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DEVELOPING THE INTERNATIONAL TOURIST MARKETS IN THE NORTHERN CENTRAL IN THE PERIOD 2000 TO 2015

Trinh Thi Phan¹

Faculty of Social Sciences and Humanity, Hong Duc University, Thanh Hoa Province

Abstract

The Northern Central (NC) is a horizontally narrow strip in the Central Coast of Vietnam including 6 provinces: Thanh Hoa, Nghe An, Ha Tinh, Quang Binh, Quang Tri, and Thua Thien – Hue. The geographical location as well as natural conditions and cultural characteristics of the region always attract international tourists from a variety of nations. Entering into the 21st century - the era of integration and development, international tourism in the region has had more opportunities for a rapid growth. Based on the assessment of the actual number of tourists, the structure of tourist source, expenditure capability and the distribution of tourists in the studied area during 15 years (2000 - 2015), the article draws conclusion about fluctuations in the trend of international tourists to NC, which recommends a number of orientations to develop the international tourist market, and contributes to the growth of tourism receipts for this region.

Keywords: market, international tourists, the Northern Central

Tóm tắt

Bắc Trung Bộ (BTB) là dải đất hẹp ngang vùng duyên hải miền Trung Việt Nam, bao gồm 6 tỉnh: Thanh Hóa, Nghệ An, Hà Tĩnh, Quảng Bình, Quảng Trị, Thừa Thiên - Huế. Vị trí địa lý cùng những đặc trưng về thiên nhiên, văn hóa và con người của BTB luôn có sức hấp dẫn đối với khách du lịch quốc tế từ nhiều quốc tịch khác nhau. Bước vào thế kỉ 21, thế kỉ của hội nhập và phát triển, du lịch đón khách quốc tế càng có nhiều thời cơ để tăng trưởng nhanh. Trên cơ sở đánh giá thực trạng lượng khách, cơ cấu nguồn gửi khách, khả năng chi tiêu và sự phân hóa lượng khách trên địa bàn nghiên cứu trong suốt 15 năm (giai đoạn 2000 - 2015); bài viết đã rút ra những biến động trong xu hướng thị trường khách quốc tế đến BTB, qua đó đề xuất một số định hướng phát triển thị trường khách du lịch quốc tế, góp phần tăng tổng thu du lịch của vùng.

Từ khóa: thị trường

¹ Email: trinhthiphan@hdu.edu.vn Phone: 0915.244.855

1. Preamble

The Northern Central (NC) has a great potential for developing tourism with beach tourism resources and treasures of natural, tangible, intangible heritages. In the period 2000 - 2015, the tourism here made remarkable progress in the number of tourists, receipts and market structure changing in a positive direction, especially international tourists. The study “*Developing international tourist markets to the Northern Central in the period 2000 to 2015*” aims to research on the change in the status and trend of the international tourist market to NC in the context of new strategies, policies and integration trends, which proposes some orientations to develop international tourist markets in NC.

2. Study content

2.1. Overview of research issues

There has been many topics, theses, and curriculums of scientists in the country assessing tourism development of NC. In previous studies ([1], [12], [13], [15]), NC does not include Thanh Hoa, Nghe An and Ha Tinh province (according to the Vietnam tourism development 2001 - 2010). Therefore, analysis and assessments of tourist status, opportunities and challenges as well as regional development orientations and solutions are no longer appropriate when the tourism development strategy is approved by the Government on December 30th, 2011. “*The Master Plan for Tourism Development in NC towards 2020, vision towards 2030*”, Tran Duc Thanh (2017), is a new zoning study, which assesses clearly the number of tourists, tourist market and expenditure capability, but its updates are not significant at the present.

2.2. Methodology

2.2.1. Methodology

In the article, the author used the following method groups:

- Data collecting, analyzing and processing method: The data used in the article is mainly from secondary information.
- Statistical and comparative method based on historical and logical viewpoint to clarify the development of the international tourist market to NC by space and time.

2.2.2. Study data

The article used secondary data provided by the Vietnam General Department of Tourism, the Institute for Tourism Research and Development, the General Department of Statistics, Departments of Culture, Sports and Tourism of NC provinces (some provinces separated into Department of Tourism). Those are documents on tourism development strategy, tourism planning, tourism statistics, survey results of tourist expenditure, reports on tourism activities in the provinces etc. In addition, the author also used a number of publications such as books and magazines.

