

**Assessing the Potential of Tourism Development in Ninh Binh
Province, Vietnam**

by

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CERTIFICATION

I, Nguyen Lan Chi (Student ID 51215602) hereby declare that the contents of this Master's Thesis are original and true, and have not been submitted at any other university or educational institution for the award of degree or diploma. All the information derived from other published or unpublished sources has been cited and acknowledged appropriately.

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ABSTRACT

Ninh Binh Province is located in the Red River Delta of Northern Vietnam, around 93km far from Hanoi, the capital of Vietnam. The province is located near the other three main economical spots in the Red River Delta, which are Hanoi, Hai Phong and Quang Ninh. It obtains local level to national level transportation system, which is convenient for trades and economic development. Together with industry, tourism has been oriented developed to become key economic sector. Ninh Binh possesses many historic-cultural landscapes with variety of architecture, which has attracted both domestic and international tourists with many types of tourism. Among those landscapes, the most famous ones are: Trang An Scenic Complex inscribed as UNESCO World Heritage Site in 2014, where they recently filmed the movie “Kong: the Skull Island” on air in 2017; Tam Coc- Bich Dong with number of natural caves, which suitable for boat touring; Bai Dinh temple, which has the biggest Buddash statue in South East Asia and Cuc Phuong National Park, which is the first and largest national reserve in Vietnam. Ninh Binh Province successfully attracted 6,441,472 tourists in 2016, increased 6.2% compared to 2015, income increased 15.2%. At the same time, State management over tourism is enhanced, security and sanitation of the area are secured, service quality is improved, and infrastructure is continued to be invested. In the long run, the Provincial People’s Committee already had the plan for tourism development to 2020, with vision to 2030 to achieve the objective of making tourism become the key economic sector of the province (Ninh Binh Department of Statistic, 2017). However, the tourism development in Ninh Binh is still at a lower level comparing to the current advantages and investment potentials of the province. Generally, this research aims at assessing the current potential and challenges of tourism development in Ninh Binh Province during the period from 2010 to 2016 and pointing out some recommendation for better development in the future.

I. INTRODUCTION

Today, following the significant trend of globalization and international economy integration, tourism is considered as a potential economic sector, which contributes significantly to the economy as a whole. The development of tourism creates more income to the country, increases income and employment for the people, and empowers the development of other economic sectors such as telecommunication, banking, service etc. Tourism not only enhances economic development but also enhances social-cultural development, because tourism activities contribute to cultural preservation and nurture national traditional handicrafts. Moreover, it helps to promote the image of the country and people worldwide. Nowadays, as living standard increases, the demand for tourism also increases. Besides, Since 31st December 2015, Vietnam became the member of ASEAN with the total population of 625 million, the number of tourists traveling to Vietnam increased. Therefore, tourism has gradually become a key and important economic sector of the country.

Ninh Binh Province is located in the Red River Delta of Northern Vietnam, around 93km far from Hanoi, the capital of Vietnam. The province is located near the other three main Northern economical spots, which are Hanoi, Hai Phong and Quang Ninh. It obtains local level to national level transportation system, which is convenient for trades and economic development. Together with industry, tourism has been oriented developed to become key economic sector. Ninh Binh possesses many historic-cultural landscapes with variety of architecture, which has attracted both domestic and international tourists with many types of tourism. Among those landscapes, the most famous ones are: Trang An Scenic Complex, which was inscribed as UNESCO World Heritage Site in 2014, where they recently filmed the movie “Kong: the Skull Island” on air in 2017; Tam Coc- Bich Dong with number of natural caves, which suitable for boat touring; Bai Dinh temple

which has the biggest Buddash statue in South East Asia and Cuc Phuong National Park, which is the first and largest national reserve in Vietnam. Ninh Binh Province successfully attracted 6,441,472 tourists in 2016, increased 6.2%, income increased 15.2% compared to 2015. At the same time, State management over tourism is enhanced, security and sanitation of the area are secured, service quality is improved, and infrastructure is continued to be invested. In the long run, the Provincial People's Committee already had the plan for tourism development to 2020, with vision to 2030 to achieve the objective of making tourism become the key economic sector of the city (Ninh Binh Department of Statistic, 2017). However, the tourism development in Ninh Binh is still at a lower level comparing to the current advantages and investment potentials of the province.

This research aims at assessing the current potential and challenges of tourism development in Ninh Binh Province during the period from 2010 to 2016 and pointing out some recommendation for better development in the future.

1.1 Research objectives

This research aims at understanding the tourism development in Ninh Binh Province from 2009 to 2016. In order to do that, the research based on the Resolution No.15 issued on 13th July, 2009 by the Provincial People's Committee regarding six main responsibilities of local government toward tourism development until 2020. Secondly, it aims to evaluate the performance of tourism industry, potentials and challenges of tourism development in Ninh Binh Province from 2009-2016. The research compares the performance of tourism between Ninh Binh and Quang Ninh - the benchmark Province. Finally, the research aims at drawing out some recommendations and conclusions for tourism development in Ninh Binh Province in the future.

1.2 Research method

To understand the tourism development in Ninh Binh Province from 2009-2016, the research analyzed the current stage of deployment of the Resolution No.15. The six main responsibilities of local government includes 1) Tourism Development Planning, 2) Infrastructure Development, 3) Human Resource Education and Training, 4) Tourism Promotion and Marketing, 5) Strengthening Local Government Management of Tourism Activities and 6) Raise Awareness of Local Community on Tourism Development. In order to analyze the current deployment of those six main categories, the research used secondary data sources collected from various Portal of city government and central government.

To evaluate the performance of tourism industry as well as potentials and challenges of tourism development in Ninh Binh Province from 2009-2016, first of all, the research evaluates the performance of tourism industry in Ninh Binh Province by the total number of tourists, the total revenue from tourism activities, and the contribution of tourism to economic development and job creation. The research also uses secondary data sources collected from various Portal. Moreover, the research compares the performance of tourism in Ninh Binh Province with Quang Ninh Province comprehensively. On the other hand, the research analyzes the potentials and challenges of tourism development through the SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats). This analysis studies the internal and external environments of organization, which considers both internal and external factors that influence the tourism development (Jeffrey, 2010).

Through analyzing the external environment (threats and opportunities), and internal environment (weaknesses and strengths), the research provides policy recommendations and conclusions for tourism development in the future.

II. LITERATURE REVIEW

The rapid development of the tourism industry in recent years has been a major source of income for the economy. With its great potentials, tourism is considered one of the major economic sectors of many countries. Along with other economic sectors, the development of the tourism industry has received increasing attention and has been placed in the context of sustainable development. There were many studies on tourism development done by many researchers in Vietnam and abroad.

Regarding studies on tourism development, previous studies go into every specific area of the tourism industry, mainly focuses on tourism business activities and tourism as a key economic sector of the whole country or individual cities. These studies also provide recommendations for further development.

Martin & Chon (1997) focus on the development of tourism in developed and developing countries, in which highlights the development of tourism in developing countries in several stages from 1930-1960, 1970-1985 and 1985-1993. The research also mentions the links between government and tourism.

Tribe (1995) revolves around the importance of tourism industry to the economy of a country, as well as the development of tourism taken into account the environmental issues. The tourism development includes tourism promotion and marketing as well as tourism facilities and entertainment facilities investment.

John et al. (1999) focus on the tourism industry through the analysis of patterns and trends, as well as impacts to the country's economic, social, cultural and environmental development. The research also deals with marketing, providing information and services for tourism activities, tourism planning and evaluation as well as tourism infrastructure development.

Minh (2006) focuses on the concept of tourism, the role of investment in the development of tourist sites and practical experiences of countries in tourism development. The author analyzes the system of mechanisms and policies of the State in the field of tourism investment in particular, tourism development in general, and also identifies the current status of investment policy for tourism development in Vietnam. Furthermore, the research proposes ten solutions to improve tourism development, which includes (i) organization and management of tourist sites; (ii) management and implementation of tourism planning; (iii) land use rights in tourist areas; (iv) investment in tourism development; (v) mobilizing investment capital sources for development of tourist resorts; (vi) financial mechanisms and policies for tourism development; (vii) exploitation of natural resources in tourist resorts; (viii) administrative procedure reform; (ix) supporting and encouraging the community to participate in tourism development; and (x) preservation of natural resources and environment.

Hanh (2011) summarizes the development experience of a number of nations on marine tourism and the following ten lessons have been learned. Firstly, the development and management of the tourism resort must in accordance with the sustainable tourism development strategy of the country. Secondly, it is necessary to clearly define the market and tourism needs. Thirdly, it is essential to select suitable locations to attract tourists. Fourthly, the establishment of tourist resorts must be linked to traffic networks and to major tourism markets. Fifthly, it is proposed to apply the technologies and scientific achievements in the organization and management of hotels in tourist resorts. Tourist sites have a life-cycle of attraction and to extend the tourist life cycle, it needs to be synchronized with the application of science and technology, continuous improvement, renovation of tourism products, grasp of market demand and tastes. Besides, it is necessary to develop the non-seasonal tourism sites for year-round exploitation.

Furthermore, market research should be conducted separately. Moreover, it is necessary to associate the resort with tourist spots and amusement parks and finally, sustainable tourism development needs to go accordance with environmental protection and preservation.

Tourism Development Research Institution of Hanoi (2012) focuses on assessing the current status of tourism development in the Centre Northern area in terms of tourism products, tourist market, brand development and promotion, organizing space for tourism development, investment in tourism development, protection of regional environmental resources. Consequently, it proposes solutions for the better development in the future, which includes investment solutions and investment capital mobilization, solutions for human resource development, tourism promotion and marketing, regional cooperation and international cooperation, protection of regional environmental resources in responding to climate change.

Tu (2006) clarifies the concept of tourism and eco-tourism development and pointed out the opportunities and challenges for the development of ecotourism in the trend of integration. On the basis of analyzing eco-tourism development experiences of several countries such as Australia, New Zealand, Nepal, Kenya, Ecuador, Costa Rica, France, Indonesia, Malaysia and Thailand and considering the conditions of Vietnam, the research has drawn out seven valuable lessons. By assessing the current status of ecotourism development in Vietnam in terms of success, limitations and main causes, the research also proposes the main solutions in the coming period, including (i) sustainable community-based ecotourism planning; (ii) improve organizational management and policy mechanisms to support eco-tourism; (iii) investment in infrastructure development and material and technical facilities; (iv) create ecological product specificity; (v) improve the quality of eco-tourism products; (vi) focus on biodiversity conservation and

environmental protection; (vii) improve the quality of eco-tourism human resources; (viii) strengthen market research and promotion of eco-tourism; (ix) strengthen international integration and cooperation in the development of eco-tourism and (x) raise awareness on eco-tourism.

Anh (2011) clarifies the theoretical background of tourism market in international economic integration. The research also analyzes the current situation of Quang Ninh tourism market, in which clearly outlines the achievements, especially the issues that need to be overcome. Besides, the research describes the development trend of the international and national tourism market, and then propose the main directions for Quang Ninh tourism market, which includes (i) develop a market program, in which contains appropriate market policies to promote strategic planning and short-term planning; (ii) strengthen domestic and international tourism cooperation; (iii) develop the territorial space of the tourism market; (iv) establish investment orientation for infrastructure development; (v) forecast the development indicators for Quang Ninh tourism market in the period of 2006 - 2010. Based on the detailed analysis, the research proposes four groups of solutions to develop the tourism market in the future.

Regarding studies on the role of local government in tourism development, Aser & Dulce (2011) provides an overview about Philippine tourism in the orientation of becoming one of the main economic sectors of the country. The local government role and anticipation in tourism development also focused on the research. The local government units (LGUs) plays an important role in providing the policy and planning, infrastructure maintenance in order to maximize the profit of tourism for the local communities. LGUs with other stakeholders are responsible for preparing and implementing tourism development planning. Under the planning of Department of Tourism (DOT), the LGUs will be monitored in accordance with the national standards

of tourism enterprises, and LGUs will also be provided technical assistance for tourism development plans implementation. The research also provides the shared governance Act, which concentrated on the shared responsibilities between national and local governments in many aspects, such as: preparing and implementing of tourism development plans, enforcing tourism development standards, formulating tourism policies and plans and projects, supervising the implementation of tourism policies, supporting, advancing and promoting the protection and preservation of natural environment. By using interview and focus group approaches and also combines the analysis of government policy and planning documents with a review of tourism development literature, the research aims at analyzing the role of the local authorities and exploring the local authorities' views and opinions on their tourism development area. The findings reveal challenges and issues that are experienced by the local authorities in development and management of tourism. To ensure tourism development sustainability in the long term, the research provides recommendations for the government.

Klodina et al. (2012), in their research, collects data from both primary and secondary resources. The primary data was conducted by an interview with local government representatives in the city of Vlora in order to provide an overview about tourism sustainable development and the role of local governance in the tourism destination. The secondary data was collected from literature review, documents and projects related to tourism sustainable development. The research aims at explaining the concept of tourism sustainable development and the role of local government in tourism development, including infrastructure provision and maintenance, land use planning, environmental management, open space planning and management, community development, education, training and employment, tourism promotion and marketing, arts and cultural development and human services. After the finding and analysis, the research

comes up with a conclusion about the achievement as well as obstacle of local government in bringing tourism sustainable development theory to practice. The local government is somewhat aware the importance of tourism sustainable development, however, there was a lack of co-operating with the local government and other stakeholders. Seasonality in tourism activities is considered as one of the important factors affecting the average number of days of stay and the level of capital expenditure of tourists. Despite the fact that the local government was somehow effectively implemented the plans and policies, tourism still fails to move toward sustainable development. Therefore, the research provides recommendations in the future. In order to achieve sustainable tourism, it is essential to take into account the cooperation between all level of government, from national government to local government and local stakeholders. The local stakeholders' anticipation and responsible in tourism sustainable development should be enhanced to achieve the best results.

