

COUNTRY/REGION REPORT (December 2018)

Vietnam tourism in the need of responsible and sustainable tourism development

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Within recent years, Vietnam tourism industry has developed rapidly and become a major economic growth driver with the strong support of government policies. Vietnam National Administration of Tourism (VNAT) is responsible for assisting in strategic planning, domestic and international marketing campaigns, and recording sector statistics, in addition to advising the government on tourism policies such as the visa waiver scheme.

The tourism sector has recorded positive performances, including the increase in international arrivals (a year-on-year increase of 30%), domestic tourists, revenues, spending and investment, employment, leading the government to increase earlier growth targets in 2018. Vietnam tourism has been promoted through diverse activities carried out through the organisations and participation in domestic, international travel fairs and to further attract foreign tourists, the Government adopted a Resolution on exempting visas for visitors from five Western European countries and a decree on granting e-visas for foreigners entering Vietnam.

Offering 3200 km of coastline, a home to about 2,770 near-shore islands, 125 beaches and bays and spectacular white sand beaches, mountainous highlands popular with a vast array of cultural, historic/heritage and culinary attractions, the marine tourism, sea and island-based tourism have been focused and considered by a range of tourism policies and measures. In particular, beach- marine tourism on the rise has increasingly contributed 70 percent to Vietnam's tourism revenue (VNAT, 2018).

Meanwhile, the increasing attention from both domestic and international stakeholders is also being significantly paid to surging hotel investment. Coastal cities hold significant investment opportunities the occupancy rates remains extremely high during peak season, thus, the hotel investment is already on the rise and set to rise. The association has highlighted the coastal cities of Ha Long, Sam Son, Cua Lo, Hoi An, Nha Trang, Ninh Hai, Mui Ne, Phu Quoc, Vung Tau and Con Dao as holding particularly high potentials for hotel expansion, in particular, the up-and-coming tourism hotspot of Da Nang beach city popular for both domestic and international attention is also expected to see the new hospitality development in the coming years while concerns for education, environment and population have arisen.

This also means that Vietnam continues to attract a growing number of new tourists and makes efforts to increase the repeat tourists, thus, this is necessitating a focus of new, qualified, trained and educated employees and the new establishments/investment of hospitality and tourism schools. Vietnamese hospitality and tourism education continues to surge and experience both promise and challenges. Meanwhile, it is the continuous call from all related stakeholders/bodies to ensure a Vietnam responsible and sustainable tourism development that provides quality travel experience, promoting conservation of the natural environment and offering opportunities and benefits for local communities.

Some photos at Danang beach city and Hoi An World heritage site retrieved at VNAT



Sources: Photos retrieved from VNAT

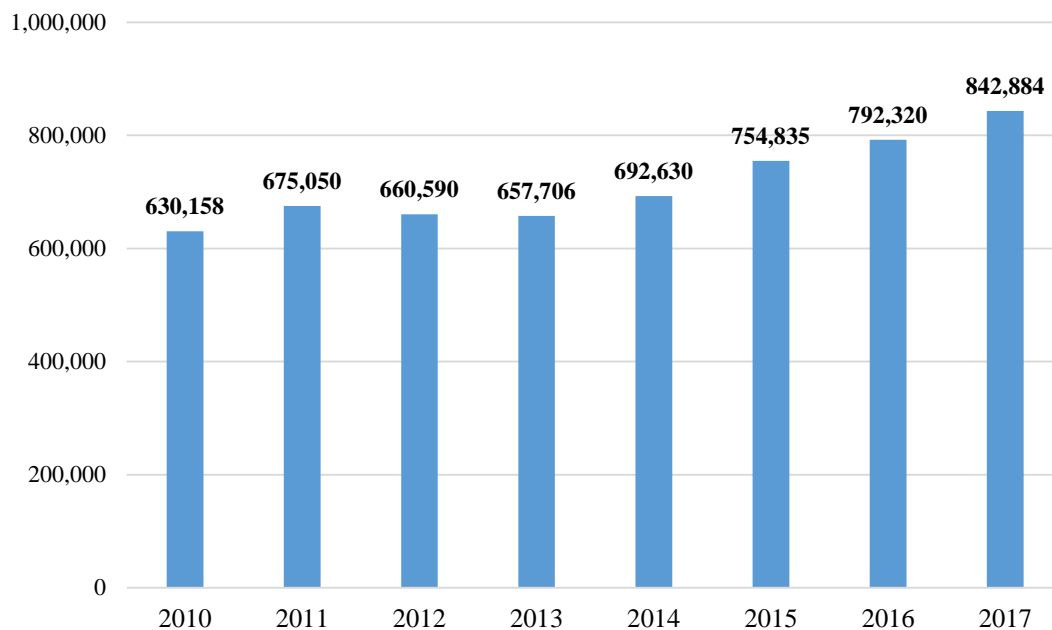
COUNTRY/REGION REPORT (March 2019)

Paradise on Earth: Fiji Islands

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International tourist arrivals continues to grow at a consistent rate. For the year 2017, international tourist arrivals reached at all-time high of over 840,000, up from over 792,000 in 2016 (Figure 1). This 6.4% growth follows a 5.0% growth in the previous year.

