bon River traditional villages*

- Only basic welcome centre at Thanh Ha (no multifunctional facilities and services such as toilets, information, café, useful items to purchase such as hats and sunscreen) and no multi-purpose welcome / interpretive centre for Thu Bon River craft region that can act as a starting point for tours and can provide additional facilities and services
- Little or no print material and / or limited distribution providing information about the people, culture, history, products, sites, activities, etc.
- On-site village tours and are simple “workshops” not comprehensive (limited cross-cultural communication, short workshops, cannot have many people participating at

once – should operate more like an “introductory class” in woodworking / pottery and take visitors through the entire process of sourcing and developing a product etc.)

- Limited co-ordination by communities to provide a more developed and comprehensive “total tour experience” from start to finish (traditional greeting / welcome, refreshments, display, handicraft marketplace, etc.)
- Many of the craft products sold in the villages can be found in Hoi An – need to be different, more unique
- No good quality cafés / restaurants in the craft villages or along the boating route to enable visitors to stop, extend their stay, increase spend, etc.

#### *Cầu Thanh Toàn cultural village*

- Core attraction of the covered bridge is in need of repair and maintenance
- Secondary attraction of the agricultural museum is very basic (not many displays, needs repairs / upgrading), has very limited written interpretation, little or no English speaking on-site guides for international visitors, etc.)
- As per Thu Bon River craft villages, the Cầu Thanh Toàn community is not well organised to co-ordinate a more comprehensive tourism experience from start to finish
- No entrance fee to village or to walk onto bridge which is a missed opportunity for generating revenue for maintenance or providing tourism services
- Little or no print material and / or limited distribution providing information about the people, culture, history, products, sites, activities, etc. No interpretive signs. Limited / no on-site / local guides or scheduled tours.
- Limited or only basic toilet facilities
- No restaurant / café or alternatively well-developed local house “lunch stop” (only basic snack food stores)
- Need to integrate more activities in the surrounding area (e.g. rice fields walk, village tour, local temple walking trail, canoeing on the river, etc.)
- No formally developed walking or cycling trails / routes around village with supporting facilities and infrastructure (trail map, directional and interpretive signs, rest areas, etc.) to expand on the range of experiences
- Agricultural museum not directly connected with tours to surrounding farms to meet local farmer, see and experience farming using current and traditional equipment, etc.
- Room to connect agricultural museum with sale of locally made food products and potentially sell through cafe.

#### *Tam Giang Lagoon*

- While there is a master plan for development of the lagoon, there is limited formal protection of the waterway as an official Protected Area to ensure its conservation and long term sustainability as a natural resource for the local people as well as a place for leisure and recreation. In particular, there is an immediate need to ensure

protection, zoning and regulations on the development and use of the most beautiful parts of the lagoon, at Sam and Chuon.

- No specific public picnic area/s with well-developed facilities (e.g. maintained gardens, seating, umbrellas / shelters, toilets, changing area, showers, cafés, etc.)
- No public area with facilities and services offering a range of boating / water sport activities such as motor boats and kayaks (in general only arranged via tour operators, at a homestay village, or hotel at the lagoon).
- Area where boat tours depart from is not well developed (e.g. no off street parking, untidy, no toilets, shelters, seating, etc.)
- Life jackets not always provided on the local tour boats. While the lagoon is quite shallow, this can still be a safety risk for children.
- Floating restaurant is very simple (no air-conditioning, basic tables and chairs, waste management problems, etc.)
- No designated walking or cycling trails around the lagoon with supporting facilities and infrastructure (trail map, directional and interpretive signs, rest areas, etc.) to expand on the range of experiences

#### *Ba Na Hills*

- No multifunctional information / welcome centre
- Wildlife best spotted early morning or late evening but this is difficult due to limited accommodation options within the reserve / outside of the leisure park area (e.g. eco-lodges, camping areas)
- No scheduled nature tours
- Nature trails and pagodas are only accessible via the leisure park which has a relatively expensive entrance fee
- Ticket price is not flexible, in particular no reduced fee for visitors who only wish to visit nature / spiritual sites or in the low periods (e.g. mid-week, wet season)
- Only limited walking trails around the nature reserve, limited interpretation of natural environment
- Crowds at Ba Na Hills during holidays and on weekends can affect enjoyment for visitors primarily motivated by the destination's nature products / experiences

