



TRADP Tourism Study July 1994

Recommended Citation

The Tumen River Area Development Programme Tourism Sub-Group, "TRADP Tourism Study July 1994", Aprenet, July 01, 1994, <https://nautilus.org/aprenet/tradp-tourism-study-july-1994/>

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Issues

REPORT

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TRADP Tourism Study

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INTRODUCTION

Development and promotion of tourism, if carried out properly, can be particularly beneficial to developing countries. Tourism stimulates the economy nationwide, stabilizes the society by creating employment opportunities and can be an important source of foreign currency income and thus play an important role in increasing GDP. A responsible, forward-looking tourism policy provides incentives for protecting the natural and cultural environment, creates economic preconditions for restoration and preservation work, promotes regional development and helps keep local traditions alive.

One of the fastest growing industries in Asia is tourism. Between 1985 and 1990, the rate of increase was nearly double that of other regions in the world, according to a recent study released by the World Travel & Tourism Council and the American Express Foundation. The number of international visitors to the Asia-Pacific region over these years increased by about 68.5% to nearly 53 million, and the prospects for the future are even brighter.

Over the past few years, China, the ROK, Thailand, Malaysia and Indonesia have made tourism a high priority. The results are clear. Their visitor arrivals have increased, cultural preservation has received stimulation, cities are cleaner, transportation is better, and service industries have enjoyed higher standards and profits. The additional benefits include improved international images and greater success in attracting international conferences and athletic events. Well-managed tourism, which helps in developing a variety of services, also adds value to other business activities. One of the best ways to convince international investors -

bankers and business people - to base their operations in TREDATA region and settle there with their families is to offer a variety of cultural, leisure, and recreational activities. The connection with tourist industry development is obvious. Not all countries in the Asia-Pacific region have realized the possibilities contained in giving priority to tourism development. Although the coastal and mountain sceneries, traditional arts, cuisine and other cultural resources have great tourism potential, they are neither well developed and packaged to form attractive tourism products nor marketed effectively. A

sufficient infrastructure is a necessary prerequisite for tourism development. The rest is purely dependent on product development and marketing. On the other hand, an attempt to increase tourism in a country which cannot provide adequate services will have long-range detrimental impacts on the success of the local tourist industry. Realizing the advantages to be gained, the riparian countries in TREDATA have shown considerable interest in tourism development, and some of them have already adopted tourism development and promotion of international tourism at the core of their economic development plans. Promoting tourism in these countries calls not only for the development of adequate services but also for utilizing the natural resources in a way that will maintain a balance with protecting the environment. It should be noted, however, that only in special cases the development of transport infrastructure can be mainly financed by income from tourism, and the needs for tourist transport should in most cases be combined with the needs of cargo transport before an adequate feasibility level can be reached in the development of such infrastructures. In using natural resources, tourism also places a burden on the environment. Tourists have an impact on nature, which should be protected against excessive exploitation by tourism. Transport of tourists also consumes natural resources and produces various types of emissions. More attention should be focused on the environmental effects of tourism. The tourist industry is increasingly aware of the significance of an unspoiled environment as a precondition for activities. This has increased the desire to choose alternatives which place less of a burden on the environment. The biggest challenge in developing tourism is the adoption of sustainable operating models. Responsible tourism will allow people to enjoy the environment without taking this privilege away from future generations. A special term ecotourism has been coined for the value placed on nature and the original environment in tourism. Ecotourism is not a solution to environmental problems in the tourist field, and can in some cases even aggravate these problems. The suddenly rising interest in nature can in fact prove dangerous to nature.

Ecotourism is still a vague term internationally, being given a different content in different countries. The principles of sustained development are not always linked to ecotourism in every country, while in some places environmental demands are so stringent that there is no room for the customary tourist industry. When the goal is to adapt the development of tourism to meet the requirements of environmental protection and to steer tourism in a direction which helps protect nature and the environment, it makes sense to talk about sustainable tourism. Developing sustainable tourism requires cooperation between different fields within the industry and between the tourist industry, authorities and tourists. Since tourism should also promote the local population's welfare by using local services and products, cooperation is also needed at this level. This does not always mean shifting to more expensive solutions. Many environmentally friendly measures lead to cost savings for tourist enterprises. The biggest benefit to the tourist industry will come from the growing demand, when environmentally friendly tourism products can be counted on to have special appeal internationally. Environmental awareness is already at a high level in Europe and North America, and continues to spread worldwide. The state of the environment is an increasingly important point when people choose their travel destination. When developing tourism in the TREDAs participating countries, environmental viewpoints should be taken into consideration from the start. This calls also for international collaboration, because some of the countries still lack resources and experience in applying the principles of sustainable development into tourism planning. Also a certain part of marketing the tourist programs could easily be done in cooperation, because the basic unique selling proposition should be as uniform as possible in order to get all TREDAs countries to benefit from the common profile of unspoiled nature and unusual cultural attractions connected with nature. The TREDAs participating countries would all profit from collaboration in tourism planning and offering of tourism programs and services. This collaboration should include all kinds of activities from cooperation in developing transport infrastructure to producing joint journey

