



รายงานวิจัยฉบับสมบูรณ์

ASEAN Tourism Image Positioning: The Case Study of Brunei and
Republic of China

โดย สุรพิชัย พรหมสิทธิ

ตุลาคม 2552

รายงานวิจัยฉบับสมบูรณ์

ASEAN Tourism Image Positioning: The Case Study of Brunei and Republic of China

ผู้วิจัย

สังกัด

สุรพิชัย พรหมสิทธิ์

มหาวิทยาลัยราชภัฏสวนดุสิต

ชุดโครงการ ASEAN Tourism Image Positioning

สนับสนุนโดย สำนักงานสนับสนุนการวิจัย

(ความคิดเห็นในรายงานนี้เป็นของผู้วิจัย สกว.ไม่จำเป็นต้องเห็นด้วยเสมอไป)

ACKNOWLEDGEMENT

I would first like to express my gratitude to The Thailand Research Fund for the support and helpful suggestions thorough out this project. Special acknowledgement is given to the Research Manager, Dr.Therdchai Choibamroong. Never to be forgotten are Ms. Prapan Srisawas and all staff of Thailand Research Fund for their assistance.

I'm greatly indebted to the participants of focus group meeting of public and private tourism organizations and businesses in both countries: Brunei and China. Their sharing of knowledge and experience of tourism situation is invaluable for the research purposes needed, without the responses this study could not have been accomplished.

My gratitude has to be given to my co-presenter in "the International Conference Symposium on Tourism Image Positioning of ASEAN, the People's Republic of China and the Republic of Korea" on August 20, 2007. Special Thanks are given to Ms.Rewadi Lerdariyakit (the General Manager of Bird Eye View Tours, Co., Ltd.) who is the co presenter for Brunei case and for China case: Mr. Sisdivachr Cheewarattanaporn (President of Thai-Chinese Tourism Alliance Association). I would also like to thanks my research associate, Ms.Kasemsri Ittiphong, who has been involved extensively in this project.

Surapit Promsit, Ph.D.

EXECUTIVE SUMMARY

The research employs SWOT Analysis to explore the tourism situation of Brunei and China. After the internal analysis of Brunei, it is found that strengths of Brunei concern with tourism resources, promotional campaign and niche markets, however the weaknesses concern with the shortage of human resources, need for reliable statistic and geography misconcept. The external analysis explains the factors generating opportunities for Brunei. These factors are good standard of living, government policy and support toward tourism industry, political stability and harmonious external relationships, terror free, development of low cost carriers. On the other hand, there are some external forces giving negative impacts on tourism of Brunei. They are terror attacks, pandemic outbreaks and health concerns, seasonal smoke/haze and high level of competition.

The SWOT analysis of China Presents the strengths concerning with these factors; Unique Tourist Attractions and Improved Facilities, Coastal Region as a Favourable Tourism Distribution in China and Increasing in Tourism Revenues. The weaknesses relate to the shortage of human resources, inappropriate promotional campaign and price discrimination against foreign tourist. Factors generating opportunities are tourism policy, business travel, visiting friends and relative (VFR) tourism, domestic tourism, low-cost carriers and health concern. Nevertheless, the threats are forced by global crises, high level of international competitions and impacts of joining the World Trade Organization.

The SWOT analyses of these two countries lead to the proposal of tourism image positioning for these countries. Tourism image positioning of Brunei is natural resources as tourism destination. For China one, the being a tourist destination with several characteristics and a large spatial distribution of attractions, this becomes a major challenge for image positioning of the country.

ABSTRACT

Project Code : ABTC/ATR/00003
Project Title : ASEAN Image Positioning: The Case Study of Brunei and
Republic of China
Investigator : Surapit Promsit
Suan Dusit Rajabhat University
E-mail Address : drsurapit@yahoo.com
Project Duration : 1 April 2006 – 30 November 2006

This research reviews related academic work on Brunei and China as well as their tourism development. By using a qualitative research approach, interviews with key informants were conducted in order to uncover the current and future tourism situations in both countries. SWOT analysis is formed based on the literature and the interview results.

Brunei is considered a new tourism destination to several tourist markets. It is also found that Brunei is working to cope with diversity of tourism facilities in order to serve different tourism markets.

It is found that China is on the move and continues to move in order to gain an attention from international tourists. It is also found that China is a country with great potential and challenge. Being new to the industry and to the competition, China is confronting with expectations from tourists and it is working hard to make itself 'better' than what the public thinks.

Keywords: image, positioning, ASEAN tourism, Brunei and China tourism

TABLE OF CONTENT

	Page
Acknowledgement	iii
Executive Summary	iv
Abstract	v
Table of Content	vi
List of Tables	viii
List of Figures	ix
Chapter 1 Introduction	1
Chapter 2 Literature Review	3
Framework of SWOT	3
Tourism and its environment	9
Chapter 3 Research Methodology	12
Sources of Information and Data collection method	12
Data analysis	13
Chapter 4 Discussion of Research Finding	14
Brunei: An Unexpected Treasure	14
Brunei's SWOT Analysis	16
China and Change	25
Domestic and Outbound Tourism	29
Chapter 5 Conclusions and Recommendations	37
Brunei	37
China	37
References	39

	Page
Appendices	
Appendix 1.1: Pictures of Focus Group Interviews in Brunei	45
Appendix 1.2: Letters of Agreement upon SWOT Analysis of Tourism in Brunei	46
Appendix 1.3: Article “Brunei: An Unexpected Treasure”	50
Appendix 1.4: Article “Image positioning in Brunei”	63
Appendix 2.1: Article “China on the Move”	72
Appendix 2.2: Article “Image positioning in China”	88

LIST OF TABLES

	Page
Table 2.1: SWOT analysis, with the principle questions listed.	4
Table 2.2: Components of SWOT analysis	5
Table 2.3: Some possible factors in a SWOT analysis	6
Table 2.4: A SWOT analysis of Bermuda's total tourism product and its cruise market	7
Table 4.1: Brunei's SWOT analysis	16
Table 4.2: Top ten world tourist destinations in 1998 (in international tourist arrivals)	28
Table 4.3: China's SWOT analysis	31

LIST OF FIGURES

	Page
Figure 2.1 : Tourism System.	9
Figure 2.2: Tourism and its environment	9
Figure 2.3: Framework for Tourism Situation Analysis	11
Figure 4.1: Map of Brunei and its location in South East Asia	14
Figure 4.2: Brunei Darussalam Estimates and Forecasts	16
Figure 4.3: Brunei – Country Risk Summary	22
Figure 4.4: The Coastal Area of China	26
Figure 4.5: Sample of Sheraton, An International Hotel in China	27
Figure 4.6: Different characteristics of China being a tourism destination	29
Figure 4.7: A ma illustrating a primary overseas market for Chinese tourists	31

CHAPTER 1

INTRODUCTION

Being known as “A Kingdom of Unexpected Treasures”, Brunei is a country which is ready for international tourism development. This is to do with manageable size of the country, the government’s investment and attention on tourism, and abundant natural resources. In comparison to many other countries, Brunei is humble but well-developed tourist attractions for international tourists.

However, tourism in China has been growing and the trend will continue even before 2008 Olympics games. Being named as a country with heterogeneity, China is a place where tourists often find ‘identities’ within an identity. In other words, the geography and a great combination of different kinds of attractions make China one of the most attractive and, to a certain extent, one of the most charming and diversity countries in Asia.

Zhang, Pine and Zhang (2000) indicate in their research that tourism in China is still very young. Looking back to the history of tourism in China, it can be seen that tourism activities are not in the form of ordinary masses. Rather, traveling was key activities for emperors, monks and scholars. On the other hand, tourism to date in China is strongly part of the country’s economic earning. This can be seen from China’s tourism public policy and planning where emphasis is placed on developing the tourism industry to gain strong financial contribution to China’s national economy (Qian 1999). China’s tourism today focuses equally on domestic and international tourism. Leisure industry is gradually developed within the umbrella of tourism sector. What is interesting for China at the moment is , therefore, the change in the industry from the past to present and, most importantly, the way public, locally and internationally, perceives this change.

By using a qualitative approach, this paper aims to discuss the strengths, weaknesses, opportunities, and threats in order to show the positioning of the tourism industry in Brunei and China. In doing so, the interviews with key informants were organized to provide an insight to the discussion of the tourism industry in Brunei and China. By employing the framework of the whole tourism system (WTS) (Leiper 1990) the paper also discusses the change of tourism in Brunei and China over past decades. This also includes the discussion

and recommendation of what it is like to be part of the tourism business within Brunei and China in the next few years.

CHAPTER 2

LITERATURE REVIEW

Tourism industry of all countries generates both positive and negative impacts to the environment. Moreover, internal and external environments and tourism industry are also interdependence. The forces of tourism environment are becoming complex and fast changing that is increasingly difficult to monitor or predict the impact; therefore the concerned tourism organizations have to identify such changes, their factors and their impacts. This research is employed SWOT analysis to identify positive and negative forces from both internal and external environment.

This chapter presents the literature review of SWOT. The components of SWOT, typical contents of each component suggested by various scholars, and detail of researches employed SWOT analysis as their analytical tools are specific respectively. The review of literature is also uncovered tourism industry and its environments. Finally, a framework of SWOT analysis of tourism industry and its environments for this research is presented.

Framework of SWOT

SWOT stands for Strengths, Weaknesses, Opportunities and Threats and may be also known as the strategic audit or situational analysis (Moutinho, 2000, p. 264). Many scholars agree that SWOT is the key technique for presenting the results of different elements of strategic analysis, whereas the strengths (S) and weaknesses (W) are based upon the internal analysis whilst the opportunities (O) and threats (T) are based upon an analysis of the external environment (Ramos *et al*, 2000, Tribe, 2002, and Evans *et al*, 2003)

Regarding to the component of SWOT, many scholars suggest typical contents of SWOT analysis (Moutinho, 2000, Tribe, 2002, and Evans *et al*, 2003) and they are shown in table 2.1-2.3.

Table 2.1: SWOT analysis, with the principle questions listed.

Source: Moutinho, 2000, p. 265

Internal analysis	External analysis
Strengths	Opportunities
Differentiation possibilities?	Potential new markets or segments to enter?
Sufficient financial resources?	Expansion of the tourist product assortment?
Appropriate competitive strategy?	Diversification into related products?
Good reputation with your clients?	Vertical integration?
A known market leader?	Possibilities to move towards a better strategic group composition?
Brilliant strategy for each functional area?	Contact with competitors?
Possible scale advantages?	Fast(er) growth in the market?
Protected (so far as possible) from strong competitive pressure?	Other opportunities?
Unique technology?	
Cost advantage?	
Competitive advantages?	
Capacity for product innovation?	
Proven management skills?	
Other strong points?	
Weaknesses	Threats
No clear strategic orientation?	Possible entrance of new competitors?
Worsening competitive position?	Decreasing market growth?
Ageing facilities?	Negative government influence?
Insufficient profit from...?	Growing competitive pressure?
Lack of management insight and experience?	Vulnerable to recessions and other economic trends?
Shortage of specific skills?	Strengthening in the negotiation position of customers and suppliers?
Bad experience with the implementation of the strategy?	Changing wants and desires of buyers?
Plagued by internal operational problems?	Threatening demographic changes?
Vulnerable to competitive pressure?	Other threats?
Bad image in the market?	
Disadvantages compared with competitors?	
Less-than-average market skills?	
Not in a position to finance the necessary	

changes in strategy?

Other weak points?

Table 2.2: Components of SWOT analysis

Source: Tribe, 2002, p. 101

Internal (resource) analysis	Strengths	Weaknesses
Resource audit	•	•
Performance monitoring	•	•
Evaluation of products	•	•
External (environmental) analysis	Opportunities	Threats
Competitive environment	•	•
Political environment	•	•
Economic environment	•	•
Socio-cultural environment	•	•
Technological environment		

Table 2.3: Some possible factors in a SWOT analysis

Source: Evans *et al*, 2003, p. 199

Internal	
Strengths	Weaknesses
• Market dominance • Core strengths • Economies of scale • Low-cost position • Leadership and management skills • Financial and cash resources • Operational ability and age of equipment • Innovation processes and results • Organizational structure • Reputation • Differentiated products • Good balance of products	• Share weakness • Few core strengths and low on key skills • Old equipment with higher costs than competition • Weak finances and poor cash flow • Management skills and leadership lacking • Poor organizational structure • Low quality and reputation • Products not differentiated • Dependent on few products • Products concentrated in mature or declining PLC stages

External	
Opportunities	Threats
• New market and segment • New products • Diversification opportunities • Market growth • Competitor weaknesses • Strategic space • Demographic and social change • Change in political and economic environment • New take-over or partnership opportunities • Economic upturn • International growth	• New market entrants • Increased competition • Increased pressure from customers and suppliers • Substitutes • Low market growth • Economic cycle downturn • Technological threat • Change in political or economic environment • Demographic change • New international barriers to trade • Environmental impacts of activities • New destinations

There are a number of tourism researches employ SWOT as a tool for organizing and interpreting information (Coliin-Kreiner and Wall, 2007, p. 52). Moreover, the SWOT provides a position statement of where the tourism industry is now (Evans *et al*, 2003).

Dale and Robinson (1999) employ SWOT analysis to evaluate the present situation of Bermuda's cruise market and its total tourism product. The finding from this analysis assists to develop a number of possible marketing strategies for sustainable growth within Bermuda. The summary of SWOT analysis of Bermuda's total tourism product and its cruise market is shown in table 2.4.

Table 2.4: A SWOT analysis of Bermuda's total tourism product and its cruise market

Source: Dale and Robinson, 1999, p. 337

Strengths • Good brand image and reputation • High level of prosperity • High level of international business • Friendly and welcoming • Physical beauty of the island • Ease of accessibility to the island	Weaknesses • Reliance on cruise markets in decline • Declining visitor numbers • Declining visitor experiences • Focus on beach tourism • Poor transportation infrastructure in and around the island • Under utilized product resources on the island
Opportunities • Target growth markets in the cruise sector • Product development, particularly business and cultural tourism and leisure shopping • Expansion and investment in marketing communication channels, particularly the World Wide Web • Improvement in infrastructure to enhance visitor experiences	Threats • Growth of international tourism thus global competition from other resorts and destinations. Particularly, the growth of cruise markets in South East Asia and the South Pacific

Ramos et al (2000, p. 409) make use of SWOT analysis to perform a content analysis on the proceedings of the Portuguese Hotels Association conferences (1993 – 1999). The analysis undertaken aimed to identify the main trends and key issues in the Portuguese tourism and hospitality sectors. From the analysis it is identified that there is an absence of a clear and enduring strategy on issues like differentiation and positioning of its products and services, marketing research and product portfolio management. The analysis of the sector's main strengths against the key trends indicates that tourism and hospitality depend too much on the environmental changes. Some of the main constraints that lead to the incapacity to capitalize on the key trends are the excess of governmental control, difficulties in reaching new markets, and over-dependence on EU funds for investments.

Li and Dewar (2003) employ SWOT analysis to categorize major supply variables; attractions, capital and policy into four factors; strengths, weaknesses, opportunities and threats. The major goal is to provide the government officials with baseline information on tourism supply to assist them in planning for sustainable development of the industry. This

exploratory research used focus groups to analyze the perception of government, business and local stakeholders regarding the supply of tourism resource in Beihai, a coastal city in Guangxi Zhuang Autonomous Region, People's Republic of China. The results show that both government and business see marine-based tourism as key to their future tourism development. In addition, cultural tourism related to components of the marine environment, such as the local pearl culture and historical areas within the city were also considered important. Marketing represents a weakness but solutions are being found, as the stakeholders understand that niche marketing may be of more value than attempting to market luxury facilities to a general tourism market. The method adopted is shown to be acceptable for areas where more reliable quantitative data are unavailable.

TDN International Edition (2006) states SWOT Analysis of ASEAN tourism. The SWOT analysis is conducted particularly in the contexts of promoting an integrated single destination, increasing intra-ASEAN travel and developing world-class products. The analysis also leads to the presentation of key issues of regional and sub-regional co-operation, which is visa liberalization and strategy to accelerate the integration of tourism service and air travel in ASEAN.

Regarding to Coliin-Kreiner and Wall (2007), SWOT analysis of national, regional and local levels are employed to examine the current status and the potential of ecotourism in one geographical area of Southern Israel. It is found that environmental factors such as the combination of its good natural and human-made resources and attitude of local community toward tourism are their strengths for ecotourism development; however the weaknesses are negative image of destination that concerns uncertain national political situation as well as the problems of infrastructure and tourism superstructure. Potential for growth of ecotourism at region and global levels spurs the opportunity for ecotourism of the destination; nevertheless unpredictable political situation in the Mediterranean region are threats forcing the destination negatively. More competition from undifferentiated ecotourism status in the framework of SWOT analysis, the research also raises some issues. One is the impact from a phenomenon that can be simultaneously positive and negative. Additionally, the research also raises the awareness of the impacts from any factor may generate different impact on different levels; nation, regional, and local level.

Tourism and its environment

Leiper (1990) outlines the whole tourism system (WTS) by presenting three basic elements; **tourist, geographical elements**, which consist of traveler-generating region, tourist destination region, and transit route region as well as tourism sector (Figure 2.1).

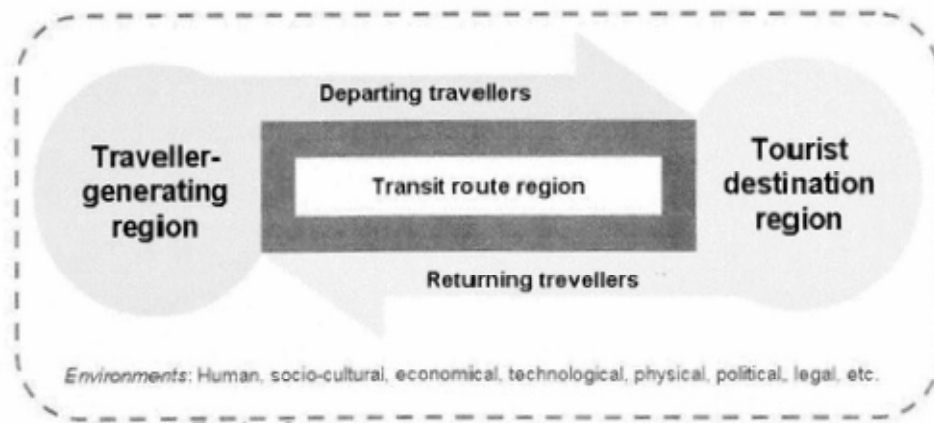


Figure 2.1 : Tourism System.