Cameron et al. (2001) concerns about the importance of tourism development to the local government in term of income accumulation and job creation as well as natural reservation. The impact of tourism at the local destination and how to achieve the sustainable tourism development in order to minimize the bad impacts of tourism and maximize the good impacts for the local communities is also concerned. The research also focuses on enhancing the role of local government, and the relationship between local authorities and stakeholders. The role of local government is mainly emphasized in certain perspectives, such as support economic development initiatives, develop local amenities and attractions, monitor tourism development and so on. In order to analyze the implementation of local government planning and regulation into practice, the researcher conducts a case study in the West Coast area, which is located between the Southern Alps and the Tasman Sea on the western side of the South Island of New Zealand. The case

study contains three main parts, including current situation of the destination's economic, social and cultural situation; current situation of the tourism industry; current situation of local government's engagement in tourism development activities. In the conclusion section, the research points out the achievements and the obstacle toward sustainable tourism development, from that, suggest recommendations for the local government and stakeholders. The research emphasizes that the support role of local government is becoming more important. The government must also be created to support and promote the creativity of the business. At the same time, businesses place regions in competition on the basis of criteria such as labor, services for enterprises, infrastructure.

Mustafa (2011) focuses on the role of the state in the market economy in creating a common playing field and protecting domestic production, at the same time promoting and marketing tourism through social media. The research also points out the basic issues revolve around the role of the State of Australia in tourism promotion and marketing, and tourism sustainable development in accordance with environmental protection and local community empowerment. In conclusion, the research points out the importance of the state to ensure the stability and development of the market economy.

Quy (2002) focus on theoretical issues of state management in the socialist-oriented market economy in Vietnam, such as the rights and responsibilities of all levels and branches in the elaboration and implementation of tourism development plannings.

Ky et al. (2006) focus on the local administration in Vietnam as well as the requirements of market economy and international integration of local authorities. The author provides some basic solutions to renew the content of activities of local authorities at the request of the market economy and international integration.

Hoan (2002) stated that no matter how the market economy is developing, the role of the state is still important, it directly or indirectly promotes socio-economic.

In conclusion, the field of tourism has been studied by many scientists and researchers. From the above-mentioned researchs, the authors have focused on the following main contents: Firstly, identify the basic features of tourism such as the concept of tourism, tourism human resources, and State management of tourism and so on. Secondly, identify the characteristics and trends of tourism development in some regions of Vietnam and other countries in the world. Thirdly, clarifies the current situation of tourism development in some provinces of Vietnam. Fourthly, provides some solutions to develop tourism in those provinces of Vietnam, such as develop mechanisms and policies to attract and improve the efficiency of investment capital to develop tourism and improve the efficiency of using tourism resources in the process of international economic integration. Some reseachers propose directions and solutions for tourism development. The researchs reflect quite in detail and clearly that, tourism plays a very important role in the socio-economic development of the country. However, these studies have not adequately analyzed the opportunities and challenges for Vietnam tourism in general and the provinces in the Red River Delta and the Northeast Coast in particular, especially Ninh Binh Province. At the same time, the researchs have not systematically presented the objectives, directions and solutions for the development of tourism in the Red River Delta and North Central Coast in general as well as in Ninh Binh Province in particular. Therefore, the research "Assessing The Potential of Tourism Development in Ninh Binh Province, Vietnam" is a new area, which has practical contribution.

III. THEORETICAL BACKGROUND ON TOURISM DEVELOPMENT

3.1 Characteristics of Tourism

According to United Nations (2010), tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes. The United Nations Conference on International Travel and Tourism also recommended a definition of the terms “visitor”, “tourist” and “excursionist” following IUOTO recommendations: “Tourism is a social, cultural and economic phenomenon related to the movement of people to places outside their usual place of residence, pleasure being the usual motivation”.

Tourism development and sustainable tourism

When mentioning tourism development, both quantity and quality of tourism development should be put into consideration. Tourism development in terms of quantity means the growth of tourism industry. The most important indicators of the growth of tourism industry are the increase in the number of tourists, the increase in income from tourism, the increase in the scope of facility and technical infrastructure for tourism, increase in the number of employments. Tourism development in terms of quality means the improvement in methods of conducting tourism activities towards modernity and efficiency. Tourist products, modern and effective services need to be developed; tourism infrastructures also need to be invested significantly to ensure the synchronous development.

The concept of sustainable development appeared on the basis of experience from many developed countries in the world. According to the United Nations (1987), “sustainable tourism must meet the needs of the present without compromising the ability of future generations to meet their own needs”. Sustainable development needs to be done on the basis of harmonized cooperation between economic growth, social development

and environmental protection. The responsibility of sustainable tourism development is to minimize the costs and negative impacts on the social-economical and natural environment while maximizing the positive impacts and benefits for the local community. Sustainable tourism can be defined as: "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (United Nations, 2010). In depth, sustainable tourism should make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity. On the other hand, it should respect the socio-cultural authenticity of host communities, conserve their cultural heritage and traditional values, and contribute to inter-cultural understanding. Moreover, it is necessary to ensure viable, long-term economic development, providing socio-economic benefits to all stakeholders, including stable employment and income-earning opportunities to host communities, which contribute to poverty alleviation.

The role of sustainable tourism

To economic development, tourism is one of the most important economic sectors, positively contributes to economic growth, and increases more employments. As tourism sector develops, it will create spillover effects on the development of the other economic sectors, it requires the combination of many other economic sectors as well. Furthermore, due to the demands of tourists, variety and quality of tourism services is increasing, which encourages the expansion of tourism entertainment chain, brings more added value to the country, contributing to the improvement of living standard of those parties involved in tourism activities.

Firstly, to tourism service providers, if they successfully build the brand name and create more tourist products, they will be able to make profit. The life cycle of tourist

products will extend as tourism develops. Therefore, business risks will be reduced and tourism service providers have no worries about long-term investment, as profits will inevitably increase significantly. Secondly, as tourism destinations develop, especially the preservation of the environment, tourists will be the one who gains benefits. They will be able to access and discover the cultures and traditions which endure over time. Tourists will be using the best tourist products with the lowest cost. Thirdly, by providing high-quality tourist products, the management board of the tourist destinations will gain a significant profit. This profit will help them continue to re-invest in renovating, upgrading, conserving of tourist resources. Last but not least, as the quality of tourist products become higher, the tourist destinations will attract more tourists. Thus, it will contribute to solve the problem of unemployments for local labor force and also increase income for the local community, at the same time enhancing living standard. In conclusion, tourism development brings lots of benefit to the local economic sector.

To social and cultural development, tourism is considered the most effective way of promoting cultural values, especially to international communities. Tourism is considered a “bridge” to connect people from different nations and cultures around the world. Through tourism activities, tourists possess the opportunity to have lively experience to understand the value of cultural heritage, which they can not experience from other media means. As a result, increasing revenue from tourists would be an important contribution to the cultural values preservation. Moreover, it is essential to have appropriate policies, so that tourism can contribute positively to promotion and preservation of cultural values.

To environment protection, tourism and environment are closely connected to each other. Tourism can only develop as long as the environment is protected. The appropriate exploitation and regeneration of tourist resources will make the environment

better and increase the attractiveness of tourism destinations. In contrast, if there was overlapping in exploitation without recovery and renewable plans, it will lead to the break down of ecological balance, causing a decline in environmental quality, from that decrease tourism activities as well as the environment of tourism destinations.

3.2 Local government and tourism development

Local government plays an important role in creating the context for future sustainable development of tourism sector. According to the Resolution No. 15, those responsibilities of local government are stated below.

Regarding tourism development planning, it is essential to establish tourism development plans as appropriate with the potential of local tourism as well as economic and social development. Moreover, the relationship between tourism and the other economic sector should also be put into consideration. Good planning will increase the positive impacts of tourism and minimize the negative impacts to the community and society. Conversely, bad planning can lead to the lack of control in tourism development and cause serious consequences in the future. Meanwhile, the social costs incurred to remedy those consequences might even be much greater than the profit of tourism. Therefore, planning for tourism development is one of the important contents of sustainable tourism development, both at local and national level.

Regarding infrastructure development, the local government should enhance investments for better development. Investments in facilities and infrastructure for tourism development includes: (i) investing in accommodation and restaurant; (ii) investing in sale network; (iii) investing in entertainment and recreation; (iv) investing in visitor information and facilitation; (v) investing in access transportation services including railway access, sea access, roads; (vi) investing in other additional services,

such as banking services, medical services and so on and (vii) investing in public safety and security (Government of Montserrat, 2012).

Regarding human resource training and education, the main purpose of fostering education and training is to increase the quality and efficiency of the labor force, who work directly in the tourism sector. High quality and efficient labor forces are extremely important factor contributed in the higher competitiveness of local tourism activities. Local government's role is to encourage the collaboration between training institutions and tourism enterprises to provide training and capital building for the labor force. Besides, local government also responsible for expanding foreign relations in order to provide research and study program for the labor force.

About tourism promotion and marketing, it includes various promotion tools. Firstly, it can be promoted through websites to advertise the image of the country as well as attractive destinations, not only for domestic tourists but also for foreign tourists. Secondly, it can also be promoted through maps, guidebooks, brochures, posters, billboards, VCD, souvenirs, postcards, which could be used in tourism exhibition. Thirdly, mass media are also useful tools for tourism promotion. Fourthly, by organizing festivals, it will also help tourism destination to attract more tourists. Finally, it is also promoted through professional tour guide. This is one of the most effective channels, because it directly transfers information to the tourists. In order to provide useful, accurate information, precisely, it requires tour operator enterprises to have a solid tour guide team with professional skill and knowledge. Those tour guide must understand the culture and custom of local destination to be able to provide tourist with both tangible and intangible values, contributing to promoting the image of the destination.

Regarding strengthening local government management of tourism activities, local government should develop regulations on management of tourism resources and

tourist destinations, at the same time strengthening coordination between every management levels and sectors. The management should focus on inspection and control of environmental pollution to develop detailed regulations on the protection of natural resources and environmental sanitation. Besides, it is important to manage appropriate fees and charges for tourist services. The local government also need to reinforce inspection, examination and strict handling of violations in tourism activities. The acts of taking advantage of inspections to cause troubles for businesses and visitors is strictly prohibited. Moreover, the local government should carry out basic surveys on tourism in accordance with the province's requirements and in accordance with the Law on Tourism.

About raise awareness of local community on tourism development, local government should enhance education on communication culture, attentive attitude, openness to tourists and environment protection for the local community, especially those who directly involved in tourism-related activities.

3.3 Factors affect tourism development at local level

On factors affect the supply of tourism services, there is both general and specific condition. General conditions are economic development, the stability of society and political, the safety of tourists, environmental conditions and so on.

Regarding specific conditions, firstly, it is difficult to develop tourism without necessary tourism resources. Tourism resources can be both natural and man-made. Secondly, it is the tourism services, including the readiness of the organizational structure and general administration for tourism with complete institutional management system, fair number of skillful workforce and so on. Business enterprises such as hotel operators, tour operators; facilities and infrastructure are also important. Thirdly, it is the variety and attractiveness of the tourist products. Fourthly, it is the management mechanism and policy system for tourism development. This is a prerequisite, because even with a

richness in natural and humanistic resources, complete technical facilities and infrastructure, skillful labor force but without a good management system, tourism still can not develop. Policies for tourism development are part of the overall social and economic development strategies. Fifthly, it is the involvement of local communities. This not only helps the local communities to increase revenue and improve living conditions but also increase the awareness and responsibility of the community for the overall development of tourism sector. This will result in more responsibilities toward environment resources reservations, contributes to the sustainable development of tourism. All of the above are factors that influence the supply of tourist services, which reflects the level of sustainability of local tourism.

On the other hand, there are many factors affecting the demand for tourism services such as income level, education level, free time and so on. Considering education level, if the education level is increased, the number of people go traveling will also increase, because of the increase in curiosity and the desire to get acquainted with neighboring and other countries. Thus, there is a close relationship between the education level of the head of the household and the proportion of their traveling. Moreover, when people's income increases, the demand for tourism will also increase. Besides, tourism activities often occur during the idle time of a person.

IV. OVERVIEW OF NINH BINH PROVINCE

4.1 Geographical condition

Ninh Binh Province belongs to The Red River Delta and the Northeast Coast area - one of the 7 areas in the list of Vietnam tourism. This area includes Red River Delta area (Bac Ninh, Ha Nam, Ha Noi, Hai Duong, Hai Phong, Hung Yen, Nam Dinh, Ninh Binh, Thai Binh and Vinh Phuc) and Quang Ninh Province. The main tourist destinations in the Red River Delta and the North East Coast includes the tourism triangle Hanoi - Ninh Binh - Quang Ninh and Hai Phong (Ministry of Cultural, Sport and Tourism, 2013).