packets and from creating common marketing efforts to introducing common service training programs. Consumers in all countries benefit from the increased supply of travel services.

Each TREDAs participating country can have a special role in the overall tourism development strategies.

This report gives a concentrated review of tourist attractions most relevant to development

cooperation, surveys tourism in the TREDAs participating countries and evaluates the main

markets. Development targets and strategies are suggested and actions are proposed to

coordinate tourism planning and development studies. Co-operation in promotion and

education is recommended and principles for sustainable tourism are presented.

The report was prepared as a draft in April 1994 to elicit comments from the participating

TREDAs countries. It was finalized in August 1994 taking into account their feedback as well as

the reports presented at the WG IV meeting in Moscow in July, 1994.

STRATEGIC TOURIST ASSETS

CHINA

China is an important traditional tourist market, which is also becoming a noteworthy tourist

generating country. Important tourist resources have been developed and utilized under the

prerequisite of protection. 249 scenic spots that offer beautiful scenery and many

transportation and tourist facilities are selected as the National Tourist Attractions, while 14

special interest tours with distinctive characteristics are promoted. Much effort in all localities

has been dedicated to the development of man-made attractions as well. 41 special tourist

trains are now in operation. There are 18 cruise ships serving on the Yangtze River alone. 123

manufacturing companies have been selected as designated producers of tourist commodities.

Encouraged by the success of the projects of Magnificent China and China Folk Customs

Village in Shenzhen, other large-scale and high-standard projects have been successively

established and are becoming popular among tourists. Using foreign capital as major source of

investment, the 12 national tourist resorts in China have achieved a steady and healthy

development. In the 229 tourist project investment contracts signed with foreign companies

until the end of August 1993, with a total volume of US\$ 6,642 million, almost 80% of the investments came from abroad. However, a very small fraction of investments in developing tourist attractions were directed into the northeastern parts of the country. The Chinese government is slowing down investments in luxury projects like golf courses, race tracks and others demanding large land areas. There are 20 golf courses under construction although only a few of the ten golf courses in operation are profitable. Twelve race tracks are under construction and three tracks are already in use. In the future no permission, planning licence, land or loans shall be given to this kind of expensive projects. A series of theme promotional activities has been launched, namely Visit China 1992, China Landscape 1993 and China Heritage 1994, which will be followed by China Folklore 1995 and China Resort 1996, eventually leading to a more influential Visit China Year in 1997. Continuous efforts will be made to perfect and promote the traditional tourist products while some intensive measures will be taken to develop and market a set of culture-related sight-seeing tourist products. This framework could offer good opportunities for introducing new attractions and special interest tours in the northeastern regions of China, where until recently only Shenyang and Dalian in Liaoning province, Harbin in Heilongjiang province and Changbai Mountains in Jilin province have received significant attention in international tourist promotion. The northeastern provinces of China offer a variety of attractions from volcanic mountain landscapes to historical sites. At the mouth of the Tumen River there are possibilities for holiday resorts. The Yanbian region offers plenty of Korean traditions still practised in the old manner. The whole province of Jilin contains many attractions in cities and natural reserves. Heilongjiang attracts tourists with exciting river and mountain landscapes as well as with summer resorts which can be converted to a world of snow and ice in the winter. Liaoning has remarkable historical sites with a brilliant blending of Han, Mongol and Manchu architectural styles; collections like the Museum of Steam Locomotives, beaches, adventure parks and modern shopping centres; as well as interesting monasteries and mountain forest preserves. The Inner Mongolian steppes offer many activities for tourists, and the

various landscapes can attract tourists to the northern parts of Inner Mongolia. Transportation infrastructure is well developed in most of Northeast China and the Chinese government has paid much attention to the development of tourist services in the region and especially Yanbian is increasing facilities for tourist accommodation. However, the marketing of Northeast China and particularly of Jilin province for tourists is still ineffective.