Sources: Leiper, 1990

Regarding to Asian Development Research Forum (2002), tourism industry in all countries comprises of three component parts; resources, services, and market. Nevertheless, the industry operates in an environment, which is itself composed of various sectors. The illustration of relationship between tourism industry and environmental realities are shown in figure 2.2.

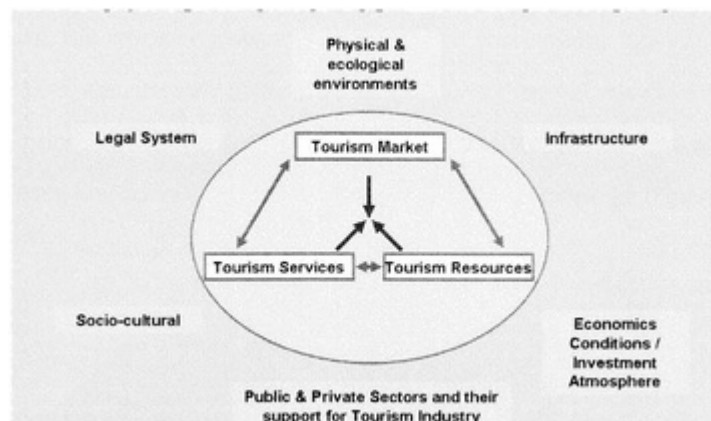


Figure 2.2: Tourism and its environment

Source: Asian Development Research Forum, 2002

Evans *et al* (2003) suggest most widely used technique for analyzing environment, which is known as STEEP analysis. STEEP analysis divides the influences into five categories (Evans *et al* 2003, p. 155) listed as following;

- Socio - demographic - social, cultural and demographic forces.
- Technological influences - products, processes, IT, communications and transports.
- Economic influences – fiscal and monetary policy, income, living standards, exchange rates and etc.
- Environmental influences – waste disposal, pollution, and energy consumption
- Political influences – governmental, legal and regulatory forces

Moreover, the tourism industry is recognized as global industry whereas Go and Moutinho (2000, p. 315) claim that both domestic and global environments are intrinsic characteristics of modern tourism industry.

From review of literatures mentioned above leads to the framework for this research in three-dimensional diagram (Figure 2.3). In order to verify the tourism situation and its factors, this research integrates both internal and external factors. The strengths and weaknesses are internally analyzed through tourism market, services and resources of selected countries as well as the opportunities and threats are externally analyzed through external environmental forces presented in both frameworks (Figure 2.1 and 2.2).

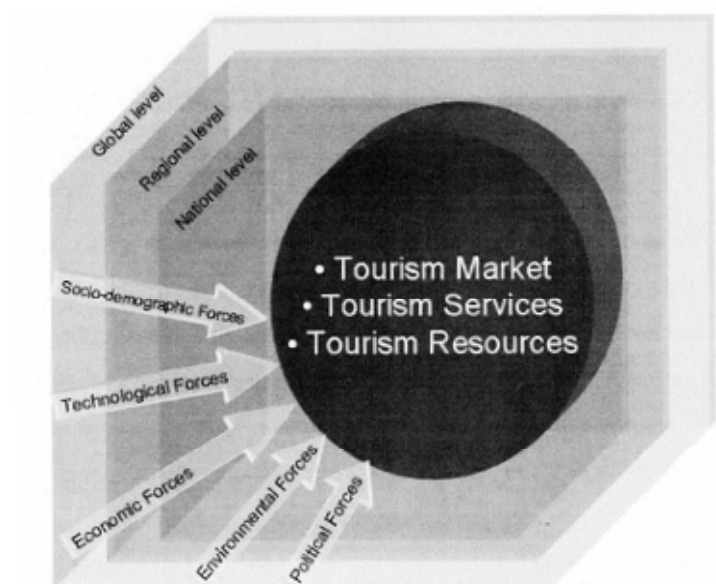


Figure 2.3: Framework for Tourism Situation Analysis

Source: Author

CHAPTER 3

RESEARCH METHODOLOGY

In order to find out the tourism situation of Brunei and China and interpret information in from of SWOT model, this research employs qualitative approach to fine out data from both primary and secondary sources. Then the data is analyzed and interpreted under each component of SWOT framework.

Sources of Information and Data collection methods

Regarding to one of the research objectives, which are uncovering the tourism situation in Brunei and China, data concerning tourism situation of these destination is able to acquire from both public and private tourism organizations. Data is also collected from both primary and secondary sources.

Secondary data was firstly searched through various secondary sources; documentaries, multiple sources and survey (Saunders et al., 2000, p. 190). Secondary data from documentaries are in formats of both written and non-written materials, from multiple sources are area based and time series based materials, as well as from survey including censuses, continuous and regular surveys along with Ad hoc surveys. The examples of sources of secondary data are government publications, journals, statistical reports from government and non-government organizations and etc. However, the information from secondary sources is not sufficient; therefore the primary data from direct relate bodies is searched.

To obtain data from primary sources, it is impracticable to survey and find out data from all concerned organizations, which can be defined as population of this research. Therefore, this research selects a sample from the whole population in order to gain these following benefits; save time and save budget (Saunders *et al.*, 2000). Moreover, to obtain the preliminary information in a quick and inexpensive way (Sekaran, 2000, p. 277), non-probability sampling is selected. Nevertheless, a range of non-probability sampling techniques are available (Saunders *et al.*, 2000, p. 170), this research employs purposive sampling to select representative organizations from both private sectors. Since the research

aims to obtain information of tourism situation from organizations concerning tourism industry of the selected countries, the purposing sampling is appropriate because it is confined to specific types of people who can provide the desired information (Sekaran, 2000, p. 278)

In order to search primary data, focus group meeting was implemented. Structured personal interviews were set up with various open-ended questions employed to find out the current situation of tourism development in destinations from participants from both public and private tourism organizations. This specific type of interview generate many advantages (Sekaran, 2000); establishing rapport and motivate respondents, can clarify the questions, clear doubts, add new questions, able to read nonverbal cues, can use visual aids to clarify points, and obtain rich data. Moreover, this would allow for a variety of ideas and perceptions on tourism supply to be generated and discussed (Li and Dewar, 2003, p. 154). The period of primay data collection of Brunei was in March 2007 and of China was in April 2007.

Data analysis

The analysis undertaken here is derived from content and secondary analysis. Words and phrases extracted from both primary and secondary data are categorized in terms of four components of SWOT.

CHAPTER 4

DISCUSSION OF RESEARCH FINDING

The research findings are presented in theoretical framework of SWOT. Moreover, the discussion of research finding is uncovered tourism situation of Brunei and China consisting of two the SWOT analysis of two countries respectively.

Brunei: An Unexpected Treasure



Figure 4.1: Map of Brunei and its location in South East Asia

Source: The Economist Intelligence Unit Limited, 2006

Brunei is a small, prosperous, stable and – as its full name, Brunei Darussalam implies a 'peaceful' kingdom located on the northern shores of the Borneo island, which it shares with the East Malaysian states of Sabah and Sarawak and Kalimantan province of Indonesia.

Brunei may have existed as a commercial center as early as the 6th century. It emerged as a powerful independent sultanate after its ruler converted to Islam in the 15th century, collecting tribute from northern Borneo and the southern Philippines. After Malacca fell to the Portuguese in 1511, Brunei flourished as the most powerful Muslim state in Southeast Asia until the 17th century. After secession of Sarawak to Malaysia, and to avoid extinction as a state, it sought and received British protection from 1888 until its independence in 1984.

Brunei is a Malay Muslim monarchy ruled by his majesty the Sultan, who is head of state, head of government and supreme executive authority.

The country is divided into two enclaves, and over 70% of its total land area of 5,765 square kilometers is covered in luxuriant and pristine tropical rainforests with abundant exotic flora and fauna. As a result, Brunei is a paradise for nature lovers and for ecotourism in general.

The wealth of Brunei comes almost exclusively from its oils and natural gas resources. The petroleum and natural-gas industry concentrated along the northwest coast and offshore. The rise in oil prices over past few years has boosted GDP growth, contributing to making the kingdom the 2nd wealthiest country in the ASEAN after Singapore. Brunei is the fourth largest producer of liquefied natural gas (LNG) in the world and the third largest oil producer in Southeast Asia after Indonesia and Malaysia.

The total population is a simple 372,000, growing at an annual rate of just 2.4%. The population comprises of 75.8% of Malay, 15.2% of Chinese, and 12% of others. Malays are concentrated in public services, while Chinese dominate commerce (www.brunet.bn, n.d.).

	2006			2016		
	Br\$ mn	% of Tot	Growth	Br\$ mn	% of Tot	Growth
Personal Travel & Tourism	434.9	11.5	0.4	699.4	12.3	5.0
Business Travel	758.1	---	2.4	1192.7	---	4.8
Government Expenditures	21.0	0.7	2.7	30.9	0.8	4.1
Capital Investment	262.7	13.4	5.9	477.0	16.6	6.3
Visitor Exports	383.8	3.1	-2.2	914.8	6.3	9.2
Other Exports	978.5	7.9	7.3	1200.9	8.3	2.2
Travel & Tourism Demand	2,839.0	---	3.4	4515.6	---	4.9
T&T Industry GDP	315.4	1.8	0.8	553.5	2.5	5.9
T&T Economy GDP	1,902.7	11.0	3.6	2947.6	13.5	4.6
T&T Industry Employment	5.0	3.0	1.2	8.0	3.8	4.8
T&T Economy Employment	21.9	13.1	3.1	33.5	16.1	4.3

Figure 4.2: Brunei Darussalam Estimates and Forecasts

Source: WTTC, 2006

Information of World Travel & Tourism council indicates that in 2006 (figure 5), the wider Travel & Tourism Economy is expected to contribute 11% of Brunei gross domestic product (GDP) and account for 21,900 jobs, representing 13.1% of total employment. Over next ten years, Travel & Tourism in the country is forecast to achieve annualized real growth of 4.6% in terms of GDP.

Brunei's SWOT Analysis

Table 4.1: Brunei's SWOT analysis

Source: Author

Strengths • Tourism Resources • Promotional Campaign • Niche markets	Weaknesses • Human Resource Shortage • Need for Reliable Statistic • Geography Misconcept
Opportunities • Good standard of living • Government Policy and Support toward Tourism Industry • Political Stability and Harmonious External Relationships • Terror Free • Development of Low Cost Carriers	Threats • Terror Attacks, Pandemic Outbreaks and Health Concerns • Seasonal Smoke / Haze • High Level of Competition

The SWOT analysis for Brunei is made up of information from research literature and interviews with key informants. This includes representatives from the following organizations: Brunei Tourism and tourism organizations such as travel agency. The summary of Brunei SWOT analysis firstly presented in table????

The strengths of Brunei are as follows.

1. Tourism Resources

One of the key strengths of Brunei's tourism is its richness of natural and cultural attractions. This includes attractions within the country, from sophisticated cities to rainforests full of wildlife, to architectural and cultural heritage water village, and to some of finest beaches. Ministry of Industry and Primary Resources considers Brunei's tourism resources into 4 pillars, namely, nature, people and culture, heritage and contemporary Asia.

In terms of nature, in *The Traveltrade Brunei Guide* (2005), it is claimed that Brunei's forests remain a magnificent natural tourism resource. This refers to the fact that with Brunei's oil wealth it means that the country does not need to log its rainforests. In terms of accessibility, Brunei's abundant natural attractions are surprisingly easy to visit, within an hour or so from the capital. In Brunei, tourists will find that more that 70 percent of the country is still covered in primary forest. Brunei has acted to conserve some 32,000 hectares as forest reserves and allocated 50,000 hectares as national parks which are some of the finest in Asia (<http://www.visitasean.travel>, 2006). The country's rainforests and mangrove swamps shelter a variety of insects, crabs, snails, prawns, fish, otters, turtles, lizards, bats, flying foxes, bird species (especially kingfishers), monkeys (including the rate proboscis monkey) and crocodiles (Traveltrade Brunei Guide, 2005). Ecotourism is as a result one of the key products for tourists. However, to be able to serve international tourists better, additional transportation and accommodation facilities are require in the areas outside the capital (<http://www.eiu.com>, 2006).

Famous natural attractions include Wong Kadir Waterfall, Luagan Lalak Recreation Park, Merimbun Lake & Heritage Park, Sungai Liang Forest Reserve, Pantai Seri Kenangan Beach, Wasai Kendal, Taman mini Perayaan, Palau Selirong, Kuala Belalong Mini Park and Ulu Temburong National Park (<http://www.tourismbrunei.com>, 2007)

For people and culture, many different ethnic and cultural groups live in Borneo, alongside more recent migrants from China, Indonesia, the Philippines and India. Evidence of early trade with India and China (in camphor, spices, precious woods and exotic jungle products) dates from the sixth century AD (Traveltrade Brunei Guide, 2005). The attractions within Brunei partly concerns with diverse people and culture. This refers to places such as Labi Long Houses, Sungai basong Recreational Park, Tamu Tutong Kampong Seramburgan, Jame'Asr Hassanil bolkiah Mosque, Omar Ali Saifuddien Mosque, Kampong Ayer (Water Village), the Arts & Handicraft Centre, Malay Technology Museam and Batang Duri (<http://www.tourismbrunei.com>, 2007). Attractions, in relations to their people and culture, become key pull strategy for both international and, especially domestic tourists who seriously consider culture and religion as part of their life.

In term of heritage, the Sultan clams his kingdom is the oldest Malay state on the island of Borneo, "like pearl cultured in an oyster of traditions kept intact". For centuries, the name Borneo to Europeans conjured up visions of a destination fabulously exotic and far-off, like Timbuktu or Tibet. In fact, the name Borneo is an ancient corruption of the name Brunei. People have lived on Borneo for at least 35,000 years. Brunei's rich and majestic royal heritage adds to the blend and distinguished the country from surrounding states (Traveltrade Brunei Guide, 2005). A long history of the country creates a value for tourism. The heritage attractions include Silver Jubilee Park, Royal Regalia Museum, Brunei History Centre, Istana Nural Iman, the House of Twelve Roofs, Mausoleaum of Sultan bolkiah and the Brunei Museam (<http://www.tourismbrunei.com>, 2007)

Another key strength for Brunei is the fact that the country is known for being 'Contemporary Asia'. Brunei is a compact, safe, peaceful, healthy and easy-to-explore family-friendly destination. It also offers some of the best golfing facilities in the region. The attractions concerning contemporary Asia are Billionth barrel Monument, Oil & Gas discovery Centre (OGDC), Jerudong Park, Royal Brunei Golf, Empire Hotel & Country Club, Dive Centre, the Mall, RBA Golf Club and Yayasan Complex (<http://www.tourismbrunei.com>, 2007.). A key strategy for Brunei is, therefore, a combination of ancient and modern tourism.

2. Promotional Campaign

Promotional campaigns of Brunei have been done by Brunei Tourism that is a Division within the Ministry of Industry and Primary Resources. Brunei Tourism is in charge of tourism development, marketing and promotion as well as licensing to tour companies. The division has been actively engaged in the promotion of tourism to Brunei since the mid 1990s. It was then that tourism gained recognition as a rising industry capable of greatly contributing to the Kingdom's economic diversification efforts, as well as becoming a significant generator of future employment opportunities for Brunei's citizens (The Traveltrade Brunei Guide, 2005, <http://www.tourismbrunei.com>, 2007).

Brunei Tourism is working to market its undiscovered tourism potential in the competitive regional tourism market. Brunei will retain its tagline "kingdom of unexpected treasures" (used since 2001) alongside the "green heart of Borneo" is aimed to better reflect that nature and eco-tourism are the kingdom's strong selling points. The other tagline "A Kingdom of Unexpected Treasures" has been retained, as that is exactly what Brunei is (Radio Televisyen Brunei, 2004). A recent launch of a new campaign shows clearly what Brunei tourism can offer to tourists domestically and internationally. This refers to the four pillars of Brunei's strengths: nature, people & culture, heritage and contemporary Asia (James, 2005 and <http://www.tourismbrunei.com>, 2007). This aims to present Brunei as a must-travel destination for those seeking something different from neighboring countries like Singapore, Malaysia and Indonesia, without competing directly with them (James, 2005). Brunei's key strength is then its clear positioning strategy as well as its marketing strategy.

3. Niche Markets

Follow its current promotion strategy, Brunei focuses on niche markets. This refers particularly to the market of quality tourists who are conscious with both positive and negative environmental impacts generated by tourism. Family travel segment is one good example of Brunei's promotional and positioning strategy as such market can be served by the products of Brunei very well. This refers to main attractions such as theme parks (shopping complexes, sports and water-related venue etc.) and spas (Traveltrade, 2005).

Brunei is also an ideal for a stopover enroute to other part of Borneo. Despite its small size, there are really interesting things to see but one or two nights is sufficient (Traveltrade,

2005). Furthermore, with Sabah and Sarawak of Malaysia as well as Kalimantan that are located next door, tourists can spend weeks uncovering Borneo's magnificent natural beauty, using Brunei's capital Bandar Seri Begawan as a gateway (<http://www.visitasean.travel>, 2006). Moreover, the flag carrier; Royal Brunei Airlines is focusing on establishing itself as an alternative carrier to Asia, with Brunei as a stopover (Traveltrade, 2005)

The weaknesses are as follows.