#### *Bach Ma NP*

- Highly seasonal visitation due to the Park's extreme wet season which strongly limits activities such as hiking, bird-watching, swimming, picnicking as well as inhibits views from the lookout which is a core attraction.
- Best bird-watching opportunities are at dawn which makes it difficult to spot the birds for day trippers from Hue and Da Nang.
- Mount Bạch Mã summit trail uses the main road which is not suitable for hiking (little shade, traffic, noisy, etc.).
- Shuttle bus to lookout sometimes struggles to meet volume of visitors during peak season
- Zip line product is not well promoted to visitors so can be overlooked

- Informational, interpretational and directional signs, displays and print material of the attractions and facilities are limited and where it does exist, is often in need of repair
- Some facilities such as the lookout pavilion, the main restaurant, and the Ecotourism Centre remain in poor condition and detract from the overall experience
- Resident mammals are difficult to spot and often nocturnal, so sightings are difficult
- Orchid garden is very limited

### *Son Tra Peninsula*

- While there is some war history in the area, there is only limited physical remains, and little to no written interpretation around the peninsula
- Only a few very basic snack and souvenir stalls near lookouts and attractions, not conducive for staying longer.
- No welcome / interpretive centre to explain about the attractions, history, activities of the peninsula
- No high quality restaurants outside of the high end resorts, and visitors are not able to go into resorts just to sit and enjoy a refreshment
- Only basic infrastructure along the Son Tra walking trails (only some directional signs, but little or no provision of interpretive signs, lookout platforms, shelters with seating, camping areas, toilets, etc.)
- Enjoying the views from various points around the peninsula are a key activity, however the lookouts are basic and often rundown (poorly graded trails and steps, limited provision of seating and shelters or they are broken, limited provision of toilets at lookouts, poor viewing platforms, inadequate off street parking areas, etc.)
- Military base currently limits level of development of infrastructure and services that can take place on the peninsula
- Wet season restricts many outdoor activities and also can make driving dangerous

### *Bho Hoong and A Luoi cultural villages*

- While the communities of Bho Hoong and A Luoi have benefited from recent CBT skills training, there is a need to strengthen general organisation and co-ordination to enable more comprehensive tourism experience from start to finish
- While there are many natural and cultural attractions in and around the villages, there is only limited infrastructure to enable tourism activities (e.g. no sign posted walking trails, no picnic areas, no lookouts, no fishing platforms, no swimming areas, etc.)
- Likewise, the communities do not provide sufficient tourism facilities and equipment, forcing tour operators to bring with them (e.g. no mountain bikes, kayaks, lifejackets, etc.). In some cases this is also limiting potential income earning opportunities for the community (e.g. bicycle hire / tours).
- While there are local community performance groups they are generally simple and could benefit from becoming more professional. In general, many performances are not well interpreted so visitors do not understand the meaning or significance. Tour companies and the provincial authorities need to work together to improve.

## CENTRAL COAST (TOURISM HUB): COASTAL PRODUCT GAPS

### Coastal areas and inland waterways

The beaches, coastal and inland waters in the Central Coast tourism hub are critical components of the tourism experience and the key attraction for most visitors. The careful management of these products is therefore critical for the hub to operate successfully as a desirable tourism destination. The coastal areas and inland waterways that have been prioritised are the beaches of Lang Co, Mỹ Khê & Phạm Văn Đồng, Cua Dai & An Bang, Cham Island, and the Han River in Da Nang.

#### *Chàm Islands*

- Rainy season from September to March brings large waves and strong currents making it difficult / dangerous for boats to reach Cham Island from Hoi An, and for visitors to swim / snorkel / dive around the islands.
- Limited interest of private sector to invest in Cham Island, so restaurants, accommodation, etc. remain at a low level. Key issue is the cost required for financing infrastructure development to make the destination more viable for hotels and resorts (e.g. roads, waste management services, etc.).
- Limited supply of fresh water, but the water that is available is currently good for drinking.
- Crowded beaches during peak season.
- Limitations on duration of stay due to high waves after 14:00.
- Risk of overpopulation of local residents on Cham Island exacerbating crowding on beaches and the market, and generating increased pollution and waste lessening its appeal as an “idyllic island” tourism destination, and increasing the risk of the destruction of coral reefs and marine life.
- Coral in highly visited areas of the Cu Lao Cham Marine Protected Area are being trampled on and touched by snorkelers and divers causing irreparable damage and the appeal of the destination as a place for snorkelling / diving.
- Wild crabs around the Cham Islands are becoming endangered from overconsumption driven by the tourism trade.
- Potential overfishing and / or illegal fishing within the Cu Lao Cham Marine Protected Area.