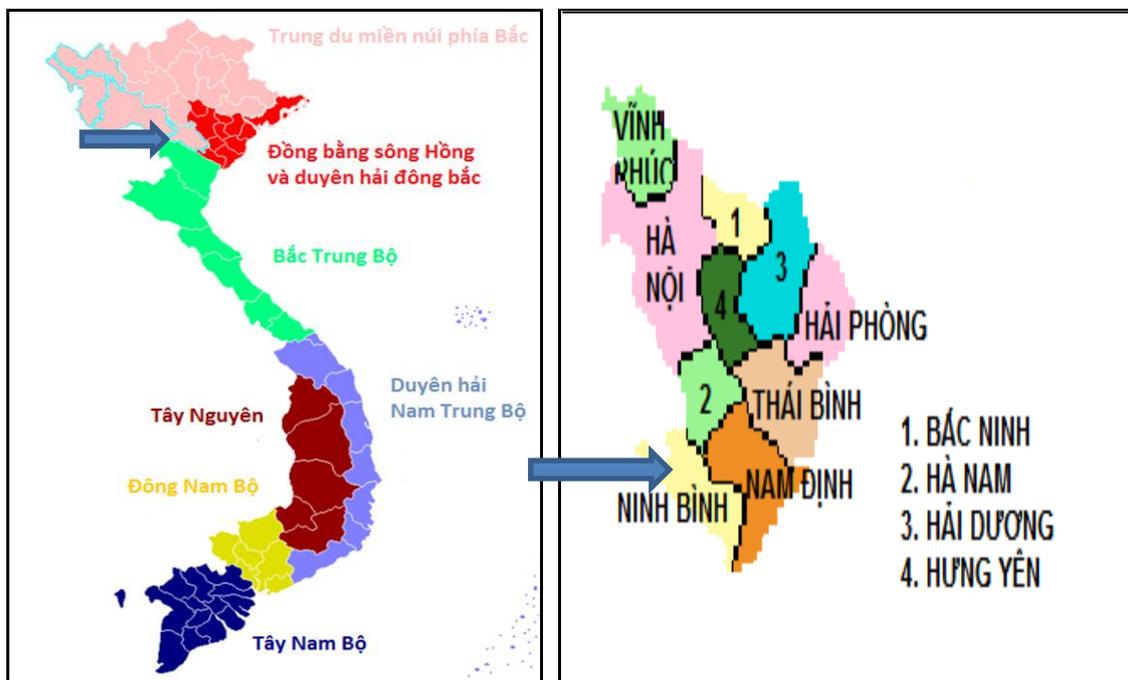


Figure 1: 7 areas of Vietnam tourism

Figure 2: 10 tourism destinations in Red River Delta area

Source: Official Website of Ministry of Cultural, Sport and Tourism (2013)

Table 1: The list of administrative units in Ninh Binh Province

Name	Population	Administrative unit	Name	Population	Administrative unit
City (2)			Kim Son	172,399	2 town, 25 communes
Ninh Binh	110,541	11 wards, 3 communes	Nho Quan	148,514	1 town, 26 communes
Tam Diep	104,175	6 wards, 3 communes	Yen Khanh	142,184	1 town, 18 communes
District (6)			Yen Mo	169,223	1 town, 16 communes
Gia Vien	119,284	1 town, 20 communes			
Hoa Lu	103,900	1 town, 10 communes			

Data Source: Official Website of General Statistic Office of Vietnam (2015)

Ninh Binh is located at the boundary of three geographical areas: the North West, the Red River Delta and the North Central Coast. The province also is located between three economic zones: Hanoi, the Northeast Coast and the Central Coast. Ninh Binh has two cities and six districts, with the total area of 1,377.6 km², the total population of 944,459 people and the population density of 686 people / km² (General Statistic Office of Vietnam, 2015).

4.2 Natural condition

In the field of tourism, Ninh Binh Province is in adjacent with the tourism triangle Hanoi - Hai Phong - Quang Ninh. Ninh Binh is the land of famous monuments and landscapes, together with the unique cultural identity, giving it the strengths for tourism development. The first typical tourism spots in Ninh Binh is Trang An Scenic Complex, which was inscribed as a UNESCO World Heritage site in 2014 (see Figure 3). The second typical spot is Hoa Lu ancient capital, which is one of the most tourist attractive destinations in Ninh Binh. Hoa Lu ancient capital was the capital as well as the economic, political and cultural center of Dai Co Viet in 10th century – the first independent

Vietnam, associated with the three kingdoms: Dinh - Tien Le - Ly, with three ethnic heroes: King Dinh Tien Hoang and King Le Dai Hanh and King Ly Thai To. Following the demise of the Le dynasty, in 1010, King Ly Thai To decided to move the capital to Thang Long (now Hanoi). Therefore, Hoa Lu was known as the “ancient capital”. The area included many defensive walls, palaces, temples and shrines, and was surrounded by limestone mountains. Nowadays, in Hoa Lu ancient capital, there are still many ancient structures had been kept.

Figure 3: Trang An Scenic Complex, Ninh Binh Province



Source: Ninh Binh Portal (2016)

Near by Hoa Lu ancient capital, Tam Coc-Bich Dong is another popular tourist attractive destination. The “Tam Coc” means three caves, which can be accessed by three hours by boat, traveling on the Ngo Dong River and going through a scenic rice fields landscapes. Tam Coc is well known by the nickname “Inland Halong Bay”. Bich Dong is a pagoda since 1428. The most beautiful time to visit Tam Coc is around May and June, because at that time, all the rice fields along Ngo Dong River will turn to a yellow color (see Figure 4). The peaceful and ancient beauty of Tam Coc- Bich Dong attracts many

tourist and photographers coming a year, making it become one of the most attractive destinations in Ninh Binh

Figure 4: Yellow rice fields, Ninh Binh Province



Source: Ninh Binh Portal (2016)

Another tourist spot is Cuc Phuong National Park, which is Vietnam's first national park and largest national reserve (see Figure 5). Established in 1962, Cuc Phuong is the oldest national park in Vietnam. It possesses variety wildlife heritage and enchanting natural landscapes, especially the magnificent limestone mountains rising up majestically from the green rice-terraces and traditional stilt houses of the Muong hill-tribe. In the earlier times, Cuc Phuong was home to the Muong minority people and until now, a few scattered villages around the park's periphery still remain with the unique culture. Covered by a dense forest, this national park forms the habitat for some of Asia's rarest animal and plant species. The ancient forest contains over 2234 vascular and

nonvascular plants, 122 species of reptiles and amphibians, and 135 species mammals. There are also an incredible 336 bird species (Ninh Binh Portal, 2016).

Figure 5: Cuc Phuong National Park, Ninh Binh Province



Source: Ninh Binh Portal (2016)

Ninh Binh also possesses Van Long Natural Reserve Resorts, which is situated in Gia Vien district along the Northeastern border of Ninh Binh Province. Van Long is 3,000 hectares and it is a large wetland with canals, lakes and streams wend through an island-like landscape of karst limestone mountains that contains the Delacour Langur - one of the world's most critically endangered species (with less than 200 individuals remaining, globally). Without the protection of the local community, Government and local authorities, it is highly probable that the Delacour Langur would be the first primate extinction of the 21st century.

Moreover, Ninh Binh also famous for its Marble Mountain (Non Nuoc), also known as the "Mountain of Poems" - the only mountain in Vietnam which has so many poems carved. There are nearly 40 poems had been existed for 8 centuries (from the 13th

century to present). Kenh Ga hot spring is also famous, where the precious mineral water brought much medical values for the health care of people.

In total, Ninh Binh Province has more than 800 monument sites that already been inventoried, 78 cultural and historical monuments and landscapes which were rated as national level monuments and 99 cultural and historical monuments which were rated as provincial- level monuments. Ninh Binh also preserving many traditional handicrafts, such as stone carving, embroidery, sedge handicrafts and wood furniture. These handicrafts preservation and development can create high-value tourism products. In term of festival, the province has 74 traditional festivals (Ninh Binh Portal, 2016).

With diverse tourism resources, Ninh Binh has great potential to develop several tourism types. Currently, Ninh Binh has seven main tourist spots, including Tam Coc- Bich Dong- Trang An- Bai Dinh temple- Hoa Lu ancient capital, Ninh Binh Province, Cuc Phuong National Park- Ky Phu- Dong Chuong, Kenh Ga hot spring- Dich Long cave and Pagoda, Phat Diem Cathedral- Kim Son , Tam Diep- Bien Son resort and Yen Thang- Dong Thai- Ma Tien.

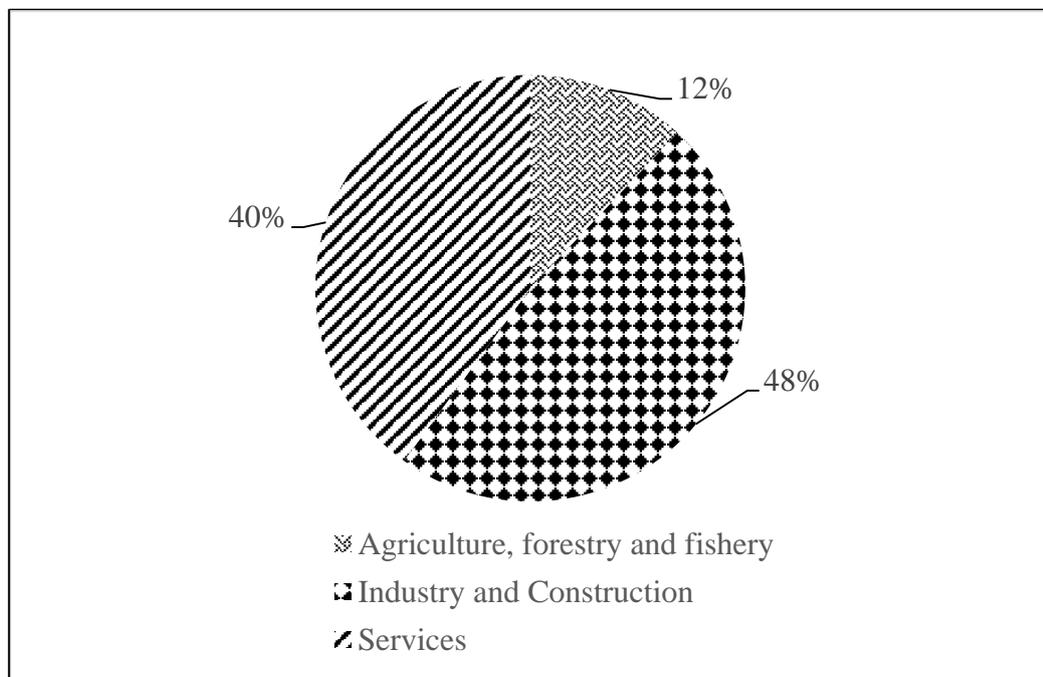
In conclusion, Ninh Binh obtains variety of natural resources with beautiful landscapes and scenery. Currently, the city attracts a huge number of both local and international tourists every year and possess a great potential for further tourism development in the future.

4.3 Economic condition

According to the General Statistic Office of Vietnam (2015), economic growth rate is at a moderate level and economic structure gradually shifting in the right direction, the infrastructure is also gradually being improved. By 2016, GDP growth reached 11.7%, with the GDP per capita of 41.5 million. There were shifts in economic structures (in

which, Agriculture- forestry- fishery decreased to 12.0%, industry and construction increased to 48.0%; services increased to 40.0).

Figure 6: Economic structure of Ninh Binh Province



Source: Official Website of General Statistic of Vietnam (2015)

Service sector, especially tourism services sector step by step becoming the key economic sectors of the province. Despite the effect of the economic downturn and some uncertainty in the region, in 2016, revenue from tourism activities reached 77.7 million USD, increase 24.2% compared to 2015. State management over tourism is enhanced, especially in term of ensuring security and environment sanitation in the most attracted tourist spots, which created a good impression and reputation on tourists. The infrastructure of the tourism resorts continues to be invested. Tourism service quality is improved, especially in term of high-quality accommodation services. The other service sectors such as insurance, telecommunications, banking and finance, transportation etc continue to be developed. More over, the province also focused on enhancing

infrastructure investment, expanding the variety of services and improving the quality of accommodation services and people's living condition [General Statistic Office of Vietnam, 2015].

In conclusion, with that geographical location, natural conditions with large areas of forest, beautiful natural scenery, Ninh Binh possesses the potential and competitive advantage in tourism development in comparison with the other provinces. On the other hand, the local authorities are also well aware of the importance of tourism development, as tourism is one of the key economic sectors. This is a huge advantage for the development of tourism in Ninh Binh. But besides the above advantages, the development direction of the tourism sector to become the main economic sector of the province in the near future is facing difficulties.

V. CURRENT SITUATION OF TOURISM DEVELOPMENT IN NINH BINH PROVINCE

5.1 Deployment of Resolution No. 15 in Ninh Binh Province- compared with Quang Ninh Province

About the Resolution No.15, local government plays an important role in creating the context for future development of tourism sector. The responsibilities of local government can be classified as six main points: i) Tourism development planning, ii) Infrastructure development, iii) Human resources education and training, iv) Tourism promotion and marketing, v) Strengthening local government management of tourism activities and vi) Raise awareness of local community on tourism development. This section will focus on analyzing the current situation of deployment of those responsibilities of local government of Ninh Binh Province in the recent years. In order to evaluate the effectiveness and results of the deployment, the research chooses Quang Ninh as a benchmark province to compare with.

Quang Ninh Province belongs to the Red River Delta and the Northeast Coast area- one of the seven areas in the list of Vietnam tourism. Quang Ninh is located 153 km far from the capital Hanoi, with the total area of 6,102.3 km², total population of 1.2 million people and population density of 199 people / km². (General Statistic Office of Vietnam, 2015).

Quang Ninh has a unique tourism resource in the country, with many beautiful beaches, famous landscapes. The most famous tourist spot in Quang Ninh is Ha Long Bay, which was inscribed by UNESCO as the World Heritage Site and became one of the seven new natural wonders of the world. Halong Bay is an island in the northeast of Vietnam, located in Quang Ninh Province, the north part is bordered by China and the eastern part is bordered by the South China Sea. The sea of Ha Long Bay forever remains

a blue color, flowing smooth, busy with time. It is beautiful throughout the four seasons, successfully attracts million of tourists every year and becoming the most attractive tourism destination in Quang Ninh Province.