1. Human Resources Shortage

Human resources issue is one of the key weaknesses for Brunei's tourism. The industry is developed in a fast pace and as a result the country lacks of skilled labor required by the tourism and hospitality industry. In relation to World Travel & Tourism Council statements (WTTC, 2006) focusing on human resources, it can be seen that Brunei's travel and tourism industry is hardly promoted at all in terms of a possible career choice. WTTC (2006) suggests that in order to enhance the level of the workforce, to boost numbers and to raise the image of travel and attract enthusiastic, career-minded and high quality employees, a dedicated travel and tourism training facility should be established by the Brunei government in collaboration with the private sector. The government should be the center in providing education, training and, most importantly, career development strategy for human resources with the country.

2. Need for Reliable Statistics

Another weakness for tourism in Brunei is the critical need for reliable statistics. In principle, quality and reliable statistics are critically needed for policy – and decision – making processes. However, Brunei's economic and marketing related Travel & Tourism research and statistics at present are extremely inadequate, both in terms of quality and quantity. As a result, public sector analysis and related policies tend to overlook, or underestimate, the impact of industry, or deal only with its smaller components. Nevertheless, the Department of Economic Planning & Development (JPKE) has recently moved through its Action Plan, to improve National Accounts' statistics. This augurs well for Travel & Tourism. High-quality research and the collection of relevant data on a regular basis are crucial to the

development of an effective strategic plan for the tourism industry in a country like Brunei. An example of a current tool for forecasting is one which is developed by WTTC who claims that it is the first organization to attempt an assessment of current trends and future growth prospects. WTTC and its research's partner Oxford Economic Forecasting (OEF) have developed an instrument called Tourism Satellite Account (TSA), a significant tool for planning and policy development. Updating the TSA on an annual basis will help to ensure that adequate data is available to factor Travel & Tourism into economic and employment strategies. With a proper tool, it will provide the Ministry and Brunei Tourism with useful economic data beneficial for short and long marketing and promotions planning. In addition, this will help raise awareness among public and private sector stakeholders within the industry a full impact of tourism across the national economy including hotels, restaurants, retail business, constructions, real estate, agriculture as well as other sector (WTTC, 2006).

3. Geography Misconception

Geography misconception can be considered as another weakness for the country. Due to the oil-rich status of Brunei, many tourists consider the geography of Brunei to be in the Middle East. Some are confused between Brunei and the Gulf state of Bahrain. Brunei is also commonly confused with Bhuthat in the Himalayas or Burundi in Africa. However, Brunei tourism has begun 'The Green Heart of Borneo' campaign to create awareness of the destination and to help promote its geographical location (Traveltrade Brunei Guide, 2005). As mentioned, it is trying hard to position the country effectively in the mind of the public by their current promotion and marketing strategies.

The opportunities for Brunei tourism are as follows.

1. Good Standard of Living

Brunei's prosperous economy, mainly oil- and gas-based, provides a good standard of living brings positive social spin-off, including high literacy rates, long life expectancy, low infant mortality rates, low unemployment and crime rates. Brunei is known as being a destination with quality host community. Unlike several Asian countries, the poverty is minimal and the overall conditions of the people become a great opportunity for the tourism industry.

As several tourism literature mentions, tourism within a country with conditions similar to those developed ones can potentially make the tourism industry prosper with quality.

2. Government Policy and Support toward Tourism Industry

Currently, the government is working towards economic diversification – in which tourism plays as important role (<http://www.visitasean.travel>, 2006). Moreover, government plans for the future also include strengthening the tourist sectors. The government's objective is to increase international tourist arrivals by minimum average rate of 7 percent a year (<http://www.eiu.com>, 2006), as well as to increase average length of stay and expenditure (<http://www.cia.gov>, 2007) As mentioned, it can be seen that the government puts strong efforts on making the tourism industry grow and, at the same time, to ensure that it is doing so in a sustainable way.

3. Political Stability and Harmonious External Relationships

Brunei enjoys a high degree of political stability, based on a monarchy that is espousing a moderate form of Islam as a unifying force for the nation. Furthermore, political violence is highly unlikely to occur. WMRC (2003) does the research of Brunei – country risk summary, which is shown in figure 6. The Brunei overall risk is lesser than the Asia-Pacific and Global overall risk

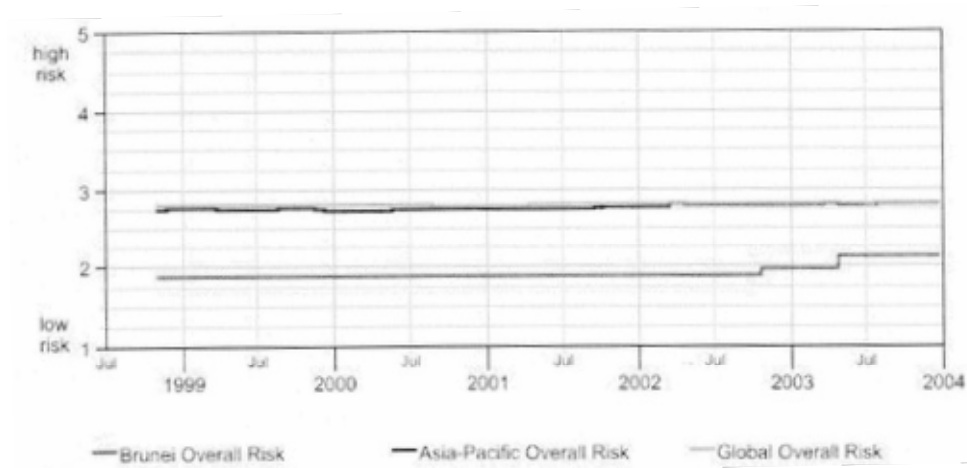


Figure 4.3: Brunei – Country Risk Summary

Source: WMRC, 2003, p.2

Moreover, the main channel for Brunei's political and economic cooperation remains the regional Association of South-East Asian Nations (ASEAN). Relation with Brunei's immediate (and much larger) neighbors Indonesia and Malaysia are helped by that fact that all three countries share a common Islamic identity and are populated by an ethnic-Malay majority. Moreover, Brunei is one of the disputants to maritime areas in the South China Sea, but this has not adversely affected the country's relations with other parties to the dispute (including China and Indonesia). Beyond the immediate region, relation with China and Japan are positive (WMRC, 2003). This good Environment can be one factors that may encourage national and international tourism organizations to operate their business within the country.

4. Terror Free

Tight security and political control in the sultanate mitigate the risk of terrorism. Moreover, Brunei's relations with its regional neighbors are very good, and the country faces no external threats (WMRC, 2003). Therefore, there are no specific threats against tourism industry in the country.

5. Development of Low-Cost Carriers

The advent of low-cost carriers in Asia has and continues to make profound impacts on other stakeholders of tourism industry. Low-cost carriers force Flag carriers to lower their airfares, which encourages frequent travel and brings visitors into more destinations. On the other hand, Flag carriers are fighting back by improving in-flight services, especially for business and first class passengers. This indicates a trend towards polarization of travel expenditure of travelers. Moreover, some low-cost carriers are venturing into the long-haul market (flights that take more than four hours), the boundaries between low-cost carriers and flag carriers are blurring. The fierce competition and too many low-cost carriers will force further consolidation and/or merger among them. The focus of low-cost carrier' expansion will also shift from South-east Asia to the north and southwest of the region (<http://www.unwto.org>, 2006).

The threats are as follows.

1. Terror Attack, Pandemic Outbreaks and other Health Concerns

Since the beginning of 2000s, the global tourism industry has been adversely affected by a series of obstacles to growth such as the terrorist attacks of September 11 2001, the Bali bombing on October 12, 2002, and Severe Acute Respiratory Syndrome (SARS) (Horner and Swarbrooke, 2004). All problems made lots of difficulties to tourism industry as a whole. The revenue from tourism industry decreased obviously and unexpectedly. In some countries, lack of crisis management readiness persists.

It has been suggested that improving of safety and security should be done by host communities cooperating with government. Due to the visitors decisions making that make base not so much on risk itself as on perception of risk, timely, accurate and responsible communication is even more important than the outbreak itself (<http://www.unwto.org>, 2006). As for timely communication, it is expected that National Tourism Organizations (NTOs) will be more proactive and vigilant in their communication strategies. NTOs will also try to secure more communication channels to ensure their information content reach the target audience in time. The following trends relating to timely communication are predicted;

- Further development of multilingual versions of NTO's websites;
- Close coordination among NTOs, tourism-related government agencies, foreign ministries, and international organizations to provide accurate travel advisories;
- More cooperation and exchanges of information between NTOs and their foreign counterparts; and
- Link with websites of travel agencies specialized in selling the destination and with GDS websites.

Moreover, therefore should closely monitor media reports to mitigate the negative impact of some irresponsible blanket reports of the attacks or outbreaks. Media relations management needs to be proactive in a world full of information and media channels (<http://www.unwto.org>, 2006).

However, some health concerns have positive impacts on tourism trends of the country. Some international inbound tourists may concern deep-vein thrombosis (DVT). This syndrome appears to be directly related to taking long-haul flight and for key market, such as Asia and North America or Asia and Europe, trips to Asia-Pacific destinations always include a long haul flight. Due to the publicity surrounding this illness some people are now unwilling to take a long flight (Horner and Swarbrook, 2004). As the geography of Brunei is located in the half way between Asia and North America or Asia and Europe, therefore, the country can be promoted to be stopover destination.

2. Seasonal Smoke/Haze

Brunei is periodically affected by seasonal smoke/haze resulting from forest fires when they hit their peak in mid- to late-summer in Indonesia Borneo. However, unless the fires are particularly serious, there are unlikely to be any effects on health (WMRC, 2003).

3. High Level of Competitions

Regarding to the positive economic impact of tourism, most of the countries have used tourism to diversify their economy. Therefore, high level of competition occurs among countries.

However, WTO (2006) recommends that fierce competition also creates more cooperation within the region. This trend of both competition and cooperation is likely to continue as tourists are becoming more experienced, savvy and look for more diversity. Another trend identified is the regional consolidation that results in a coordinated marketing drive. ASEAN countries are promoting their destinations as a whole.

China and Change

The literature on tourism in China shows consistent information on China and the change that gradually takes place within the country. During the past years, there is a positive development within the tourism industry in order to be more dynamic and receptive to both international tourists and, at the same time, domestic tourists who require better facilities and leisure activities of international standards. China also has a clear strategy to invest in the coastal region. This includes three municipalities and nine provinces (Liaoning, Hebei,

Beijing, Tainjin, Shandong, Jiangsu, Shanghai, Zhejiang, Fujian, Guangdong, Guangxi, and Hainan) taking 87.2 percent of the total hotel income and 81.2 percent of all tourist arrivals (CNTA 1988; YU and Smith 2007). Figure 7 illustrates the coastal area of China.

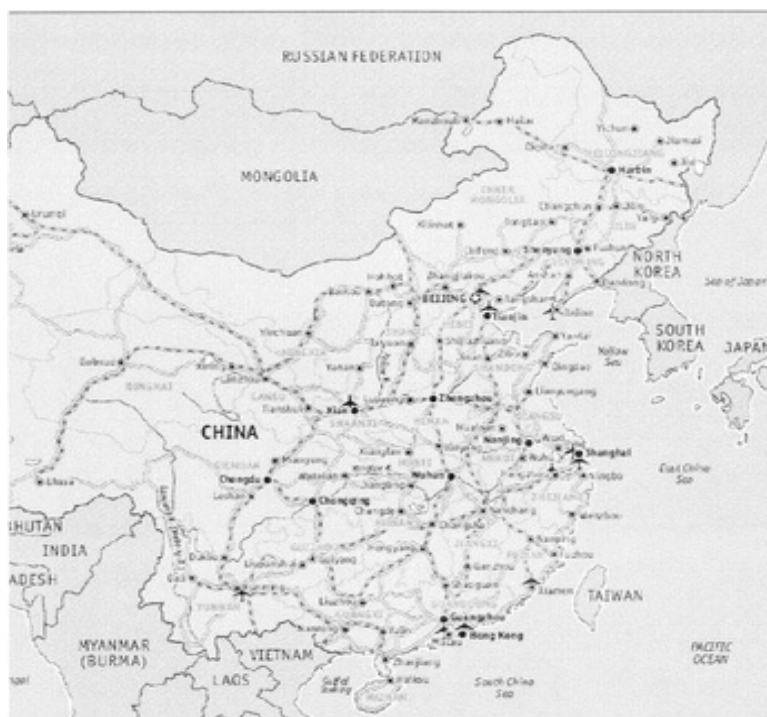


Figure 4.4: The Coastal Area of China

To recall on what China tourism has been in the past with the present change at present, it can be difficult. In 1978, when the country first opened itself to tourism and, in particular, international tourism, the supply of tourism facilities was very limited (Wen 1988). The fact that government was the major owner of most of the tourism facilities also prohibited the industry to be receptive to the need and demand of both domestic and international tourists. It was only in 1982 where there was a clear strategy from the government to allow a foreign direct investment project to enables China to compete with other countries. At the moment, there are 10,888 hotels in China and approximately 50 percent of those hotels are state –owned ones. Another 50 percent are owned by other forms of ownership (CNTA 2005). Looking at China in 2007 and forward, especially for the Olympics Games in 2008, China has come a long way and is now able to set itself as a proper ‘tourism destination’ for tourists, locally and internationally. The early days of poor quality of accommodations, poor tourist facilities, and strong communication barrier are gone. Local and international tourists can

enjoy a variety of cuisine and accommodation from local Chinese hotels to international chain hotels like Inter-Continental hotels group, Starwood hotels and resorts, and Accor. Figure 8 shows facilities of Sheraton in Beijing, China. China is, therefore, Working hard not only to ensure that it can keep up with the needs of tourists and the competition from other destinations but also to convince the public that it is ready for the big Olympics event in 2008.



Figure 4.5: Sample of Sheraton, An International Hotel in China

One key facto of success for China is, therefore, its vision and courage to put the tourism industry into the national plan for social and economic development for the first time in the year 1986 (He, 1999). Within 10 years after that, the governments of 24 out of all 31 municipalities, provinces and autonomous regions have made the tourism industry of one of the key industries in their regions. Being a late corner of tourism, in comparison to other destinations of the world, China was in he old days the 40th destination visited by international tourist (WTO 1999) and now the 6th destination with 3.8 percent market share of the overall international tourist arrivals (WTO 1999). Table 6 shows this information. The change of planned economy to the market economy is a great success. The 'openness' of hotel,

catering, transportation, and retailing and other related industries becomes a key feature to the growth of the tourism industry in China.

Table 4.2: Top ten world tourist destinations in 1998 (in international tourist arrivals)

Source: WTO, 1999

Rank	Country/ Region	International tourist arrivals	Market Shares (%)
1	France	70,000	11.2
2	Spain	47,743	7.6
3	USA	47,127	7.5
4	Italy	34,829	5.6
5	UK	25,475	4.1
6	China	24,000	3.8
7	Mexico	19,300	3.1
8	Poland	18,820	3.0
9	Canada	18,659	3.0
10	Australia	17,282	2.8
	Total	323,235	51.7
	World	625,236	100

China is on a bit change with a hope to grow and to be able to ‘pull’ tourists from all over the world. As Inskeep (1990) stated, the process of destination development is a complex one. It requires strong collaboration from a number of stakeholders. This includes the government; several business sectors such as accommodation/lodging, food and beverages, transportation; and, most importantly, local communities. The size of the country and large number of population further make the issue complicated. China is now not struggling to make itself known to the market but putting together ‘attractions’ as well as their systems to ensure that China as a whole tourism system is representing marketable destination attributes to both local and international tourists (Wen 1998; Zhang et al 2000). As mentioned earlier, China as ‘one’ tourism destination comprises of several sub-systems or what most tourism literature indicates as being destination having various markets or identities

(Urry 1990; Leiper 2003). Figure 9 shows different characteristics of China being a tourism destination. This is a considerable challenge for China in order to work with this complexity and, at the same time, to maintain, strengthen and enhance the competitive edge of the country.

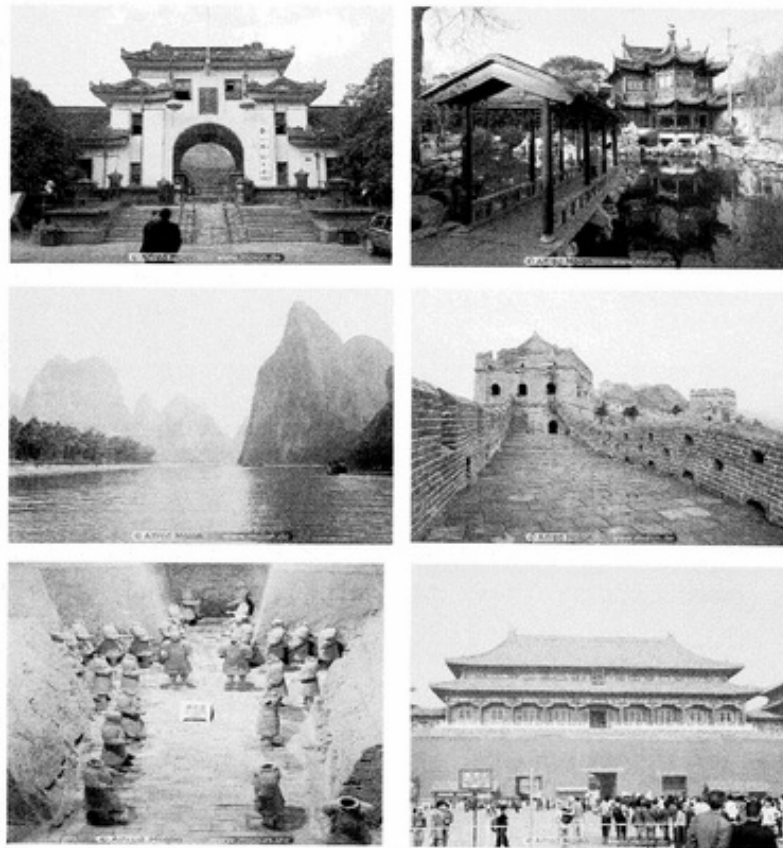


Figure 4.6: Different characteristics of China being a tourism destination

Domestic and Outbound Tourism

Domestic tourist is another strong feature of the tourism industry in China. China has put a lot of attention in developing its domestic tourism all over the country. CNTA has reported a continuous growth in the number of domestic tourists. It is predicted that the number of domestic tourist arrivals will keep growing to more than three times of the present and income nearly five times from the past until 2010 (CNTA 2005). In the past, tourism literature has shown that China did not consider domestic as a key target but found that domestic tourism was preventing international tourism from growing (Tisdell 1993). It is until

the early 1990 that the government recognizes that the expansion of domestic tourism is an unavoidable phenomenon (Wen 1998). In-land tourism is named to be a famous destination for domestic tourists for economic reasons. This is in country to the international tourists where their preference is mainly on the coastal region. Domestic tourism is, therefore, one form of rural development particularly for in-land areas.