Inner Mongolia

The Inner Mongolia autonomous region has a climate that ensures tempting prospects for summer vacationers as well as winter sports enthusiasts. In the summer season, which is already marketed, the Inner Mongolia steppe and surrounding mountain slopes lush with aromatic grass and trees are especially attractive, when south of the Great Wall is wilting under the scorching sun. The winter season has not been commercialized very far and could be better utilized by winter sports activities. The southern parts of Inner Mongolia, however, have only light snowfall and thus only the northern parts are suitable for winter tourism. There are three principal areas in Inner Mongolia with remarkable potential for tourism.

The area between Ulanhot and Manzhouli, within reach of Tongliao by air and from Harbin and Baicheng by rail, with an express railway service linking Hailar with Beijing, and having rail connections with Russia and further with Mongolia, has developed mainly nature-related

tourism. Lake Hulun near Manzhouli, Sun Island in the Yimin River at Hailar, tours in Hohenaer grasslands and horse riding tours near Zalantun are already known to vacationers and could be upgraded to attract more international tourists. Hailar is a gateway to the Greater Xingan Mountains, where the Ewenkis, a nomadic ethnic group, live. Near Hailar is the Mt. Xishan Nature Reserve with dense pine forests. In winter the snow-bound Xishan Mountains provide an ideal ground for skiing. Hailar city also features ice lantern and sculpture shows in winter. Manzhouli is popular among the border traders. The major attraction in Ulanhot region is a 5.5 hectare compound in Gandeli steppe known as the Mausoleum of Chinggis Khan (Genghis Khan). Emperor Taizu of Yuan Dynasty was entombed here, and the mausoleum

consists mainly of a row of three yurt-shaped palaces with domes of glazed yellow and blue tiles, white walls and vermilion gates. In the southeastern corner of the compound stands a palace in which the Khan used to stay when he was away from his capital. The area between Chifeng and Xilinhot contains ancient relics and natural attractions. The Imperial Palace of Qing Dynasty and Xigyuan temple of Qing Dynasty are in this region as well as the ancient city south of Chifeng. A natural preserve area near Xilinhot adds to the scenic views of the neighbouring Da Hingganling Mountains. This ecotone contains a lot of things interesting to nature fans. Xilinhot can be reached from Hohhot by air. The area between Erenhot and Wuhai is most popular because of being relatively close to Beijing. It is dominated by Huanghe River (Yellow River) and the railroad from Beijing through Ulaanbaatar to the Transsiberian railway. Hohhot and Baotou are the main centres of the area and have air and rail connections to Beijing as well as to Yinchuan. The area is famous of the Nadam Fair, a traditional Mongolian festival falling in July and August. The main activities at the fair include such moving and attractive performances as horse racing, wrestling, Mongolian chess and other dramatic shows. To the north of Hohhot, the first few Inner Mongolia steppes are catering to tourism. In Xilamuren and Gegendala summer resorts the air is fresh and a midsummer night is cool as in autumn. There are many tourist activities, including horse and camel riding, visits to herdspeople's homes, watching Mongolian singing and dancing performances, making cart tours to the grasslands, practising archery and joining campfire parties. Horse and camel races and other competitions also take place. The yurt-hotels complete with all necessary modern facilities accommodate tourists. In the middle section of the undulating Kubuqi Desert, Dalate Banner, is Xiangshawan, or Noisy Sand Bay. It is actually a small sand slope measuring 60 by 40 meters at an angle of about 45 degrees. Sliding down the slope on a sunny day, with hands stirring the sand, produces a thrumming noise like from a plane flying overhead. Five kilometres from Xiangshawan is a stretch of dense forest where yurt-hotels are available for tourists. 70 kilometres to the south from Baotou city is the largest and best preserved lamasery in Inner

Mongolia, the Wudang Lamasery. Built in the latter half of the 17th century, it comprises six temple halls, three mansions for Living Buddha, and an altar hall, covering a total area of 20 hectares. Constructed on mountain slopes, the magnificent lamasery overlooks the clusters of small lamaseries and attracts many visitors.

Heilongjiang Province

Heilongjiang has a reputation as a world of winter attractions. The capital of the province,

Harbin is known as Ice City. The busiest tourist season is from December to February, when,

clad in snow, the city presents a typically enchanting North China scene.

