



WWF *for a living planet*[®]

MARKET SURVEY FOR DEVELOPING POTENTIAL CBET PRODUCTS AND SERVICES IN BIDOUP – NUI BA NATIONAL PARK

**PREPARED FOR
WWF VIETNAM**

**PREPARED BY
NGUYEN DUC HOA CUONG – HANOI UNIVERSITY
NGUYENDUCHOACUONG@GMAIL.COM – CELLPHONE: 0912120860**

**TRAN TUAN ANH – HANOI UNIVERSITY
TRANTUANANH@GMAIL.COM – CELLPHONE: 0123456789**

**WITH SUPPORT FROM
PHAM TRONG NHAN – WWF VIETNAM
MAC TUYET NGA – WWF VIETNAM
CHRIS SANDBROOK – WWF UK**

HANOI, MAY 2010

TABLE OF CONTENTS

TABLE OF CONTENTS	II
LIST OF FIGURES & TABLES	III
1. PART ONE – RESEARCH DESIGN AND FIELD WORK	4
1.1. RESEARCH QUESTIONS AND STRATEGY	4
1.2. SAMPLING AND DATA COLLECTION	5
2. PART TWO – FINDINGS	6
2.1. SURVEY WITH TOUR OPERATORS	6
2.2. TOURIST SURVEY	8
3. PART THREE – IMPLICATIONS AND RECOMMENDATIONS	13
APPENDICES	15
APPENDIX 1: TEST OF DIFFERENCES ON LOCAL COMMUNITY’S BENEFITS BETWEEN DIFFERENT NATIONALITIES	15
APPENDIX 2: GUIDELINES FOR DIFFERENT TRAIL CATEGORIES	16

LIST OF FIGURES & TABLES

Figures:

Exhibit 1: Gender.....	8
Exhibit 2: Nationality.....	8
Exhibit 3: Age Group.....	8
Exhibit 4: Length of Stay in Vietnam.....	9

Tables:

Table 1: Destinations before or after visiting Da Lat.....	9
Table 2: Interested tourist activities in Vietnam.....	10
Table 3: Visiting interests.....	11
Table 4: Preferred types of lodging facility.....	11
Table 5: Importance of local community's benefits.....	11
Table 6: Willingness to pay extra for the local community fund.....	12

1. PART ONE – RESEARCH DESIGN AND FIELD WORK

1.1. RESEARCH QUESTIONS AND STRATEGY¹

Previous consultancy reports have identified the outline for a potential tourism model at BDNB, based on the following:

- 1) Trail development for hikes inside the forest, from short walks up to multi-day mountain climbing.
- 2) Construction of a Giang Ly Pine Forest Ecolodge inside the forest.
- 3) Homestays in local households.

It is now necessary to carry out a demand survey for these products, to find out whether tourists and tour operators would be interested in these products, and what they would be willing to pay.

Specifically, the activities to be carried out are:

- 1) Read the tourism consultancy report of Mr. Cuong to understand the proposed tourism products for Da Chais commune.
- 2) Develop a questionnaire for Tour Operators to assess their interest in these products.
- 3) Develop a questionnaire for potential tourists to assess their interest in these products.
- 4) Implement the questionnaire survey for tour operators in Dalat and Nha Trang, with at least 03 surveyed in each location.
- 5) Implement the questionnaire survey for international tourists in Dalat and Nha Trang, with at least 100 surveyed in each location. Ensure that a range of different tourists complete the survey (older/younger, richer/poorer, independent/tour group etc.).
- 6) Analyse the results of the surveys.
- 7) Write up a report based on this analysis. The report should explain the background and methodology for the study, and give details of the results of the tour operator and tourist surveys. The report should then give recommendations for the type of tourism product at Da Chais which is most likely to be commercially profitable, including details of the activities and facilities needed, the appropriate prices, and the tourists who should be targeted. Advice should also be given on how to market the products to these tourists.

¹ Source: TOR for the market survey assignment drawn up by Chris Sandbrook

1.2. SAMPLING AND DATA COLLECTION

This is a cross-sectional study using the sample survey method to measure the profile, details of the trip, general preferences and behaviours and attitudes of tourists to BDNB NP with regard to future tourist activities and services offered in the park. The study provides a “snapshot” of the tourist market demand at only one point in time when tourists were intercepted to ask for participation in the research.

Based on the purposes of the research, the research was designed in two different questionnaires, one for tourists and the other for tour operators to gather the best information required by WWF.