FIT and Ecotourism are also two new phenomenon for domestic tourism in China. In the old days, traveling in China was mainly a mass tourism and social events. Wu, Zhu and Xu (2000) reported that some domestic tourist prefer the FIT and ecotourism approach because they are able to tailor-made the trips in the way they want and, most importantly, they can protect the natural environment of the country. This is also because the main attractions of China, besides theme parks, sports, leisure/services, arts performance, are recreation parks. At present, there are 119 national park and 500 provincial parks in the country.

Literature also mentions China becoming a major market for the global tourism industry. Chinese are predicted to be a large tourist population in the near future. This is because Chinese do travel for the purpost of visiting friends and relatives as well as of businesses besides those of leisure (Zhang et al 2000). Moreover, the impact of globalization and the increase in number of international tourists into the country are two reasons that push Chinese to go overseas. After a long close to the outside world, the media and foreign visitors make Chinese aware of the big world outside their country (Wen 1988). Recent research also shows that there is a primary and secondary overseas market for the Chinese. In terms of a primary market, this refers to the nearby neighborhood countries such as Taiwan and Macau where businesses and family are bonded. Please refer to figure 10 for more information. In terms of a secondary market, this refers to countries where Chinese can choose to enjoy attractions that are different from home such as Thailand and Singapore.

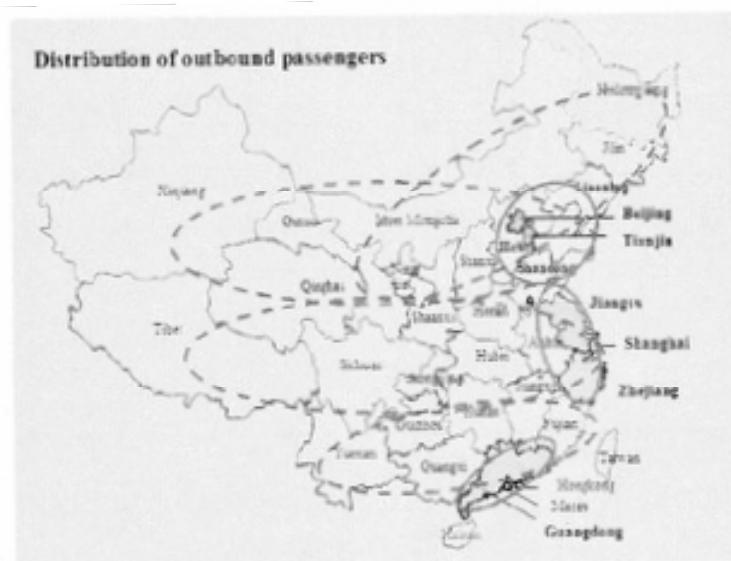


Figure 4.7: A ma illustrating a primary overseas market for Chinese tourists

This sections presents the China SWOT analysis that is made up of information from research literature and interviews with key informants. This includes representatives from the following organization: Ministry of Tourism, CNTA, and TAT (China's Office). The summary of SWOT analysis of china is briefly shown in table 7.

Table 4.3: China's SWOT analysis

Source: Author

Strengths • Unique Tourist Attraction and Improve Facilities • Coastal Region as a Favourable Tourism Distribution in China • Increasing in Tourism Revenues	Weaknesses • Human Resources Shortage • Inappropriate Promotional Campaign • Price Discrimination against Foreign Tourist
Opportunities • Tourism Policy • Business Travel • Visit friends and relatives (VFR) Tourism • Domestic Tourism • Low-cost Carriers • Health Concern	Threats • Global Crises • High level of International Competitions • Impact of joining the World Trade Organization

The strengths are as follows:

1. Unique Tourist Attractions and Improved Facilities

In the past 20 year or so, the last decade in particular, the infrastructure and superstructure for international tourism in China have been improved greatly with the joint efforts of the state and local governments, public and private sectors. The serious shortage of accommodation and transportation that once bottlenecked Chinese tourism development has been removed, and the problem of lack of tourist attractions and recreation activities have been resolved by and large. The increase of domestic air traffic capacity, speed-up of railways and regulation of operating modes and networking of expressways have made travel within China more convenient and comfortable. The introduction of overseas capital and management has helped China's hotel industry make a bit leap forward, reaching or closely approaching the world standards in term of both hard- and soft wares. At the same time, the multiple investment channels may promote the building of tourist attractions, providing a greater choice of unique tourist products for inbound visitors. All of this will enhance the attractiveness of China's entrie inbound tourism and improve China's image in international tourism market.

2. Coastal Region as a Favourable Tourism Distribution in China

The regional distribution of tourism in China consists of inland and coastal regions. It follows that the coastal region has an above average income per hotel room and more tourists per hotel employee. Further more, tourist receipts in the coastal region per inhabitant are about twice those for China as a whole, as is the number of tourist per inhabitant of the coastal region. Therefore, China's heavy concentration of inbound tourism along the coast is a result of favorable conditions from both demand- an supply-side tourism factors. Factors such as greater international business connections on the coast, strong family connections to coastal provinces of oversea Chinese especially, the predominance of international entry ports along the coast and the location of several major tourist attractions may help to explain the existing spatial pattern of tourism.

3. Increasing in Tourism Revenues

According to the World Tourism Organization, in 2004, China was already the forth-largest international tourist destination in the world with 109m inbound visitors, and the country also received the fifth-highest total of foreign-exchange receipts from tourism, at US\$25.7bn.

In terms of outbound tourism, mainland-Chinese residents have become increasingly active travelers in recent years, particularly with Asia. However, the government has unties restrictions on outbound travel. By the end of 2005, a total of 115 countries have been granted Approved Destination Status (ADS) by the Chinese government. ADS is a bilateral tourism arrangement between China and foreign destination, whereby Chinese tourists are permitted to undertake leisure travel in groups to that destination. The number of overseas trips made by Chinese residents has risen rapidly, from 8.4m in 1998 to 28.9m in 2004.

The followings are the weaknesses.

1. Human Resources Shortage

The increasing demand for tourism in the country has and will continue to create a shortage of human resources in the tourism and hospitality industry. Levels of manpower standards are different.

2. Inappropriate Promotional Campaign

Some source markets are niche-oriented and do not align well within a multi-destination approach. Furthermore, sometimes the country and counterparts conveys a similar image as a tourist destination such as they have similar tourism resources; natural and cultural assets.

3. Price Discrimination against Foreign Tourist

A two-tiered price system exists in the transportation system and sometimes in accommodation and dining facilities, with foreigners being charged usually one-third to 50 percent more than Chinese

The opportunities are as follows.

1. Tourism Policy

Government policy on tourism changed correspondingly, and experienced a transition from restraint to nonintervention and then to positive encouragement. Since the adoption of open-door policy and economic reform in 1978, the economic functions of tourism including earning foreign exchange, providing employment and promoting regional development have been emphasized by the Chinese government. Since then, a set of tourism policies and regulations has been formulated to promote the development of tourism as an economic industry.

Even Chinese tourism policies and regulations are formulated in the government structure, they will finally be implemented in enterprises. The implementation of these policies has provided some opportunities in creating a positive and supportive business environment for the enterprises to start up and develop their tourism businesses. However, tourism enterprises can rarely participate in the tourism policy-making process, they have found difficulty in implementing some policies and regulations.

2. Business Travel

China has close economic relationships with many foreign countries. Relations with ASEAN countries have at times been tense. In 2002 China agreed to establish a free-trade area with the ASEAN countries from 2002. From such collaborations, liberalization to ease visa requirements and government regulation of airlines could be developed. Moreover, intra-regional travel could be increased for leisure, business, study and MICE.

3. Visiting friends and relatives (VFR) Tourism

As more and more people from China and the other two special administration areas; Hong Kong and Macau have migrated to foreign countries, the scope for inbound visiting friends and relatives tourism into the country could be activated.

4. Domestic Tourism

Domestic tourism becomes a big business in terms of numbers. It could contribute to more rural development because Chinese tourist activities differ from those of foreigners. Chinese tourists, with coastal regions and large metropolitan areas as principal generating markets, may have more opportunity to visit rural and inland areas. However, more careful study on the domestic market is essential for further development of this sector. Tourist facilities oriented towards domestic tourists are in short supply compared with the availability of high-class hotel for foreigners.

5. Low-cost Carriers

The development of low-cost carriers (LCCs) makes intra- and inter-regional travel more affordable and will change people's travel habits and patterns. Lower airfares are likely to encourage travelers to shift from annual long-haul holidays to multiple short-haul short breaks, and hence further boosting the intra-regional travel demand. Moreover, experts predict that airlines are likely to become a low-cost industry.

6. Health Concern

Diabetes is the health concern that will have a serious impact on tourism trends in the whole Asia-Pacific region. According to the World Health Organization (WHO), diabetes cases in Asia will rise by 90 percent in the next 20 years to affect 330 million people and is set to become the 21st century's biggest health problem. Four out of five of the largest diabetic populations are in India, China, Pakistan and Japan. China is also Plagued by obesity. If unchecked, China will have at least 200 million obese people within 10 years. And diabetes and obesity are affecting more young Asian people too.

If not contained, diabetes will cripple more people and reduce their mobility. Exercise is one of the solutions to prevent diabetes. As people begin to realize the threat of this disease, their travel behaviors and activities preferences may have to change in order to accommodate the exercise needs. Action-oriented activities like soft adventure tourism and sport tourism is likely to become more popular. For destinations that target family travel, the inclusion of physical activities in their offerings might be worth considering.

Threats are as follows:

1. Global Crises

Since the beginning of 2000s, the global tourism industry has been adversely affected by a series of obstacles to growth such as the terrorist attacks of September 11 2001, the Bali Bombing On October 12, 2002, and Severe Acute Respiratory Syndrome (SARS). All problems made lots of difficulties to tourism industry as a whole. The revenue from tourism industry decreased obviously and unexpectedly. In some countries, lack of crisis management readiness persists. Risk management contributes to a positive revival of tourist destinations in many cases.

2. High level of International Competitions

At the present time, more and more countries pay great attention to the development of international tourist, seeing it as a significant way to earn tourist receipt and improve the international balance of payments. Consequently, they promote their countries by every possible means, leading increasingly to fierce competition among all destinations. In fact, nowadays, tourism competition is not competition among tourist enterprises *per se*, but more importantly, the competition of national power among destination countries.

3. Impacts of joining the World Trade Organization

When China obtains membership of the organization, it means that China has to release part of its market, and to lead its competitors into its own territory, leaving trades that used to be protected to compete directly with their oversea counterparts. Some weak links of China's tourist industry, such as travel agencies, may meet with great difficulties. They may not be able to match their counterparts in the developed tourism countries in terms of technology, capital, human resources, networking and service quality. Once the overseas solely owned or joint-venture travel agents enter into China and perform their business directly in the country, the business of some Chinese tour operator and travel agents may suffer.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

According to the SWOT analysis above, tourism situation of Brunei and China is concluded. According to the benefits gaining from strengths (S) and opportunities (O) as well as negative impacts from weaknesses (W) and threats (T), the tourism image positioning is carefully considered and more accurately formulated.

Brunei

The image positioning of Brunei is represented by natural tourism resources especially, its primary rainforests, which the government has taken great strides to protect. In Brunei, visitors can have the unique opportunity to walk in the rainforest canopy, which houses an abundance of birds, plants, micro fauna and mammals, such as the rare Bornean proboscis monkey, making up one of the world's richest and most diverse ecosystems. Brunei is also home to some of Asia's best nature reserves and field study centres, such as the world famous Ulu Temburong National Park and the Kuala Belalong Field Study Centre, both of which offer an exciting array of ecotourism and adventure activities. Indeed, the longboat ride down a winding jungle river, surrounded on all sides by pristine rainforest makes the journey as much of an adventure as the destination itself. With few tourists around, nature lovers will appreciate having this untouched paradise all to them and may explore at their own pace, returning to lodgings in the capital when they have completed their visit, or staying in more primitive forest lodgings nearby.

China

China is on the move. Over the past 30 years, China has put strong efforts to compete with other destinations. Being new to the market for international tourists, it can be said that China has been active in improving its attractions and facilities aiming to increase revenues from international tourists. However, being a tourist destination with several characteristics and a large spatial distribution of attractions, this becomes a major challenge for image positioning of the country. The change of China tourism policy and practice makes a great progress, being known as an international tourism destination and capturing the attention of

tourists from all over the world. The future progress that China has to make is to sustain international demand, improve quality of the facilities and infrastructures to meet with the needs and demands of international tourism, and ensure that the destination is able to meet with what the tourist expect. This also refers to establishing an 'identity' with 'identities' and to be able to communicate to the public on its development, style, and readiness for international tourism. So far, it is on the 6th place in receiving international tourists. It is only few places from becoming the first. China is no longer a sleeping tiger but a dragon which is ready for a competition in the global tourism market.

REFERENCES

- Asean Tourism Association (2006). *Destination: Brunei Darussalam* [online] Asean Tourism Association, Malaysia. Available from:
<http://www.visitasean.travel/CountryDestination.aspx?COID=27>
[Accessed 23 March 2007]
- Asian Development Research Forum, (2002). *Policy and Planning of Tourism Industry in Asian Countries* [online] Available from
http://adrf.trf.or.th/Webboard/adrf_forum_info.asp?topic=1369
[Accessed 20 March 2007]
- Brunei Tourism*, (n.d.) Available from: <http://www.tourismbrunei.com>
[Accessed 20 March 2007]
- Brunet, (n.d.) *Country Profile: Brunei Darussalam* Available from:
<http://www.brunet.bn/org/bimpeabc/BNprofl.htm> [Accessed 24 March 2007]
- Campaigning to put Brunei on the tourism map (June 2005) *TRAVEL TRADE BRUNEI GUIDE*, p.3
- Central Intelligence Agency (CIA) (2007). *CIA – The World Factbook – Brunei* [online] Central Intelligence Agency, Washington, D.C. Available from:
<http://www.cia.gov/cia/publications/factbook/print/bx.html> [Accessed 25 March 2007]
- CNTA (1998). China Domestic Tourism Sample Survey, China National Tourism Administration, Beijing, PRC China.
- CNTA (2005). China Domestic Tourism Sample Survey, China National Tourism Administration, Beijing, PRC China.

- Colis-Kreiner, N. and Wall, G. (2007). Evaluating tourism potential: A SWOT analysis of the Western Negav, Israel, *Tourism Review*, 55(1):51-63
- Dale, C. and Robinson, N. (1999) Bermuda, tourism and the visiting cruise sector: Strategies for sustained growth, *Journal of Vacation Marketing*, 5(4): 333-339
- Economist Intelligence Unit (EIU) (2006). *Country Profile 2006*, Brunei [online] The Economist Intelligence Unit, London. Available from:
<http://web.ebscohost.com/ehost/pdf?vid=10&hid=113&sid=822ad21b-fbe7-425a-a296-6504bc81ab28%40sesionmgr102> [Accessed 20 March 2007]
- Evans, N., Campbell, D. and Stonehouse, G. (2003). *Strategic Management for Travel and Tourism*, Butterworth-Heinemann, Oxford
- Go, F. and Moutinho, L. (2000). 'International Tourism Management' in Moutinho, L. (ed), *Strategic Management in Tourism*, CABI, Wallingford, pp. 315-335
- He, G.W. (1999). "Speech at the National Conference of Tourism", China Tourism News, January 7.
- Horner, S. and Swarbrooke, J. (2004) *International Cases in Tourism Management* Elsevier Butterworth-Heinemann, Oxford
- Inskeep, T. (1991). *Tourism Planning, An Integrated and Sustainable Development Approach*. Van Nostrand Reinhold, New York.
- James, M. (2005) *Brunei uses nature to build brand* [online] Media Asia Available from: <http://web.ebscohost.com> [Accessed 22 March 2007]
- Leiper, N. (1990) *Tourism System*, Massey University Department of Management Systems Occasional Paper 2, Auckland

Leiper, N. (2003). *Tourism Management*. TAFE Publications: Collingwood.

Li, W. M. and Dewar, K. (2003) Assessing tourism supply in Beihai, China, *Tourism Geography*, 5(2):151-167

Moutinho, L. (2000) 'Strategic Planning' in Moutinho, L. (ed), *Strategic Management in Tourism*, CABI, Wallingford, pp. 259-281

Qian, Q.C. (1999). "Speech at the National Conference of Tourism on 3 January 1999", China Tourism News, January 7.