#### *Coastal beaches*

- Rainy season from October to December makes beach and water products / activities less attractive and in some cases dangerous, significantly impacting on visitation.
- Serious erosion of Cua Dai & An Bang beach from rain, typhoons, increasing sea levels. Not only whole sections of beach are disappearing, but whole resort buildings are at risk of damage and destruction. Erosion is creeping north every year. Attempts by resorts often insufficient and without being under the direction of expert scientific advice, could be making the situation worse for neighbouring properties.

- Souvenir sellers along beach sometimes disturb visitors wanting to relax in particular on Cua Dai, Mỹ Khê & Phạm Văn Đồng beaches.
- Limited good quality restaurants and cafes along Lang Co and Cua Dai beach. Those that are available tend to be aimed only at the high or low end.
- Limited quantity and variety of retail shops and services along Lang Co and Cua Dai beach limiting overall visitor satisfaction (e.g. minimarts, fashion shops, etc.)
- Public sections of Cua Dai, An Bang, Mỹ Khê and Phạm Văn Đồng beaches are relatively limited resulting in significant crowding in the morning and afternoon and reducing the appeal of the beaches being places for rest and relaxation.
- In general, waste water (sewerage) is being piped out close to the beach, reducing water quality and increasing health risks for swimmers.
- Good waste management services tend to be best managed in front of hotels / resorts or in the most popular sections of the beach with litter building up in the other areas.

#### *Han River*

- Some pollution of river with rubbish visible on muddy sections of river bank.
- Limited shade for walking beside the river making it uncomfortable during the day time
- Limited services and activities on and around the Han River (e.g. limited forms of boat cruises, no scheduled ferry hop-on-hop-off service, no extensive parklands / gardens, no barbecue and picnic facilities, limited fishing platforms and jettys, etc.)
- Insufficient supply of floating restaurants
- Crowds walking across Dragon Bridge before and after the “spit fire spectacle” and taking photos forcing pedestrians to walk on the busy road creating safety issues.
- Crowds along river promenade on the east side of the Han River and very limited and / or basic facilities (shops, cafes, restaurants, etc.).

#### **Public infrastructure**

- Roads on Cham Island are generally very narrow, restricting the use of buses and cars and forcing visitors to walk everywhere (can be a positive).
- Poor mobile phone telecommunications access on Cham Island.
- No or limited use of designated tourist attraction signs to inform visitors about destinations and tourism services throughout the Central Coast tourism hub region.
- Only a small international hospital in Da Nang, very limited health care services on Cham Island.
- Annual flooding can also cause erosion to the roads that are located beside the beaches and requires costly ongoing maintenance.
- Limited provision of coastal lookouts with parking and infrastructure (shelters, seating, interpretation, etc.) throughout the Central Coast region.
- Inadequate parking areas and facilities at the public beaches.
- Limited provision of life guards, in particular on Cua Dai Lang Co beaches, and insufficient equipment such as speed boats, medical equipment, etc.

- Some traffic problems around public beaches in the mornings and afternoon, in particular, the Mỹ Khê and Phạm Văn Đồng public beaches.

## Accommodation

- Due to limited accommodation options on Cham Island most typical visitors are not able / interested to stay overnight which restricts length of stay, visitor spend, and further income earning opportunities for the local people.
- In relation to hotels, on Cua Dai beach there are no international hotel chains and other hotels have typically low quality standards. Along Mỹ Khê and Phạm Văn Đồng Beach there appears to be a current oversupply of 3-4 star hotels resulting in increased competition, the lowering of prices, and the lowering of standards, creating an overall less attractive experience for visitors.
- In relation to resorts, there are a limited supply of 3-4 star resorts on Mỹ Khê, Phạm Văn Đồng and Lang Co beaches.
- Connected to the issue of coastal erosion, there is insufficient application of planning controls to ensure resort / hotel developments are not built too close to the ocean or result in the removal of natural barriers that normally help minimise weather events causing erosion such as sand dunes, mangroves, or bushland areas.