Winter sports such as

skating, skiing and ice hockey attract many, as does the famous Ice Sculpture Exhibition in

Harbin during the two-month-long Ice and Snow Festival. A number of visitors from tropical and

subtropical regions of Southeast Asia are attracted to Heilongjiang, which offers a world

entirely different from theirs in geophysical features and life styles. They can enjoy cross-

country skiing, sledging and horse-riding in snow-covered forests and take part in making ice

and snow sculptures or take part in winter game hunting. The Songhua River is frozen to a

thickness of 70 to 80 centimetres, and tourists may try their skills in sailing on ice or in winter

swimming.

Harbin is easily accessible from all the major cities in China by air and by rail. It is the common

starting point of tours to elsewhere in Heilongjiang. To the northeast from Harbin there is the

Taoshan Tourist District which is ideal for snow sports and game hunting. Mt. Taoshan ski

ground has two skiing runs, suitable also for beginners, and the gentler slopes can be slid

down with sleighs and sledges, keeping the district busy from November through March.

Tourist hotels and guest houses at Taoshan provide also mountain food specialties of various

kinds, including the famous four delicacies of Heilongjiang Province - bear's paw, Hazet

grouse, stewed moose nose and monkey-head mushroom. Of the other ski grounds only Mt.

Yabuli to the east from Harbin is suitable for serving international tourists. Hunting can be

enjoyed all the year round in Yuquan, Mt. Taoshan, Mt. Wulong and Lianhuanhu hunting

fields.

In summertime the Sun Island in Harbin is a resort for sun worshippers. This

38 km² sand dune

on the northern bank of Songhua River, which in winter hosts the international snow sculpture competition, is turned into a centre for camping, swimming, sunbathing and picnic. Anglers go to the Sun Island, and there are yachts and sailing boats on the river. The southern bank accommodates the longest riverside park in China, with a club on the water, Youyi Palace, etc.

Other attractions include a 2 km long miniature railway for children. In the more remote parts of Heilongjiang there are plenty of opportunities for outdoor life like fishing by Zhanhe River, bicycle touring in Yichun or admiring Jingpo Lake, waterfalls, volcano craters and caves in the Jinpohu tourist area. Those interested in birds can visit Zalong red-top cranes near Qiqihar.

Harbin is also known as the musical hometown of the North, as the annual Harbin Summer Music Festival in August is one of the three major music festivals in China. There are many other kinds of cultural activities available in Harbin, e.g. Heilongjiang Exhibition Centre and Songhuajiang Art Gallery. A rare opportunity to visit one of the large oil fields in the world is open in the Songnen Plain where China's largest oil field Daqing is located. It produces half of China's crude oil. The first oil well at Daqing can be visited by tourists, and there is an underground exhibition hall with a total displaying space of 1,320 m² showing the geophysical structure of the oil field with models, charts and samples. In the vicinity of Hegang there is a chance for a locomotive tour.

Liaoning Province

The favourite tourist centre in Liaoning is Shenyang, the former capital of the Qing Dynasty founding emperor Nurhachi. The imperial palace built in 1625 covers an area of more than 6 hectares with more than 300 rooms of 70 buildings encircled by high palace walls on all sides.

This well preserved majestic palace is second only to the Palace Museum in Beijing and embodies a harmonious blending of the Han, Mongol, and Manchu architectural styles. To the north of Shenyang lies the most magnificent of the three Qing royal tombs in the Northeast, the burial place of Emperor Huangtaiji and his empress. The approach to the tomb is lined with stone monuments and bridges. The Zhaoling tomb area is of 4.5 hectares and consists of the

fortress, the guard tower, halls and the tumulus. The landscape has been used for a lantern festival around the middle of the first lunar calendar month every year with massive dance events and entertainment for tourists.

The largest of its kind in China, the Museum of Steam Locomotives of a hectare in area is in the Sujiatun Marshalling Area in Shenyang. In this museum a steam locomotive enthusiast may pass many pleasant hours. On display are more than a dozen steam locomotives from Asia, Europe and the USA, made between the turn of the century and the fifties. Tourists may visit a rolling stock plant or a dispatcher's office, or drive a steam locomotive.