2.3. Study results

2.3.1. Current situation of the international tourist market in NC

** The number of tourist*

In 15 years (2000 - 2015), international tourists went to NC continuously increased with an average growth by 16.5%. In 2000, NC only attracted 245,680 international tourist arrivals; by 2015 NC welcomed more than 2.4 million tourist arrivals, 10 times compared with this number in 2000 and accounted for 9.87% of total tourists all over the country. This is resulted from the tourist attraction of natural resources, the unique landscape of Phong Nha - Ke Bang and cultural values in a variety of tangible and intangible cultural heritages recognized by UNESCO: Ancient imperial city of Hue, Ho Dynasty's Citadel, Hue royal folk-music, Nguyen Dynasty's woodblocks, and folk-song of Nghe Tinh.

However, the tourist growth rate of NC in each period was uneven: the period 2000 to 2005 was 14.4%, the period 2006 to 2011 was 25.2%, but only 7% in the period 2012 to 2015. This relative different growth is due to political, economic and social changes in the world that directly affect travelling demand in general and the number of international tourists to Vietnam in particular. At the beginning of the 21st century, incidents such as terrorist attack on September 11th, 2001, the SARS outbreak in 2005 was big fluctuations that made international tourists come to Vietnam as well as NC lessen and increase more slowly. The period 2006 to 2011 marked the recovery of world tourism as well as Vietnam tourism with the spread of heritage values recognized by UNESCO in NC. The number of international tourists came to NC increased rapidly with 1.75 million arrivals, 7.1 times compared with the number of visitors in 2000.

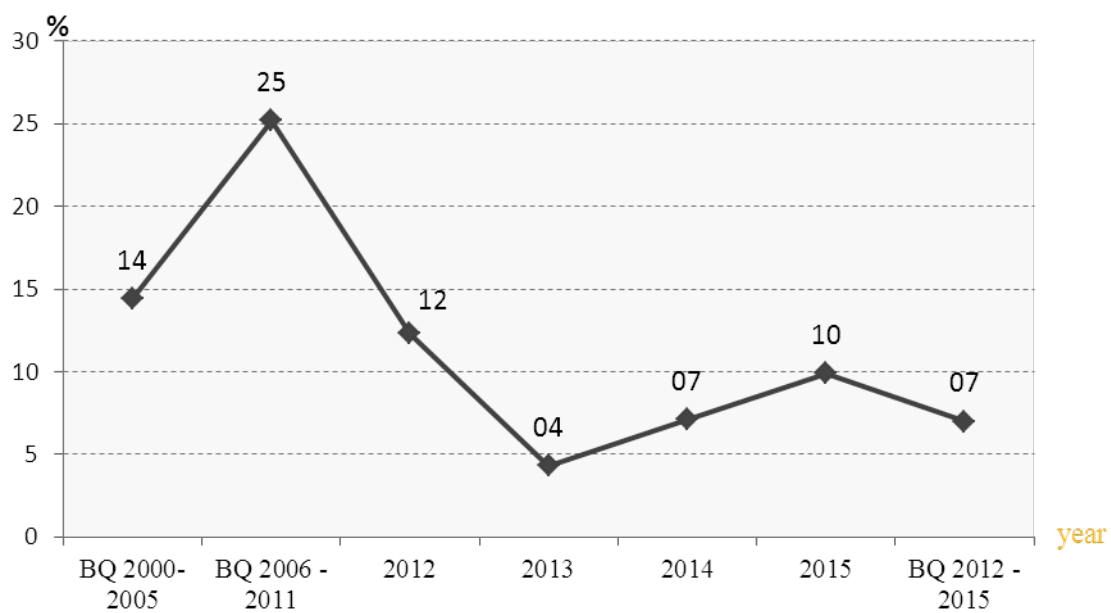


Figure 1. The growth rate of international tourists travelled to NC in the period 2000 to 2015

Source: The author used data from sources [3] [4] [5] [6] [7] [8] [10]

The global financial crisis has been going on since 2008 but its aftershock has been still strong and affected many economies in the world many years later. After 2011, the number of international tourists came to NC slowly rose, this is shown in the slow growth in 2012, it reduced 12.9 percentage points compared with the period from 2006 to 2011. Continuing the slow growth, the number of international tourists came to NC “touched bottom” in 13 years in 2013 with an increase of only 4.3% over 2012. Although this number increased quite rapidly in 2014 and 2015, it only reached an average of 7% per year in the period 2012 - 2015.