The tour operator questionnaire (pls see the Annex 1 for further details) focuses on gathering the information from the travel agent’s point of view since they directly interact and serve customers and promptly best understand customers’ needs. The questionnaire was conducted with 3 and 5 tour operators in Da Lat and Nha Trang respectively.

The tourist questionnaire (pls see the Annex 2 for further details) was conducted and delivered to 100 foreign tourists each in Da Lat and Nha Trang. The length of the questionnaire was kept minimum up to 20 questions with almost close-ended questions used to facilitate respondents to complete the questionnaire. The surveyors in these two locations include students from Da Lat & Nha Trang universities, receptionists in the hotels where most foreign customers stay during their holiday. These surveyors were trained by the supervisor on the purposes, the requirements of the survey and then on how to identify, approach the respondents and especially on how to best gather the information needed for later analysis and reporting of the survey. The surveyors contacted the supervisor at any time when they have a problem in conducting the survey and they reported to the supervisor at the end of the day the performance as well as the difficulties faced for more guide and support from the supervisor.

The sample was taken by a convenient method and aimed at getting a sample size of 100 for each type of tourists. Data was tabulated and analysed by the SPSS software, version 13.0.

2. PART TWO – FINDINGS

2.1. SURVEY WITH TOUR OPERATORS

Most of the tour agents especially in Da Lat showed a great interest in developing ecotourism services in Bi Doup Nui Ba National Park in Da Lat. In Da Lat, almost all Vietnamese tourists are young married couples who come here for their honeymoon and they come here themselves. Therefore, travel agents in this city rely mainly on foreign tourists who come to Da Lat to seek adventures and explore the nature of this region and to study about the eco, natural life in this region. The travel agents here do think that ecotourism is feasible in Bi Doup Nui Ba if there will be activities to be enjoyed/ explored, essential services to be offered and especially the nature to be conserved. They suggest targeting new groups of customers such as both local and overseas students, scientists, biologists, and young foreign customers. They also suggest developing services, prices and promotional activities to attract more customers.

A little different from the travel agents in Da Lat, those in Nha Trang have quite a balance of Vietnamese and foreign tourists, most of the foreign tourists in Nha Trang are young and they come here for the beach and do not care much for the eco, culture tourism. A couple of travel agents even haven't heard about Bi Doup Nui Ba National Park in Da Lat themselves. However, they do show an interest in offering such a tour to BDNB to their foreign customers.

According to the interviewed tour operators, there is a quite significant difference between tourists in Da Lat and tourists in Nha Trang for the demand of ecotourism products. Foreign tourists in Da Lat are more diversified, they are mainly European, North American (Canadian & American) and Australian & New Zealand, very few of them are Asians who are often more interested in beaches and more exciting places. Especially, tourists in Da Lat are of more different ages and occupations than those in Nha Trang, they are both young (scholar students), middle-aged & older (wildlife lovers, biologists, scientists) who love to explore the nature and wildlife of this region. Most of them intend to take an adventurous tour while stay in Da Lat and many of them are going to take an ecotourism tour.

However, almost all of them have not heard about Bi Doup Nui Ba National Park, probably there have never been any ecotourism activities, tours or the like in BDNB and neither any promotional activities for this place. When they were introduced something about BDNB, most of them showed an interest coming here for a 2-3 day tour and even longer. Most of the customers who are keen on ecotourism complain about the conservation and preservation of the natural resources, wildlife and the local community being damaged in many places in Vietnam and they showed great concern on BDNB being well preserved if this place is to develop to be an ecotourism destination.

On the other hand, most tourists in Nha Trang are young and dynamic, they come here to enjoy the sunshine of the beach and love excitement such as drinking and dancing. When asked, almost all of these customers have never

heard about BDNB like those in Da Lat and not many of them show an interest or intend to take such a tour as in Da Lat. Among those fewer who showed an interest also concerned about the wildlife destruction, local community being negatively influenced and natural resources being exploited and suggested that if the wildlife, natural resources and the local community being well protected, they would love to take such a tour.

In brief conclusion, if BDNB is to be put into an ecotourism destination for foreign customers, and if it is well managed, the wildlife and natural resources are well protected and the local community benefits from this tourism, it will be a potential project.

2.2. TOURIST SURVEY

2.2.1. Tourist market profile and their general behaviours when travelling in Viet Nam

Of the total 192 respondents, nearly three-fifth is male and two-fifth is female.