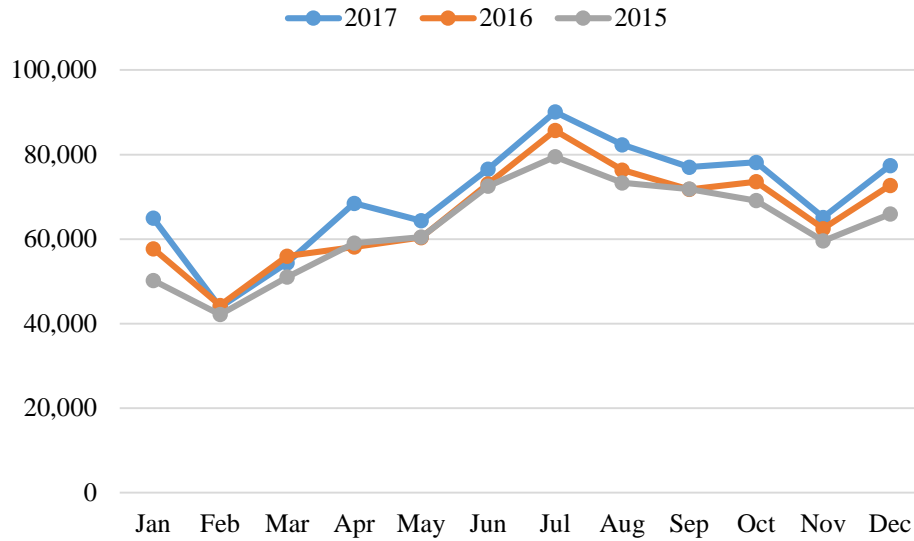
Figure 1: International Tourist Arrivals to Fiji



Source: South Pacific Tourism Organization (SPTO)

Fiji continues to exhibit seasonality in its international tourist arrivals. Figure 2 shows a familiar pattern year after year. Peak season is in June, July and August. This is the winter in the Southern Hemisphere. Residents from Fiji's main source markets, Australia and New Zealand, visit Fiji to escape the colder months at home. Conversely, the Southern Hemisphere summer months of November, December, January and February is the low season in Fiji. December and January tend to have a larger amount of tourists than November and February as it is school holidays in Australia and New Zealand and Fiji offers an attractive Christmas holiday destination. By February, school has commenced in Australia and New Zealand. Resorts in Fiji try to fill this gap by offering attractive resort and hotel stays to local residents.

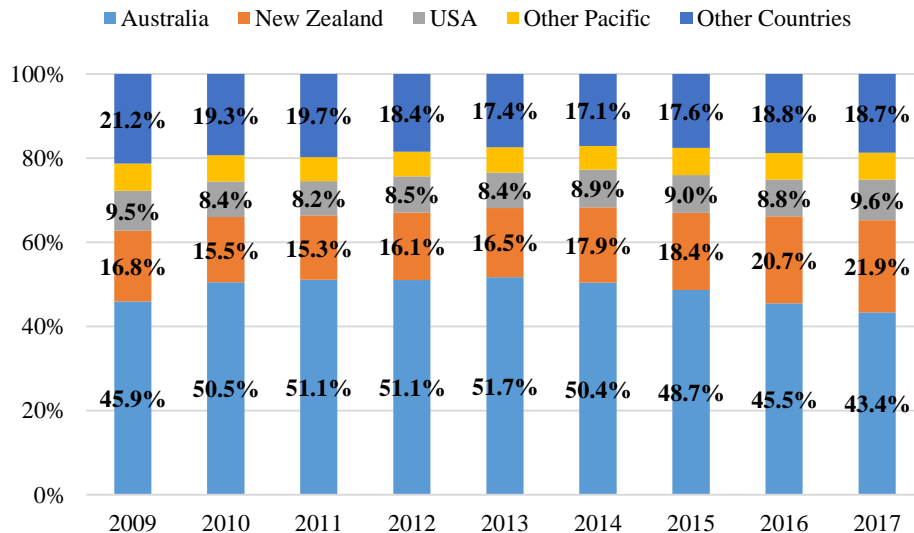
Figure 2: Fiji's International Tourist Arrival by Month: 2015 to 2017



Source: South Pacific Tourism Organization (SPTO).