Radio Television Brunei (2004) *Tourism, a Major Factor in Development of "The Green Heart of Borneo"* [online] Radio Television Brunei, Bander Seri Begawan.
Available from: <http://www.rtb.gov.bn/NewsUpdate/2004/January/290104/main6.htm>
[Accessed 22 March 2007]

Ramos, P., Salazar, A. and Gomes, J. (2000). Trends in Portuguese tourism: a content analysis of association and trade representative perspectives, *International Journal of Contemporary Hospitality Management* 12(7):409-416

Sauders, M., Lewis, P. and Thornhill, A. (2000). *Research Methods for Business Student* 2nd edn., Financial Times/Prentice Hall, Harlow

Sekaran, U. (2000). *Research Method for Business: A Skill Building Approach* 3rd edn., John Wiley & Sons, Inc., New York

Small nation big on attractions (May 2005) *TRAVELTRADE*, p. 18

TDN INTERNATIONAL EDITION (2006). *A SWOT Analysis of Asian Tourism* [online] Available from: http://www.traveldailynews.com/stiles_print.asp?central_id=1243 [Accessed 1 April 2007]

Tisdell, C. (1993). *Economic Development in the Context of China: Policy Issues and analysis*.
St Martin's Press, New York

Tribe, J. (2002). *Corporate Strategy for Tourism*, Thomson, Bath

Urry, J. (1990). *The Tourist Gaze. Leisure and Travel in Contemporary Societies*. Sage, London.

Wen (1998), Evaluation of tourism and tourist resources in China: Existing method and their limitations. *International Journal of Social Economics*, 25(2/3/4):467-485.

World Markets Research Centre (WMRC) 2003 *WMRC Country Report: Brunei* [online] World Markets Research Centre, London. Available from:
<http://www.policyconcepts.com/Country-Report-Brunei.pdf> [Accessed 20 March 2007]

World Tourism Organization (WTO) Regional for Asia and the Pacific (2006). *MEGA-TRENDS OF TOURISM IN ASIA-PACIFIC* [online] World Tourism Organization, Madrid
Available from:
http://www.unwto.org/regional/east_asia_&_pacific/publications/megatrend.pdf
[Accessed 21 March 2007]

World Travel & Tourism Council (WTTC) (2006). *BRUNEI DARUSSALAM: THE IMPACT OF TRAVEL AND THE ECONOMY*, London

Wu, Z. and XU (2000) Trends in China's domestic tourism development at the turn of the century. *International Journal of Contemporary Hospitality Management*, 12(5):296-299.

Yu and Smith (2007). *Hospitality, Chinese Style*. China's hotel industry is maturing as differentiated markets evolve and hotel companies target niche segments.
Chinabusinessreview.com.

Zhang, P. and Zhang (2000). China's international tourism development: present and future.
International Journal of Contemporary Hospitality Management, 12(5):282-290.

LIST OF APPENDIX

Appendix 1.1: Pictures of Focus Group Interviews in Brunei

Appendix 1.2: Letters of Agreement upon SWOT Analysis of Tourism in Brunei

Appendix 1.3: Article “Brunei: An Unexpected Treasure”

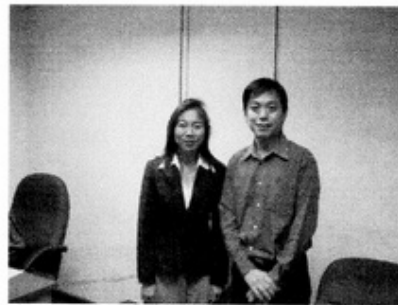
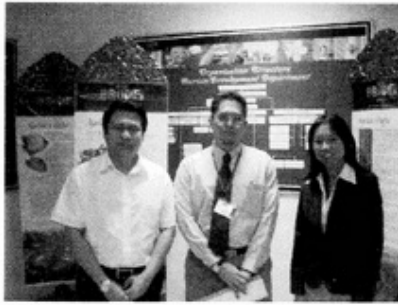
Appendix 1.4: Article “Image positioning in Brunei”

Appendix 2.1: Article “China on the Move”

Appendix 2.2: Article “Image positioning in China”

Appendix 1.1

Picture of Focus Group Interview in Brunei



Appendix 1.2

Letter of Agreement upon SWOT Analysis of Tourism in Brunei

Brunei Tourism
 Bandar Seri Begawan, Brunei
 March 28, 2007

ASEAN Image Positioning: The Case of Brunei

To Whom It May Concern:

According to the project of establish and strengthen collaborative networks among all tourism-related stakeholders and to create ASEAN databank to facilitate the growth for tourism that has been implemented by the Thailand Research Fund (TRF). The project objectives are to create the tourism research networks of tourism-related stakeholders in ASEAN, China, Republic of Korea and Japan, to build up the ASEAN Tourism Research Databank and to enhance collaboration of tourism research undertaking in ASEAN, China, Republic of Korea and Japan. At the present, Phase Two: ASEAN, China and Republic of Korea Image Positioning is in progress. To accomplish this phase, Thai researchers have visited to collaboratively set up a focus group to approve SWOT analysis and themes in relevant country.

For the case of Brunei, the focus group meeting is implemented for academic research on March 28, 2007 in Bandar Seri Begawan, Brunei. The objectives are to discuss, consider and adopt the current situation of tourism development in Brunei Darussalam towards SWOT analysis, which is the model identifying the main strengths, and weaknesses (internal analysis) against the main opportunities and threats (external analysis). The information from this meeting is employed as primary data to propose image position for Brunei. Moreover, the image positioning is leaded to create promotional themes of the country and 15 destinations are listed according to such theme.

Towards the end of the focus group meeting, the representative of Brunei Tourism and other participants agreed upon the SWOT analysis of the current situation of tourism development in Brunei, the image positioning, promotional theme and the recommended attractions as shown in the attachments.

Name:



Mohd Jeffrey HJ Mohd Sunny Lai
 Tourism Officer
 Marketing and Promotions

Brunei Tourism
 Ministry of Industry and Primary Resources
 Jalan Menteri Besar, Bandar Seri Begawan - BB39110
BRUNEI DARUSSALAM
 Tel: (673) 238 28 22 ext 2009 Fax: (673) 238 28 24 D/L: (673) 238 28 29
 E-mail: jeffrey@brunetourism.travel / Jeffrey.sunnyla@gmail.com

Appendix 1.2 (cont.)

Letter of Agreement upon SWOT Analysis of Tourism in Brunei

Brunei Tourism
 Bandar Seri Begawan, Brunei
 March 28, 2007

ASEAN Image Positioning: The Case of Brunei

To Whom It May Concern:

According to the project of establish and strengthen collaborative networks among all tourism-related stakeholders and to create ASEAN databank to facilitate the growth for tourism that has been implemented by the Thailand Research Fund (TRF). The project objectives are to create the tourism research networks of tourism-related stakeholders in ASEAN, China, Republic of Korea and Japan, to build up the ASEAN Tourism Research Databank and to enhance collaboration of tourism research undertaking in ASEAN, China, Republic of Korea and Japan. At the present, Phase Two: ASEAN, China and Republic of Korea Image Positioning is in progress. To accomplish this phase, Thai researchers have visited to collaboratively set up a focus group to approve SWOT analysis and themes in relevant country.

For the case of Brunei, the focus group meeting is implemented for academic research on March 28, 2007 in Bandar Seri Begawan, Brunei. The objectives are to discuss, consider and adopt the current situation of tourism development in Brunei Darussalam towards SWOT analysis, which is the model identifying the main strengths, and weaknesses (internal analysis) against the main opportunities and threats (external analysis). The information from this meeting is employed as primary data to propose image position for Brunei. Moreover, the image positioning is leaded to create promotional themes of the country and 15 destinations are listed according to such theme.

Towards the end of the focus group meeting, the representative of Brunei Tourism and other participants agreed upon the SWOT analysis of the current situation of tourism development in Brunei, the image positioning, promotional theme and the recommended attractions as shown in the attachments.

Name:

Foo C.P
Country Travel Centre
ST



RECEIVED BY TOURISM DEPARTMENT

Foo C.P
 Secretary

No: Q 48 Landed at Industrial Estate RM 714
 P. O. Box 1778, 95400, Negara Brunei Darussalam.
 Tel: 2391051 Fax: 2394885
 E-mail: tourism@brunei.gov.bn

Appendix 1.2 (cont.)

Letter of Agreement upon SWOT Analysis of Tourism in Brunei

Brunei Tourism
Bandar Seri Begawan, Brunei
March 28, 2007

ASEAN Image Positioning: The Case of Brunei

To Whom It May Concern:

According to the project of establish and strengthen collaborative networks among all tourism-related stakeholders and to create ASEAN databank to facilitate the growth for tourism that has been implemented by the Thailand Research Fund (TRF). The project objectives are to create the tourism research networks of tourism-related stakeholders in ASEAN, China, Republic of Korea and Japan, to build up the ASEAN Tourism Research Databank and to enhance collaboration of tourism research undertaking in ASEAN, China, Republic of Korea and Japan. At the present, Phase Two: ASEAN, China and Republic of Korea Image Positioning is in progress. To accomplish this phase, Thai researchers have visited to collaboratively set up a focus group to approve SWOT analysis and themes in relevant country.

For the case of Brunei, the focus group meeting is implemented for academic research on March 28, 2007 in Bandar Seri Begawan, Brunei. The objectives are to discuss, consider and adopt the current situation of tourism development in Brunei Darussalam towards SWOT analysis, which is the model identifying the main strengths, and weaknesses (internal analysis) against the main opportunities and threats (external analysis). The information from this meeting is employed as primary data to propose image position for Brunei. Moreover, the image positioning is leaded to create promotional themes of the country and 15 destinations are listed according to such theme.

Towards the end of the focus group meeting, the representative of Brunei Tourism and other participants agreed upon the SWOT analysis of the current situation of tourism development in Brunei, the image positioning, promotional theme and the recommended attractions as shown in the attachments.

Name: NELSON KWA
(General Manager)
WING ON TRAVEL & TRADING SDN BHD



柯文偉
Nelson Kwa
General Manager

永安旅行貿易(汶萊)有限公司
WING ON TRAVEL & TRADING SDN BHD

207 2nd Floor, Kompleks Mohamed Yusoff
Jalan Kubah Mallam Di-Raja
Jalan Tutong (SA2111)
P. O. Box 29 Bandar Seri Begawan B58670
Brunei Darussalam
Tel : 2220486, 2224823
HSP : 8721411
Fax : 2220536
Email : wot@brunei.bn
nelson@brunei.bn

Appendix 1.2 (cont.)

Letter of Agreement upon SWOT Analysis of Tourism in Brunei

Brunei Tourism
 Bandar Seri Begawan, Brunei
 March 28, 2007

ASEAN Image Positioning: The Case of Brunei

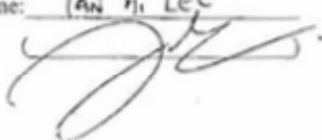
To Whom It May Concern:

According to the project of establish and strengthen collaborative networks among all tourism-related stakeholders and to create ASEAN databank to facilitate the growth for tourism that has been implemented by the Thailand Research Fund (TRF). The project objectives are to create the tourism research networks of tourism-related stakeholders in ASEAN, China, Republic of Korea and Japan, to build up the ASEAN Tourism Research Databank and to enhance collaboration of tourism research undertaking in ASEAN, China, Republic of Korea and Japan. At the present, Phase Two: ASEAN, China and Republic of Korea Image Positioning is in progress. To accomplish this phase, Thai researchers have visited to collaboratively set up a focus group to approve SWOT analysis and themes in relevant country.

For the case of Brunei, the focus group meeting is implemented for academic research on March 28, 2007 in Bandar Seri Begawan, Brunei. The objectives are to discuss, consider and adopt the current situation of tourism development in Brunei Darussalam towards SWOT analysis, which is the model identifying the main strengths, and weaknesses (internal analysis) against the main opportunities and threats (external analysis). The information from this meeting is employed as primary data to propose image position for Brunei. Moreover, the image positioning is leaded to create promotional themes of the country and 15 destinations are listed according to such theme.

Towards the end of the focus group meeting, the representative of Brunei Tourism and other participants agreed upon the SWOT analysis of the current situation of tourism development in Brunei, the image positioning, promotional theme and the recommended attractions as shown in the attachments.

Name:

Tan A. Lee


Al Lee Tan
 Executive Director

MegaBorneo Tour Planner

"Your Reliable Ground Handler in Brunei & Beyond"

Internal Division of MegaBorneo Marketing Services

Unit 217, 2nd Floor, Plaza Athira, Jalan Kubah Makam Di Raja,
 Mile 1 Jalan Tutong, Bandar Seri Begawan, Brunei Darussalam
 Tel: 673-2224026 / 2224027 Fax: 673-2224028
 Email: megaborneo@brunet.bn

Appendix 1.3

Brunei: An Unexpected Treasure

Dr. Surapit Promsit

Director, Office of Special Affairs

Director, MBA (Hospitality Management)

Suan Dusit Rajabhat University, Thailand

Abstract

This research reviews related academic work on Brunei and its tourism development. By using a qualitative research approach, interviews with key informants were conducted in order to uncover the current and future tourism situations in Brunei. SWOT analysis is formed based on the literature and the interview results. It is found that Brunei is considered a new tourism destination to several tourist markets. It is also found that Brunei is working to cope with diversity of tourism facilities in order to serve different tourism markets. Being

Introduction

Being known as “A Kingdom of Unexpected Treasures”, Brunei is a country which is ready for international tourism development. This is to do with a manageable size of the country, the government's investment and attention on tourism, and abundant natural resources. In comparison to many other countries, Brunei is humble but well-developed tourist attractions for international tourists.

By using a qualitative approach, this paper aims to discuss the strengths, weaknesses, opportunities, and threats in order to show the positioning of the tourism industry in Brunei. In doing so, the interviews with key informants were organized to provide an insight to the discussion of the tourism industry in China. By employing the framework of the whole tourism system (WTS) (Leiper 2003), the paper also discusses the change of tourism in Brunei over past decades. This also includes the discussion and recommendation of what it is like to be part of the tourism business within Brunei in the next few years.

SWOT ANALYSIS

The SWOT analysis for China is made up of information from research literature and interviews with key informants. This includes representatives from the following organizations: Brunei Tourism and tourism organizations such as travel agency.

The strengths of Brunei are as follows.

1. Tourism Resources

One of the key strengths of Brunei's tourism is its richness of natural and cultural attractions. This includes attractions within the country, from sophisticated cities to rainforests full of wildlife, to architectural and cultural heritage water village, and to some of finest beaches. Ministry of Industry and Primary Resources considers Brunei's tourism resources into 4 pillars, namely, nature, people and culture, heritage and contemporary Asia.

In terms of nature, in *The Traveltrade Brunei Guide* (2005), it is claimed that Brunei's forests remain a magnificent natural tourism resource. This refers to the fact that with Brunei's oil wealth it means that the country does not need to log its rainforests. In terms of accessibility, Brunei's abundant natural attractions are surprisingly easy to visit, within an hour or so from the capital. In Brunei, tourists will find that more than 70 percent of the country are still covered in primary forest. Brunei has acted to conserve some 32,000 hectares as forest reserves and allocated 50,000 hectares as national parks which are some of the finest in Asia (<http://www.visitasean.travel>, 2006). The country's rainforests and mangrove swamps shelter a variety of insects, crabs, snails, prawns, fish, otters, turtles, lizards, bats, flying foxes, bird species (especially kingfishers), monkeys (including the rare proboscis monkey) and crocodiles (Traveltrade Brunei Guide, 2005). Ecotourism is as a result one of the key products for tourists. However, to be able to serve international tourists better, additional transportation and accommodation facilities are required in the areas outside the capital (<http://www.eiu.com>, 2006).

Famous natural attractions include Wong Kadir Waterfall, Luagan Lalak Recreation Park, Merimbun Lake & Heritage Park, Sungai Liang Forest Reserve, Pantai Seri Kenangan

Beach, Wasai Kendal, Taman mini Perayaan, Pulau Selirong, Kuala Belalong Mini Park and Ulu Temburong National Park (<http://www.tourismbrunei.com>, 2007).

For people and culture, many different ethnic and cultural groups live in Borneo, alongside more recent migrants from China, Indonesia, the Philippines and India. Evidence of early trade with India and China (in camphor, spices, precious woods and exotic jungle products) dates from the sixth century AD (Traveltrade Brunei Guide, 2005). The attractions within Brunei partly concerns with diverse people and culture. This refers to places such as Labi Long Houses, Sungai Basong Recreational Park, Tamu Tutong Kampong Seramburgan, Jame'Asr Hassanil Bolkiah Mosque, Omar Ali Saifuddien Mosque, Kampong Ayer (Water Village), the Arts & Handicraft Centre, Malay Technology Museum and Batang Duri (<http://www.tourismbrunei.com>, 2007). Attractions, in relations to their people and culture, become a key pull strategy for both international and, especially domestic tourists who seriously consider culture and religion as part of their life.

In terms of heritage, the Sultan claims his kingdom is the oldest Malay state on the island of Borneo, "like pearl cultured in an oyster of traditions kept intact". For centuries, the name Borneo to Europeans conjured up visions of a destination fabulously exotic and far-off, like Timbuktu or Tibet. In fact, the name Borneo is an ancient corruption of the name Brunei. People have lived on Borneo for at least 35,000 years. Brunei's rich and majestic royal heritage adds to the blend and distinguished the country from surrounding states (Traveltrade Brunei Guide, 2005). A long history of the country creates a value for tourism. The heritage attractions include Silver Jubilee Park, Royal Regalia Museum, Brunei History Centre, Istana Nural Iman, the House of Twelve Roofs, Mausoleum of Sultan Bolkiah and the Brunei Meseum (<http://www.tourismbrunei.com>, 2007).

Another key strength for Brunei is the fact that the country is known for being 'Contemporary Asia'. Brunei is a compact, safe, peaceful, healthy and easy-to-explore family-friendly destination. It also offers some of the best golfing facilities in the region. The attractions concerning contemporary Asia are Billionth Barrel Monument, Oil & Gas Discovery Centre (OGDC), Jerudong Park, Royal Brunei Golf, Empire Hotel & Country Club, Dive Center,

the Mall, RBA Golf Club and Yayasan Complex (<http://www.tourismbrunei.com>, 2007). A key strategy for Brunei is, therefore, a combination of ancient and modern tourism.

