**EXECUTIVE SUMMARY**

**PROFILE OF INTERNATIONAL TOURISTS TO HERITAGE CITIES OF HANOI, KYOTO, CHIANGMAI, AND PENANG**

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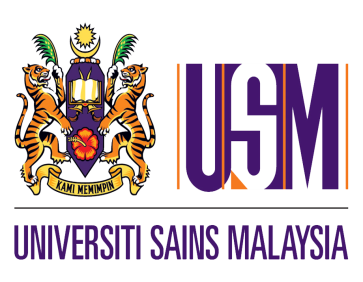


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**1.0 INTRODUCTION OF THE PROJECT**

This project aims to conduct a cross-sectional and longitudinal research on tourism promotion issues of multi-cultural exchanges between four ASEAN countries (Japan, Vietnam, Thailand and Malaysia). Funded by the Japan Foundation Grant of Tourism Research Promotion, this project involves four (4) universities: Kyoto University of Foreign Studies (KUFS) (Japan), Chiang Mai University (CMU) (Thailand), Hanoi University (HANU) (Vietnam) and Universiti Sains Malaysia (USM) (Malaysia).

Kyoto, Hanoi, Chiang Mai and Penang have been chosen as the case studies, which are rich with heritage and cultural elements. Some of these elements have received international recognition and been awarded the World Heritage Site title by the United Nations Educational, Scientific and Cultural Organisation (UNESCO). The international recognition which attracts high number of visitations hence leads to the importance of understanding factors contributing to tourism development and its longevity. Thus, this project assesses the tourist segmentation, image of the city, tourist motivation and travel satisfaction; from the international tourists’ perspective.

This project seeks: (i) to understand and evaluate the culture and heritage issues in the chose four cities; (ii) to discover what are the culture and heritage differences between the chose four cities; and (iii) to understand how tourism affects or get affected by culture and heritage.

Visitor Market Surveys were conducted from September to November 2016 where self-administered questionnaire survey approach was employed as the data collection instrument. This project has successfully collected 140 completed survey forms in Hanoi, 98 completed survey forms in Kyoto, 107 completed survey forms in Chiang Mai and 100 completed survey forms in Penang; totalling to 445 completed survey forms. The data was analyzed to study the differences in visitation motivations, satisfaction level and images of the city; between the four selected cities. This report presents the summary of the Visitor Market Surveys results.

**2.0 BACKGROUND OF CITIES**

This project was carried out in Hanoi, Kyoto, Chiang Mai, and Penang; to understand the international tourist markets in terms of visitation motivation, travel satisfaction, image of the city and tourist segmentation.

Located in the northern region of Vietnam, Hanoi is the capital of Vietnam and the second largest city after Ho Chi Minh City. The population of this city is 7.588 million people in 2015. Since the end of the Vietnam War, Hanoi has experienced a tremendous economy paradigm shift where it leaped from an agriculture-based city to a city that handles more than 2000 businesses engaged in foreign trade. The City of Hanoi attractiveness could be seen in the forms of unique ancient colonial architecture that gives the city a rich stylistic heritage, cultural sites that boasts more than 1000 years of history, city-between-rivers that offers the majestic and scenic view, and the modern skyline outside the old city. With its tree-fringed boulevards and efficient infrastructures, Hanoi sometimes dubbed the Paris of the East.

Located in the central part of Honshu Island, Kyoto was originally founded as Heian Kyo in 794 (Nara Period) and now is enjoying a 1200-year history. With a population close to 1.5 million, it is the third largest city in Japan and the capital city of Kyoto Prefecture. Despite the Hamaguri Rebellion in 1864 and the small-scale air raids during World War II which resulted in the economy paralysation, Kyoto was successfully revived and the Modern Kyoto was formed in 1889. Despite modernization is changing the Modern Kyoto landscape with new architecture styles, traditional townhouses and pre-war buildings are still preserved and conserved by the city. Kyoto is a culturally vibrant city where 17 of its historical sites have been awarded the World Heritage Site title by UNESCO. Other than palaces, gardens and architecture intact, Kyoto is also known for its delicious Japanese foods and cuisine. Besides tourism and culture (traditional Japanese crafts and sake brewing), economic activity of Kyoto is also driven by information technology and electronics sectors.

Chiang Mai,sometimes written as "Chiengmai" or "Chiangmai", is the largest and most culturally significant city in Northern Thailand. The population of this city is 200,952 in 2016. Chiang Mai is the home to many historically and culturally interesting sites and temples. The city, also referred to as the “Rose of the North”, has a reputation for its cool weather, pretty girls, historic temples and mountainous jungle surroundings. During the city's medieval heyday, almost everything was made of teak wood hauled by elephant from the surrounding rainforest, with the notable exception of its towering wát. The monasteries remain, centred on ancient brick chedi (stupas) in a remarkable range of shapes and styles, but the gaps between them have been filled in with modern Thai houses and hotels. Despite this, the historic centre of Chiang Mai still feels overwhelmingly residential, more like a sleepy country town than a bustling capital.