As noted above, Australia is the main source market for Fiji with New Zealand ranked second. However, from Figure 3, it can be seen that in recent years, Australia's share has been decreasing. For example, in 2013 Australians comprised 51.7% of all international tourists to Fiji. By 2017, this figure has constantly decreased to 43.4%. The decrease in Australia's share coincides with an increase in New Zealand's share, rising from 16.5% in 2013 to 21.9% in 2017. The share of the third largest market, USA, has remained relatively constant over the past nine years, hovering between 8-10% while arrivals from other Pacific Island Countries has also been relatively constant between 5-7%.

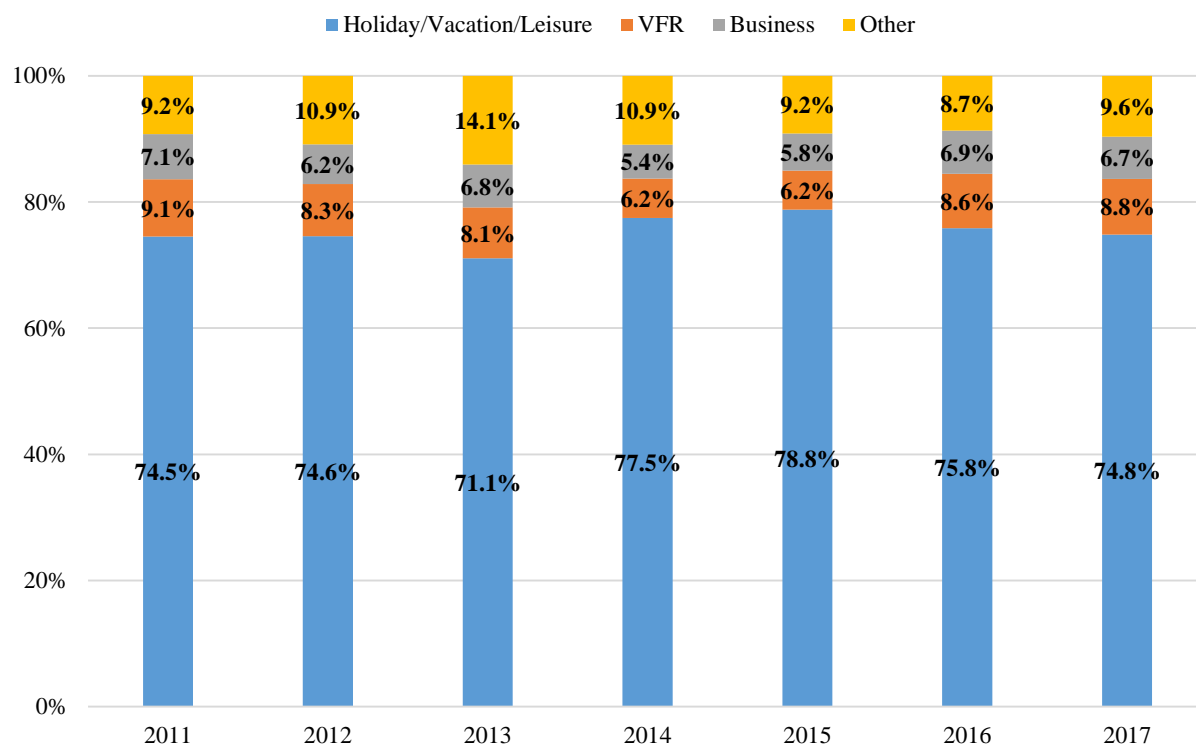
Figure 3: Fiji's International Tourist Arrivals by Source Market



Source: South Pacific Tourism Organization (SPTO).

Purpose of visit to Fiji has remain stable from 2011 to 2017 (Figure 4). Almost three-quarters (74.8%) of all international tourist arrivals visited Fiji for a holiday / leisure / vacation in 2017. This is slightly down from a high of 78.8% leisure tourists in 2015. Business travelers make up between 5-7% of all tourists to Fiji. With a relatively large amount of migration occurring in earlier decades, partly attributed to previous political instability, tourists coming to Fiji to Visit Friends & Relatives (VFR) makes up between 6 to 9% of all tourists. In fact, VFR tourists outnumber business tourists across the 2011 to 2017 period.