To the southeast from Shenyang there are famous caves in Benxi. Twenty kilometres to the southwest of Anshan stands Mt. Qianshan, a well-known scenic spot of Northeast China. The serried rows of lush green peaks are studded with jagged rocks of grotesque shapes. In the Mt. Qianshan area there are more than a dozen temples and Taoist and Buddhist monasteries and nunneries, as well as pagodas and steles, erected during the Ming and Qing dynasties. Also Taihe, Wulong and Zhaoyang palaces and Luohan cave belong to the local attractions.

Not far are the Tanggangzi springs. Halfway from Shenyang to Dalian stretches a chain of mountains where Bingyu Valley winds in a 5,000 hectare primeval forest preserve. Places of interest there include the Skylark Peak, Xiaoyu Valley, the Yingna River, and the Longhua and Huaguo mountains. There is a certain primitive simplicity and rustic charm in the whole area, which is a newly opened tourist attraction. Tourists are taken into virgin forest by motor vehicles.

Further southward is the port city of Dalian on the southern tip of the Liaodong Peninsula. The beach area along the seashore to the south of Dalian is a famous summer resort with an average temperature of 20°C in the season. Along the 30-kilometre coastal highway there are many scenic spots. Tourists may swim in the sea, sunbathe on the beach, and fish on the rocks. There are also seafood restaurants with local delicacies. The Dalian Zoo and the Dalian Natural history Museum are the tourists' favourites in the city. Built on the hilly slopes of Cape Dahushan, the Economic and High-tech Development Zone is 27 kilometres to the

north of

Dalian. In addition to its natural scenery, the zone also features the Iridescent Town, a "nightless metropolis" where the streets are flanked with department stores and specialty shops. Contrasted to the shopping centre there is the Park of the "Pilgrimage to the West" with traditional palace-style structures. A Palace of Adventures will take sight-seers through hair-raising experiences.

Jilin Province

Jilin province is perhaps the richest of the northeast provinces in the variety of interesting attractions. As many parts of the province have been only recently opened for tourism and foreigners, there are still many unused possibilities. There are interesting places for tourism in all seasons. The province has been a cul-de-sac for travellers more than Heilongjiang and Liaoning, and it is crucial for expanding tourism significantly to have better traffic connections to the DPRK and Russia.

Changchun, the capital of the province, has no famous monuments from the ancient times.

The more interesting are the attractions of this century. On the northeastern outskirts of

Changchun city there is a palace built to the former puppet regime of Manchuria. The palace,

covering some 43,000 m², consists of inner and outer courts. The old buildings, including the

Hall of Dedication to the People where Pu Yi was enthroned, and the Pavilion of Joint Virtue

where Pu's last concubine Li Yuqing lived, have been thoroughly renovated. The palace also

houses three exhibitions. In Changchun city, centering on the Changchun Film Studio is the

Film City, which features tourism, recreation and filmshooting simultaneously. The Changchun

Film Studio, known as the cradle of New China's film making industry, contains outstanding

features like the location shooting ground which is complete with structures of old Beijing's

streets, archways and shops, and a palatial hall just like the Hall of Mental Cultivation in the

palace Museum in Beijing. The hall of stage properties stores all sorts of antiques, real and

fake, clothes and furniture. The hall of special effects is another spot where viewers can see

how film makers create scenes of the crashing of trains, explosion of a bridge and the

manoeuvring of a submarine.

In the western part of the province, Xianghai birds garden should be mentioned. Most of the popular attractions are, however, situated to the east of Changchun, and the city of Jilin is an important base for tourists. City of Jilin itself has some interesting examples of architecture and offers nice views, being surrounded by Songhua River from three sides. In winter the river, which has an ice-free section of a hundred kilometre, generates fog and creates frost flowers all around the city and gives it a fantastic silvery and crystalline finish. The really famous place in the neighbourhood is the Songhua Lake, 24 kilometres southeast of Jilin City, one of the National Attractions known for its serene lake and beautiful surrounding mountains. There is a development project for the lake, and in the beginning of April 1993, WTO has decided to direct investments there. The scenic area covers 550 km². The mirror-like lake has very clean water and some small islands, out of which the Five Tiger Island in the middle of the lake is ideal summer resort for angling, swimming, rowing and picnic. Motor boats can be used for transportation on the lake. In winter, the frozen lake offers ice sailing and ice fishing opportunities, and the banks of the lake may be used for skiing. The surrounding hills abounding with game are open to winter hunting. Beside the Songhua Lake, only 16 km from Jilin City, is Mt. Daqing, which is open to skiers with two tracks (3,050 meters and 2,600 meters), the steepest slope being 33 degrees. A cableway is capable of moving uphill 120 persons per hour. The skiing season here lasts from December through February. The deer farm on the Longtan Mountain on the eastern bank of the Songhua River boasts over one thousand head of spotted deer. Summer is the best season to see the deer in their best form and colour. Besides the deer, the farm uses its 17 hectare space to cultivate ginseng and raise martens. Tourists can buy pilose antler, ginseng and marten fur in the shop run by the farm. A drive some 500 km southward from Jilin City takes the tourists to the ancient tombs in Tonghua, famous for their fresco paintings, to the eastern pyramids, and the Donggou ancient tombs. At the time of Tonghua Grape Wine Festival local wines can be sampled and various entertainment enjoyed.