Located on the northwest coast of Peninsular Malaysia, Penang is a Malaysian State founded by Captain Francis Light in 1786. It consists of two parts: Penang Island and Seberang Perai. Dubbed the Silicon Valley of the East, Penang with a total population of approximately 1.9 million in 2016, is one of the most urbanized and economically important cities in Malaysia. The name of “Penang” comes from the Malay name Pulau Pinang, which means “Island of the areca nut palm”. Its capital city, George Town, is a UNESCO World Heritage Site. The World Heritage Site title was awarded in July 2008 by UNESCO and it is shared with the State of Melaka. With its heterogeneous population which profoundly different in ethnicity, culture, language and religion; Penang is a booming tourist destination offering the uniqueness of pre-war buildings from the British Colonial Era and the history of several colonialism including the Japanese Era, the British Era, the Portuguese Era and the Netherland Era.

**3.0 METHODOLOGY**

This project used quantitative method for data collection where self-administered questionnaire survey was utilized as the data collection instrument. The survey was conducted at selected tourist hotspots and the gateways to the cities. The study population is international tourists who visited the cities during the data collection timeframe. The random sampling technique was employed for sample selection process and the sample was screened to exclude day-trippers and transient visitors. The data validity and reliability was strengthened through assistance by way of explanation.This project has successfully collected 445 completed survey forms. The Table 3.1 shows the summary of the data collection for each city.

**Table 3.1: The Summary of the Data Collection**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Cities** | **Locations** | **Sample Size** | **Usable Form** | **Usable Rate %** |
| **Hanoi**  **8-12 SEPT**  **2016** | Museum Ethnology Hanoi, Ho Chi Minh Mausoleum, Ho Chi Minh Museum, and Hanoi International Airport (Noi Bai) Vietnam. | 140 | 140 | 100% |
| **Kyoto**  **14-20 OCT**  **2016** | Kinkakuji Temple, Rock Garden, Nishiki Street food market, Nijo Castle, Toji Temple, Kiyomizu, Teramachi and Arashiyama | 100 | 98 | 98% |
| **Penang**  **14-18 SEPT**  **2016** | Armenian Street, Love Lane, Padang Kota, Batu Ferringhi, and Penang International Airport, Malaysia | 102 | 100 | 98% |
| **Chiang Mai**  **19-23 NOV**  **2016** | Karen Long Neck Camp, Doi Pui Hmong Hill tribe Village, Bhubing Palace, Wat Phratat Doi Sutep, Mae Sa Elephant Camp, and Chiang Mai International Airport, Thailand. | 109 | 107 | 98% |
| Total |  | 451 | 445 | 99% |

**4.0 RESULT OF THE PROJECT**

**Report 1: Hanoi Visitors Profile Report**

The respondents to Hanoi city were: (i) mostly female (N=85), (ii) age between of 26-35 (N=64), (iii) single (N=99), and (iv) received tertiary education – diploma or degree level (N=73). Majority of visitors are Europeans (N=39), followed by Southeast Asians (N=26) and Oceanians (N=22). Hanoi was closely visualized with the following images: local cuisine (33.3%), world heritage site (23.4%), and traditional (9.2%). Visitation to Hanoi was highly influenced by food (39.7%), affordability of the destination (35.9%), natural scenery (34.8%), and 31.2% respectively for heritage sites, culture, arts and tradition.

The following satisfaction level were observed: (1) 51.1% respondents were pleased with the quality of accommodation and hospitality of hotel staff, (2) 18.4% respondents agreed that the public toilet needs to be improved, (3) 8.5% respondents rated hospitality of immigration officials at the entrance point as poor, and (4) 8.5% respondents considered the local public transport services as poor. In overall, results showed that the average satisfaction score is 3.74 over 5.00, with 52.1% were very satisfied with their travelling experience. 106 respondents would like to revisit the city (75.2%) and 91 visitors are willing to recommend Hanoi to friends and relatives (64.1%).

Friendly people and local cuisine are the selling points of Hanoi, while traffic congestion and dirty places are giving bad images to Hanoi. Respondents raised their concerns over communication barrier, safety issue (in terms of high number of motorcycle on the pedestrian walkway), and price scamming by taxi drivers who charged the international tourists with unreasonable high price.

**Report 2: Kyoto Visitors Profile Report**

The respondents to Kyoto city were: (i) mostly female (N=57), (ii) age between of 26-35 (N=49), (iii) single (N=57), (iv) received tertiary education – diploma or degree level (N=51). Majority of visitors come from Southeast Asia countries (N=26), followed by Eastern Asia (N=19) and America (N=19). Main travelling purposes to Kyoto include leisure (69.4%), followed by culture and heritage (13.3%) and education (7.1%). Kyoto was closely visualized with the following images: World Heritage Site (48.3%), local cuisine (14.0%), and safe destination (11.2%). Kyoto was highly chosen for natural scenery (66.3%), heritage sites, culture, arts and tradition (59.2% respectively), safety level of destination (57.1%), positive image (52.0%), and food (50.0%).