Halong Bay is one of the factors leading to the success of tourism development. It is nominated as an important national monument by the Vietnamese government in 2009. Right from the beginning of the 20th century, Quang Ninh tourism has brought the image of Ha Long Bay to dozens of airlines and international travel. Every year, it gets the attention of tourists from 50 countries and territories. Asia Pacific Travel Association has made the reputation of Ha Long Bay a great concern for many organizations and individuals around the world. Furthermore, it has an important role associated with China tourism - a potential tourism market in the world. Because of the above-mentioned values, according to the Master Plan, Ha Long Bay is considered an important resource. Accordingly, Ha Long Bay associated with the Cat Ba Island and Do Son of Hai Phong is oriented to become the national tourism spots of Vietnam. In recent years, Ha Long Bay has contributed significantly to the cause of socio-economic development, continuously enhancing the international integration. In 2016, it has attracted 4.850.000 visitors, accounting more than half of the total number of tourists in Quang Ninh (Quang Ninh Portal, 2017).

Besides, Quang Ninh also famous for its commercial port of Van Don, which is the first foreign trade port in our country. Van Don is located in the south east of Ha Long Bay. Moreover, Quang Ninh possesses more than 600 historical relics and beautiful landscapes, of which, 3 tourist spot ranked special national monuments. With the existed natural resources and unique cultures, Quang Ninh's tourism is more and more developed year by year, forming the popular tourism triangle in Red River Delta area, but also become the center of international tourism (Quang Ninh Portal, 2017).

Tourism development planning

In Ninh Binh, in 2009, the provincial People's Committee in has approved the Master Plan for tourism development up to 2010 vision to 2015. In 2016, the provincial People's Committee approved budget estimates for the implementation of the Master Plan for Tourism Development up to 2025 vision to 2030. The Tourism Department in collaboration with the Institute for Tourism Development Studies implemented the next steps in planning.

The provincial People's Committee has focused on directing the adjustment, supplementation and elaboration of detailed planning of tourism destinations. In total, there were 13 specialized tourism-related plans approved by the Provincial People's Committee (Ninh Binh Portal, 2016).

Table 2: Tourism- related plans approved by the Provincial People's Committee

Name	Publicization status
Handicraft villages development up to 2020	In progress
The plan for conservation and sustainable development of special-use forests up to 2020	Publicized
The plan for economic development of Kim Son coastal area up to 2020 vision to 2030	Publicized
The trade development planning up to 2020 vision to 2030	Publicized
The planning of Ninh Hai embroidery village	Publicized
The planning of the power supply system and water supply system for tourist resorts up to 2020	Publicized
The transport development planning up to 2020 vision to 2030	In progress
The fisheries development planning	In progress
The livestock development planning in association with tourism development	In progress
The planning of the national wildlife park	Publicized
The planning of public passenger transport by bus up to 2015	Publicized
The planning of the internal passenger transport network and taxi passenger transportation in the period of 2015-2025.	Publicized

Source: Ninh Binh Portal (2016)

All the above-said plannings have been publicized and are being publicized by the Provincial People's Committee in order to organize the implementation of projects.

On the other hand, in Quang Ninh Province, in recent years, the Provincial People Committee have directed the development and implementation of resolutions and plans on management of tourism business. Quang Ninh Province hired Boston Consulting Group, USA to develop the Master Plan for Quang Ninh tourism development up to 2020, with a vision to 2030. Until 2017, there are total of 32 master plans and detailed plans on tourism development period 2013- 2020, in which 15 plans are related to tourism development (Quang Ninh Portal, 2017).

Infrastructure development

In Ninh Binh, the transportation system in recent years has been developed enough for daily needs of local community as well as tourists. The road system consists of four highways with a total length of over 110 km; the provincial road consists of 15 roads, with the total length of over 293.6 km; the district roads have the total length of 79 km and the inter-commune roads have the total length of 1,338 km. All the roads are equipped with lighting systems and green trees. Most of these roads are being upgraded to meet the needs of tourism and trading. Alongside, the North-South highway, which is under construction, will create a competitive advantage for tourism development (Ninh Binh Department of Statistic, 2017).

Waterway system consists of 22 river routes, of which the central government manages 4 routes, with the total length of 364.3 km and 3 main ports managed by the central government. There are a number of cargo stations, docks and anchorages are located on river banks and river estuarine to serve local economic activities. The North-South railway system is 19km long with 4 stations, which are convenient for transportation of passengers, cargo and especially construction materials. The high-speed

railway system is being planned, designed to be put into operation. This will create great advantages for the province (Ninh Binh Department of Statistic, 2017).

The Post Office Department implemented licensing of telecommunication services using 4G technology for 4/5 telecommunications operators. More over, the Department also focus on the management of international telephone service charges. In 2016, the Department focus drastically on measures to protect confidentiality of personal information. The Directive in 2016 enhanced the interests of users of telecommunications services and manage prepaid mobile subscribers, by requiring mobile telecom businesses to manage mobile SIM sales. With the enhanced usage of modern 4G mobile technology, Ninh Binh is able to utilize new IT technology in promoting its tourism industry (Ninh Binh Department of Statistic, 2017)

Over the past few years, in Ninh Binh, many key tourism projects have been financed by the central budget. In 2016, the total number of central budget supports investment in tourism infrastructure is 29.3 million USD (Table 3). In 7 years (2009-2016), the provincial People's Committee has issued Investment Certificate (IC) for 29 projects with the total investment of 5.2 million USD (Ninh Binh Department of Statistic, 2017).

Table 3: Ninh Binh central budget in tourism infrastructure investment projects in 2016

Project name	Total investment
Trang An Scenic Complex ecotourism infrastructure invesment project	\$20,988,000
Tam Coc- Bich Dong cave waterway dredging investment project	\$822,800
Thung Nham ecological tourism road system investment project	\$717,200
Kenh Ga- Van Tri infrastructure investment project	\$6,776,000
Total	\$29,304,000

Data Source: Official Website of Ninh Binh Department of Statistic (2017)

Alternatively, in Quang Ninh Province, in the period from 2010 - 2016, there are 42 projects in total, of which 14 are in the field of tourism services with the total investment of 12.2 billions USD. The Provincial People’s Committee has issued IC for 35 projects in the field of tourism and services with total investment of 1.2 billions USD (including 4 projects with foreign investment). In 2016, the total investment budget reached 996.8 million USD (Invest Quang Ninh, 2017) (Table 4).

Table 4: Quang Ninh central budget in tourism infrastructure investment projects in 2016

Project name	Total investment
Luxury beach resort in Rachu Island	\$49,971,152
Quang Hanh high-class hot mineral resort project	\$154,000,000
Halong Bay Ocean Park	\$264,000,000
Ben Doan high-class service area	\$528,830,764
Total	\$996,801,916

Data Source: Official Website of IPA Quang Ninh (2017)

In term of investment project, Quang Ninh has more project with a significantly higher amount of investment budget. Most of the projects in Quang Ninh focus are high-class project, oriented develop to obtain the international standard of tourism infrastructure.

In Ninh Binh, regarding tourism accommodation development, the Provincial People’s Committee has created favorable conditions for enterprises to invest in and construction of restaurants and hotels, and to form a diversified network of tourist services. Tourism accommodation facilities are constantly expanded and upgraded. At the same time, the quality of tourism services was also improved. In 2009, the city has 108 hotels (4 one-star hotel, 18 two-star hotel) with a total of 1,681 rooms, 2,806 beds, attracted 18.7 million USD of investment capital, and created jobs for 991 people all over

the city. In 2016, there are 423 hotels (14 one-star hotel, 27 two-star hotel, 1 three-star hotel and 3 four-star hotel) with a total of 5,748 rooms, 9,331 beds, attracted 185.1 million USD of investment capital and created jobs for 2,829 people (Ninh Binh Department of Statistic, 2017). The details of numbers of tourism accommodation from 2009 to 2016 can be found in the Appendices.

Conversely, in Quang Ninh, in 2016, there was a total of 738 hotels, including 12 five-star hotels, 9 four-star hotels, 14 three-star hotels, 45 one-star hotels and 632 mini hotels. 10,000 rooms with 18,000 beds. Besides, Quang Ninh also has 350 cruise ships (13,000 seats), 150 luxury boarding ships, of which 49 are overnight cruise ships (422 beds), more than 40 tour operators, especially provide service for tourists visiting Ha Long Bay (Quang Ninh Portal, 2017).

Human resource training and education

In Ninh Binh, to train human resources for accommodation from 2009 to 2015, Hoa Lu University in collaboration with the Hanoi College of Tourism has recruited three majors in Tourism, Hospitality, and Reception with 526 students.

The provincial People's Committee also coordinated with the Department of Culture, Sports and Tourism to organize professional training for officers and employees of the tourism industry. One training course was established for volunteers for World Cultural Heritage and Natural Heritage Complex of Trang An Scenic Complex ceremony. Moreover, four training courses were opened on management of tourist accommodation for nearly 400 trainees, who are managers of tourist accommodation establishments. Besides, one training course was devoted to tourism promotion. In addition, two training courses were set up for sustainable tourism for officials and employees of the Department of Culture, Sports and Tourism. Lastly, four training courses were established on the protection of intellectual property rights in enterprises and protection of intellectual

property rights for specialty products for more than 200 trainees. The Provincial People's Committee also coordinates with the EU Project Management Board to organize 9 training courses for 330 trainees in order to improve the knowledge on responsible tourism. In addition, the tourism industry regularly organizes competitions, thereby contributing to improving the skill level of labor in the tourism industry (Ninh Binh Portal, 2016).

Tourism promotion and marketing

In Ninh Binh, in 2013, the provincial People's Committee coordinated with the Vietnam Buddhist Association to organize an international conference on spiritual tourism for sustainable development. In January 2015, the provincial People's Committee coordinated with the Ministry of Culture, Sports and Tourism to hold a ceremony to receive the Certificate of Trang An Scenic Complex as World Cultural and Natural Heritage. The welcome ceremony has attracted many tourists, local and foreign agencies to broadcast live on a national television. In addition, hundreds of other traditional festivals have attracted million of participants.

Annually, the Provincial People's Committee has directed the tourism industry and related departments to organize many tourism promotion conferences at domestic and foreign tourism fairs. During the period from 2010 – 2016, the Provincial People's Committee has organized and coordinated to participate in over 60 domestic and foreign tourism fairs and exhibitions. Tourism promotion in Ninh Binh, is deployed in various forms from publications, propaganda materials in a variety of languages (Vietnamese, English, French, Chinese and Japanese). In the period of 2009 - 2016, more than 150,000 publications have been published and promoted, which reflects the beautiful landscapes, unique culture and tourism activities of the province. Every year, those publications attract from 1.5 to 2.5 million online visitors. Especially, in 2016, the promotion of

tourism in Ninh Binh in general and World Cultural and Natural Heritage - Trang An Scenic Complex Spectacular Complex, in particular, have been focused effectively. The promotion on the media has attracted 4.870.000 visitors, an increase of 75.18% over the same period of 2015 (Ninh Binh Portal, 2016).

Online travel consultants provided information for 4,300 visitors and travel companies. Moreover, in 2016, 6 of the 7 Hollywood films shot in Vietnam are filmed in Ninh Binh, especially latest movie named Kong, The Skull Island was also filmed in the province. This is a good opportunity to introduce and promote the cultural, historical and human values of Ninh Binh worldwide. Thanks to the renovation in advertising and promoting methods, Ninh Binh's tourist market has been expanded. Visitors from Europe, America, Australia and North East Asia increased (Ninh Binh Portal, 2016).

While Ninh Binh mainly focus on tourism promotion and marketing through tourism fairs, electric portal and mass media, mainly aims at the domestic market, in Quang Ninh, regarding tourism promotion and marketing, the Provincial People's Committee has promulgated the promotion plan for the period of 2016-2020. According to the planning, the promotion must be at the international level and the image of Quang Ninh tourism must be shown on major international channels and focus on expanding regional link. Until now, the province has partnerships with many international and regional organizations.

Basically, the functional agencies, localities and enterprises have organized many activities, programs for tourism promotion with different contents, such as Ha Long Carnival, Cherry Blossom Festival, Yen Tu Mountain Climbing Festival, which has had a great impact on tourism attraction. The Provincial People's Committee has also directed the marketing, promotion and participation in tourism fairs worldwide. Along with the major promotional events held in Ha Long City - the center of the province, the other

cities also actively organized events to promote the attraction of tourist. The cooperation activities for tourism development with other neighboring cities also organized. The province has signed tourism cooperation agreements with Ho Chi Minh City, Hanoi and other cities in order to form diversified tourism network, which links tourism routes and tourism product chains between cities. The contents of the cooperation focus and activities of exchanging tourist information, promoting tourist routes, sharing management experience and training of human resources.

In Quang Ninh, regarding tourism products development, the Provincial People's Committee actively established market development strategies, especially focusing on international markets including China, Northeast Asia, ASEAN, Europe, Russia, North America, South Asia, Middle East. Moreover, Quang Ninh aims at targeting high income customers, while also taking into account the domestic market. The Provincial People's Committee focus on expanding relationships with local and foreign partners, actively supporting enterprises in organizing market development activities and concentrate on linking tours and tourism products with Hanoi and other neighboring cities.

The Quang Ninh People's Committee directed the development of many new tourism products such as the special cultural performances of local ethnic, exploring Halong by kayak, seaplane, airship, cable car at the cultural historical vestiges of the Ngo Thien Van Pagoda, Ocean Park, transshipment and luxury restaurant ships etc. All those tourism products have been put into operation and promoted effectively, which has attracted many tourists.