## Attractions and activities

- Limited night time attractions and activities / entertainment to keep visitors interested in the evening in Da Nang city (e.g. no regular traditional performances, currently no night market, limited international retail outlets, etc.)
- Limited range of activities and attractions on Cham Island (mostly swimming, snorkelling / diving, picnics, sampling local food). CBT villages are not strongly packaged into tours and the local people are missing out.
- Cham Island museum and temple are very basic and not strong enough to be of interest to international visitors
- Only simple fishing equipment for hire on Cham Island (professional equipment must be brought from the mainland). No specific wharf for fishing (normally has to be done from a boat).
- Limited regulation of standards for diving / snorkelling boat tours to Cham Island (e.g. broken / dirty masks, no flippers, etc.).
- On Cua Dai and Lang Co beaches there is also a limited range of water sports available to the public (mostly restricted to jet skiing).
- While there is a good quality reef located close to Son Tra Peninsula, it is not accessible due to its proximity to a military base.
- Many of the cruise boats on Han River are converted from fishing boats and do not meet international standards for comfort, safety, cleanliness, etc. Boat crew / staff capacity can be improved (English speaking skills, interpretation is noisy and mostly in Vietnamese).
- Currently no fixed terminal for cruise boats on Han River. Stairs to cruise boats are not safe, in particular at night. There have been plans however, to develop a new cruise boat terminal in 2016.

## **SECTION 5: RECOMMENDATIONS FOR PRODUCT STRENGTHENING**

Based upon tour operator round table discussions and site inspections as well as the results of the gap analysis, a range of actions for strengthening tourism products were identified. To focus efforts, the most critical issues were identified according to the defined cluster and route approach to destination and product development with three to four key recommendations identified for each. In total the following twelve product strengthening recommendations were identified:

<b>Cluster / Route</b>	<b>Key recommendation</b>
Heritage Road	• Improve interpretation at cultural heritage sites
	• Improve range and quality of services and activities at cultural heritage sites
	• Improve customer service standards of tour guides, transportation service providers and retailers at cultural heritage sites
	• Better safeguard condition of cultural heritage sites
Central Coast tourism hub	• Reduce strength and impact of tourism low season
	• Improve range and quality of services & activities in beach destinations
	• Reduce crowding on public beaches during peak periods and seasons
	• Broaden range of coastal accommodation offerings to better meet market demand
Nature Trail	• Strengthen protection of key traditional villages or sites from urbanisation and modernisation
	• Improve tourism infrastructure and services along inland section of Nature Trail
	• Improve road infrastructure along inland section of Nature Trail
All	• Strengthen development, promotion and co-ordination of Central Coast tourism festivals and events

One additional critical gap was identified; to safeguard Cua Dai and An Bang Beach from erosion. However, recommendations to tackle this issue have not been discussed in the report because it was felt that the fixing the gap requires the input and advice from highly specialised scientific technicians and goes well beyond the scope of what could be recommended in this report.

### **Improve interpretation at cultural heritage sites**

- Ensure all heritage sites develop, implement or are guided by formal interpretation plans and strategies. The plans should identify key themes and logical frameworks for presenting messages that visitors can relate to.
- Improve development and reliable distribution of written information to heritage site visitors. Ensure information sheets / brochures and site maps are given to every visitor when they pay their entrance fee or go through the front gate. Consider complementing a simple free version (included with ticket price), with the sale of a paid version that is more comprehensive, acts like a souvenir, and can generate money to fund ongoing production.
- Install better and more informative and interesting interpretive signs next to displays or relics. The interpretation should be engaging, be based upon fostering access and

enhancing understanding, be grounded in comprehensive research, relate to the wider context and setting, be authentic and promote sustainability. Presentation needs to be attractive, interesting and easy to understand (including effective use of pictures / diagrams, etc.)