Reversing from Tonghua to the east, the tourists will reach the Changbai Mountains on the Korean border with the famous crater lake and the Changbaishan Nature Reserve, which is the country's largest nature reserve covering some 2,000 km². If arriving from Tumen, the tourists can reach the area by passing Yanji and Antu. With its thick forests, crater lakes and waterfalls, the reserve is a huge natural zoo as well as an enormous botanical garden boasting over 1,400 species of plants, 50 kinds of beasts and 280 species of birds. The nature reserve was included into UNESCO's nature reserve network in 1980 and has become an important ground for studies in natural science. Meanwhile it is open to tourists for sight-seeing, making botanical expeditions, drawing and photographing. The crater lake on Mt. Baitou (which is called Mt. Paekdu by the Koreans), known as the Heavenly Lake, was created in 1702 by a volcanic eruption. It nestles on this main peak of the Changbai Mountains with the lake surface about 2,155 meters above the sea. The 9.2 km² lake is 204 meters deep on the average, the deepest lake in China. It is also a border lake between China and Korea. In its vicinity there are smaller crater lakes and hot springs. Mt. Changbai is by far the attraction with the greatest tourist potential in Northeast China. The problem there is that the higher parts of the mountain and the Heavenly Lake can be safely visited only between the beginning of July and September, because in other times the roads on the upper levels can be icy. It snows in the mountains from the beginning of October to the late April, and in December and January it is impossible to visit the mountain because of snow. From the Changbai area to the Russian border the eastern part of Jilin Province consists of Yanbian Korea Autonomous Prefecture, which covers an area of 4,270 km² and has a population of 2.1 million, of whom 0.9 million are ethnic Koreans. The capital of the prefecture is Yanji. Because Yanji is surrounded by water and mountains, it has a reputation of being a beautiful metropolis. After entering Yanbian Prefecture, the traveller approaching Yanji from Jilin first passes Dunhua with its ancient relics and tombs, then comes to Antu. Between Antu and Yanji there are more ancient relics, tombs and other tourist attractions between Longjing

and the Tumen River. Some more relics can be seen between Yanji and the city of Tumen, which can also be reached by the Tumen River Express train overnight from Changchun. 60 km beyond Tumen there is the city of Hunchun, which has been an economically open area since December 1988 and further opened for economic cooperation and trade with the neighbouring countries in March 1992. Hunchun was once a flourishing commercial port and a starting point for the maritime silk road linking China with Japan and North America. It is known that in the year 785 Hunchun already had close contacts with Japan. At the end of Qing Dynasty, large numbers of Koreans and Hans poured in Hunchun, where they reclaimed wasteland and developed industry and commerce. The ensuing trade between China and Russia, and between China and Korea lasted for decades. During the best years, more than 1,500 ships a year sailed in or out of the sea via the lower reaches of the Tumen River. In 1938, following the Zhanggufeng Campaign, the river was finally closed to navigation. Because of the long prosperous history, there are many ancient relics and other tourist attractions outside of the city of Hunchun, ready to be visited by groups of tourists. In Hunchun the Dragon and Tiger Pavilion, survived from 1886, is one of the remaining monuments of the past. It is 46 km from Hunchun to Kraskino in Russia, and 93 km to the port of Rajin in the DPRK. 73 kilometres to the south from Hunchun by road there is the village of Fanchuan, only 17 kilometres away from the sea and bordering both Russia and the DPRK. It is in this village where stands the Tuzi stele, which marks the border between China and Russia. There are several restaurants in Fanchuan, one of them on a hill with a view to Khasan in Russia, Tumengang in the DPRK, and the sea. There are holiday villages under construction on the river bank near Fanchuan, and the Chinese are increasingly visiting the Fanchuan area to catch a glimpse of the sea. Yanbian has established seven frontier posts along China's border of 700 km with Russia and the DPRK, of which two are in Hunchun. The Changlingzi frontier post, which faces Khunchun of Russia and was formally opened in 1991, is now the busiest of them because the border