The comparison shows that although the number of international tourists came to NC had a high growth rate in the period 2000 to 2015 compared with other regions (the second highest increased after the South-Central Coast), the proportion was very modest compared with the total number of tourists all over the country. In 2000 and 2005, the rate was 5.2% and 5.3% respectively; NC ranked number 5 in seven tourism areas; by 2010 and 2015, the position was improved to No. 4 behind the Red River Delta, the Northern East Coast, the Southern East and the Southern Central Coast. Even though there has been improvement in the number of visitors compared with other regions, the figure of 10.1% has not been really worth with the value that tourism resources of the region can bring.

Table1. Comparison the number of international tourists came to NC and all the country

Unit: 1000

Region	2000	2005	2010	2015	Average growth (2000 - 2015)
The Midland Mountainous North	263.9	386.6	762.3	1728.4	13.3%
<i>% compared with the whole country</i>	5.6%	4.3%	5.4%	7.2%	
The Red River Delta and the North East Coast	1912.7	2,877.9	3828.0	7437.7	9.5%
<i>% compared with the whole country</i>	40.2%	31.8%	27.2%	30.9%	
The North Central	245.7	481.9	1,601.0	2,417.1	16.5%
<i>% compared with the whole country</i>	5.2%	5.3%	11.4%	10.1%	
The South-Central Coast	483.7	2,242.6	3307.5	4,896.3	16.7%
<i>% compared with the whole country</i>	10.2%	24.8%	23.5%	20.4%	
The Highlands	88.07	129.1	235.85	330.1	9.2%
<i>% compared with the whole country</i>	1.9%	1.4%	1.7%	1.4%	
The South East	1,217.6	2,153.8	3,288.19	5383.5	10.4%
<i>% compared with the whole country</i>	25.6%	23.8%	23.4%	22.4%	
The Mekong River Delta	540.8	786.15	1,038.51	1838.2	8.5%
<i>% compared with the whole country</i>	11.4%	8.7%	7.4%	8.9%	

Source: The author used data from the source [10] [12] [16]

** Classified by location*

Exploiting its inherent strengths, NC has attracted investment, formed and developed a number of tourism sites, arrivals, centres which are attractive to both domestic and international tourists such as Sam Son (Thanh Hoa), Bai Lu (Nghe An), Cua Tung, Cua Viet (Quang Tri), Phong Nha (Quang Binh), Hue and Lang Co (Thua Thien Hue) etc. These arrivals receive 65 - 70% of international tourists to the region annually [10].

In the period from 2000 to 2015, the number of international tourists came to Thua Thien - Hue was always at the top of the region. In 2000, this province welcomed 204,000 tourist arrivals, occupied 83% the total number of tourists in the region; by 2015, the figure was 1.96 million, equal to 81% (see Table 2). This place has been also in the top 10 provinces and cities that received the most international tourists in Vietnam for many years [14]. Thua Thien - Hue has been famous for its tourism product of sightseeing tour for studying the World Heritage from the 1990s of the previous century. In 1993, Hue Imperial Citadel was recognized by UNESCO as a World Cultural Heritage; then Royal Folk-music (2003); Nguyen Dynasty's Woodblocks (2009). In 2014, the Nguyen Dynasty's Approval was also recognized by UNESCO as a documentary Heritage of the World Memory Program of Asia-Pacific. Moreover, Hue City is recognized as a festival city (2008), a cultural city of ASEAN,... All of these events are special attractions of Hue tourism to international tourists.

The remaining provinces only received 19% of the total tourists coming to NC of which Quang Tri occupied 8.1%; Thanh Hoa made up 5.2%; Nghe An accounted for 2.7% and Quang Binh was 1.9%. Ha Tinh received overseas visitors the least in NC with 1.1% in 2000 and 0.9% in 2015. The above structure shows the suitability of the current situation of tourism products in the area.