- Engage all the senses to heighten interest and learning. Improve use of video and audio (e.g. movie rooms), incorporate use of touch screen technology, create displays that allow visitors to touch or smell objects, etc.
- Improve access to on-site guides with international language skills. Offer more scheduled on-site guided tours in different languages. Provide scheduled discussions and presentations by research staff or special guests.

*Priority destinations:* Hue Citadel complex, Perfume River temples & tombs, Marble Mountains, Hoi An ancient houses

### **Improve range and quality of services and activities at cultural heritage sites**

#### Hue Citadel:

- Upgrade and convert snack food / souvenir shop into a single purpose café offering greater range of snacks, beverages and light meals.
- Examine opportunities to operate higher quality souvenir shops at the Exit gates and next to main car parks and removing low standard souvenir stalls within Citadel. Consider contracting to private sector.
- Improve signage around Citadel and provide maps at ticket booths to help visitors see the sites in a logical order. Can consider themed routes and routes of different durations. Support routes with good directional signage.
- Develop a high quality multi-functional welcome centre next to the Front Gate. Should become an activity in itself and the visitors' first stop. Provides information, café, toilets, souvenirs, etc.

#### Marble Mountains:

- Identify 1-2 snack food shops with good views of coast / district and upgrade into small cafes selling light meals
- Develop a small high quality multi-functional Welcome Centre next to the elevator and parking area. Visited as first stop. Provides information, café, toilets, souvenirs, etc.
- Encourage greater diversity in marble products being sold by factories around Marble Mountain. Encourage greater diversity of retail shops.
- Consider enabling greater access / improving visitation to Mount Metal. Link with Quan The Am Pagoda. Examine opportunities to connect Cham Museum to Quan The Am Pagoda and Mount Metal by boat.

#### Perfume River temples & tombs:

- Develop a floating / riverside restaurant or café near to Minh Mang tomb as lunches on the boats are not high quality and there are no other good lunch options nearby.

- Develop a Welcome Centre for Perfume River tombs and temples region by the river and next to the Thien Mu Pagoda. Should be accessible to visitors on boat tours, bus tours and bicycle tours. Visited as a first stop. Activity in itself. Provides information, café, toilets, souvenirs, etc.
- Strengthen regulation and enforcement of standards of boat tours with yearly checks and fines. Provide more training courses in tour boat operation and customer service standards.

#### My Son:

- Develop new restaurant to accommodate tour groups next to the performance area. Should have A/C and be sensitively designed to fit with the heritage site and surroundings.
- Implement existing plans to develop a walking trail network with facilities and infrastructure around the My Son temples and into buffer zone.
- Encourage more overnight visitation by expanding activities around the temple and homestay village, e.g. trekking or cycling to Ho Vinh Trinh, boat tours on the lake, farm experiences, etc.
- Improve road from My Son to the Que Loc hot springs to diversify products and keep visitors longer, increase spending, etc.

#### Cham Museum:

- Upgrade existing café / souvenir room to attract more customers, increase length of stay, and visitor satisfaction.
- Connect museum to Quan The Am Pagoda in the Marble Mountains by boat tour (see previous).
- Examine opportunities to promote and package cheaper tickets that combine entrance to the museum with My Son to strengthen total visitor experience and increase revenue made.

#### Hoi An:

- Examine opportunities to improve ticketing system to ensure greater uptake, e.g. centralised ticketing place with digital photos printed onto tickets. Examine opportunities to increase security staff to enforce ticketing system.
- Develop high quality multi-functional Welcome Centre next to the car park outside the Old Quarter (consider using part of the Cultural Centre facilities). Visited as a first stop. Provides information, café, toilets, souvenirs, etc.
- Develop a masterplan to encourage development of tourism into satellite areas around Old Quarter (e.g. about 10km radius). Offer incentives to encourage private sector investment (e.g. open land for rent, lower tax in target satellite destinations, support with greater marketing / promotion).

*Priority destinations:* Hue Citadel complex, Perfume River temples & tombs, Marble Mountains, My Son, Cham Museum, Hoi An

### **Improve customer service standards of tour guides, transportation service providers and retailers at cultural heritage sites**

- Provide training or awareness raising campaign for sales assistants, cyclo drivers and boat operators about appropriate (and effective) sales techniques including effects of improper behaviour in order to create a more satisfying shopping and tourism experience for visitors.
- Examine potential of imposing regulations to require retailers to use fixed pricing for their products and services and / or to clearly display prices for customers.
- Consider trialling a hotline service for visitors to report problems or complaints about unscrupulous cyclo drivers or boat tour operators (e.g. stickers on boats or cyclo communicating the hotline phone number).