2. Promotional Campaign

Promotional campaigns of Brunei have been done by Brunei Tourism that is a division within the Ministry of Industry and Primary Resources. Brunei Tourism is in charge of tourism development, marketing and promotion as well as licensing to tour companies. The division has been actively engaged in the promotion of tourism to Brunei since the mid 1990s. It was then that tourism gained recognition as a rising industry capable of greatly contributing to the Kingdom's economic diversification efforts, as well as becoming a significant generator of future employment opportunities for Brunei's citizens (The Traveltrade Brunei Guide, 2005, <http://www.tourismbrunei.com>, 2007).

Brunei Tourism is working to market its undiscovered tourism potential in the competitive regional tourism market. Brunei will retain its tagline "kingdom of unexpected treasures" (used since 2001) alongside the "green heart of Borneo" label (Traveltrade Brunei Guide, 2005). The current tagline "The Green Heart of Borneo" is aimed to better reflect that nature and eco-tourism are the kingdom's strong selling points. The other tagline "A Kingdom of Unexpected Treasures" has been retained, as that is exactly what Brunei is (Radio Televisyen Brunei, 2004). A recent launch of a new campaign shows clearly what Brunei tourism can offer to tourists domestically and internationally. This refers to the four pillars of Brunei's strengths: nature, people & culture, heritage and contemporary Asia (James, 2005 and <http://www.tourismbrunei.com>, 2007). This aims to present Brunei as a must-travel destination for those seeking something different from neighboring countries like Singapore, Malaysia and Indonesia, without competing directly with them (James, 2005). Brunei's key strength is then its clear positioning strategy as well as its marketing strategy.

3. Niche Markets

Following its current promotion strategy, Brunei focuses on niche markets. This refers particularly to the market of quality tourists who are conscious with both positive and negative environmental impacts generated by tourism. Family travel segment is one good example of

Brunei's promotional and positioning strategy as such market can be served by the products of Brunei very well. This refers to main attractions such as theme parks (shopping complexes, sports and water-related venue etc.) and spas (Traveltrade, 2005).

Brunei is also an ideal for a stopover enroute to other part of Borneo. Despite its small size, there are really interesting things to see but one or two nights is sufficient (Traveltrade, 2005). Furthermore, with Sabah and Sarawak of Malaysia as well as Kalimantan that are located next door, tourists can spend weeks uncovering Borneo's magnificent natural beauty, using Brunei's capital Bandar Seri Begawan as a gateway (<http://www.visitasean.travel>, 2006). Moreover, the flag carrier; Royal Brunei Airlines is focusing on establishing itself as an alternative carrier to Asia, with Brunei as a stopover (Traveltrade, 2005).

The weaknesses are as follows.

1. Human Resources Shortage

Human resources issue is one of the key weaknesses for Brunei's tourism. The industry is developed in a fast pace and as a result the country lacks of skilled labor required by the tourism and hospitality industry. In relation to World Travel & Tourism Council statements (WTTC, 2006) focusing on human resources, it can be seen that Brunei's travel and tourism industry is hardly promoted at all in terms of a possible career choice. WTTC (2006) suggests that in order to enhance the level of the workforce, to boost numbers and to raise the image of travel and attract enthusiastic, career-minded and high quality employees, a dedicated travel and tourism training facility should be established by the Brunei government in collaboration with the private sector. The government should be the center in providing education, training and, most importantly, career development strategy for human resources with the country.

2. Need for Reliable Statistics

Another weakness for tourism in Brunei is the critical need for reliable statistics. In principle, quality and reliable statistics are critically needed for policy – and decision – making processes. However, Brunei's economic and marketing related Travel & Tourism research and statistics at present are extremely inadequate, both in terms of quality and

quantity. As a result, public sector analysis and related policies tend to overlook, or underestimate, the impact of industry, or deal only with its smaller components. Nevertheless, the Department of Economic Planning & Development (JPKE) has recently moved through its Action Plan, to improve National Accounts' statistics. This augurs well for Travel & Tourism. High-quality research and the collection of relevant data on a regular basis are crucial to the development of an effective strategic plan for the tourism industry in a country like Brunei. An example of a current tool for forecasting is one which is developed by WTTC who claims that it is the first organization to attempt an assessment of current trends and future growth prospects. WTTC and its research's partner Oxford Economic Forecasting (OEF) have developed an instrument called Tourism Satellite Account (TSA), a significant tool for planning and policy development. Updating the TSA on an annual basis will help to ensure that adequate data is available to factor Travel & Tourism into economic and employment strategies. With a proper tool, it will provide the Ministry and Brunei Tourism with useful economic data beneficial for short and long marketing and promotions planning. In addition, this will help raise awareness among public and private sector stakeholders within the industry a full impact of tourism across the national economy including hotels, restaurants, retail business, constructions, real estate, agriculture as well as other sectors (WTTC, 2006).

3. Geography Misconception

Geography misconception can be considered as another weakness for the country. Due to the oil-rich status of Brunei, many tourists consider the geography of Brunei to be in the Middle East. Some are confused between Brunei and the Gulf state of Bahrain. Brunei is also commonly confused with Bhuthan in the Himalayas or Burundi in Africa. However, Brunei tourism has begun 'The Green Heart of Borneo' campaign to create awareness of the destination and to help promote its geographical location (Traveltrade Brunei Guide, 2005). As mentioned, it is trying hard to position the country effectively in the mind of the public by their current promotion and marketing strategies.

The opportunities for Brunei tourism are as follows.

1. Good Standard of Living

Brunei's prosperous economy, mainly oil- and gas-based, provides a good standard of living brings positive social spin-off, including high literacy rates, long life expectancy, low infant mortality rates, low unemployment and crime rates. Brunei is known as being a destination with quality host community. Unlike several Asian countries, the poverty is minimal and the overall conditions of the people become a great opportunity for the tourism industry. As several tourism literature mentions, tourism within a country with conditions similar to those developed ones can potentially make the tourism industry prosper with quality.

2. Government Policy and Support toward Tourism Industry

Currently, the government is working towards economic diversification – in which tourism plays as important role (<http://www.visitasean.travel>, 2006). Moreover, governmental plans for the future also include strengthening the tourist sectors. The government's objective is to increase international tourist arrivals by minimum average rate of 7 percent a year (<http://www.eiu.com>, 2006), as well as to increase average length of stay and expenditure (<http://www.cia.gov>, 2007). As mentioned, it can be seen that the government puts strong efforts on making the tourism industry grow and, at the same time, to ensure that it is doing so in a sustainable way.

3. Political Stability and Harmonious External Relationships

Brunei enjoys a high degree of political stability, based on a monarchy that is espousing a moderate form of Islam as a unifying force for the nation. Furthermore, political violence is highly unlikely to occur. The main channel for Brunei's political and economic cooperation remains the regional Association of South-East Asian Nations (ASEAN). Relation with Brunei's immediate (and much larger) neighbors Indonesia and Malaysia are helped by the fact that all three countries share a common Islamic identity and are populated by an ethnic-Malay majority. Moreover, Brunei is one of the disputants to maritime areas in the South China Sea, but this has not adversely affected the country's relations with other parties to the dispute (including China and Indonesia). Beyond the immediate region, relations with China and Japan are positive (WMRC, 2003). This good environment can be one of factors that may

encourage national and international tourism organizations to operate their business within the country.

4. Terror Free

Tight security and political control in the sultanate mitigate the risk of terrorism. Moreover, Brunei's relations with its regional neighbors are very good, and the country faces no external threats (WMRC, 2003). Therefore, there are no specific threats against tourism industry in the country.

5. Development of Low-Cost Carriers

The advent of low-cost carriers in Asia has and continues to make profound impacts on other stakeholders of tourism industry. Low-cost carriers force Flag carriers to lower their airfares, which encourages frequent travel and brings visitors into more destinations. On the other hand, Flag carriers are fighting back by improving in-flight services, especially for business and first class passengers. This indicates a trend towards polarization of travel expenditure of travelers. Moreover, some low-cost carriers are venturing into the long-haul market (flights that take more than four hours), the boundaries between low-cost carriers and flag carriers are blurring. The fierce competition and too many low-cost carriers will force further consolidation and/or merger among them. The focus of low-cost carriers' expansion will also shift from South-east Asia to the north and southwest of the region (<http://www.unwto.org>, 2006).

The threats are as follows.

1. Terror Attacks, Pandemic Outbreaks and other Health Concerns

Since the beginning of 2000s, the global tourism industry has been adversely affected by a series of obstacles to growth such as the terrorist attacks of September 11 2001, the Bali Bombing on October 12, 2002, and Severe Acute Respiratory Syndrome (SARS) (Horner and Swarbrooke, 2004). All problems made lots of difficulties to tourism industry as a whole. The revenue from tourism industry decreased obviously and unexpectedly. In some countries, lack of crisis management readiness persists.

It has been suggested that improving of safety and security should be done by host communities cooperating with government. Due to the visitors decisions making that make base not so much on risk itself as on perception of risk, timely, accurate and responsible communication is even more important than the outbreak itself (<http://www.unwto.org>, 2006). As for timely communication, it is expected that National Tourism Organizations (NTOs) will be more proactive and vigilant in their communication strategies. NTOs will also try to secure more communication channels to ensure their information content reach the target audience in time. The following trends relating to timely communication are predicted;

- Further development of multilingual versions of NTO's websites;
- Close coordination among NTOs, tourism-related government agencies, foreign ministries, and international organizations to provide accurate travel advisories;
- More cooperation and exchanges of information between NTOs and their foreign counterparts; and
- Link with websites of travel agencies specialized in selling the destination and with GDS websites.

Moreover, therefore should closely monitor media reports to mitigate the negative impact of some irresponsible blanket reports of the attacks or outbreaks. Media relations management needs to be proactive in a world full of information and media channels (<http://www.unwto.org>, 2006).

However, some health concerns have positive impacts on tourism trends of the country. Some international inbounds tourists may concern deep-vein thrombosis (DVT). This syndrome appears to be directly related to taking long-haul flight and for key markets, such as Asia and North America or Asia and Europe, trips to Asia-Pacific destinations always include a long haul flight. Due to the publicity surrounding this illness some people are now unwilling to take a long flight (Horner and Swarbrooke, 2004). As the geography of Brunei is located in the half way between Asia and North America or Asia and Europe, therefore, the country can be promoted to be stopover destination.

2. Seasonal Smoke/Haze

Brunei is periodically affected by seasonal smoke/haze resulting from forest fires when they hit their peak in mid- to late-summer in Indonesia Borneo. However, unless the fires are particularly serious, there are unlikely to be any effects on health (WMRC, 2003).

3. High Level of Competitions

Regarding to the positive economic impacts of tourism, most of the countries have used tourism to diversify their economy. Therefore, high level of competition occurs among countries.

However, WTO (2006) recommends that fierce competition also creates more cooperation with in the region. This trend of both competition and cooperation is likely to continue as tourists are becoming more experienced, savvy and look for more diversity. Another trend identified is the regional consolidation that results in a coordinated marketing drive. ASEAN countries are promoting their destinations as a whole.

Conclusion: Image Positioning

According to the SWOT analysis above, image positioning of Brunei is represented by natural tourism resources especially, its primary rainforests, which the government has taken great strides to protect. In Brunei, visitors can have the unique opportunity to walk in the rainforest canopy, which houses an abundance of birds, plants, micro fauna and mammals, such as the rare Bornean proboscis monkey, making up one of the world's richest and most diverse ecosystems. Brunei is also home to some of Asia's best nature reserves and field study centres, such as the world famous Ulu Temburong National Park and the Kuala Belalong Field Study Centre, both of which offer an exciting array of ecotourism and adventure activities. Indeed, the longboat ride down a winding jungle river, surrounded on all sides by pristine rainforest makes the journey as much of an adventure as the destination itself. With few tourists around, nature lovers will appreciate having this untouched paradise all to them and may explore at their own pace, returning to lodgings in the capital when they have completed their visit, or staying in more primitive forest lodgings nearby.

References

- Asean Tourism Association 2006 *Destinations: Brunei Darussalam* [online] Asean Tourism Association, Malaysia. Available from: <http://www.visitasean.travel/CountryDestination.aspx?COID=27> [Accessed 23 March 2007]
- Brunei Tourism*, (n.d.) Available from: <http://www.tourismbrunei.com> [Accessed 20 March 2007]
- Campaigning to put Brunei on the tourism map (June 2005) *TRAVELTRADE BRUNEI GUIDE*, p.3
- Central Intelligence Agency (CIA) 2007 *CIA – The World Factbook –Brunei* [online] Central Intelligence Agency, Washington, D.C. Available from: <https://www.cia.gov/cia/publications/factbook/print/bx.html> [Accessed 25 March 2007]
- Economist Intelligence Unit (EIU) 2006 *Country Profile 2006, Brunei* [online] The Economist Intelligence Unit, London. Available from: <http://web.ebscohost.com/ehost/pdf?vid=10&hid=113&sid=822ad21b-fbe7-425a-a296-6504bc81ab28%40sessionmgr102> [Accessed 20 March 2007]
- Horner, S. and Swarbrooke, J. 2004 *International Cases in Tourism Management* Elsevier Butterworth-Heinemann, Oxford
- James, M. 2005 *Brunei uses nature to build brand* [online] Media Asia Available from: <http://web.ebscohost.com> [Accessed 22 March 2007]

Radio Televisyen Brunei 2004 *Tourism, a Major Factor in Development of "The Green Heart of Borneo"* [online] Radio Televisyen Brunei, Bandar Seri Begawan. Available from: <http://www.rtb.gov.bn/NewsUpdate/2004/January/290104/main6.htm> [Accessed 22 March 2007]

Small nation big on attractions (May 2005) *TRAVELTRADE*, p.18

World Markets Research Centre (WMRC) 2003 *WMRC Country Report: Brunei* [online] World Markets Research Centre, London. Available from: <http://www.policyconcepts.com/Country-Report-Brunei.pdf> [Accessed 20 March 2007]

World Tourism Organization (WTO) Regional for Asia and the Pacific 2006 *MEGA-TRENDS OF TOURISM IN ASIA-PACIFIC* [online] World Tourism Organization, Madrid Available from: http://www.unwto.org/regional/east_asia_&_pacific/publications/megatrend.pdf [Accessed 21 March 2007]

World Travel & Tourism Council (WTTC) 2006 *BRUNEI DARUSSALAM: THE IMPACT OF TRAVEL AND THE ECONOMY*, London

=====

Appendix 1.4

Image positioning in Brunei

Dr. Surapit Promsit

Director, Office of Special Affairs

Director, MBA (Hospitality Management)

Suan Dusit Rajabhat University, Thailand

Image positioning of Brunei is represented by **natural tourism resources** especially, its primary rainforests, which the government has taken great strides to protect. In Brunei, visitors can have the unique opportunity to walk in the rainforest canopy, which houses an abundance of birds, plants, micro fauna and mammals, such as the rare Bornean proboscis monkey, making up one of the world's richest and most diverse ecosystems. Brunei is also home to some of Asia's best nature reserves and field study centers. Indeed, the longboat ride down a winding jungle river, surrounded on all sides by pristine rainforest makes the journey as much of an adventure as the destination itself. With few tourists around, nature lovers will appreciate having this untouched paradise all to them. From virgin rainforests and coral reefs, stunning waterfalls and mangrove-covered islands to easy-to-visit nature reserves and one-of-a-kind jungle canopy walkways, a visit to Brunei is a glimpse at Mother Nature in her purest form. Visitors may explore at their own pace, returning to lodgings in the capital when they have completed their visit, or staying in more primitive forest lodgings nearby. Information of the impressive tourist attractions is provided regarding to the Brunei's four districts; Temburong, Brunei-Muara, Tutong and Belait.

Temburong District

The geographically district, Temburong District contains dense forest and patches of land utilized for



hill rice. Ulu
Temburong
National Park
is the nation's
first as well as
one of the best



preserved rainforests in the world and houses a wealth of biodiversity, offering visitors the once-in-a-lifetime opportunity to look out over the rain forest canopy from its elevated walkways. Perhaps the jewel in the crown of Brunei's natural wonders is this untouched area of Borneo, accessible only by longboat. While in the park, visitors will see crocodiles, monkeys and rare egrets as well as be immersed in the jungle sounds, smells, and the awe-inspiring feel of total remoteness. Walk in the rainforest canopy at dawn or sunset for feeling the awe-inspiring power of nature and a view of the earth in its purest form. Return to the



comforts of the capital after an adrenalin-rush of rafting down the Tamburong River. Visitors who wish to explore the jungle wilderness may opt to spend their two nights deep in the park, while those looking to experience Temburong's indigenous lifestyle attractions may choose one night at either the Bahgar Lodge or Rainforest Lodge and one night at the National Park.





The isolated **Kuala Belalong Mini Park** is a focus for learning about the lowland tropical forests. The park includes a waterfall, a pond, a landscape garden, and traditional huts exhibiting pictures of His Majesty's Temburong visits and display finding made at the Kuala Belalong Field Studies Centre.



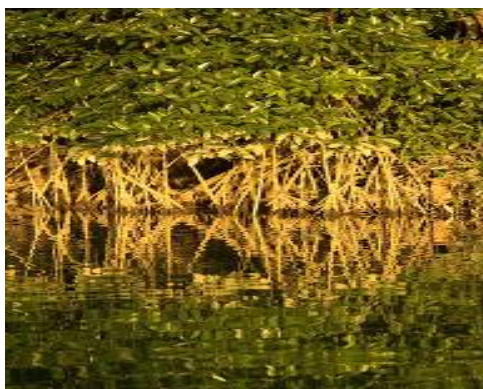
Brunei-Muara District

Meanwhile, at **Pulau Selirong** (Selirong Island) is a mysterious ambiance pervades on “Mosquito Island”. This is a small mangrove island situated of Brunei Bay, affording



adventurous visitors a glimpse at a unique tropical ecosystem. It consists of 100% mangroves, majority of the *Rhizophora* species. It has about 3 kilometers plank walkways between matured trees. Visitors are able to enjoy the walk within the mangrove swamp – the natural breeding place of many sea creatures.