Nearly half of tourists come from Australia or New Zealand and two-fifth from the US or Canada. Very few of them (1%) from Western European countries and the remaining come from Asian countries. Obviously international tourists to Da Lat are part of the traditional tourist markets of Vietnam.

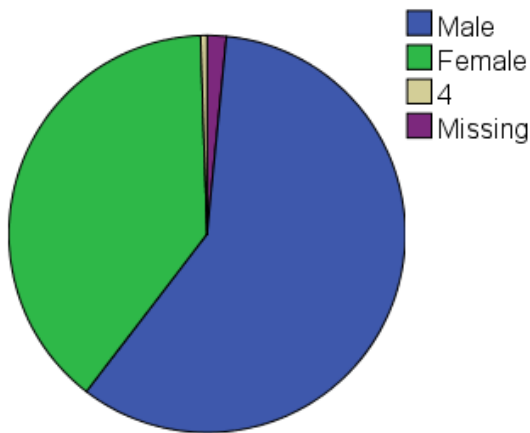


Exhibit 1: Gender

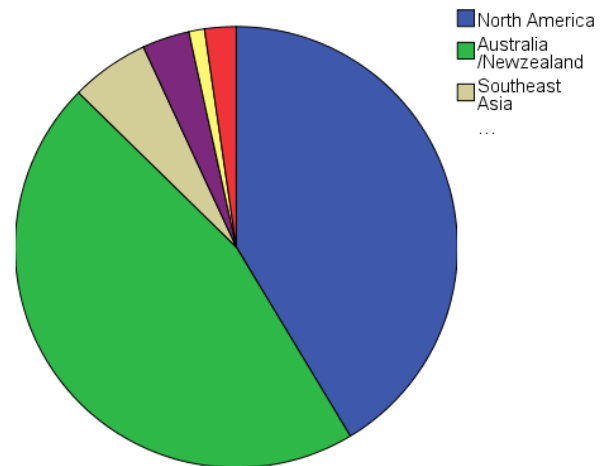


Exhibit 2: Nationality

The markets are quite young with nearly half is aged from 23 – 39 and one-fifth are either 18 – 22 or 40 – 60 years old. At these ages, tourists are most willing to and have sufficient time, money and healthiness to participate in adventure tourism activities in wilderness areas like those in the BDNB NP.

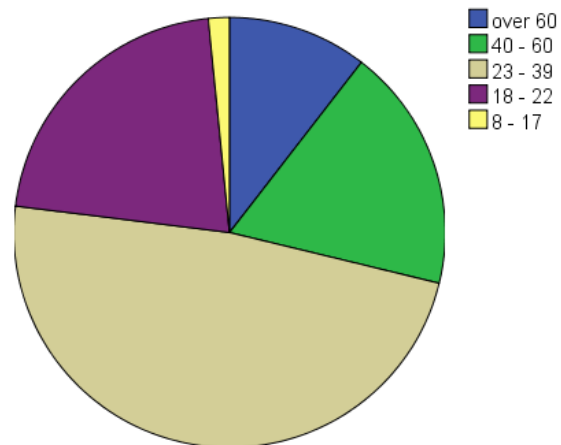


Exhibit 3: Age Group

Majority (60%) of tourists stay in Vietnam from one to 4 weeks with the highest percentage (10%) staying for 4 weeks. This number is divided equally (appx. 20%) by each range of 1 – 2 weeks; 2 – 3 weeks; and 3 – 4 weeks. Only one-third (30%) stayed less than one week.