Table 2. The number of international tourists to localities in NC in the period 2000 to 2015

Unit: 1000

Province	2000	2005	2010	2011	2012	2013	2014	2015	Average growth
Thanh Hoa	3.1	6.7	35.0	43.0	60.1	85.0	100.7	125.0	27.9%
Nghe An	15.2	40.9	98.2	97.8	97.0	60.6	64.5	65.0	10.2%
Ha Tinh	2.7	6.0	18.3	13.1	15.3	17.9	16.3	22.9	15.4%
Quang Binh	3.6	12.2	23.6	24.9	29.6	32.4	43.2	46.0	18.4%
Quang Tri	17.0	47.1	99.3	108.0	170.0	184.0	190.0	197.0	17.7%
Thua Thien - Hue	204.0	369.0	1320.0	1460.3	1598.4	1675.9	1785.0	1961.2	16.3%
Total	245.7	481.9	1594.4	1747.1	1970.4	2055.7	2199.6	2417.1	16.5%

Source: The author used data from the source [3] [4] [5] [6] [7] [8] [16]

Regarding the average growth rate, Thanh Hoa province had a modest proportion of the total tourists came to NC, but it had the highest growth rate with 27.9%; far ahead of the second place with 9.5 percentage points (Quang Binh was

18.4%). The investment attraction of Nghi Son Economic Zone (Thanh Hoa) and the process of building Nghi Son Refinery and Petro chemical here have made the number of tourists travelling for business and professional purposes and foreign experts to this province increase rapidly. In addition, Thanh Hoa province was selected as the host of the National Tourism Year with the theme “Linking World Heritages” in 2015, which was also a big leap for tourism development.

Quang Binh, Quang Tri also have had an average growth in the No. 2, No. 3 position after Thanh Hoa. These two localities have been exploiting strengths to create a typical tourism product, which is attractive to international tourists: heritage sightseeing tours and DMZ tourism [11]. Ha Tinh and Nghe An were two provinces with average growth lower than that of the whole area; Nghe An province was only 10.2% in the period 2000 to 2015, which was lower than the common rate of all the region by 6.3 percentage points. Due to some subjective reasons for tourism products such as monotonous, less innovative, not unique and not create style, Nghe An tourism was not a destination of international tourists.

Based on continuous data series from 2005 to 2015, it is forecasted that NC will welcome more than 3 million tourist arrivals by 2018 and it is estimated that about 3.5 million international tourist arrivals by 2020. The average growth rate for the period 2005 to 2015 was estimated to reach 8% per year.

** Classified by main market (by country and territory)*

The market of international tourists to NC in the period 2005 to 2015 had some significant improvements. Statistics in 2005 showed that Western European countries (the UK, France, and Germany) had the highest number of visitors travelling to NC with nearly 166,000 arrivals (34.6% of total tourists to the whole region). The second was the Southeast, accounting for 23.75%. Followed by Northeast Asia (10.6%), Australia (10.1%), North America (10.09%), Eastern Europe (5.8%), Middle East countries and some other nationalities made up 4.95%. In 2010, tourists from Western Europe, Northeast Asia, Australia, and North America etc. declined in proportion to that of 2005. The number of tourists of Western Europe fell to No. 2 with 29.3% of total tourists of the whole region (down 5.3%). Notably, the Southeast Asia market occupied No. 1 at 35.97% (an increase by 12.2% compared to 2005). The reason is that some localities in the region began to allow the arrival of Caravan tourists. This line of tourists crossed Vietnam's border with cars through border gates in the region such as Cau Treo (Ha Tinh), Lao Bao (Quang Tri), Cha Lo (Quang Binh).

In 5 years (from 2005 to 2010), French tourists were always in the first rank of the 10 countries with the largest number travelling to NC. This tourist source has features such as exploring landscape, unique culture of ethnic people, the heritage values of art, architecture, museum as well as people's friendliness. That is attraction of the NC tourism to tourists from Europe. Other European countries as the UK, Germany also had tourists in the top 10 (2005). In addition, Japan, Thailand, Australia, the Netherlands, Spain and a division of Oversea Vietnamese (Viet Kieu) were also the main market of international tourists travelling to NC. Different from other countries, the number of Chinese tourists travelling to NC at this time was not significant (whereas this market had been usually the first rank in the number of international tourists to Vietnam since 2000).