Listen to the singing of the different species of birds and the clapping sound of the clams as they shut up when the tide ebbs. Experience the feeling of anticipation of encountering one of the species of mangrove snakes or primates, look out for proboscis monkeys and flying foxes on your. It is very ideal place for birdwatchers to spend their day.



Easy access to the rain forest and waterfalls is possible at **Wasai Kendal**. This is a retreat famous for its wide trails and tranquil waterfalls, picturesque pools and beautiful display of tropical flora.

Less than 27 kilometers from Bandar Seri Begawan's town center, **Muara Beach**'s long, quite esplanade invites leisurely strolling and is an ideal destination for a family outing. Amenities here include a well-equipped picnic area, a children's playground, changing and toilet facilities, as well as weekend food and drink stalls.

Meragang Beach is another quiet spot for a sunset stroll or a beach jog. The area is also known as "Crocodile Beach". The origin of this name is unknown but despite its name, visitors encounter no such creature along this peaceful, unspoilt stretch of sand – only a warm sea breeze, a brilliant sunset or double rainbow.

A mere 10 minutes drive from Muara, **Serasa Beach** is a haven for water sports enthusiasts. It is also home to the Serasa Watersports Complex, which provides comprehensive facilities for sporting and recreational activities including jet skiing, kayaking, windsurfing, regatta sailing, power boat racing, aqua sports training and water-skiing.





In addition to the natural attractions in the area of Muara district, **Kampong Ayer** or water village is one of the cultural tourist attractions. Today the Kampong has grown into one of the world's largest water villages and it has been described as the "Venice of the East" that are home to more than 30,000 people who live in traditional houses built on stilts over both banks of the Brunei River. Even four centuries ago, the size and complexity of Kampong Ayer greatly impressed the Magellan expedition, which received a stately welcome upon entering Brunei Bay in 1521. Although Kampong Ayer is still growing and its sprawling jumble of timber houses now stretches some eight kilometers along the river and most of the houses are now furnished with every modern amenity, a traditionally colorful and lively atmosphere remains. The stilted city is actually a collection of small kampungs each with their own names and their own government-appointed leaders, or Ketua Kampong. The myriad homes, which have piped water and electricity and are bedecked by forest of TV aerials, are interconnected by a maze of wooden walkways along which it is possible to walk from one end of the village to the other. The community is almost self-contained. It has shops, mosques, schools, a police station clinics and a centuries-old tradition of living over water. A compulsory stop in Kampong Ayer is the Mini Museum at the residence of Haji Mahmud bin Haji Mohamad at No. 159D, Kg. Saba Laut. Mukin Saba that displays traditional handcrafted brassware. Visitors are welcomed to wander along the Kampung's pathways at appropriate hours.





Tutong District



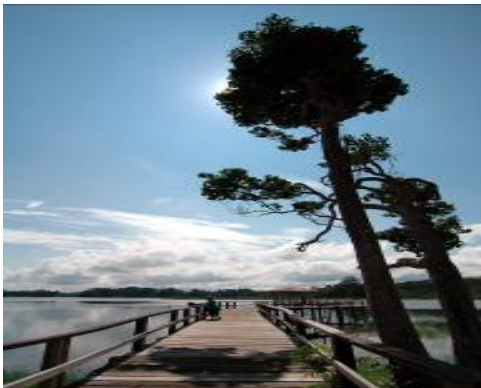
Seri Kenangan Beach is “the beach of beautiful memories”. This scenic locale is a popular recreation spot featuring a narrow spit of land with the South China Sea on one side and the Tutong River on the other. Seri Kenangan is located just five minutes drive from Tutong Town. Chalets, restaurants, huts a playground and food stalls are available.

Marimbun Lake & Heritage Park

Another distinctive Brunei attraction, this park is situated around an S-shaped lake and has been earmarked as an ASEAN National Heritage site.

Lake, 27 kilometers inland from Tutong, has developed into a popular picnic spot attracting large crows on Sundays. The large shallow freshwater lake is about 500 meters long by 150

meters wide, fringed by swamp and long grass. In the middle of the lake is an island. Elevated wooden walkways criss-cross the lake connect the shore and island at several points. Pavilions built off the walkways provide benches, tables and shade for picnics and nature observation. The far side of the island offers pleasant walks through primary jungle.



Sungai Liang Forest Reserve immense arboretum features virgin jungle transformed into a park with nature trails accessible for all levels of hiking experience. As visitors walk in the air above on a canopy walkway, they will see the diversity of jungle flora and fauna thriving in Brunei's rainforest.

Betait District

Luagan Lalak Forest Recreational Park is one of Brunei's more unique wonders, this alluvial freshwater swamp that swells to become a lake during heavy rains. A walkway meanders along the lake, allowing visitors a firsthand interaction with this unusual natural attraction.

Surrounded by primary rainforest, this **Wasai Wong Kadir** (Wong Kadir Waterfall) is reached after a rather challenging uphill trek. But the stunning reward at the end is worth every minute of the workout. Treks to Wasai Wong Kadir take approximately 45 minutes from the Luagan Lalak Recreational Park area.

For those who prefer a day of sun and sand while Belait, **Lumut Beach** offers complete facilities for picnicking, jogging and family outings. Added features here are the huts and shelters especially designed for visitors' relaxation.



in

Appendix 2.1

China on the Move

Dr. Surapit Promsit

Director, Office of Special Affairs

Director, MBA (Hospitality Management)

Suan Dusit Rajabhat University, Thailand

Abstract

This research reviews related academic work on China and its tourism development in the past decades. By using a qualitative research approach, interviews with key informants were conducted in order to uncover the current and future tourism situations in China. SWOT analysis is formed based on the literature and the interview results. It is found that China is on the move and continues to move in order to gain an attention from international tourists. It is also found that China is a country with great potential and challenge. Being new to the industry and to the competition, China is confronting with expectations from tourists and it is working hard to make itself 'better' than what the public thinks.

Introduction

Tourism in China has been growing and the trend will continue even before 2008 Olympics games. Being named as a country with heterogeneity, China is a place where tourists often find 'identities' within an identity. In other words, the geography and a great combination of different kinds of attractions make China one of the most attractive and, to a certain extent, one of the most charming and diversity countries in Asia.

Zhang, Pine and Zhang (2000) indicate in their research that tourism in China is still very young. Looking back to the history of tourism in China, it can be seen that tourism activities are not in the form of ordinary masses. Rather, traveling was key activities for emperors, monks and scholars. On the other hand, tourism to date in China is strongly part of

the country's economic earning. This can be seen from China's tourism public policy and planning where emphasis is placed on developing the tourism industry to gain strong financial contribution to China's national economy (Qian 1999). China's tourism today focuses equally on domestic and international tourism. Leisure industry is gradually developed within the umbrella of the tourism sector. What is interesting for China at the moment is, therefore, the change in the industry from the past to present and, most importantly, the way public, locally and internationally, perceives this change.

By using a qualitative approach, this paper aims to discuss the strengths, weaknesses, opportunities, and threats in order to show the positioning of the tourism industry in China. In doing so, the interviews with key informants were organized to provide an insight to the discussion of the tourism industry in China. By employing the framework of the whole tourism system (WTS) (Leiper 2003), the paper also discusses the change of tourism in China over past decades. This also includes the discussion and recommendation of what it is like to be part of the tourism business within China in the next few years.

China and Change

The literature on tourism in China shows consistent information on China and the change that gradually takes place within the country. During the past years, there is a positive development within the tourism industry in order to be more dynamic and receptive to both international tourists and, at the same time, domestic tourists who require better facilities and leisure activities of international standards. China also has a clear strategy to invest in the coastal region. This includes three municipalities and nine provinces (Liaoning, Hebei, Beijing, Tianjin, Shandong, Jiangsu, Shanghai, Zhejiang, Fujian, Guangdong, Guangxi, and Hainan) taking 87.2 percent of the total hotel income and 81.2 percent of all tourist arrivals (CNTA 1998; Yu and Smith 2007). Figure 1 illustrates the coastal area of China.

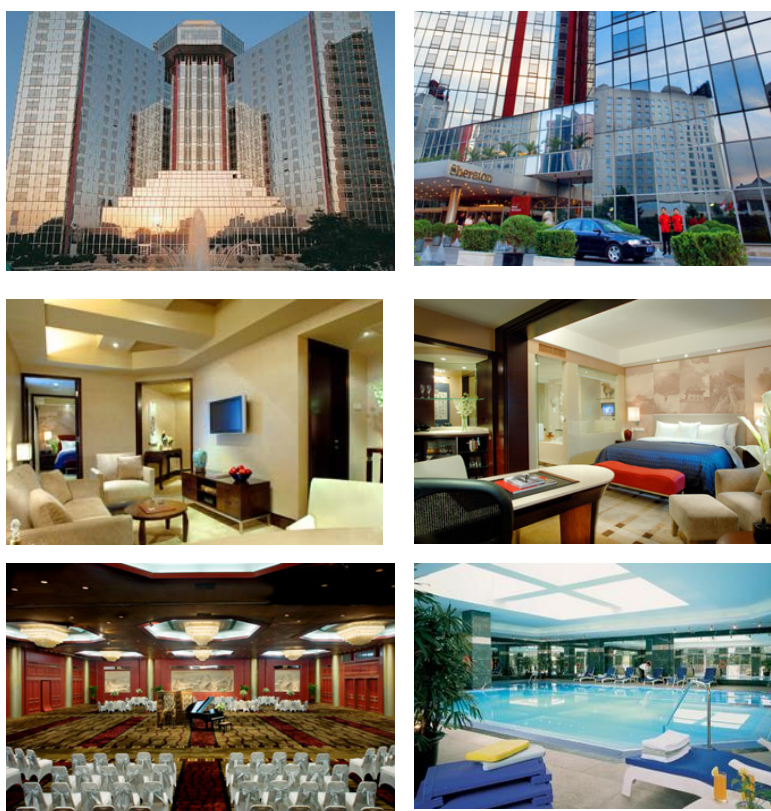
Figure 1 The Coastal Area of China



To recall on what China tourism has been in the past with the present change at present, it can be difficult. In 1978, when the country first opened itself to tourism and, in particular, international tourism, the supply of tourism facilities was very limited (Wen 1998). The fact that government was the major owner of most of the tourism facilities also prohibited the industry to be receptive to the need and demand of both domestic and international tourists. It was only in 1982 where there was a clear strategy from the government to allow a foreign direct investment project to enables China to compete with other countries. At the moment, there are 10,888 hotels in China and approximately 50 percent of those hotels are state –owned ones. Another 50 percent are owned by other forms of ownership (CNTA 2005). Looking at China in 2007 and forward, especially for the Olympics Games in 2008, China has come a long way and is now able to set itself as a proper ‘tourism destination’ for tourists, locally and internationally. The early days of poor quality of accommodations, poor tourist facilities, and strong communication barriers are gone. Local and international tourists can

enjoy a variety of cuisine and accommodation from local Chinese hotels to international chain hotels like Inter-Continental hotels group, Starwood hotels and resorts, and Accor. Figure 2 shows facilities of Sheraton in Beijing, China. China is, therefore, working hard not only to ensure that it can keep up with the needs of tourists and the competition from other destinations but also to convince the public that it is ready for the big Olympics event in 2008.

Figure 2 Sample of Sheraton, An International Hotel in China



One key factor of success for China is, therefore, its vision and courage to put the tourism industry into the national plan for social and economic development for the first time in the year 1986 (He, 1999). Within 10 years after that, the governments of 24 out of all 31 municipalities, provinces and autonomous regions have made the tourism industry of one of the key industries in their regions. Being a late comer of tourism, in comparison to other destinations of the world, China was in the old days the 40th destination visited by international tourists (WTO 1999) and now the 6th destination with 3.8 percent market share of the overall international tourist arrivals (WTO 1999). Table 1 shows this information. The change of

planned economy to the market economy is a great success. The 'openness' of hotel, catering, transportation, and retailing and other related industries becomes a key feature to the growth of the tourism industry in China.

Table 1: Top ten world tourist destinations in 1998 (in international tourist arrivals).

Rank	Country/ Region	International tourist arrivals	Market Shares (%)
1	France	70,000	11.2
2	Spain	47,743	7.6
3	USA	47,127	7.5
4	Italy	34,829	5.6
5	UK	25,475	4.1
6	China	24,000	3.8
7	Mexico	19,300	3.1
8	Poland	18,820	3.0
9	Canada	18,659	3.0
10	Australia	17,282	2.8
	Total	323,235	51.7
	World	625,236	100

Source: WTO, 1999

China is on a big change with a hope to grow and to be able to 'pull' tourists from all over the world. As Inskeep (1990) stated, the process of destination development is a complex one. It requires strong collaboration from a number of stakeholders. This includes the government; several business sectors such as accommodation/lodging, food and beverages, transportation; and, most importantly, local communities. The size of the country and large number of population further make the issue complicated. China is now not struggling to make itself known to the market but putting together 'attractions' as well as their systems to ensure that China as a whole tourism system is representing marketable destination attributes to both local and international tourists (Wen 1998; Zhang et al 2000). As mentioned earlier, China as 'one' tourism destination comprises of several sub-systems or

what most tourism literature indicates as being destination having various markers or identities (Urry 1990; Leiper 2003). Figure 3 shows different characteristics of China being a tourism destination. This is a considerable challenge for China in order to work with this complexity and, at the same time, to maintain, strengthen and enhance the competitive edge of the country.

Figure 3 Different characteristics of China being a tourism destination



Domestic and Outbound Tourism

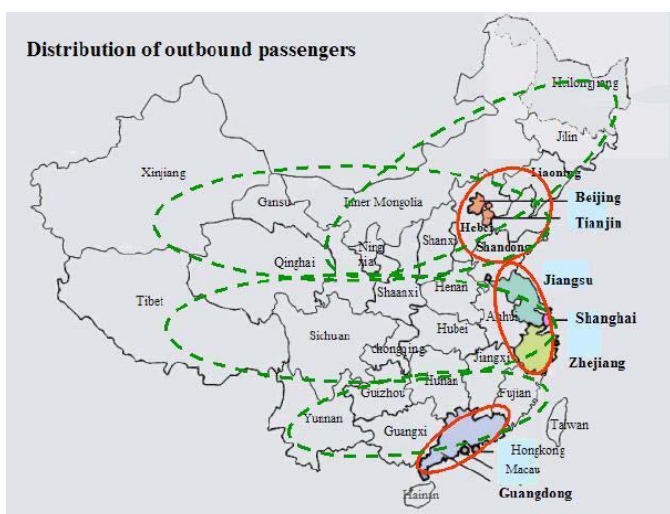
Domestic tourism is another strong feature of the tourism industry in China. China has put a lot of attention in developing its domestic tourism all over the country. CNTA has reported a continuous growth in the number of domestic tourists. It is predicted that the number of domestic tourist arrivals will keep growing to more than three times of the present and income nearly five times from the past until 2010 (CNTA 2005). In the past, tourism literature has shown that China did not consider domestic as a key target but found that domestic tourism was preventing international tourism from growing (Tisdell 1993). It is until the early 1990 that the government recognizes that the expansion of domestic tourism is an unavoidable phenomenon (Wen 1998). In-land tourism is named to be a famous destination for domestic tourists for economic reasons. This is in contrary to the international tourists where their preference is mainly on the coastal region. Domestic tourism is, therefore, one form of rural development particularly for in-land areas.

FIT and Ecotourism are also two new phenomenon for domestic tourism in China. In the old days, traveling in China was mainly a mass tourism and social events. Wu, Zhu and Xu (2000) reported that some domestic tourists prefer the FIT and ecotourism approach because they are able to tailor-made the trips in the way they want and, most importantly, they can protect the natural environment of the country. This is also because the main attractions of China, besides theme parks, sports, leisure/services, arts performance, are recreation parks. At present, there are 119 national parks and 500 provincial parks in the country.

Literature also mentions China becoming a major market for the global tourism industry. Chinese are predicted to be a large tourist population in the near future. This is because Chinese do travel for the purpose of visiting friends and relatives as well as of businesses besides those of leisure (Zhang et al 2000). Moreover, the impact of globalization and the increase in number of international tourists into the country are two reasons that push Chinese to go overseas. After a long close to the outside world, the media and foreign visitors make Chinese aware of the big world outside their country (Wen 1998). Recent

research also shows that there is a primary and secondary overseas market for the Chinese. In terms of a primary market, this refers to the nearby neighborhood countries such as Taiwan and Macau where businesses and family are bonded. Please refer to figure 4 for more information. In terms of a secondary market, this refers to countries where Chinese can choose to enjoy attractions that are different from home such as Thailand and Singapore.

Figure 4 A map illustrating a primary overseas market for Chinese tourists



SWOT Analysis for China

The SWOT analysis for China is made up of information from research literature and interviews with key informants. This includes representatives from the following organizations: Ministry of Tourism, CNTA, and TAT (China's Office).

The strengths are as follows:

1. Unique Tourist Attractions and Improved Facilities

In the past 20 year or so, the last decade in particular, the infrastructure and superstructure for international tourism in China have been improved greatly with the joint efforts of the state and local governments, public and private sectors. The serious shortage of

accommodation and transportation that once bottlenecked Chinese tourism development has been removed, and the problem of lack of tourist attractions and recreation activities have been resolved by and large. The increase of domestic air traffic capacity, speed-up of railways and regulation of operating modes and networking of expressways have made travel within China more convenient and comfortable. The introduction of overseas capital and management has helped China's hotel industry make a big leap forward, reaching or closely approaching the world standards in term of both hard- and soft wares. At the same time, the multiple investment channels may promote the building of tourist attractions, providing a greater choice of unique tourist products for inbound visitors. All of this will enhance the attractiveness of China's entire inbound tourism and improve China's image in international tourism market.