The following satisfaction level were observed: (1) 53.1% respondents were pleased with the cleanliness of eating places, (2) 52.0% respondents were satisfied with the local public transport services, (3) 44.9% respondents rated hospitality of immigration officials at the entrance point and accessibility of tourist attractions as excellent, and (4) 5.1% respondents considered the price of local transport and the price of accommodation were relatively pricey. In overall, results showed that the average satisfaction score is 4.36 over 5.00, with 45.9% were satisfied with their travelling experience. 93 respondents would like to revisit the city (95.5%) and 85 visitors are willing to recommend Kyoto to friends and relatives (86.7%).

Friendly people and cleanliness of the city are the selling points of Kyoto, while crowded and communication barrier are giving bad images to Kyoto. Respondents raised their concerns over communication barrier and hard to find trash bin.

**Report 3: Penang Visitor Profile Report**

The respondents to Penang city were: (i) mostly female (N=53), (ii) age between of 26-35 (N=34), (iii) single (N=56), and (iv) received tertiary education – diploma or degree level (N=42). Majority of visitors come from Europe countries (N=54), followed by Southeast Asia (N=20) and America (N=12). The main purposes of travelling to Penang include leisure (52.6%), followed by education (15.8%) and culture and heritage (10.5%). Penang was linked with the following images: World Heritage Site (40.9%), local cuisine (20.1%), and multicultural society (14.8%). Factors highly influencing visitation are as follows: affordability of the destination (37.0%), food (32.0%), and 31.0% respectively for natural scenery, heritage sites, culture, arts and tradition, as well as convenience of Visa.

The following satisfaction level were observed: (1) 36.0% respondents were satisfied with the hospitality of hotel staff, (2) 33.0% respondents agreed that there is a sufficient number of accommodation, (3) 31.0% respondents rated check-in/check-out process at the airport as excellent, (4) 6.0% respondents considered the internet connectivity/ Wi-Fi and public as poor. In overall, results showed that the average satisfaction score is 3.96 over 5.00, with 56.0% were very satisfied with their travelling experience. 91 respondents would like to revisit the city (91%) and 79 visitors are willing to recommend Penang to friends and relatives (79%).

While one factor was observed as the selling point of Penang (friendly people), five factors were giving the bad impression on Penang (crowded, cleanliness, high price, spicy food and traffic in the city). Respondents raised their concerns over cleanliness of the city, congested road and spicy food.

**Report 4: Chiang Mai Visitor Profile Report**

The respondents to Chiang Mai city were: (i) mostly female (N=62), (ii) age between of 26-35 (N=39), (iii) single (N=57), and (iv) received tertiary education – diploma or degree level (N=64). Majority of visitors come from Europe countries (N=40), followed by Eastern Asia (N=26) and America (N=23). The main purposes of travelling to Chiang Mai were leisure (74.8%), followed by culture and heritage (16.8%) and education (3.7%). Chiang Mai was visualized as World Heritage Site (39.6%), local cuisine (25.4%), and safe destination (6.7%). Visitation motivations are highly influenced by natural scenery (49.5%), friendliness of local people (44.9%), food (41.1%), and safety level of destination (36.4%).

The following satisfaction level were observed: (1) 43.9% respondents were satisfied with the hospitality of hotel staff, (2) 36.4% respondents agreed that there is a sufficient number of accommodation, (3) 31.8% respondents rated quality of accommodation as excellent, (4) 7.5% respondents considered the public toilet needs to be improved, and (5) 4.7% respondents evaluated that cleanliness of eating place as poor. In overall, results showed that the average satisfaction score is 4.14 over 5.00, with 60.7% were very satisfied with their travelling experience. 97 respondents would like to revisit the city (90.7%) and 90 visitors are willing to recommend Chiang Mai to friends and relatives (84%).

Friendly people and local cuisine are the selling points of Chiang Mai, while six factors are ruining Hanoi’s reputation as a tourist destination (crowdedness, cleanliness, spicy food, metre-less taxi, no public bus, and insufficient provision of rubbish bins and public bus). Respondents raised their concerns over communication barrier, traffic congestion and poor public transport system.

**5.0 CONCLUSION**

Motivation and travel satisfaction analysis is important to identify the different needs of market segmentation. This report examined the motivation and satisfaction of international tourists who visited Hanoi, Kyoto, Penang and Chiang Mai. Majority of respondents were satisfied with their travelling experiences, and they would like to revisit again in the future. Additionally, they are willing to recommend these cities as a place that is worth visiting to their friends and relatives. Specific marketing strategies are important in assuring the visitors’ needs and demands are maximally addressed. Results indicated some criteria could be improved to increase the visitors’ satisfaction level, for example, the cleanliness of Penang, Chiang Mai, and Hanoi. In case of Kyoto, the price of public transport and accommodation are suggested to be readjusted.