In addition, implementing Resolution 07, in recent years, the Quang Ninh Provincial People's Committee has focused on expanding the tourism scope to the western and eastern areas of the province, more tourist routes and products are introduced, especially develop cultural tourism. Up to now, there have been 32 routes, 78 tourist sites

of 10 localities, which has been issued by the Decision of the Provincial People's Committee. Furthermore, the Provincial People's Committee also concentrates on One Village One Product (OVOP), which can be defined as a set of regional (local) economic and social development activities through the development of products and services based on territorial identities and resources. The OVOP campaign had been originally developed in Japan, and today many different countries apply it for the local economic development (Fred, 2016). This campaign create tourism products, including some products have been highly appreciated by tourists such as Ha Long squid, Van Don red dragon fruit, Yen Tu apricot wine, Binh Lieu rice noodle etc. Besides, the Provincial People's Committee also directed research and application of science and technology in the development of tourism products and organize the contest of creating souvenir samples for tourists (Quang Ninh Department of Statistic, 2016).

Strengthening local government management of tourism activities

In Ninh Binh, the Provincial People's Committee established a set of regulations to manage environmental sanitation. The Department of Justice has drafted 13 sample protocols and 13 conventions to guide the villages about reasonable protection and exploitation of tourism resources. Up to now, 100% residential clusters in key tourist areas have made agreements on the protection of the tourist environment. On the other hand, food safety in hotels and restaurants is maintained; basic waste is collected and treated. The provincial People's Committee also invested in the construction of new public toilets in Hoa Lu ancient capital and repairing toilets at the main tourist destinations (Ninh Binh Portal, 2016).

On the other hand, the Provincial People's Committee assigns the Department of Finance to coordinate with the relevant departments in adjusting fees and charges for boat trips at tourism destinations. The Provincial People's Committee also established an inter-

branch delegation to inspect the implementation of state regulations on prices and fees at tourism destination to ensure the interests of tourists, anti-dumping phenomenon, excessive price increases for services. In 2016, Tourism Association of Ninh Binh held the Congress of Tourism Association II, which has actively coordinated with the State management agencies in price management and quality management of tourism services (Ninh Binh Portal, 2016).

In recent years, to provide information and support for tourists, the local authority coordinates with Information Center to establish the website of Ninh Binh Tourism Department. Through this website, information-seeking organizations, individuals and tourist business units can access to search for necessary documents. At the same time, the website for tourists support was also put into operation. In 2016, it had more than 560.000 visitors. Furthermore, there were also counseling and assistance for tourists to ensure safety at main tourism destinations, where tourist support stations has supported directly for nearly 24.000 visitors and indirectly for 3.600 visitors through telephone. The hotline at Trang An Scenic Complex support station supported 2007 delegations, with 13.206 visitors; of which, domestic customers make up 75% (with 9.905 visitors) and international visitors make up 25%. On the other hand, the hotline at Bai Dinh support station supported 1.730 delegations, with 10.705 visitors; of which, 80% of domestic visitors (with 8.564 visitors) and 20% of international visitors. (Ninh Binh Department of Statistic, 2017).

Additionally, from 2013, People's Committee has developed the regulations on coordination to ensure security. In 2014, the Provincial Police developed and implemented the inter-sectoral plan to strengthen the management of cultural environment, ensuring the security and safety of tourism destinations. In 2015, the provincial People's Committee established a tourist support center under the Department

of Culture, Sports and Tourism for tourists. Regarding the traffic safety in transportation of tourists, the Department of Transport coordinated with the Department of Tourism to repair and install the system of signboards in important locations (on routes leading to tourist sites) to create favorable conditions for tourists. The Department of Transportation has trained and fostered the provisions of the Inland Waterway Navigation Law and granted specialized certificates for over 2,000 ferry drivers. Besides, in order to create favorable conditions for businesses to declare their temporary residence, currently, there are 265 motels in the province make temporary residence via the internet. Every year, the Department of Statistics develops and implements basic survey and tourism statistics as required by the province, by the Law on Tourism (Ninh Binh Department of Statistic, 2017).

Raise awareness of local community on tourism development

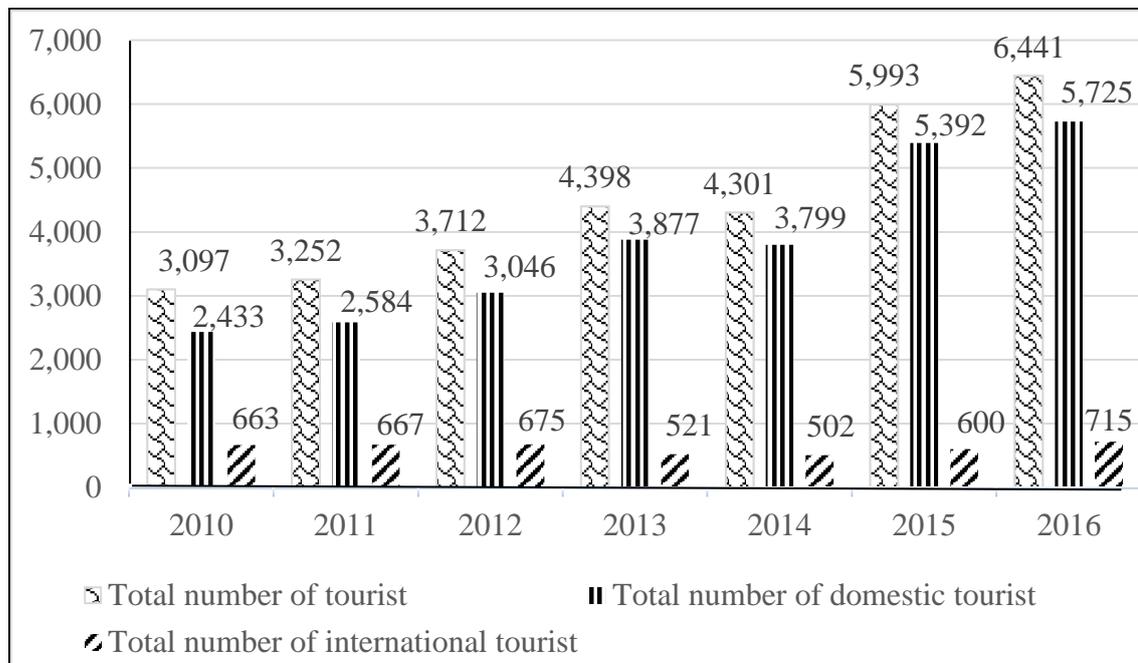
In coordination with the Provincial People's Committee, Provincial Women's Union, universities, colleges and enterprises open fostering courses to improve their knowledge of tourism and foreign languages as well as a civilized and polite way of communicating with tourists for officials, employees and local communities. From 2010-2016, there were 15.000 laborers and local communities participated in tourism activities. Consequently, their sense and attitude toward tourists increased significantly. There were many conferences, competitions, training courses for local communities about the tourism development. The Provincial Women's Union also maintains practical activities, organizing festivals, cultural exchange programs to raise responsibility of local community (Ninh Binh Department of Statistic, 2017).

5.2 Evaluation of the performance of tourism sector

Total number of tourists

Ninh Binh tourism in recent years has initially changed, gradually exploiting the potential and strength of tourism effectively. The total number of tourists increased significantly from 3,096,589 tourists in 2010 to 6,441,472 tourists in 2016 with the annual growth rate of 13.7%. The total number of tourists is at its peak in 2012, 2013 and 2015 with the growth rate of 14.1%, 18.5% and 39.3% compared to 2010.

Figure 7: Total number of tourist in Ninh Binh Province from 2010-2016 (in thousands)



Data Source: Official Website of Ninh Binh Statistic Department (2017)

The domestic tourists still account mainly among the total number of tourists to Ninh Binh in recent years. In 2010, the total number of domestic tourist reached 2,433,305 tourists, almost 4 times larger than the total number of international tourists. Domestic tourists to Ninh Binh increased steadily over the years with the annual growth

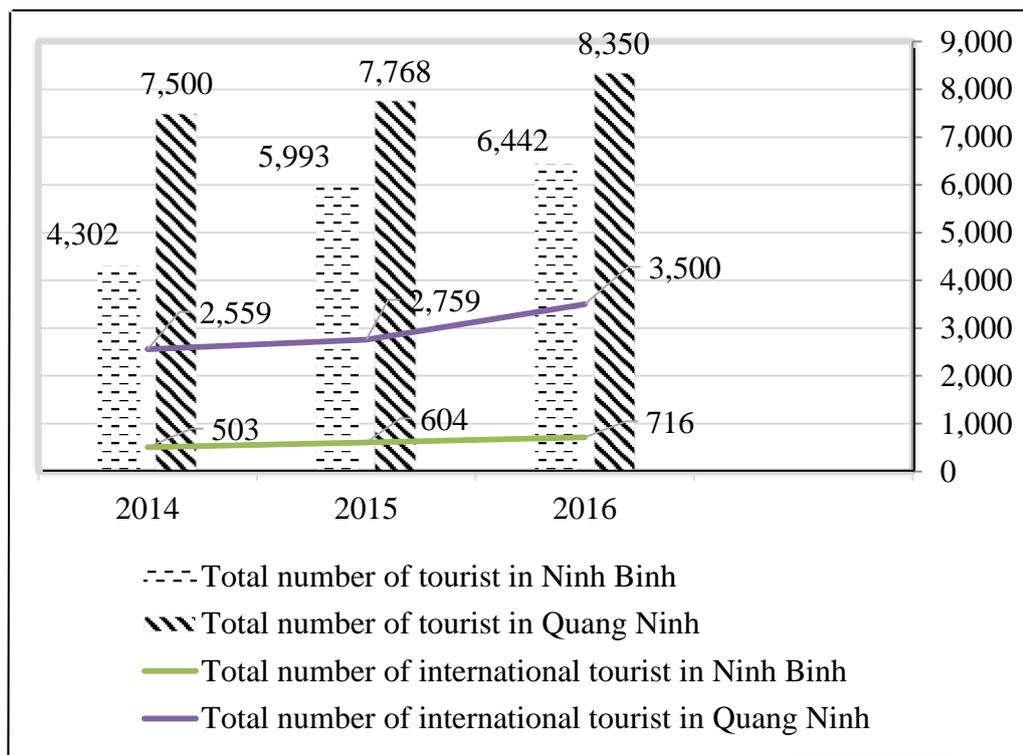
rate of 16.2% and at its peak in 2012, 2013 and 2015 with the growth rate of 17.5%, 27.7% and 41.9% compared to 2010.

The total number of domestic tourists decreased in 2014, because of the South China Sea dispute. Although the South China Sea dispute mainly affects the number of international tourists to Vietnam, however, the unstable in political situation also affect the decision of traveling of domestic tourists, especially when Chinese brought rig near Vietnam's central coast in a part of the South China Sea dispute. In 2016, the number of domestic tourists reached 5,725,868 tourists, increased 6.2% compared to 2015.

The domestic tourists in Ninh Binh mainly come from Hanoi and Northern cities with the purpose of visiting resorts, spiritual and religious tourism in Bai Dinh Temple etc. Tourists from the southern cities are mainly business travelers. Moreover, there are number of sporting centers in the city, where it regularly hosts national and international sporting event, attracting a large number of athletes, managers and tourists to participate. In addition, the large number of domestic tourists also come from Ninh Binh itself.

On the other hand, in 2010, the international tourists reached only 663,284 visitors. The number of international tourists to Ninh Binh also increased over the years with the annual growth rate of 2.3% and at its peak in 2015 and 2016 with the growth rate of 19.5% and 19.2% compared to 2010. The number of international tourists decreased sharply in 2013 by 22.8% because of the impact of South China Sea disputes. As the dispute did not really affect the number of domestic tourists, it seriously affect the number of international tourists, especially from China and Hong Kong. Despite the severe decreases over 2013 and 2014, by 2016, Ninh Binh's tourism gained back its strength and attractiveness, successfully welcomes approximately 715,603 international tourists. The details number of tourists can be found in the Appendices.

Figure 8: Total number of tourists in Ninh Binh and Quang Ninh from 2014 to 2016 (in thousands)



Data Source: Official Website of General Statistic Office of Vietnam (2017)

The total number of tourists in both Ninh Binh and Quang Ninh increases steadily from 2014 to 2016. In 2014, the total number of tourists in Quang Ninh was almost twice higher than the total number of tourists in Ninh Binh, however, Ninh Binh was catching up and narrowing the differences year by year. By 2016, the total number of tourists in Quang Ninh reached 8,350,000 tourists while the total number of tourists in Ninh Binh reached 6,441,442, with not many differences.

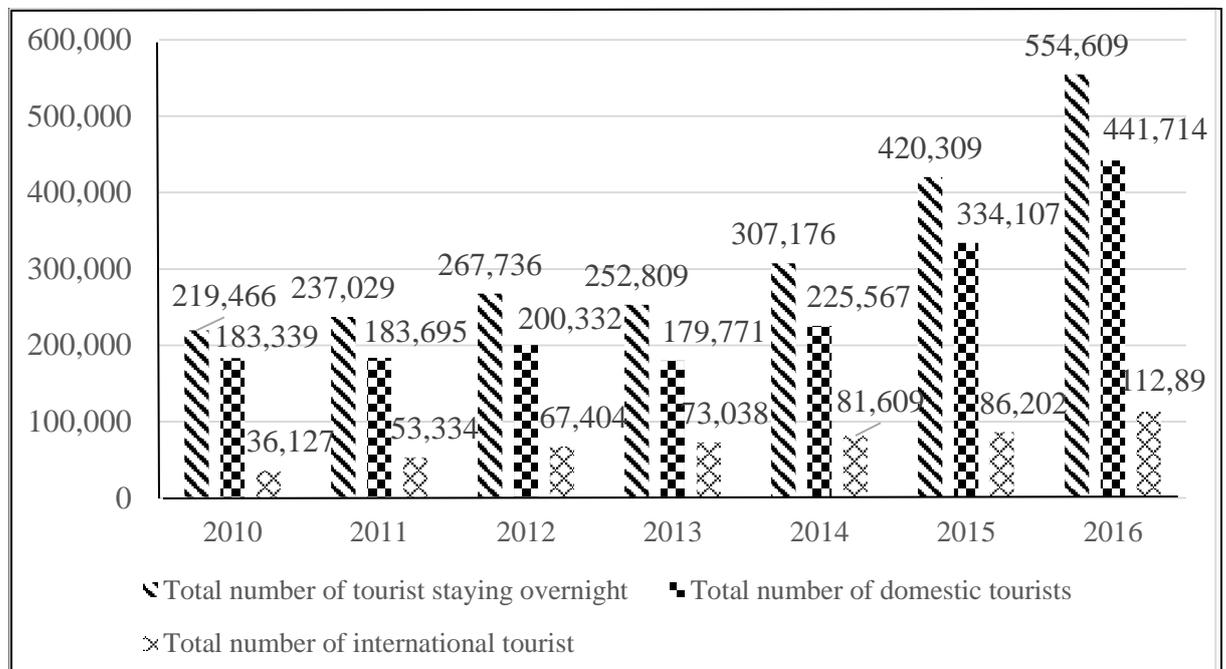
However, noticeably, the total number of international tourists in Ninh Binh was very small compare to Quang Ninh in the same period. Especially in 2014, the total number of international tourists in Quang Ninh was more than 5 times higher than Ninh Binh. The differences still remains in 2016. It is because of the advanced tourism

facilities, entertainment facilities as well as diversified tourism products in Quang Ninh that attracted a larger number of tourists visiting the province.