*Priority destinations:* Hue Citadel & Perfume River boat tours, Marble Mountain factories and stores, Hoi An (lesser extent)

### **Better safeguard condition of cultural heritage sites**

- Reduce damage caused by visitors (prevention). Conduct audit to assess condition of heritage sites and establish plan that identifies and prioritises repair and maintenance requirements / activities. Implement strategies to control visitor behaviour (e.g. notices to inform about correct / incorrect behaviour, closing off whole areas using barriers, using fencing, ropes, etc. to close off specific areas (e.g. fragile exhibits), control visitor flow (in particular during peak periods). Develop simple and low cost M&E programme that includes identifying indicators, setting limits of acceptable change, monitoring, control, continuous feedback, etc.
- Implement awareness raising programme to gain support of local residents living in heritage sites (e.g. Hoi An ancient houses) to improve their understanding about the importance of maintaining the cultural heritage of their houses, the benefits of cultural heritage, simple do's and don'ts, etc.
- Examine opportunities to develop innovative strategies to raise money to fund ongoing maintenance and conservation (e.g. corporate sponsorships, visitor voluntary conservation fees with gifts / souvenirs, community events to help clean-up heritage places, etc.)
- Strengthen systems for management and use of heritage site maintenance funds at Hue Citadel and Perfume River Tombs to ensure funding is used for the correct purpose and is used for priority activities and not for other reasons.

*Priority destinations:* Hue Citadel, Perfume River Tombs, Hoi An, Cham Museum

### **Reduce strength and impact of tourism low season**

- Encourage greater differential pricing strategies by operators and service providers (hotels, airlines, attractions, etc.) such as seasonal pricing to increase visitation and length of stay in low periods, group booking offers (e.g. for retirees) to increase visitation in low periods, and providing support (e.g. training) on financial planning and budgeting to manage fluctuating operational costs.

- Encourage diversification of attractions / product mix, for example, by introducing festivals and events in the low season (e.g. surfing competition), developing Da Nang's city offerings (e.g. bars, restaurants, clubs, cafés, cinemas, shopping, etc.), offering complimentary services or themed offers (e.g. combining a hotel with coffee shops or retail outlets), or diversifying to increase local customers.
- Diversify the market, for example, attracting more MICE visitors in the low season or retirees who can travel year-round (i.e. develop and implement a highly targeted campaign to MICE source markets in region, beginning with source markets with direct flights in South East Asia and North Asia)
- Increase provision of government sponsored business support services and initiatives such as loans or subsidies to develop product or local services, tax concessions (e.g. on price of fuel), support for low season community initiatives (e.g. local arts festivals), providing business support services (e.g. marketing, financial planning), etc.

*Priority destinations:* All

### **Improve range and quality of services and activities in beach destinations**

- Develop stronger shopping experience along Da Nang beach by increasing allocation of retail zones and encouraging mixed use property developments (e.g. hotels with public access areas on the ground floor and lower levels for restaurants, supermarkets, fashion outlets etc.). Combine with offering incentives to encourage such development (provision of land, tax breaks, loans, etc.). Focus on products that fit with coastal context (e.g. ice cream shops, beach ware fashion shops, hair salons, local speciality food stores, jewellery shops (beaches are romantic destinations), barefoot beach night market, etc.
- Diversify entertainment options at Da Nang beaches (therapeutic massage, spas, bars and clubs, karaoke, dancing halls, "open air" cinema, pier entertainment complex near Son Tra (with restaurants, cafes, entertainment, cruise boats, fishing, etc.)
- Encourage private sector to operate more sea sports and beach activities such as paddle boarding, windsurfing, surfing, kitesurfing, etc.
- Improve standard of restaurant strip along Cua Dai and An Bang beach
- Examine opportunities to develop community based / SME entertainment opportunities on Cham Island such as walking and cycling trails and tours, partner with university of institute to develop a research centre that can attract student groups, scientists / researchers, etc.