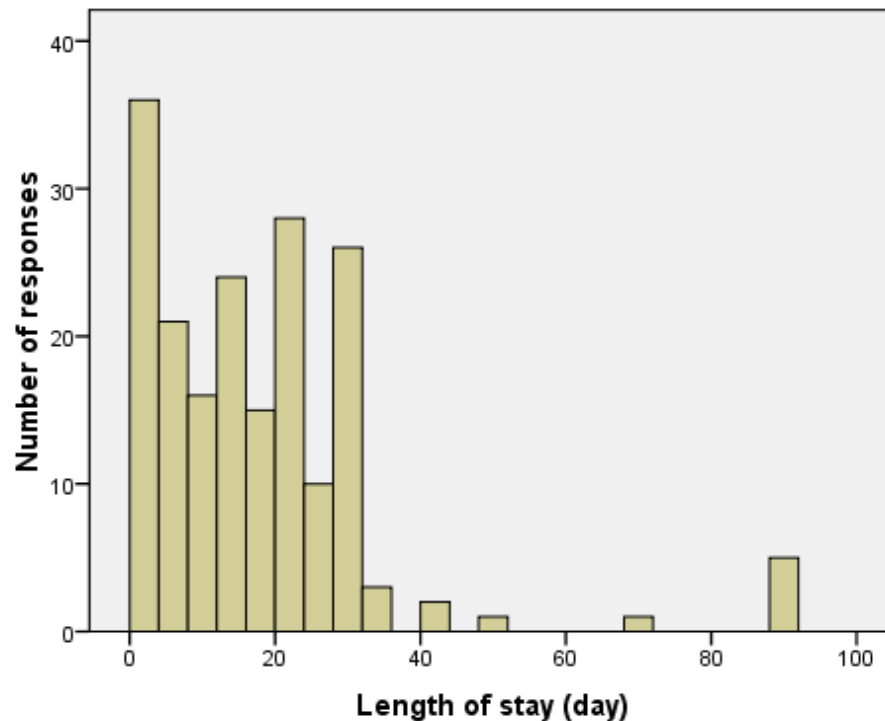


Exhibit 4: Length of Stay in Vietnam

It is easy to see that tourists tend to combine visits to different types of tourist destinations during their trip to Vietnam. Typical itineraries are HCMC – Da Lat; HCM – Da Lat – Nha Trang; HCM – Da Lat – Hoi An – HCM. A smaller number of tourists combine their visit to Da Lat with farer destinations in the North, including Hanoi, Ha Long Bay or Sa Pa. The visit to Da Lat (as a mountainous tourist destination) was typically combined with a marine tourism destination (like Nha Trang, Mui Ne or Ha Long Bay) or a city (like HCM City, Da Nang, Hue, Hanoi). Very few of them wanted to combine Da Lat with another mountainous destination like Sa Pa. In which, Nha Trang and Da Lat tend to be two complementary destinations, indicating by two-third of the interviewed tourists included the other into their trip to one of the two destinations.

It is also interesting to see that more than half of interviewed tourists combined a visit to Da Lat after they trip in Nha Trang.

Table 1: Destinations before or after visiting Da Lat

Visit to Nha Trang			Visit to Da Lat ²			Visit to HCM City			Visit to Hoi An		
		Valid Percent			Valid Percent			Valid Percent			Valid Percent
Valid	No	19.8	Valid	No	40.6	Valid	No	19.3	Valid	No	41.9
	Yes	80.2		Yes	59.4		Yes	80.7		Yes	58.1
Visit to Hue			Visit to Ha Noi			Visit to Halong Bay			Visit to Sa Pa		

² People who came to Da Lat after visiting Nha Trang

		Valid Percent			Valid Percent			Valid Percent			Valid Percent
Valid	No	49.5	Valid	No	42.7	Valid	No	46.9	Valid	No	77.1
	Yes	50.5		Yes	57.3		Yes	53.1		Yes	22.9

Beach and coastal tourism seem to be the first choice of majority of tourists to Vietnam. However, when coming to visit mountainous ethnic minority areas like BDNB NP, the interested activities include hiking in forests, watching wife lives or paying a visit to ethnic minority villages. Staying overnight in the local houses or enjoying local singing or dancing are not the main interest.

Table 2: Interested tourist activities in Vietnam

Watching wild lifes			Hiking			Climbing		
		Valid Percent			Valid Percent			Valid Percent
Valid	No	65.1	Valid	No	70.3	Valid	No	80.1
	Yes	34.9		Yes	29.7		Yes	19.9
Swimming			Fishing			Camping		
		Valid Percent			Valid Percent			Valid Percent
Valid	No	42.2	Valid	No	77.1	Valid	No	76.6
	Yes	57.8		Yes	22.9		Yes	23.4
Trekking			Village tour			Dance and songs		
		Valid Percent			Valid Percent			Valid Percent
Valid	No	77.4	Valid	No	68.2	Valid	No	82.3
	Yes	22.6		Yes	31.8		Yes	17.7
Homestay			Other activities					
		Valid Percent			Valid Percent			
Valid	No	76.3	Valid	No	90.5			
	Yes	23.7		Yes	9.5			

Thanks to availability of tourist information as well as convenient transportation means to this destination, nearly nine-tenth of tourists came to Da Lat on their own arrangement rather than travelling on a package tour with a travel agency. They are interested in both natural and cultural tourism attractions. Few of them (6%) are merely interested in experiencing nature based tourism, whilst the bigger number (16%) is just cultural motivations.