Moreover, the tourism promotion and marketing in Quang Ninh also aims at international markets, which resulted in a much higher number of international tourists visiting the province. Last but not least, Quang Ninh effectively created linkages with Hanoi and the other neighboring cities cooperating and organizing sightseeing tours, therefore, tourists who visit Hanoi tend to visit Quang Ninh as well.

Total number of tourist staying overnight

Figure 9: Number of tourist staying overnight from 2010-2016 in Ninh Binh Province



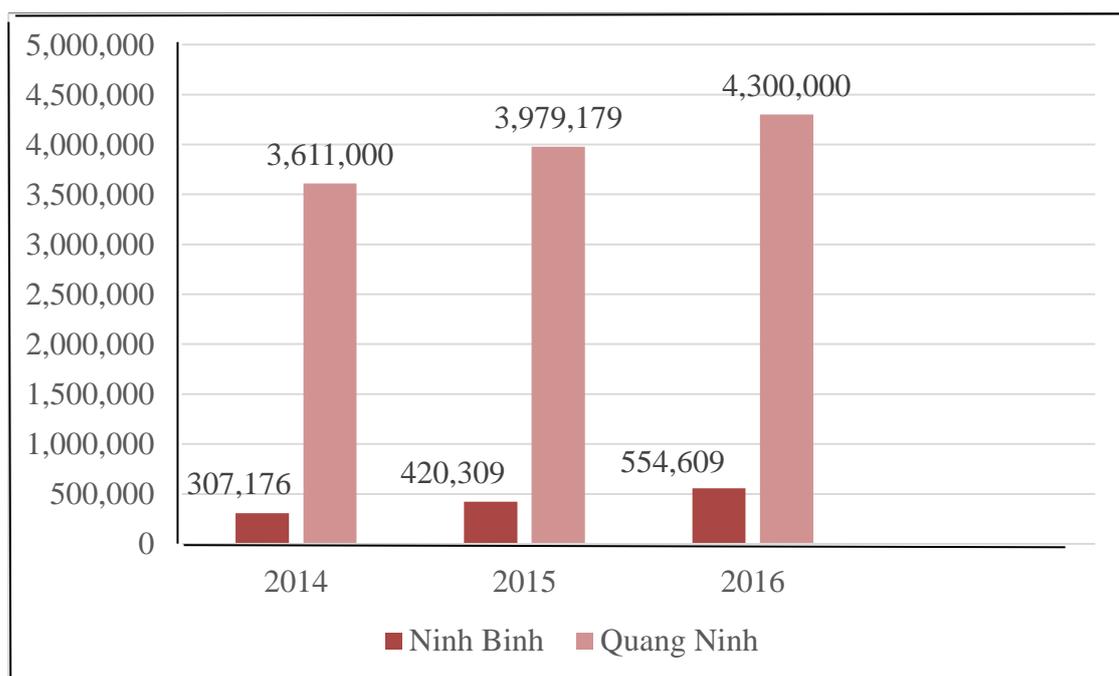
Data Source: Official Website of Ninh Binh Department of Statistic (2017)

Although the total number of tourists to Ninh Binh Province in 6 years is huge (31,195,833 people), the total number of tourists staying overnight only accounted for 7.2% of the total number of tourists. In which, the total number of domestic staying overnight is 1,748,525 tourists, only accounted for 6.5% of the total number of domestic tourists; and the number of international tourists staying overnight only accounted for

11.7% total number of international tourists. The total number of tourist staying overnight increasing over the years, from 219,466 tourists in 2010 to 554,609 tourists in 2016, with the annual growth rate of 17.6%. The total number of tourists staying overnight increased significantly from 2014 to 2016, with the growth rate of 21.5%, 36.8% and 32.0%.

The domestic tourists still account for a large number of tourists staying overnight and also increase steadily over the years, with the annual growth rate of 17.5%. The international tourists are still the minor contribution to the overall night stayed, which is only 510,609 in total in 6 years, with the annual growth rate of 21.8%. The details number of tourist staying overnight can be found in Appendices.

Figure 10: Total number of tourist staying overnight in Ninh Binh and Quang Ninh Province from 2014 to 2016



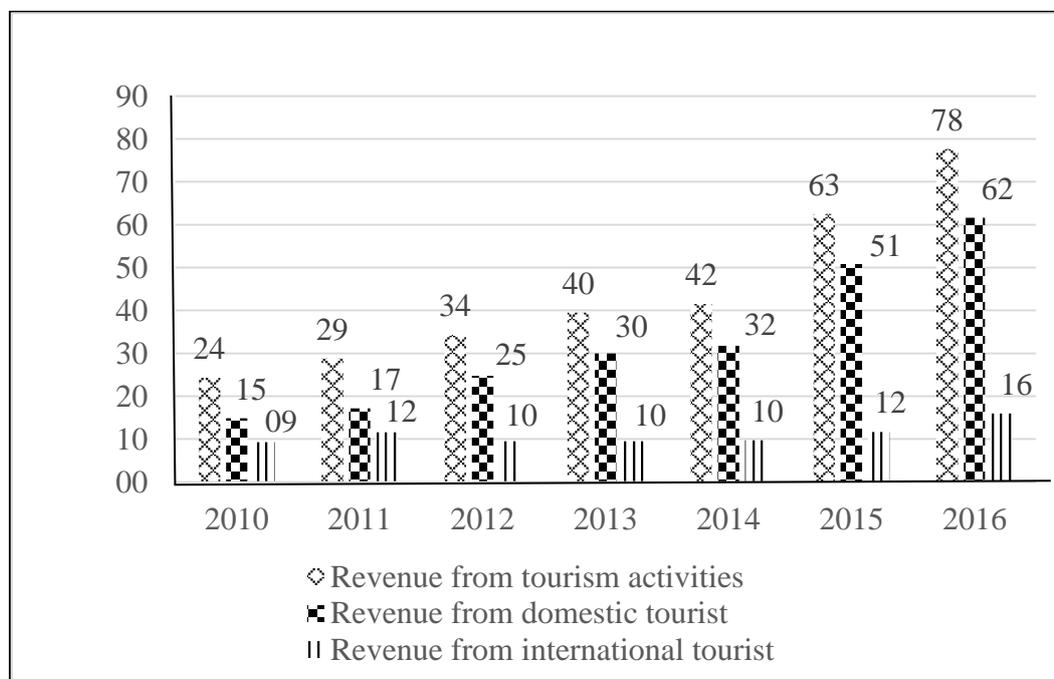
Data Source: Official Website of Ninh Binh Department of Statistic (2017)

The total number of tourists staying overnight in both Ninh Binh and Quang increased gradually from 2014 to 2016. Nevertheless, the gap between 2 provinces was vast. In 2014, the total number of tourist staying overnight in Quang Ninh was 11,75

higher than Ninh Binh. Throughout the years, the total number of tourist staying overnight in Ninh Binh did not have big enlargement. By 2016, the total number of tourist staying overnight in Quang Ninh reached 4,300,000 tourists while the total number of tourist staying overnight in Ninh Binh only reached 554,609 tourists, approximately 1/7 of that in Quang Ninh. Once again, it is because of the advanced tourism facilities, entertainment facilities as well as diversified tourism products in Quang Ninh that attracted tourists to lengthen their stay.

Tourism contributes to economic development

Figure 11: Revenue from tourism activities (million USD)

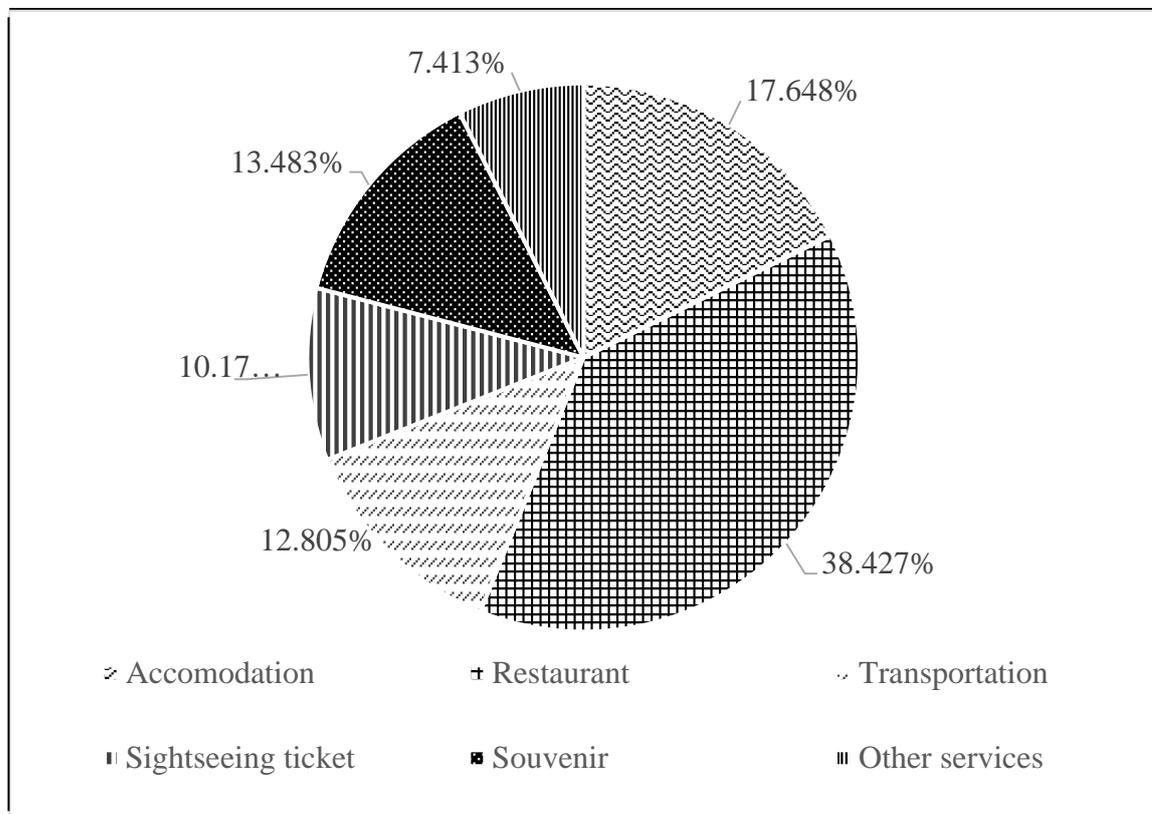


Data Source: Official Website of Ninh Binh Department of Statistic (2017)

Revenue from tourism activities in 2010 reached 24.3 million USD, of which 14.9 million USD was from domestic tourists and 9.3 million USD was from international tourists. In 2016, revenue from tourism activities reached 77.7 million USD, increase 24,2% compared to 2015. In which, the revenue from domestic tourists reached 61.6

million USD, increased 21,3% compared to 2015; and the revenue from international tourists reached 16.0 million USD, increased 36,7% compared to 2015.

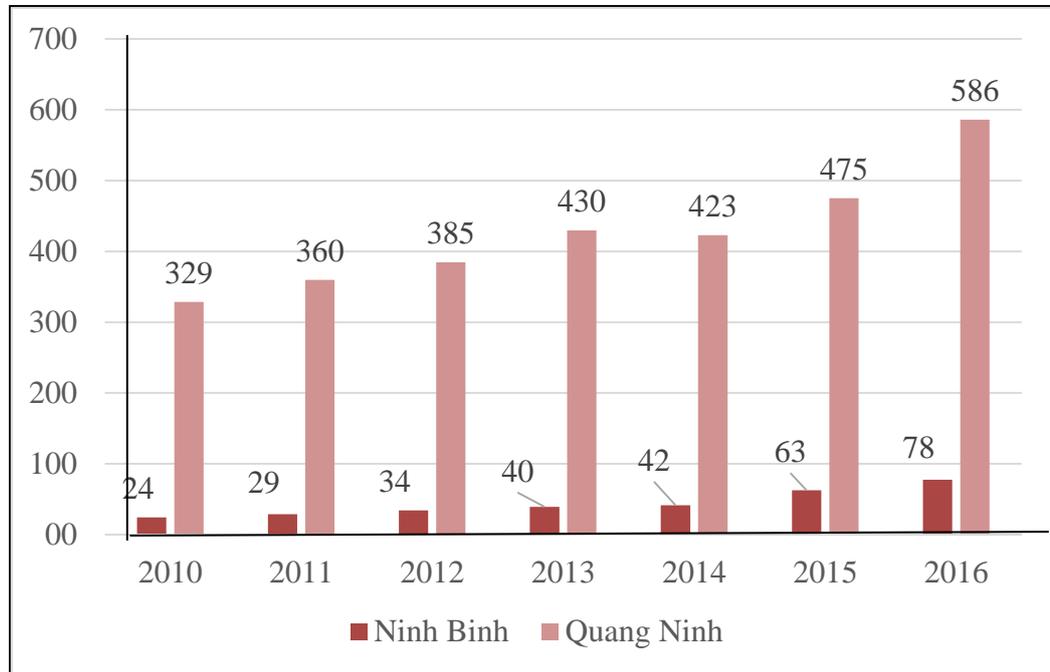
Figure 12: Revenue structure



Data Source: Official Website of Ninh Binh Department of Statistic (2017)

The annual growth rate of revenue from tourism activities is 22,15% during the period from 2010-2016. The domestic tourists are the main source of revenue for Ninh Binh Province. The revenue of tourism activities is from variety of sources from accommodation to souvenir and other services, however, it mainly comes from accommodation and restaurant, which accounted for 17.6% and 38.4% of the revenue structure. In 2010, revenue from accommodation reached only 4.3 million USD, while revenue from restaurant reached 8.8 million USD. In 2016 the revenue from accommodation reached 13.7 million USD; while the revenue from restaurant reached 29.9 million USD.