there has been open for nationals of thirds countries since January 25, 1994. The biggest is the frontier post in Tumen, linking Yanbian with the DPRK. An agreement on visits of the Chinese for 1 to 7 days to the DPRK has been signed, but the accommodation capacity in the Rajin-Sonbong area sets limits to the possibilities of tourism. China has recently regained its rights to sail on the Tumen River to the sea. The last 17 kilometres of the river can be navigated by boats of several hundred tons at high water time, but the bridges may still cause some problems. There has been for some years a regular boat traffic on the Tumen River between Tumen and Fanchuan, and also ferry traffic from Tumen has been run. In the wake of Yanbian's opening to the outside world, tourism is developing rapidly. The "golden delta" of Hunchun, with its Tumen, Yalu and Songhua rivers, Korean customs and culture and new frontier villages, will be attracting more and more tourists. Tours of the Tumen River have already become especially popular.

DEMOCRATIC PEOPLE'S REPUBLIC OF KOREA

The Democratic People's Republic of Korea abounds in potential tourism resources. The DPRK, however, has no reputation as an international tourism country and needs extensive marketing efforts. There are impressive scenic spots, many picturesque places and historical remains. The DPRK has rows of mountains, plenty of rivers and fine beaches, although not yet largely used for commercial purposes. The attractions have been developed for tourism mainly in Pyongyang and its vicinity. Other areas involved in active tourism promotion are Mt. Paekdu, the Kumgang and Myohyang mountains, Nampo, Haeju, Wonsan, Hamhung and Kaesong. With the exception of Mt. Paekdu area, the country northeast from Mt. Myohyang and Hamhung has not received attention as a tourist destination and the services there for tourists are poor, even nonexistent. For tourism in the TRENDA participating countries, the DPRK in general and the northeastern part of the country especially can be in a key position. It is strategically situated in the core of the area and for optimizing the tourist logistics in Northeast Asia cooperation from the DPRK is required. Separate from the TRADP activities, a UNDP project DRK/90/005 executed by WTO is formulating a tourism action plan for an orderly expansion of tourism in

the DPRK through several means. That plan will deal with all general aspects of tourism in the DPRK and make recommendations for development of tourism in the country. Details concerning the eastern provinces of the DPRK, especially the Rajin-Sonbong area are still required for seeing tourism in the DPRK in a larger context and for developing tourism in TRED.A.

Pyongyang

The capital city and its vicinity contain many attractions, which can be connected with a trip to the other parts of the country or included in a tour programme involving several Northeast Asian countries. At present, Pyongyang has the single international airport in the DPRK, and therefore all tourists arriving in the country by air have to start their visit there. Pyongyang is perhaps the most impressive of all capitals in Asia, and the modern parts of the city blend well with the surrounding hills, fields and rivers. Good availability of various entertainment, the existence of several museums of high standards, and facilities available for sports events and congresses make Pyongyang a useful place to be included in diverse tourist programs.

The main attractions should be mentioned here. They are the Mansu Hill housing monuments and temples, a theatre, an assembly hall etc., the Grand People's Study House, the Korean Central History Museum, the Korean Folklore Museum, the Korean Art Gallery, historical remains like the Taedong Gate, the Pyongyang Bell and the Ryongwang Pavilion, the monuments of the recent age like the Tower of the Juche Idea, the Monument to Fallen Soldiers and the Arch of Triumph, theatres, a circus, huge sports stadia, 10 gymnasias in Chongchun Street, etc. Outside of the city there is Mangyongdae with the birthplace of President Kim Il Sung, the tombs of his family, the Revolutionary Museum, and a large amusement park. Four kilometres north of Mangyongdae there is Mt. Ryongak with ancient halls and pavilions and the Pobun cloister. 16 kilometres to the north from the city lies the Korean Film Studio with an area of 80 hectares. Mt. Taesong is 10 kilometres northeast of the city centre with an area containing a zoo, a botanical garden, the Revolutionary Martyrs Cemetery, and an amusement park. 25 kilometres to the east from the city centre lies the

Tomb of King Tongmyong, the site of the Chongnung Temple and a museum.