*Priority destinations:* Da Nang beaches, Cua Dai & An Bang beach, Cham Island

### **Reduce crowding on public beaches during peak periods and seasons**

- Strongly enforce government regulations to take back coastal land and beaches that are not developed within 5 years (in particular around Da Nang and to a lesser extent

Cua Dai and An Bang), and examine opportunity of opening up new sections of beach for the public

- Encourage private sector to invest in Xuan Thieu beach to take pressure off Da Nang beach
- Consider to set a limit on the number of boat tours / visitors or business licences to Cham Island
- Examine opportunity (demand, business case) of developing a section of beach with paid entrance fee that offers a less crowded experience with higher level of facilities and services (e.g. umbrellas, beds, café / snack food, water sports, changing room with showers, etc.)

*Priority destinations:* Da Nang beaches, Cua Dai & An Bang beach, Cham Island

### **Broaden range of coastal accommodation offerings to better meet market demand**

- Review master plan on land allocated for 5 star resorts in Da Nang and Cua Dai / An Bang (due to many failing to raise the funding to develop) and consider allowing more 3-4 star resorts where there is stronger consumer demand.
- Offer incentives to encourage 3-4 star boutique hotels to open on Cham Island
- Consider awareness raising campaign to improve standards of domestic hotels and resorts in Cua Dai / An Bang (including the importance of standards and low cost ways to improve standards). Consider use of providing low cost seminars, flyers, brochures, posters, encourage media attention, etc.
- Implement a more aggressive promotional campaign in particular for Lang Co Beach to attract more 3-4 star resorts and capitalise on the limited opportunities available for such resorts in Da Nang and Cua Dai / An Bang.
- Review and consider reducing the issuing of hotel licenses for 3-4 star hotels in Da Nang
- Establish opportunities for regular Public-Private Dialogue (PPD) at the regional level to discuss plans, strategies, industry needs, etc. for developing tourism in the region
- Improve and facilitate greater use of market research and effective dissemination on hotel sector to better enable private sector to respond to new trends and opportunities in the provision of accommodation. Consider partnership with private sector (e.g. extending Grant Thornton report), or partnering with local / regional university / tourism college.

*Priority destinations:* Da Nang Beaches, Cua Dai & An Bang Beach, Cham Island, Lang Co Beach

### **Strengthen protection of key traditional villages or sites from urbanisation and modernisation**

- Audit key cultural tangible and intangible assets in priority destinations (e.g. specific houses / buildings, streets, or other places with special history or significance), identify local and tourism values, resource use, and sustainability challenges, and prioritise significance of sites.

- Develop and implement zoning system based upon the heritage audit for sites that do not have adequate protection to ensure sustainable use through cross-sectoral / multi-stakeholder dialogue.
- Develop and implement guidelines to inform resource users about the rules and regulations of use, and to guide developers in the appropriate design, construction and operation of new developments.
- Develop and implement a fees system connected with visitation to the key cultural heritage sites that can help finance maintenance of the special sites for tourism.
- Conduct training and capacity building of key stakeholders, in particular, awareness-raising with local community on the value of their cultural and historical heritage to generate community pride and motivation to protect it.

*Priority locations:* Thu Bon River craft villages, A Luoi, Nam Dong, Thanh Toan village