Figure 13: Revenue from tourism activities of Ninh Binh and Quang Ninh from 2010 to 2016 (million USD)



Data Source: Official Website of General Statistics Office of Vietnam (2017)

The total revenue from tourism activities increasing progressively over the years in both provinces. Remarkably, the gap between the total number of tourists in both province was not huge, which was proven by the total number of tourists in Quang Ninh was almost twice higher than the total number of tourists in Ninh Binh, however, Ninh Binh was catching up and narrowing the differences year by year. By 2016, the total number of tourists in Quang Ninh reached 8,350,000 tourists while the total number of tourists in Ninh Binh reached 6,441,442, with not many differences.

Despite the reasonable gaps in the total number of tourists, the gap between revenue from tourism activities between 2 provinces was expressively huge. In 2010, the revenue from tourism activities in Quang Ninh was 13.5 times higher than that in Ninh

Binh. Ninh Binh was catching up over the years, in 2016, the revenue from tourism activities in Quang Ninh was still 7.5 times higher than Ninh Binh.

The reason behind Quang Ninh's success is the advanced tourism facilities, entertainment facilities as well as diversified tourism products, which increase tourists' spending. Moreover, Quang Ninh focused on the high-income tourist groups as well as international markets to gain more revenue from tourism activities. Last but not least, Quang Ninh also put efforts to utilize Long Bay's potential to become the main source of revenue attraction of the province. The details on Quang Ninh's total revenue and revenue structure can be found in Appendices.

Tourism contributes to job creations

Figure 14: Number of labor in tourism industry



Data Source: Official Website of Ninh Binh Department of Statistic (2017)

The tourism industry in Ninh Binh Province had been attracting many labors over the years. The number of employees in tourism increased from 991 people in 2010 to 2829 people in 2016. By the time of 31st December 2016, the total number of labor in the

tourism industry in the province reached 2829 people, successfully created employments and contributed to the improvement of living standard for the local community This is the number of direct jobs registered in tourism activities in the city. In addition, the number of seasonal tourism jobs increased sharply, especially during the festival season from November to May, serving clean and specialty agricultural products such as chayote, pork, beef, chicken, herbs for visitors also increased rapidly. The income and livelihood of people in Ninh Binh Province are also improved along with tourism activities.

5.3 Evaluation of potentials and challenges of tourism development

In this section, I would like to use SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. SWOT analysis is to study the internal and external environments of organization (Jeffrey, 2010). This table below shows the SWOT analysis for challenges of tourism development of Ninh Binh Province, which considers both internal and external factors that influence the tourism development of the city.

Table 5: SWOT analysis

<p>Strengths (internal, positive)</p> <ul style="list-style-type: none"> ▪ Diversity of tourism resources ▪ Well known image in Vietnam ▪ Developed infrastructure 	<p>Weaknesses (internal, negative)</p> <ul style="list-style-type: none"> ▪ Workforce management and operation ▪ Tourism facilities ▪ Tourism product ▪ Cooperation with neighboring cities ▪ Management and implementation of tourism planning ▪ Tourism promotion and marketing to international markets
<p>Opportunities (external, positive)</p> <ul style="list-style-type: none"> ▪ Increasing demand for tourism ▪ Good location 	<p>Threats (external, negative)</p> <ul style="list-style-type: none"> ▪ Competitions in tourism market ▪ Impact of urban and industrial development ▪ Degradation of resources and natural environment ▪ Pressure of preserving the natural resources ▪ Social awareness of tourism ▪ Seasonality in tourism activities

Strengths

The first strength of Ninh Binh is the diversity of tourism resources, such as historical and cultural relics sceneries, national parks, continental wetland ecosystems, hot mineral water sources and villages with the traditional activities (stone carving, embroidery). This diversified tourism potential is one of the important strengths of Ninh Binh not only in comparison with the tourism center Hanoi but also in comparison with the other tourist destinations all over the country.

Secondly, Ninh Binh obtains a developed tourism infrastructure. Ninh Binh is located on the north-south transport axis, which has been paid much attention by the Government. Besides, as a province with relatively developed river system, many tourist sites in Ninh Binh can be reached by waterway. Along with the construction of tourist boat wharves in appropriate places, this is an opportunity to create attractive tours for tourists.

Finally, the image of Ninh Binh tourism is well known in Vietnam. Ninh Binh has long been known to domestic and foreign tourists with beautiful landscapes and unique culture.

Weaknesses

Besides strengths, Ninh Binh tourism also has weaknesses that need to be identified for appropriate solutions and strategies. Firstly, it is the limitation of workforce management and operation. Recent years, along with the rapid development of tourism and the rapid growth in the number of accommodations, the number of workforce in tourism industry also increased to fulfill the demand of tourists. However, the quality of services in many accommodations, restaurants, tourist attractions of Ninh Binh, even in famous tourist destinations is relatively poor. Despite that the local government had attempted to improve the quality of workforce in tourism industry, the management

activities, guiding enterprises and organizing professional training courses have not been strengthened enough to meet the development requirements.

Secondly, it is the limitation on tourism facilities, especially hotel system with the standard of 3 stars or more, banking and financial services and entertainment. Currently, due to the shortcoming in tourism planning management, Ninh Binh is facing difficulties with land ground in the construction of tourism facilities in general and the construction of resorts and hotels of 3 star or higher and amusement parks in particular. This situation becomes more difficult for urban areas and some tourist destinations. This is not only a weakness but also a challenge for Ninh Binh tourism in the near future.

Thirdly, it is the limitation of tourism products. Tourism products is one of the important factors to determine the success of the tourism industry. However, there is overlapping product between the resort and tourism area. Thus, there are restrictions on marketing and promotion of tourism products. Although Ninh Binh government awares of the above problem, the investment in the construction and development of tourism products is still inadequate. The investment in the construction of a number of specific products, which is defined in Master Plans, such as village tourism, Van Long wetland ecosystem, adventure tourism in Cuc Phuong have not received the attention. Ninh Binh's tourism marketing and promotion, so far, has no specific strategy. Therefore, the investments in recent years are only temporary and based on the limited budget of the province as well as the support of the National Action Plan for Tourism.

Fourthly, it is the lack of cooperation between Ninh Binh and neighboring provinces, especially Hanoi. The link between Ninh Binh tourism and local tourism in the region is not only contributes to promoting tourism development in Ninh Binh but also increasing the attractiveness and competitiveness of tourism products. However, over time, Ninh Binh has not actively created this link and a common tourism image of the

region, of which Ninh Binh is an important destination. This is also one of the reasons limiting the number of visitors to Ninh Binh, especially from Hanoi. Moreover, it is the limitation in management, implementation of tourism planning. Ninh Binh is considered as one of the leading localities in the planning tourism development. Since 1995, Ninh Binh has implemented Ninh Binh Tourism Development Plan 1996-2010. In addition, Ninh Binh has also participated in planning the tourism development of Hanoi tourism center and its vicinity up to 2010 and with vision to 2020. However, the management of the implementation of tourism development planning has many shortcomings. This weakness of Ninh Binh tourism is reflected in the concrete construction of many projects in the Tam Coc-Bich Dong - a key tourist of Ninh Binh with the strength of ecotourism, where the landscape and the environment are considered as the most important factors. Many visitors, especially international tourists, are disappointed with the construction, which lacks harmony with the natural landscape in the area. The limitation of planning implementation is also reflected in the lack of consideration of the location, size and utility of the accommodation system in the Van Long tourist area- an eco-tourism considered to be the destination not only for Ninh Binh tourism but also for the tourism center Red River Delta and North East Coast.

Last but not least, Ninh Binh has to improve on tourism promotion and marketing to international markets to attract more foreign tourists. While Quang Ninh has Ha Long Bay, which inscribed as World Heritage Site by UNESCO, Ninh Binh also has Trang An Scenic Complex as a World Heritage Site. Although Ha Long Bay is very well known worldwide and become the main source of tourist attractions and tourism revenue for Quang Ninh Province, Trang An Scenic Complex contrasty received less attention internationally and have not been focused on becoming the great potential of the province's tourism development. Since international market is important to tourism

development as well as to deliver the image of national tourism worldwide, it is essential for Ninh Binh Province to improve its tourism promotion and marketing to international market.

Opportunity

In recent years, there is an increasing demand for tourism (international and domestic) along with stability in terms of security and politics. Vietnam tourism in general and Ninh Binh tourism in particular, stands a great opportunity. Due to the stable political and security situation, Vietnam has been attracting the attention of international tourists when deciding on the destination of their vacation destination. For the domestic tourist market, the demand for tourism has increased rapidly with the increase in demand for pilgrimages and festivals; the lengthen of holiday for workers; the improvement of living standard, especially in big cities like Hanoi and Ho Chi Minh. In fact, not only during the tourist season but even during the weekends, the number of domestic tourists from Hanoi to neighboring provinces, including Ninh Binh, is huge.

In addition, Ninh Binh is located close to the capital Hanoi - the main distribution center for tourists in the Red River Delta area. This is considered an important factor to the increase in the number of tourists, if the local government knows how to establish suitable tourism products. In the near future, it will be a great opportunity for Ninh Binh to become an ideal tourist destination for tourists from Hanoi and the other neighboring cities.

Threats

With the advantages and opportunities when Ninh Binh is located near Hanoi and its vicinity, this is also great challenges as Ninh Binh tourism must be competitive with Hanoi and other potential provinces. This competition is indispensable for all development activities in the market economy. However, this challenge for Ninh Binh

tourism has become more intense as the image of Ninh Binh tourism is still faint, Ninh Binh tourism products are still monotonous, development is low and not fully organized to utilize the specific potentials.

Secondly, the impact of urban and industrial development is also a huge threat. One of the important orientations of Ninh Binh's socio-economic development strategy is to develop the construction material industry with the production of cement and building stone materials on the basis of exploiting of huge resources. In addition, the urban system of Ninh Binh will also be expanded, especially the development of Ninh Binh city. The construction of the Vina-KanSai Cement factory along with the rock mining in the mountain ranges of Gia Hoa commune on a total area of over 200ha had bad impact. The construction changes the natural landscape, which is an important attraction factor of the resort. The rock mining has been a direct cause of losing the White Pants Void, particularly important for tourists, especially international tourists. Another significant impact is the risk of air pollution (mainly explosions, noise and dust). In order to overcome this challenge, it is necessary to make adjustments to the overall planning approach to limit the impact on the tourist environment. Fourthly, it is the degradation of resources and the tourist environment in which the overlapping situation in management is a major inadequacy.

Fifthly, it is the influence of seasonality in tourism activities. Seasonality in tourism activities is considered as one of the important factors affecting the average number of days of stay and the level of capital expenditure of tourists. As located in the North, Ninh Binh tourism activities are affected by the sub-tropical climate characteristics, with other social effects such as festival season; student summer vacation and the tourist season of international tourists, especially from Europe, America, Oceania. According to Ninh Binh Department of Statistics (2017), in the peak season, tourist

arrivals account for 67% of the total visitors in the year, average occupancy is 58%. However, in the low season, this target is only accounted for 30% and 45%. Considering the tourism products in Ninh Binh Province at the present (sightseeing tourism, eco-tourism etc), the effect of seasonality is not as serious as that of the other provinces with sea tourism. However, this is still a real problem for provinces in the North, including Ninh Binh. Therefore, when considering investment projects to develop tourism products, the seasonality effect still needs to be considered and taken seriously to limit the low effectiveness of investment.

Moreover, Ninh Binh tourism develops under the pressure of preserving the values of nature. Cuc Phuong was recognized as the first national park in Vietnam; Van Long is recognized as the first continental wetland reserve in the north with the preservation of the world's only solitary white pants Vooc; Hoa Lu, Trang An with special cultural and historical monuments of national value. The increase in the number of visitors to these sites will be the pressure on the landscape, the environment, the existence of monuments. Besides, the tourism activities in this sites will be subject to legal laws and regulations in line with international laws that Vietnam has committed. This is a great challenge of Ninh Binh tourism to harmonize the conflict between the opportunities and the desire to increase the number of guests with the obligation of preserving cultural and natural values for sustainable development.

Finally, the social awareness of tourism is inadequate. This perception of the local community, especially the managers is still low. This is evident in the industrial development with rock mining affecting the environmental landscape, inadequate policies for investment in tourism infrastructure development, promotion of tourism, and human resource development training for tourism.