In the period 2011 to 2015, major countries with tourists travelling to Vietnam as well as NC were mainly from Northeast Asia and Southeast Asia; European tourists declined in proportion significantly. In 2011, Southeast Asian tourists led with 638,680 arrivals, accounting for 36.4% of total travelling to NC; the second rank was Northeast Asia with 396,470 arrivals, accounting for 22.6%. Tourists from Western Europe (France, Germany, and the UK) were the third rank with 13.7% of total; Australia 4.5% and North America 6.2%. By 2015, tourists from the Southeast Asian and Northeast Asian countries still dominated all over the country as well as NC. These two markets accounted for more than 54% of the number of tourists all NC, including 30.7% of Southeast Asia with the main departure from Thailand and Laos. Northeast Asia had a slight increase in proportion due to the rapid growth of Korean tourists and the advantage of Chinese tourists maintained.

Statistically, some main markets of tourists travelling to NC in the period 2011 to 2015 showed the predominant advantage of Thai and Lao tourists with 31.4% (2011) and 24.5% (2015) compared with the number of international tourists of the whole region. This number of tourists mainly came by road through the western border gate on the Vietnam - Laos border in the form of caravan tourism. The East-West Economic Corridor Development Cooperation, ASEAN economic community, which were officially established by the end of 2015 and regulations on entry and exit for ASEAN citizens, which took effect from Jan 1st 2016 have been opportunities to attract more ASEAN tourists travelling to NC in the coming years. In addition, although the French, British and German tourist market declined in proportion compared to the period 2005 to 2015, its growth rate was higher than those of the general increase all over the country.

Although the Chinese and Taiwanese tourist markets increased from 2011 to 2015, the growth speed was likely to slow down. In fact, NC tourism products were not really popular with Chinese tourists, but recently the attractiveness of investment in Nghi Son (Thanh Hoa), Vung Ang (Ha Tinh) have took a large number of tourists travelling for business and professional purposes from these two markets. In 2015, in Thanh Hoa, there was 24.6% of the number of Chinese tourists, in Ha Tinh there was 30% from China and Taiwan.

Table 3. Some markets led the number of international tourists to NC

Market	2011		2015	
	<i>The number of tourist arrivals (1,000)</i>	<i>Share (%)</i>	<i>The number of tourist arrivals (1,000)</i>	<i>Share (%)</i>
Total	1,754.62	100,00	2,417.10	100,00
<i>Some main markets</i>				
- China	200.83	11.45	231.80	9.59
- South Korea	42.08	2.40	159.89	6.62
- Japan	77.41	4.41	104.94	4.34
- The United States of America	108.79	6.20	141.68	5.86
- Taiwan (China)	76.15	4.34	76.10	3.15
- Australia	78.40	4.47	114.01	4.72
Thailand, Laos	550.39	31.37	591.83	24.49
- French	147.88	8.43	183.26	7.58
- Malaysia	16.42	0.94	32.59	1.35
- Singapore	22.04	1.26	33.48	1.39
- Cambodia	49.83	2.84	83.55	3.46
- The UK	46.92	2.67	120.45	4.98
- Germany	44.95	2.56	124.68	5.16
- The other markets	293.02	16.70	419.00	17.34

Source: [16]

International tourists travelling to NC for the purpose of pure tourism were in large numbers compared to other purposes, but only accounted for approximately 60% of the number of international tourists travelling to NC while the rate of all the country was 80%. More remarkably, tourists came along with business accounted

for a much larger rate than that of the country: about 25% (all the country 10%). Some localities had a high occupation combination rate of tourists such as Thanh Hoa (43%) and Ha Tinh (45%) due to the attractive investment of the two largest economic zones in this period. In addition, NC also had a relatively large number of tourists due to the number of Overseas Vietnamese in Thailand and Laos came to see their hometown. Tourists with other purposes accounted for a small percentage.