Table 3: Visiting interests

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Nature based tourism	11	5.7	6.1	6.1
	Cultural tourism	29	15.1	16.2	22.3
	Both	139	72.4	77.7	100.0
	Total	179	93.2	100.0	

Majority of tourists (three-fifth) spent less than 100 USD a day when staying in Vietnam. Normally they spent about 40 – 50 USD a day; however many of them (14%) spent just 20 USD a day.

2.2.2. Tourist behaviours about Bi Doup – Nui Ba NP

More than half of interviewees did not hear about BDNB NP before coming to Da Lat, thus few of them (18%) included visit to the national park in their tour program. However, after listening to a description of tourism attractions and activities in the park, the rate of interested visit to the park was improved significantly, at over 70%. One-third of those who showed their interest in BDNB NP want to stay at least two nights in the park and another 15% of them want to stay either one night or three nights.

Table 4: Preferred types of lodging facility

Camping sites			Local home stay			Cheap Guesthouse		
		Valid Percent			Valid Percent			Valid Percent
Valid	No	74.0	Valid	No	78.0	Valid	No	66.0
	Yes	26.0		Yes	22.0		Yes	34.0
Furnished homestay			Medium priced guesthouse			Forest ecolodge		
		Valid Percent			Valid Percent			Valid Percent
Valid	No	84.9	Valid	No	85.3	Valid	No	88.0
	Yes	15.1		Yes	14.7		Yes	12.0

If tourists are interested in visiting a natural area in the BDNB NP, they will be most likely to stay at a cheap guest house, priced at around 5 USD/ pax/ night or stay in a camp at a price of 3 USD/ pax/ night. Homestay in the local house will be also preferred. Least number of tourists showed their preference in staying in a forest ecolodge.

Table 5: Importance of local community's benefits

	Frequency	Percent	Valid Percent	Cumulative Percent

Valid	Not at all	1	.5	.5	.5
	Not important	6	3.1	3.3	3.8
	Neutral/ No idea	35	18.2	19.1	23.0
	Important	73	38.0	39.9	62.8
	Very important	68	35.4	37.2	100.0
	Total	183	95.3	100.0	
Missing	System	9	4.7		
Total		192	100.0		

Table 6: Willingness to pay extra for the local community fund

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	47	24.5	37.6	37.6
	Less than 5\$/ night	41	21.4	32.8	70.4
	5\$ - 10\$/ night	27	14.1	21.6	92.0
	10\$ - 60\$/night	9	4.7	7.2	99.2
	over 60\$/ night	1	.5	.8	100.0
	Total	125	65.1	100.0	
Missing	System	67	34.9		
Total		192	100.0		

Over two-third of tourists considered making benefits for the local community at the destination where they are travelling important as part of their trip. One-third of them were willing to pay extra less than 5 USD a night, another one-fifth will pay extra from 5 USD – 10 USD a night if they are confident that this money will go directly to the local people.

There is a significant difference on making or sharing benefits with the local community during their trip within and between nationalities. The Australian and New Zealand tourists showed the highest level, and Chinese tourists showed the lowest level, of consideration of local community's benefits than other nationalities. Refer to the Appendix 1 for statistical test's evidence.

3. PART THREE – IMPLICATIONS AND RECOMMENDATIONS

The international tourist markets to Da Lat in general, to BDNB NP in particular are very conventional to Vietnam. Efforts could be made to attract tourists from Australia/ New Zealand and North America. The target markets are quite young, possibly aged from 23 to 39 years old.

The previous study has proposed three ecotourism products to be developed in the national park, including:

- Trail development for hikes inside the forest, from short walks up to multi-day mountain climbing;
- Construction of a Giang Ly Pine Forest Ecolodge inside the forest;
- Homestays in local households.

Taking into consideration of the market demand identified in this survey, those proposed products could be prioritized as follows:

- the 1st priority product: trekking trails
- the 2nd priority product: homestays in villages
- the 3rd priority product: the ecolodge near Giang Ly ranger station.

The proposed trekking tours should combine both natural and cultural tourism attractions in the region such as hiking at easy to medium level of hardship (refer to the Appendix 2 for details). The featured activities could include wildlife watching, swimming in lakes, steams, waterfall (if the weather permits), and paying a visit to local villages along the trails.