VI. POLICY RECOMMENDATIONS AND CONCLUSION

In the period of 2010- 2016, the tourism industry of Ninh Binh Province had certain achievements, especially in the year of 2015 and 2016. The number of visitors to Ninh Binh has increased sharply, employment and income from tourism also increased, investments in infrastructure are also developed. However, to make tourism more attractive in Ninh Binh, the tourism industry needs to take more creative steps, especially exploiting the potential of diverse natural beauty and spiritual cultural relics. The success of the tourism development, as well as the limitations and causes in the recent years, are important for Ninh Binh to take into account for tourism development in the coming period. Ninh Binh should implement synchronous solutions by improving the quality of tourism services, attracting investment capital to develop tourism, promoting tourism, developing human resource, strengthening inspection and supervision of tourism activities and so on. With all the beauty of nature and spiritual culture as well as the determination of Ninh Binh Province's local authorities, in the future, sustainable tourism development is potential to become the key economic sector. In this regard, this study provides following policy recommendations.

Regarding the implementation of planning, the Provincial People's Committee needs to determine tourism planning boundaries in the identified tourism clusters after consulting with the Department of Environment-Resources, Department of Construction, and local authorities of districts and communes. It is also essential to early avoid overlapping of management and development between economic sectors in the same territory. The planning also needs to limit the negative impact on tourism development from the perspective of landscape, resources and tourism environment. On the other hand, investment projects also need to be evaluated. Ninh Binh Province should apply appropriate investment policies from the local budget in combination with the support of

the central budget to improve the upgrading and construction of tourist accommodation in combination with socio-economic development to fully utilize the potential of tourism.

It is also important to quickly establish a connection of tourism activities among cities in the province, thereby creating new tourist products that are attractive to visitors in order to develop tourism in key tourist destinations in particular and in Ninh Binh Province in general.

Regarding investment mechanism, investment in tourism development is an effective investment not only in terms of economic but also social aspects. However, due to the specific characteristics of the industry as well as the specific conditions of Ninh Binh's tourism, the investment structure for tourism development should include the following basic contents.

Firstly, Ninh Binh should invest in construction of tourist spots and clusters. This is a very important investment direction, creating a qualitative change in tourism development.

Secondly, the city should invest in development of tourism facilities such as accommodations and entertainment. In the trend of Vietnam tourism integration with regional and international tourism, the standards of tourist services must be improved in accordance with international standards. Therefore, it is important to invest in upgrading new hotel systems and services. In terms of investment in hotel development, priority should be given high-end commercial hotels in big cities and in the important tourist destinations. The high-end hotel system also needs to be built in some of the national and international tourist destination. In other key tourist areas of the province, it only needs to invest in the construction of transitional hotels with medium standards to ensure business efficiency. Furthermore, the entertainment facilities also need to be taken into account. One of the limiting factors in the tourism development of Ninh Binh is the poor

system of entertainment facilities. This significantly limits the length of stay of visitors and tourism business performance.

Finally, the province should invest in the protection and embellishment of cultural and historical relics and development of traditional festivals as tourism products. One of the main purposes of tourists to Ninh Binh is to learn about the culture, the history of national development and national defense. Therefore, the investment in the protection and renovation of historical and cultural relics and traditional festivals is not only meant to educate the next generations, but also important for tourism development.

In order to enhance investment, the local tax incentives need to be consistent with local preferences, of which there are tax exemptions to enhance investment in unspoiled areas. On the other hand, the province should base on the law and the actual situation of the locality to create favorable conditions for local and international investors. There should be a policy of encouraging capital safety for investors and simplifying administrative procedures to attract investors. One of the important contents of this policy mechanism is to ensure the fairness and harmony of interests between investors, the managers tourism resources, land and forest resources usages and local communities to ensure the unity and management of resource exploitation in accordance with the approved tourism planning.

In addition, this policy mechanism also ensures that special mechanisms and legal corridors not only comply with Vietnamese law, but also in accordance with international practice. Thus, Ninh Binh tourism general have a favorable environment to integrate with the development of tourism in the region and in the world. It is necessary to have appropriate policies to efficiently exploit the tourist market in urban areas, first of all in Hanoi, where people have higher incomes and have more idle time. In addition, Ninh Binh should adopt policies that are consistent with the conditions attached to the well-

developed customer base in rural areas, which account for more than 80% of the region's population. Accompanying with that is the policy on insurance services, banking services ... to create the most favorable environment for international tourists to Ninh Binh. Furthermore, to ensure the effective management, it is essential to combine the system of mechanisms and policies and the capacity-building process of the officers and local workforce.

Regarding human resources training and education, as with all other industries, human resource is critical to the development of the tourism industry, especially because tourism is an economic sector that requires direct communication with tourists and professionalism in communication skills and hospitality. In Ninh Binh, the professional level is not commensurate with the requirements of development. However, in recent years, due to the development requirements of the sector, especially in the context of Vietnam joining ASEAN and regional integration, the professional level of the workforce in tourism industry is an urge to be upgraded. In order to meet the urgent requirements, Ninh Binh should have a comprehensive training program with specific plans for improving knowledge and professional skills of the workforce.

Regarding tourism promotion and marketing, in order to contribute to improving business efficiency, there must be investment so that it actually becomes an active content. Firstly, quickly release quality publications and official information on Ninh Binh tourism for tourist's demands, such as accommodation, tourist attractions, restaurants, entertainment, living costs etc; and most importantly, the addresses of information counseling centers. For brochures, it can be combined with the transportation industry to provide free of charge brochures on routes to destinations in the area.

Secondly, promoting the construction and dissemination of documentary films on cultural history, architectural works, monuments, landscapes, villages, festivals etc. This

information is very useful not only for visitors but also for many investors and business men that interested.

Thirdly, Ninh Binh tourism should take advantage of the opportunity to participate in international tourism conferences, seminars and fairs to promote the special products of local tourism.

Lately, in favorable conditions, Ninh Binh can consider open tourism representative offices in distribution markets such as Hanoi, Ho Chi Minh City as the functions of travel services and tourism marketing promotion. It helps to introduce Ninh Binh tourism widely and attract more tourists.

Regarding environment protection for sustainable tourism development, this is particularly significant for the development of the tourism industry, where the environment is considered vital to the survival of tourism. Considering the current situation of tourism environment Ninh Binh Province, although there are no serious problems, environmental degradation and pollution have caused negative impacts to the tourism development. Therefore, it is necessary to consider some basic solutions as follows

In order to avoid overlapping in the exploitation of territorial resources between different economic sectors, it is necessary to develop a master plan in order to maximize the resource potential of Ninh Binh and ensuring the sustainable development of the ecological environment. All plans for the exploitation of resources for socio-economic development must be carefully considered. This will be a relatively comprehensive and effective solution, if the planning is carried out seriously as well as the implementation of the planning is guaranteed.

In any case, the human element is in top priority. Therefore, in order to ensure a sustainable environmental development strategy, it is necessary to raise people's

knowledge and create conditions for all people to know and participate in the development of the economy. At the same time, there should be a strategy of training and retraining to have a scientific and technical management staff with high level of knowledge and understanding on environmental issues, Socio-economic development, tourism law as well as policies and regulations of the State in protecting the environment. This would require the organization of environmental training courses, with the participation of environmental trainers, scientists, managers and experienced foreign experts in environment field. In the long run, it is necessary to progress to the standardization and understanding of environmental issues with managers at all levels.

This is an important solution to improve people's knowledge in environmental protection. Through the mass media such as radio and television, the knowledge about the benefits of environmental protection for daily life and public health will gradually be improved in the perception of the people. Although raising local community's awareness about environment protection in the short run might not show obvious result, however, this environmentally conscious actions, in the long run, will be a great guarantee for the sustainable development. In addition, in favorable conditions, the local government should organize seminars and workshops on environmental issues, especially in rural areas and mountainous villages. On the other hand, to ensure that the local community actively participate in environmental protection activities, the high standard of community life and employment creation associated with tourism development at tourist destinations should also be concerned.

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APPENDICES

Table A 1: Tourism facilities in Ninh Binh from 2009-2016

Category	2009	2010	2011	2012	2013	2014	2015	2016
Total number of tourist accommodation	108	187	224	235	273	286	390	423
In which								
Total number of 1-4 star hotels	22	23	33	33	38	42	45	45
1 star hotel	4	3	7	8	9	10	13	14
Number of rooms	133	107	197	197	232	242	274	260
Number of beds	242	196	332	332	410	419	479	524
2 star hotel	18	20	24	23	26	28	28	27
Number of rooms	609	825	898	796	845	910	926	972
Number of beds	1,040	1,529	1,597	1,457	1,517	1,623	1,708	1,976
3 star hotel			1	1	1	1	1	1
Number of rooms			102	102	102	102	81	81
Number of beds			140	140	140	140	140	140
4 star hotel			1	1	2	3	3	3
Number of rooms			107	107	237	416	416	417
Number of beds			214	214	409	569	643	643
Total number of rooms	1,681	3,041	3,564	3,628	4,102	4,508	5,353	5,748
Total number of beds	2,806	4,058	5,222	5,230	5,787	7,227	8,502	9,331
Investment capital (million USD)	18.74	69.2	85.1	86.2	98.2	120.2	173.2	185.1

Source: Official Website of Ninh Binh Department of Statistic (2017)

Table A 2: Total number of tourist in Ninh Binh Province from 2010-2016

Category	2010	2011	2012	2013	2014	2015	2016	Annual growth rate(%)
Total number of tourists	3,096,589	3,252,234	3,711,994	4,398,767	4,301,569	5,993,208	6,441,472	13.70
		5.00%	14.10%	18.50%	-2.20%	39.30%	7.50%	
Domestic tourist	2,433,305	2,584,793	3,036,424	3,877,219	3,799,160	5,392,645	5,725,868	16.20
		6.20%	17.50%	27.70%	-2.00%	41.90%	6.20%	
International tourist	663,284	667,441	675,570	521,548	502,409	600,563	715,603	2.30
		0.60%	1.20%	-22.80%	-3.70%	19.50%	19.20%	
Total number of tourist staying overnight	219,466	237,029	267,736	252,809	307,176	420,309	554,609	17.60
		8.00%	13.00%	-5.60%	21.50%	36.80%	32.00%	
Domestic tourist	183,339	183,695	200,332	179,771	225,567	334,107	441,714	17.50
		0.20%	9.10%	-10.30%	25.50%	48.10%	32.20%	
International tourist	36,127	53,334	67,404	73,038	81,609	86,202	112,895	21.80
		47.60%	26.40%	8.40%	11.70%	5.60%	31.00%	

Source: Official Website of Ninh Binh Department of Statistics (2017)

Table A 3: Revenue from tourism activities in Ninh Binh Province (million USD)

Category	2010	2011	2012	2013	2014	2015	2016	Annual growth rate (%)
Revenue from tourism activities	24.3	28.8	34.3	39.5	41.5	62.5	77.7	22.15
Compared to 2010		18.6%	19.1%	15.2%	5.1%	50.7%	24.2%	
Domestic tourist	14.9	17.2	24.8	30.0	31.8	50.8	61.6	27.9
Compared to 2010		15.3%	44.0%	21.0%	6.0%	59.8%	21.3%	
International tourist	9.3	11.6	9.5	9.5	9.7	11.7	16.0	10.97
Compared to 2010		23.9%	-18.0%	0.1%	2.1%	21.1%	36.7%	
In which								
Accommodation	4.3	5.4	6.2	6.4	7.0	14.9	13.7	26.39
Restaurant	8.8	10.5	12.8	15.2	15.6	22.4	29.9	23.37
Transportation	3.4	3.9	4.3	4.6	4.5	4.1	9.9	27.15
Sightseeing ticket	2.1	2.5	3.8	5.6	6.8	12.3	7.9	30.67
Souvenir	3.2	3.6	4.2	4.3	4.3	5.0	10.5	26.2
Other services	2.5	2.9	3.0	3.4	3.4	3.8	5.8	15.76

Source: Official Website of Ninh Binh Department of Statistic (2017)

Table A 4: Total number of tourist and total revenue from tourism activities in Quang Ninh from 2010 to 2016

Category	2010	2011	2012	2013	2014	2015	2016	Annual growth rate(%)
Total number of tourist (million tourist)	5.4	6.5	7.0	7.52	7.50	7.8	8.4	7.6
		19.2%	8.5%	7.3%	-0.2%	3.6%	7.5%	
International tourist	2.1	2.3	2.5	2.61	2.56	2.8	3.5	9.0
		8.2%	8.5%	4.7%	-1.8%	7.8%	26.8%	
Domestic tourist	3.3	4.2	4.5	4.91	4.94	5.0	4.9	7.1
		26.3%	8.4%	8.8%	0.6%	1.4%	-3.2%	
Total number of tourist staying overnight	2.1	2.6	3.2	3.608	3.611	4.0	4.3	13.3
		24.2%	23.4%	13.6%	0.1%	10.2%	8.1%	
International tourist	1.1	1.2	1.321	1.322	1.27	1.4	1.9	10.4
		8.2%	12.7%	0.1%	-4.3%	13.6%	32.2%	
Domestic tourist	0.9	1.4	2.4	2.29	2.35	2.5	2.4	21.2
		55.8%	70.8%	-4.6%	2.6%	8.4%	-5.6%	
Total tourist other tourism sites	2.1	3.1	3.58	3.65	3.3	3.7	3.5	10.1
		46.0%	15.6%	1.9%	-10.6%	13.1%	-5.1%	
Total number of tourist visiting Ha Long Bay	3.3	3.40	3.43	3.9	4.2	4.1	4.9	6.9
		3.1%	0.8%	13.0%	9.5%	-3.8%	18.8%	
Total revenue from tourist (million USD)	328.7	359.8	384.6	429.8	422.6	475.2	585.9	10.4
		9.5%	6.9%	11.8%	-1.7%	12.4%	23.3%	

Source: Official Website of Quang Ninh Department of Statistics (2017)