** Average number of days and expenditure capability*

International tourists travelling to NC have often stayed in short time. Averagely a tourist stayed 1.59 days in 2011; 1.89 days in 2015 lower than the average of the country. The average growth rate of stay was 7% during the period 2011 to 2015. Although there had been many improvements in NC's tourism product structure, it was still rather monotonous in general, so it was difficult to lengthen the stay time of international tourists. Thua Thien - Hue was the province with the highest number of stay days in the whole region: 2.4 days / a tourist in 2013 and reached 5.4 days/a tourist in 2015, which was lower than the average of the country; Thanh Hoa and Ha Tinh province had the large number of tourists travelling for business and professional purposes, so the stay time was longer than that of other provinces and higher than the average of the whole region (over 2 days/ a tourist).

In terms of expenditure: International tourists travelling to NC generally had low spending and slow growth. In the period 2011 to 2015, the average money a tourist spent per day only reached an increasing rate by 6%. Specifically, an international tourist travelling to NC in 2011 averagely spent about 1.072 million VND a day; increased approximately 1.356 million VND in 2015. The structure of spending was slowly improving, about 50% of expenses for accommodation and meals. This proved that leisure services, entertainment, souvenir items for tourists were not still plentiful, which made tourism business efficiency low.

3. Conclusion and implementation

Entering into the 21st century with the trend of integration and cooperation, international tourism in NC has had many remarkable achievements. The number of tourists has increased rapidly, the growth rate of tourism has been high, the expenditure capacity of tourists has been improved, and expenditure structure and market structure have had positive changes. Nonetheless, as the common picture of Vietnam's tourism, international tourists travelling to NC had short stay time, low

average daily spending, expenditure structure of tourism was improved slowly, a large gap of territory. In the coming time, NC tourism needs efforts in diversifying products, developing high-class tourism target at the high spending client market; continuing promoting tourism to important overseas markets of high growth such as ASEAN countries and Northeast Asia.

Based on the economic cooperation between the Greater Mekong Subregion and the East-West Corridor (EWEC), NC needs to identify the important international market in the long - term as ASEAN market. It should also develop tourism routes along the corridors of national highways 7, 8, 9 and 12; focusing on tours connecting ancient capital cities (Ayutthaya - Luangprabang - Hue), Vientiane - Phonsavan - Vinh, Thakhek - Naphau - Dong Hoi etc. The productivity of direct flights Dong Hoi - Chiang Mai, Tho Xuan - Bangkok, Vinh – Bangkok should be increased. In order to promote the development of the ASEAN market, NC needs to create more favorable conditions for the travel of visitors along EWEC (expansion and upgrading of transport routes, the establishment of attractive stops); to strengthen linkages with localities along the routes of Laos, Thailand, and Myanmar in order to find appropriate solutions and to solve difficulties for common problems. It also needs to propose priority policies for socio-economic development and development of infrastructure in the international border gate area. Simultaneously, cooperating with the ASEAN countries need to be tied to build tourism product packages associated with the strengths of cultural heritage tourism, eco-tourism etc.

For the Northeast Asia market, priority should be given to promotion of cultural heritage tourism products, cave ecotourism and beach resorts, which particularly includes promoting NC as a unified and attractive destination on the regional and Vietnam tourism map. To further attract the Japanese, Korean market travelling to NC, it is firstly necessary to establish direct flights from these countries to the region; then to improve the quality of accommodation services, the quality of human resources and the enhancement of high quality services at tourist sites and areas (water and electricity services, medical and souvenirs etc.)

Although traditional markets from France, the United Kingdom, the United States, Australia and the Netherlands have been slow to grow, they are capable of spending high with long stays. Therefore, it is necessary to pay more attention to the promotion of cultural heritage tourist products, cave eco-tourism, historical and revolutionary learning tours, and cultural lifestyle tours. To increase the

attractiveness of NC's tourism to this market, localities in the region need to promote intra-regional cooperation and to build specialties showing the region's trademark. In addition, the linkages with top cities such as Hanoi, Ho Chi Minh City, Da Nang; association with localities on the “heritage road” such as Ninh Binh, Quang Nam etc. should be strengthened.

Thus, the NC tourism product, which is characterized by the World Heritage, is both highly competitive and capable of cooperation, combination in attracting tourists, especially international tourists from all markets.

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Website: <http://nxb.neu.edu.vn>-Email: nxb@neu.edu.vn

Tel/ Fax: (024) 36282486

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