2. Coastal Region as a Favourable Tourism Distribution in China

The regional distribution of tourism in China consists of inland and coastal regions. It follows that the coastal region has an above average income per hotel room and more tourists per hotel employee. Further more, tourist receipts in the costal region per inhabitant are about twice those for China as a whole, as is the number of tourist per inhabitant of the coastal region. Therefore, China's heavy concentration of inbound tourism along the coast is a result of favorable conditions from both demand- and supply-side tourism factors. Factors such as greater international business connections on the coast, strong family connections to coastal provinces of oversea Chinese especially, the predominance of international entry ports along the coast and the location of several major tourist attractions may help to explain the existing spatial pattern of tourism.

3. Increasing in Tourism Revenues

According to the World Tourism Organization, in 2004, China was already the forth-largest international tourist destination in the world with 109m inbound visitors, and the country also received the fifth-highest total of foreign-exchange receipts from tourism, at US\$25.7bn.

In terms of outbound tourism, mainland-Chinese residents have become increasingly active travelers in recent years, particularly within Asia. However, the government has untied restrictions on outbound travel. By the end of 2005, a total of 115 countries have been granted Approved Destination Status (ADS) by the Chinese government. ADS is a bilateral tourism arrangement between China and foreign destination, whereby Chinese tourists are permitted to undertake leisure travel in groups to that destination. The number of overseas trips made by Chinese residents has risen rapidly, from 8.4m in 1998 to 28.9m in 2004.

The followings are the weaknesses.

1. Human Resources Shortage

The increasing demand for tourism in the country has and will continue to create a shortage of human resources in the tourism and hospitality industry. Levels of manpower standards are different.

2. Inappropriate Promotional Campaign

Some source markets are niche-oriented and do not align well within a multi-destination approach. Furthermore, sometimes the country and counterparts conveys a similar image as a tourist destination such as they have similar tourism resources; natural and cultural assets.

3. Price Discrimination against Foreign Tourist

A two-tiered price system exists in the transportation system and sometimes in accommodation and dining facilities, with foreigners being charged usually one-third to 50 percent more than Chinese.

The opportunities are as follows.

1. Tourism Policy

Government policy on tourism changed correspondingly, and experienced a transition from restraint to nonintervention and then to positive encouragement. Since the adoption of

open-door policy and economic reform in 1978, the economic functions of tourism including earning foreign exchange, providing employment and promoting regional development have been emphasized by the Chinese government. Since then, a set of tourism policies and regulations has been formulated to promote the development of tourism as an economic industry.

Even Chinese tourism policies and regulations are formulated in the government structure, they will finally be implemented in enterprises. The implementation of these policies has provided some opportunities in creating a positive and supportive business environment for the enterprises to start up and develop their tourism businesses. However, tourism enterprises can rarely participate in the tourism policy-making process, they have found difficulty in implementing some policies and regulations.

2. Business Travel

China has close economic relationships with many foreign countries. Relations with ASEAN countries have at times been tense. In 2002 China agreed to establish a free-trade area with the ASEAN countries from 2002. From such collaborations, liberalization to ease visa requirements and government regulation of airlines could be developed. Moreover, intra-regional travel could be increased for leisure, business, study and MICE.

3. Visiting friends and relatives (VFR) Tourism

As more and more people from China and the other two special administration areas; Hong Kong and Macau have migrate in foreign countries, the scope for inbound visiting friends and relatives tourism into the country could be activated.

4. Domestic Tourism

Domestic tourism becomes a big business in terms of numbers. It could contribute to more rural development because Chinese tourist activities differ from those of foreigners. Chinese tourists, with coastal regions and large metropolitan areas as principal generating markets, may have more opportunity to visit rural and inland areas. However, more careful study on the domestic market is essential for further development of this sector. Tourist

facilities oriented towards domestic tourists are in short supply compared with the availability of high-class hotel for foreigners.

5. Low-cost Carriers

The development of low-cost carriers (LCCs) makes intra- and inter-regional travel more affordable and will change people's travel habits and patterns. Lower airfares are likely to encourage travelers to shift from annual long-haul holidays to multiple short-haul short breaks, and hence further boosting the intra-regional travel demand. Moreover, experts predict that airlines are likely to become a low-cost industry.

6. Health Concern

Diabetes is the health concern that will have a serious impact on tourism trends in the whole Asia-Pacific region. According to the World Health Organization (WHO), diabetes cases in Asia will rise by 90 percent in the next 20 years to affect 330 million people and is set to become the 21st century's biggest health problem. Four out of five of the largest diabetic populations are in India, China, Pakistan and Japan. China is also plagued by obesity. If unchecked, China will have at least 200 million obese people within 10 years. And diabetes and obesity are affecting more young Asian people too.

If not contained, diabetes will cripple more people and reduce their mobility. Exercise is one of the solutions to prevent diabetes. As people begin to realize the threat of this disease, their travel behaviors and activities preferences may have to change in order to accommodate the exercise needs. Action-oriented activities like soft adventure tourism and sport tourism is likely to become more popular. For destinations that target family travel, the inclusion of physical activities in their offerings might be worth considering.

Threats are as follows:

1. Global Crises

Since the beginning of 2000s, the global tourism industry has been adversely affected by a series of obstacles to growth such as the terrorist attacks of September 11 2001, the Bali

Bombing on October 12, 2002, and Severe Acute Respiratory Syndrome (SARS). All problems made lots of difficulties to tourism industry as a whole. The revenue from tourism industry decreased obviously and unexpectedly. In some countries, lack of crisis management readiness persists. Risk management contributes to a positive revival of tourist destinations in many cases.

2. High level of International Competitions

At the present time, more and more countries pay great attention to the development of international tourism, seeing it as a significant way to earn tourist receipt and improve the international balance of payments. Consequently, they promote their countries by every possible means, leading increasingly to fierce competition among all destinations. In fact, nowadays, tourism competition is not competition among tourist enterprises *per se*, but more importantly, the competition of national power among destination countries.

3. Impacts of joining the World Trade Organization

When China obtains membership of the organization, it means that China has to release part of its market, and to lead its competitors into its own territory, leaving trades that used to be protected to compete directly with their overseas counterparts. Some weak links of China's tourist industry, such as travel agencies, may meet with great difficulties. They may not be able to match their counterparts in the developed tourism countries in terms of technology, capital, human resources, networking and service quality. Once the overseas solely owned or joint-venture travel agents enter into China and perform their business directly in the country, the business of some Chinese tour operators and travel agents may suffer.

Conclusions: Image Positioning

China is on the move. Over the past 30 years, China has put strong efforts to compete with other destinations. Being new to the market for international tourists, it can be said that China has been active in improving its attractions and facilities aiming to increase revenues from international tourists. However, being a tourist destination with several characteristics and a large spatial distribution of attractions, this becomes a major challenge for image positioning of the country. The change of China tourism policy and practice makes a great progress, being known as an international tourism destination and capturing the attention of tourists from all over the world. The future progress that China has to make is to sustain international demand, improve quality of the facilities and infrastructures to meet with the needs and demands of international tourism, and ensure that the destination is able to meet with what the tourists expect. This also refers to establishing an 'identity' with 'identities' and to be able to communicate to the public on its development, style, and readiness for international tourism. So far, it is on the 6th place in receiving international tourists. It is only few places from becoming the first. China is no longer a sleeping tiger but a dragon which is ready for a competition in the global tourism market.

References

- CNTA (1998). China Domestic Tourism Sample Survey, China National Tourism Administration, Beijing, PRC China.
- CNTA (2005). China Domestic Tourism Sample Survey, China National Tourism Administration, Beijing, PRC China.
- He, G.W. (1999). "Speech at the National Conference of Tourism", China Tourism News, January 7.
- Inskip, T. (1991). Tourism Planning, An Integrated and Sustainable Development Approach. Van Nostrand Reinhold: New York.
- Leiper, N. (2003). Tourism Management. TAFE Publications: Collingwood.
- Qian, Q.C. (1999). " Speech at the National Conference of Tourism on 3 January 1999", China Tourism News, January 7.
- Tisdell, C. (1993). Economic Development in the Context of China: Policy Issues and analysis. St Martin's Press, New York, NY.
- Urry, John. (1990). The Tourist Gaze. Leisure and Travel in Contemporary Societies. Sage: London.
- Wen (1998), Evaluation of tourism and tourist resources in China: Existing method and their limitations. International Journal of Social Economics, Vol. 25. 2/3/4, 1998, pp. 467-485.
- Wu, Zhu and XU (2000) Trends in China's domestic tourism development at the turn of the century. International journal of contemporary hospitality management 12/5 p.296-299

Yu and Smith (2007), Hospitality, Chinese Style. China's hotel industry is maturing as differentiated markets evolve and hotel companies target niche segments.
chinabusinessreview.com

Zhang, Pine and Zhang (2000) China's international tourism development: present and future.
International journal of contemporary hospitality management 12/5 p.282-290

=====

Appendix 2.2

Image positioning in China

Dr. Surapit Promsit

Director, Office of Special Affairs

Director, MBA (Hospitality Management)

Suan Dusit Rajabhat University, Thailand

China, an ancient, mysterious and beautiful land, is always appealing to adventurous foreign visitors. It is the third largest country in the world occupying an area of 9,600,000 sq km with various impressive and fantastic destinations. A wide variety of terrain and climate also shape its numerous natural attractions. China is proud of her many people, long history, resplendent culture and distinctive customs. Chinese arts and crafts, including painting, calligraphy, operas, embroidery and silk are distinctive and unique. Ancient Chinese architecture enjoys a long history and great achievements, and created many architectural miracles such as the Great Wall. In the process of its development, superior architectural techniques and artistic design were combined to make unique Chinese architecture be one of the three greatest architectural systems. Information of the impressive tourist attractions is provided regarding to China's four cities; Beijing, Shanghai, Nanjing and Suzhou.

Beijing

Great Wall in Beijing

For centuries, the wall served succeeding dynasties as an efficient military defence. The Great Wall represents the magnificent engineering achievement of the ancient China. The well-preserved sections of the Great Wall in Beijing are China's most famous tourist site. These sections are mainly the remains from the Ming Dynasty,



an era of tremendous construction. The wall runs across the northern part of Beijing for over six hundred kilometers with various passes and towers. Badaling is the section where most tourists go. The wall is famous for its completeness, imposing structures and the famous Juyongguan Pass. Most pictures publicized on

guide books, brochures and magazines are taken in this section. Today, the Wall has become a must-see for every visitor to China.

Beijing's Hutong and Courtyard A hutong is a unique form of community that exists only in China. The word 'Hutong' literally means a small street or a lane between two courtyards. There are many different types of hutongs. The most interesting to tour is in the Shichahai area, which is a scenic spot. There are many historic scenes around this area. The oldest hutong in Beijing is called Sanmiao Street which has been there for more than 900 years.

A courtyard is like a square. Rooms are built along the four sides of the square. Beijing's courtyards have three sizes - the bigger ones, the middle-sized ones and the smaller ones. The smaller ones are very simple. Usually, there are several rooms arranged on each of the four sides respectively. They are the north rooms, east and west wing-rooms and south rooms. The older family members live in the north rooms; the young live in the wing-rooms, and a south room is constructed as a living room or study.



Forbidden City was listed by UNESCO as a World Cultural Heritage Site in 1987. It was the imperial palace during the Ming and Qing dynasties which is now one of the most popular tourist attractions world-wide. It is also the world's largest palace complex and covers 74 hectares. Splendid painted decoration on these royal architectural wonders, the grand and deluxe halls, with their surprisingly magnificent treasures will certainly satisfy 'modern civilians'.



Since yellow is the symbol of the royal family, it is the dominant color in the Forbidden City. Roofs are built with yellow glazed tiles; decorations in the palace are painted yellow; even the bricks on the ground are made yellow by a special process. However, there is one exception. Wenyuange, the royal library, has a black roof. The reason is that it was believed black represented water then and could extinguish fire.

Summer Palace (Yiheyuan) The Summer Palace is the archetypal Chinese garden, and is ranked amongst the most noted and classical gardens of the world. In 1998, it was listed as one of the World Heritage Sites by UNESCO. Summer Palace having the largest royal park and being well preserved, it was designated, in 1960 by the State Council, as a Key Cultural Relics Protection Site of China. Containing examples of the ancient arts, it also has graceful landscapes and magnificent constructions. By the time of the Qing Dynasty (1644-1911), it had become a luxurious royal garden providing royal families with rest and entertainment. Guided by nature, artists designed the gardens exquisitely so that visitors would see marvelous views and be amazed by perfect examples of refined craftwork using the finest materials.



Temple of Heaven The Temple of Heaven is a worthwhile visiting place in Beijing. The Temple was built in 1420 A.D. during the Ming Dynasty to offer sacrifice to Heaven. The Temple of Heaven is enclosed with a long wall. The northern part within the wall is semicircular

symbolizing the heavens and the southern part is square symbolizing the earth. This design shows that the heaven is high and the earth is low and the design reflected an ancient Chinese thought of 'The heaven is round and the earth is square'.



Tiananmen Square (Gate of Heavenly Peace) It is the must place to visit in Beijing City. It is located at the center of Beijing City. It is the place where you can visit Tiananmen Tower, Monument to the People's Heroes, Great Hall of the People, Mao Zedong Memorial Hall and see the national flag raising ceremony. Thousands of people come to the Square every day. The most important use of it in the past was to declare in a big ceremony to the common people who became the emperor and who became the empress.



Shanghai

Huangpu River and the Bund

Huangpu River is the most important shipping artery of Shanghai. Huangpu River divides Shanghai into two parts, east and west. The great modern skyscrapers and the



characteristic buildings in different architectural styles are the best records of the development of the city and the Huangpu River, the birthplace of Shanghai, is the faithful eyewitness.



The Bund, also called the Zhongshan Road, is a famous waterfront and regarded as the symbol of Shanghai for hundreds of years. The most famous and attractive sight which is at the west side of the Bund are the 52 various buildings of different architectural styles including Gothic, Baroque, Romanesque, Classicism and the Renaissance

Jade Buddha Temple

Jade Buddha Temple is a venerable and famous Buddhist temple which was built to keep two jade Buddha statues which had been brought from Burma by a monk named Huigen. Both the Sitting Buddha and the Recumbent Buddha are carved with whole white jade. Not only rare cultural relics but also porcelain artworks the old-time and classical architectural style makes the temple unique and inimitable in this modern city. In addition, More than 7,000 Dazang sutras are kept in the Jade Buddha Tower; these are all the inestimable culture relics.



Located in the center of Shanghai in People's Square, Shanghai Museum is a large museum of ancient Chinese art. The museum style and presentation surround visitors with artifacts demonstrating ancient wisdom and philosophy. The exterior design of the round dome and the square base symbolizes the ancient idea of a round heaven and a square land.



Chinese culture is a result of the melding and collaboration of many nationalities. During its long history, minority nationalities have created their own colorful cultures. From clothes to textiles, metal wares, sculptures, pottery, lacquer and bamboo wares, the exotic styles of their artwork give us a general picture of creativity and passion toward life of those ethnic groups.



Yuyuan Garden Yuyuan Garden is a famous classical garden located in Anren Jie, Shanghai. Yu in Chinese means pleasing and satisfying, and this garden was specially built for Pan's parents as a place for them to enjoy a tranquil and happy time in their old age. However, the small size is not a representative of the attractions of the garden. The pavilions, halls, rockeries, ponds and cloisters all have unique characteristics. Upon entering the garden, you will encounter a rockery, which is called the Great Rockery. On the top of the rockery, you can get a bird's eye view of the garden.

Nanjing

Dr. Sun Yat-sen's Mausoleum



The majestic Mausoleums construction was started in 1926 and completed in 1929. The whole Mausoleum Scenic Area represents an alarm bell as seen from the air, symbolizing the noble spirit and heroic efforts of Dr. Sun Yat-sen's devotion to the Chinese people, fight of oppression and winning the independence of China. With deep historical significance, magnificent architecture and beautiful scenery, it is a must see when traveling in Nanjing.

Qin Huai River

Qin Huai River is the largest river in the Nanjing City area and is the 'life blood' of the city. There are many famous sites of interest along the banks of the Qin Huai River , including Confucius Temple, Zhanyuan Garden, Zhonghua Gate, and the sights along the Taoye Ferry ride to Zhenhuai Bridge. . While floating on one of the traditional, recently modernized, painted boats of the region, visitors will have the opportunity to fully appreciate the beautiful sights of the Qin Huai River.



Suzhou

Canglang Pavilion (Blue Wave Pavilion)

Unlike other gardens, Canglang Pavilion emphasizes the harmony between man made buildings and the natural environment. There are also winding corridors with pavilions that link the hills and pools together. As you walk along these corridors that follows a path alongside the unique stone formations and strategically planted ancient trees, it seems as if walking in a

primitive forest. The architectures that have been built in the garden are simply and classically designed which present a Qing Dynasty (1644-1911) style.



Lingering Garden



The Lingering Garden is located outside Changmen Gate in Suzhou, Jiangsu Province. Originally a classical private garden, it is one of the four most famous gardens in China. Possessing typical Qing style, it is well-known for the exquisite beauty of its magnificent halls, and the various sizes, shapes, and colors of the buildings. Maples cover the hill. When all the leaves turn red in autumn, it is extraordinarily beautiful. The northern part used to be a vegetable garden, but now is used to exhibit potted plants of which the Suzhou people are quite proud.

Hanshan Temple (Cold Mountain Temple)



It presents the architectural style of the Qing Dynasty (1644-1911). Being one of the most famous temples in Chinese history, Hanshan Temple often boasts about its bell rings. However, the best known bell described in Zhang Ji's poem disappeared a long time ago. The bell in the tower now, was modeled on the previous one in 1904. Every year on New Year's Eve in China's lunar calendar, the bell is tolled to pray for the happiness and safety of the coming New Year. This festival attracts thousands of tourists both at home and abroad.

Around the Cold Mountain Temple, the visitors can also enjoy the beautiful scenery of the Maple Bridge, where Zhang Ji's boat was once moored, and get a realistic feel of the ordinary life of the people living in the Fengqiao Old Town. The visitors can also have a look at the famous Jinghang Canal, which is the longest ancient man-made canal in the world.