Figure 4: Fiji's International Tourist Arrivals by Purpose of Visit



Source: South Pacific Tourism Organization (SPTO).



Figure 5: View from Treasure Island



Figure 6: Grand Pacific Hotel pool with Suva Harbor



Figure 7: Sunset at Grand Pacific Hotel, Suva, Fiji



Figure 8: Breakfast at Treasure Island



Figure 9: Treasure Island



Figure 10: Arrival at Treasure Island

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COUNTRY/REGION REPORT (March 2019)

Prospects of Hong Kong Tourism Development

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In October 2017, in order to further establish Hong Kong as a world-class premier tourism destination, Hong Kong Tourism Commission rolled out the Development Blueprint for Hong Kong's Tourism Industry (the Blueprint), which is a detailed, forward-looking strategic plan with the mission "to ensure the balanced, healthy and sustainable development of the industry" in the coming five years. In this Blueprint, Hong Kong Tourism Commission formulated the following four development strategies, calling for concerted efforts among various bureaus and departments concerned to further boost Hong Kong's tourism industry.

Strategy 1: To develop a diversified portfolio of visitor source markets for Hong Kong, with a focus on attracting high value-added overnight visitors

Strategy 2: To nurture and develop tourism products and initiatives with local and international characteristics, including cultural tourism, heritage tourism, green tourism and creative tourism; and to consolidate and enhance Hong Kong's status as a travel destination for MICE tourism, regional cruise hub, and Events Capital of Asia

Strategy 3: To develop smart tourism

Strategy 4: To upgrade the service quality of tourism industry and encourage the trade in adopting good trade practices



In the fourth quarter of 2018, Hong Kong witnessed the commissioning of two major cross-boundary modern transport links, The Hong Kong-Zhuhai-Macao-Bridge (HZMB) and the Hong Kong section of the Guangzhou-Shenzhen-Hong Kong Express Rail Link, which bring Hong Kong closer to the Guangdong-Hong Kong-Macao Greater Bay Area as well as other regions in Mainland China. The HZMB is a 55-kilometre bridge-tunnel system consisting of a series of three cable-stayed bridges, an undersea tunnel, and four artificial islands. It is both the longest sea crossing and the longest fixed link on earth. With the HZMB, the Western Pearl River Delta region falls within a three-hour commuting radius of Hong Kong, saving considerable time and costs for travelling in this area. Visitors through the HZMB can conveniently reach various tourist

attractions and facilities at Tung Chung and Lantau Island such as Ngong Ping 360, the Giant Buddha, Asia World-Expo and Hong Kong International Airport, etc., bringing additional business opportunities to this area and boosting Hong Kong's tourism industry at large.

Following nearly 20 years of planning and construction, the Hong Kong section of the Guangzhou-Shenzhen-Hong Kong Express Rail Link was fully opened on September 23, 2018, connecting the city with 44 stations along Mainland China's 25,000-kilometre-long national high-speed rail network including Guangzhou, Shanghai and Beijing. With trains currently operating at a speed of more than 200 kilometers per hour, travelling from Hong Kong to Beijing takes just nine hours (down from 24 hours), greatly enhancing Hong Kong's premier status as the gateway to Mainland China for both leisure and business travelers. The Hong Kong Tourism Board (HKTB) has predicted the new cross-border high-speed rail link, together with the HZMB, would boost Hong Kong visitor arrivals by 3.6 per cent, to about 60 million people in 2018.



In addition to investing large-scale transport infrastructure projects to enhance Hong Kong's connectivity, the government also works hard to enrich the content of the tourism by creating new tourist attractions and implementing various cultural tourism projects in different districts. For example, the heritage trail in Central is a rejuvenation of history and heritage content together with elements of arts and design. It not only includes numerous antique and art shops along Hollywood Road but also connects some of the historical buildings such as PMQ (former Police Married Quarters), which houses around 100 design galleries, shops and creative enterprises in a revitalized historical site, the cluster of buildings around the Central Police Station, the Central Magistracy and the old Victoria Prison. The HKTB also rolled out the "Hong Kong Neighborhoods – Sham Shui Po" campaign in September 2018, which encourages visitors to explore one of the most authentic parts of Hong Kong and experience the best of local life.

COUNTRY/REGION REPORT (April 2019)

New Zealand Tourism and Hospitality Update

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The tourism and hospitality industry in New Zealand is experiencing substantial growth, and is now the largest earner of export revenue. In 2013, tourism in New Zealand was a \$24 billion industry, employing 110,800 employees. By 2016, total tourism expenditure had reached \$34.7 billion. This growth is expected to continue and reach \$41 billion by 2025.