It is possible to schedule 1 – 3 night stay in the national park. The recommended types of lodging facilities include camping (perhaps in the first night) and homestay in local houses (in the second night). If they stay longer, it is possible to accommodate them in a cheap local guest house.

In addition, products could be designed and developed corresponding to low to medium spending, yet educated markets. As the markets are normally price conscious, service quality and amenities could be developed at the standard level, yet safe and hygienic. Especially investments should be made to upgrade the present quality of tourist facilities in the park, including room equipments, room décor, tour guide equipments, and wildlife watching tour equipments and so on.

Soft adventure tours with more outdoor activities such as trekking, camping, biking, team building, ethnic cultural experiences, boating and so on are most preferred.

Training on front office, housekeeping, F&B and tour guiding skills are essential to can make tourists more satisfy with the service quality in the park. Training should be focused on skill standards to make sure that the park staffs could perform their job up to the expected level of service quality of the job, thus provide tourist satisfaction across different market segments. Therefore, training need to be on-the-job, practical and customized to the local conditions in the park.

BDNB NP may need to concentrate on attracting FIT tourists who want to arrange tours themselves, using private or public means of transportation. Therefore, it is crucial to provide convenient transportation conditions, including provision of information as well as frequent scheduled public buses linking BDNB NP with Da Lat city and Nha Trang. Attention should be made to use "word of mouth" as the most effective information channel to promote the park. Maintaining good and frequent relationships with travel writers and journalists, especially those from famous printed travel guidebooks such as Lonely Planet or Routledge as well as online travel forums such as Virtualtourist.com or Fodor.com.

Last but not least, BDNB NP should try to encourage (responsible) travellers to contribute to conservation and community development activities by adding a surcharge on the total package tour or accommodation prices. The recommended amount of surcharge could be 5 USD – 10 USD a night. However, it should not be compulsory for every and any tourists, yet most suitable to Australian, New Zealand, North American, European nationalities.



APPENDICES

APPENDIX 1: TEST OF DIFFERENCES ON LOCAL COMMUNITY'S BENEFITS BETWEEN DIFFERENT NATIONALITIES

ANOVA

Importance of local community benefits

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	9.812	5	1.962	2.447	.041
Within Groups	61.755	77	.802		
Total	71.566	82			

Descriptives

Importance of local community benefits

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Western Europe	1	3.00	3	3
North America	34	3.91	.866	.148	3.61	4.21	2	5
Southeast Asia	5	3.20	.447	.200	2.64	3.76	3	4
East Asia	3	3.67	.577	.333	2.23	5.10	3	4
China	2	2.50	.707	.500	-3.85	8.85	2	3
Australia /New Zealand	38	4.16	.973	.158	3.84	4.48	1	5
Total	83	3.93	.934	.103	3.72	4.13	1	5

APPENDIX 2: GUIDELINES FOR DIFFERENT TRAIL CATEGORIES³

Following are guidelines for specific trail categories. It is assumed that each trail that is used for walking and trekking is rated against the description of trail categories and managed according to the suggested guidelines.

Trekking Trail Level A - Easy

Easy trekking for up to two hours. Trail can cater for tour groups of up to 15 people. Tour guide not necessary but recommended. There should be one tour guide for each group of 15 people (client to guide ratio 1:15). Trail for the most part accessible by vehicle.

The trail is mostly well formed and broad, small sections may be a little steep, rough or muddy. There may be steps. The trail may be paved at times but is mostly gravelled. The trail is suitable for average levels of fitness and abilities and streams and rivers are bridged.

Tourism services and facilities (accommodation and restaurants) are at the start or end point. Light walking shoes recommended.

Trekking Trail Level B – Medium to Difficult

Medium to difficult trekking of up to 8 hours. Trail is suitable for tour groups of up to a maximum of 8 people. It is mandatory to be in a tour group. There should at least one tour guide (recommended two) for each group of 8 people (client to guide ratio at least 1:8). Only some parts are accessible by vehicle.

The trail is mostly well formed, but often narrow ('single trail'). At times some sections may be steep, rough or muddy. Suitable for people with above average fitness and abilities. Streams and rivers may be bridged, if not they are relatively easy to cross.

Limited to very limited tourism services available and visitors have to carry some food and beverage. Porters may be provided to carry food and equipment. Solid walking shoes recommended.

³ Cuong, NDH, Achim, M (2010) *Tourism development and management framework, Ngoc Son – Ngo Luong Natural Reserve*, Fundacion Promocion Social de la Cultura (FPSC)