### **Improve tourism infrastructure and services in key inland CBT destinations**

- Work with tour operators to identify needs and potential locations for additional places for homestay, guesthouses and / or hotels to cater to key target markets along the Nature Trail's inland roads to lengthen trip duration, encourage greater exploration and types of activities (e.g. cycling, trekking) and increase spend. Locations need to be carefully selected based upon the strength of their attractions and their connection to viable target markets.
- In particular, it is recommended that the following two destinations could be assessed as potential strengthening as homestay destinations:
  - A Tieng Town (Tay Giang District, Quang Nam) – Half way stopping point between Boh Hoong and A Loui. The town is home to Ka Tu people with rich culture and traditions, has traditional houses, pretty mountain surrounds, etc. Existing homestays should be strengthened and further CBT products developed.
  - Thanh Toan Village (tt.Hue) – Develop as a simple rural / inland CBT experience that is easily accessed from Hue. Already visited by tourists who wish to see the ancient covered bridge. Positioned as an alternative to homestay experience to Tam Giang Lagoon which is based on fishing life. Requires development of homestays and supporting CBT products.
- Work with tour operators, local community, and other stakeholders to identify needs and locations for lunch stops (can be multi-functional rest stops) along the inland Nature Trail roads. Should be connected to an interesting attraction (e.g. hot springs, waterfall, lookout, river, etc.). In particular, the location for one multi-functional rest stop could be situated about half way between Hoi An and Bho Hoong. Likewise, identify and prioritise other key attractions along the route such as waterfalls or places for lookouts and establish working groups to identify development needs and implement activities (e.g. parking, lookout platforms, toilets, etc.)
- Work with Quang Tri Province to develop the extension from A Luoi to Hamburger Hill, site of one of the fiercest battles of the American war, and popular destination with Easy Riders and war veterans.

- Develop and implement incentives to encourage private sector development along the inland section of the Nature Trail, for example through the provision of government sanctioned tax breaks, access to land, removing travel restrictions for foreign visitors to particular destinations (if relevant), supporting in the improvement of roads, telecommunications, etc.
- Develop and implement government sponsored awareness and training for communities in priority destinations along the inland section of Nature Trail in areas such as CBT product development and small tourism business skills. Develop and link to schemes for communities to access finance to develop products / businesses, and help connect communities with tourism private sector (partnerships) for investment and development of products.

*Priority locations:* Inland Nature Trail region, in particular between Bho Hoong – A Luoi – Hue

### **Improve road infrastructure along inland section of Nature Trail**

- Improve inland roads:
  - A Luoi – Route 1, Route 1 – HCM Road: Widen, improve surface (pot holes, some sections of mountain roads need safety fences, improve provision of road lines, consider installing street lights near key tourism destinations / junctions
  - Hoa Bac – Tuy Loan: Road upgrade and extension to connect CBT products of Hoa Bac (Da Nang) and Bho Hong (Quang Nam)
- Route signage:
  - Work with tour operators and tourism sector stakeholders to identify signage needs (what types and where?)
  - Identify key travel routes along HCM road and the HCM Road to attractions as well as within attractions (e.g. along walking trails to waterfalls, caves, etc.) and develop and implement a strategic plan for tourism directional signs.
  - Signs should use internationally recognised symbols and designs, be in Vietnamese and English, include both name of destination and distances, be reflective for night time visibility, and be located at key junctions, intersections as well as at the final destination / attraction.
  - A brand (with logo and tagline) should be created for the Nature Trail route (and also Heritage Road) that can be incorporate into the signage.

*Priority locations:* Inland Nature Trail region, in particular between Hoi An – Bho Hoong – A Luoi – Hue

### **Strengthen development, promotion and co-ordination of Central Coast tourism festivals and events**

- Improve co-ordination and co-operation between communes, provincial tourism authorities and travel agents on the planning and promotion of local festivals and events

- Develop an Annual Central Region Food Festival (e.g. 2 week event) that is rotated between the three provinces. Includes producers, retailers, wholesalers of food and beverage products, entertainment (e.g. music), cooking shows, competitions, etc.
- Develop a strategy to encourage street performances (increase issuing of licences, find ways for groups to offer traditional court games with visitors that generate a profit for the performers, traditional music in the street)
- Increase *nightly* scheduled cultural performance / shows in destinations (e.g. a historically based play / drama of the life of a royal dynastic family including musical and dance performances in Hue Citadel)
- Outsource major events to private sector (or operate as a partnership) to reduce the drain on government human resources, funds, and ensure quality standards, cost-effectiveness, etc.
- Likewise, currently all three provinces have a beach festival. Potential to create bigger impact and save money by having only one larger regional level Central Coastal Beach Festival which is rotated between the three provinces each year.
- Develop a low season festivals and events calendar.
- Develop a Sculpture by the Sea Festival (themed, annual, 2 prizes, incorporates trail, etc.). Potentially rotate hosting between the three provinces.
- Attract an international surfing competition to Da Nang and / or Cua Dai / An Bang Beach
- Establish an events fund to promote common festivals / events. Support with development of a marketing plan for the whole region.

*Priority locations:* All