Growth has been experienced across all tourism sectors including the cruise market. In the 2018-19 cruise season 344,000 passengers were expected to visit New Zealand. Australia has become an increasingly important market for New Zealand and it is now



one of the world's leading cruise market in terms of growth and market penetration. This growth has been driven by increased local capacity and product improvements.

As a result of increasing demand, it is estimated that 36,000 extra staff will be required over the next 7 years to keep up with New Zealand tourism growth. Expected staff requirements include the need for over 8000 accommodation managers, 6000 chefs, 5000 service staff, over 1500 tourism and travel advisors and 624 outdoor adventure guides. All of this results in tremendous opportunities for hospitality and tourism business, education, research and development. However, it also means that resources will be stretched, environmental impacts will increase, and societal benefits will need careful consideration.



As a part of ongoing tourism development, the 2019 China-New Zealand Year of Tourism was launched on 30 March 2019. Tourism plays an important role in the bilateral relationship between China and New Zealand, and it is a particularly important driver of economic growth. There was an 8.8% increase in Chinese holidaymakers to New Zealand from 2017 to 2018, and China is New Zealand's second-largest tourism market. The number of New Zealanders visiting China has also reached a new high. The Year of Tourism is an opportunity to showcase New Zealand's unique value proposition to Chinese visitors – from World Heritage designations such as the spectacular Milford Sound, viewed as the eighth wonder of the world, to a unique Māori heritage and indigenous culture, and a burgeoning ecotourism industry.



Milford sound New Zealand

The increase in tourism numbers is further driven by the increasing number of events being hosted by New Zealand. For example, in 2021 Auckland will host the America's Cup, the APEC Leaders' Summit, Te Matatini national kapa haka festival, the Royal NZ Yacht Squadron's 150th Anniversary, the women's Rugby World Cup, the women's Cricket World Cup, and the men's Softball World Championship. All these events will bring an influx of visitors.

In preparation for the 36th America's Cup in Auckland in 2021, Auckland City council and the NZ Government are spending \$212 million on construction and running costs to help host the event along with millions of dollars on infrastructure and public spaces to transform Auckland.



Americas Cup Host, Emirates Team New Zealand



Education and research supporting tourism and hospitality development

New Zealand has a world class education sector that offers tourism and hospitality qualifications at undergraduate and postgraduate levels at Auckland University of Technology (AUT), Waikato University, Victoria University and Lincoln University. Additionally, the New Zealand Tourism Research Institute (NZTRI) at Auckland University of Technology (AUT) brings together experts from around the world to deliver innovative research solutions for the tourism and hospitality industry and those who depend on it. The research enables business, community and government to develop profitable and sustainable industry outcomes. NZTRI is recognised as a leader in graduate student research and education. Additionally, NZTRI's research extends beyond New Zealand's shores to provide services to the South Pacific and beyond. For example, ongoing research is carried out with Cook Islands international visitor surveys which has been ongoing since 2012 and now has 14,000 responses in the system. The director of NZTRI, Professor Simon Milne, says "It is a tremendous sample size, and that's a good thing," says Professor Milne. "Every year we collect the data, the more we can do with it – we can mine the data in new ways." The data is used to help inform tourism strategy, including targeting visitor spend or yield rather than simply numbers or arrivals. The Cook Islands modal of data collection has led to the replication of this research on international visitor trends in other destinations.



Cook Islands, Rarotonga

Recently, Professor Simon Milne, presented the results of Samoa's 2018's visitor survey to the tourism sector at Samoa Tourism Authority's Tourism Forum 2019, held at the Sheraton Samoa Aggie Grey's Hotel. Professor Simon Milne commented, "We can see that Samoa clearly as a destination in the Pacific is performing very well, in terms of visitor numbers." "They are ranking just behind French Polynesia, and obviously behind Fiji in terms of numbers but they have just outstripped the Cook Islands."

Not only are there larger numbers of visitors to Samoa, those visitors are bringing a significant contribution to Samoa. Professor Simon Milne further remarked "What makes Samoa different is

its people, its culture, its way of life. It's about finding sustainable and appropriate ways to open that up to the visitor and give the visitor more opportunities to benefit from what Samoa has to offer.

For further information about the New Zealand Tourism Research Institute (NZTRI) visit <http://www.nztri.org.nz/>



Professor Simon Milne In Samoa To Present The Findings Of 2018 International Visitors Survey, Conducted By The New Zealand Tourism Research Institute. (Photo: Misiona Simo)