Kangwon Province

There are two main regions of tourist interest in Kangwon province, the Wonsan area and the

Mt. Kumgang area. Wonsan is a port city of culture and recreation. It has good connections to

Pyongyang and is a gateway to the Kumgang Mountains. The northwestern part of Wonsan,

Songdowon, contains a botanical and a zoological garden, a flower garden, children's pleasure

ground, an open-air theatre and a sandy beach close to green pine groves with holiday homes

and camps. The flower garden has a well-stocked lotus pond, a hothouse and public service

facilities. The zoo is not particularly large, but has a good variety of birds, and several

hundreds of fish, amphibians and reptiles. The Songdowon International Children's Union

Camp borders the sea and is open from mid-April to the end of October.

Opposite of

Songdowon there is Kalma Peninsula with a sandy Myongsasimni beach of 4 kilometres

length.

To the south from Wonsan there are two lakes, Lake Tongjong and Lake Sijung.

Close to the

latter there is a sanatorium giving mud treatments, with a sandy beach nearby. Further on,

there is the Kosong county with Kumgang Mountains, Changjon Bay and Samil Lagoon. The

Kumgang Mountains are a remote and spectacular stretch of granite pinnacles ranging over

ten kilometres along the Taebak mountain range and the sea coast. Fabled in literature and

art, they also contain a number of now-empty Buddhist temples and many waterfalls, pools

and caves. Kumgangsang Hot Spring is a famous mineral silica spring containing radioactivity.

Kuryong Pool in Outer Kumgang has pine woods, peculiar rock formations, and numerous

waterfalls of 3 to 139 meters of height. Manmulsang presents attractive scenes with cliffs and

rocks of strange forms and a charming spring up on the mountain. In addition there are high

seasonal waterfalls on the route to Sujong Peak. Samil Lagoon, 0.87 km² in area, lies 12

kilometres eastward. It offers many nice views.

Rygang Province

The main attraction in Rygang Province is Mt. Paekdu (or Mt. Baitou in Chinese), the

ancestral mountain shared with the Yanbian Korea Autonomous Prefecture of China, which

has been worshipped by the Korean people from time immemorial. The magnificent and beautiful mountain is noted as one of the eight wonders of Korea. It can be reached by air from Pyongyang through the airport near Lake Samji, or by rail from Hyesan. The crater lake on Mt. Paekdu, Lake Chon, can be reached from Samjiyon by using a route along the side of River Amnok (R. Yalu in Chinese). On the shore of the lake is Paekdu Spa. The mineral water of this spa, with plenty of sodium bicarbonate, is used for thermotherapy and for treating gastroenteric disorders. Around the lake can be found many plants blooming even in severe cold and snow. Here can be seen piping hares, squirrels, chipmunks, brown bears, deer, roe deer and other animals. On the lower levels there are relics of headquarters and camps of the revolutionary army. River Amnok contains many waterfalls, up to 20 meters high. Lake Samji was formed a million years ago in a volcanic eruption. It has an area of 0.46 km² and is 3 meters deep. The lake can be reached also by train from Hyesan. Near the lake lies the grand monument of the battle of Musan. To the northeast from the lake there is the Taehongdan Plain, covered with azaleas in spring and ablaze with autumnal tints in fall. There are blueberry fields across Mubong, Singaechok and other plains, and the Paekdusan Youth Blueberry Farm with over 300 hectares of planted blueberries. In August blueberries are available to tourists. South of Samjiyon there are 6 meters high Rimyongsu Falls, which are formed by underground water gushing out from crevices in the basalt rock. In winter the falls afford a spectacular view with ice pillars formed below the waterfalls and mists around the place. The area also offers excellent facilities for winter sports of different kinds. Aside from the region of Mt. Paekdu and Lake Samji, the province is short of tourist attractions. There are well-known medicinal waters in the valley of River Changjin south of Kim Jong Suk, mountains offering impressive scenes, lakes and rivers, but they were not developed into tourist products in the belief that Mt. Paekdu would fulfil all needs for tourist attractions in the province. It is possible, however, to extend the summer tourist season considerably by developing the mountain regions into an area for hikers and

mountain
trekkers.

North Hamgyong Province

There is a chain of beaches along the eastern coast of Korea, stretching down to the south

from North Hamgyong province. They have white sands and friendly waves of a clear sea. The

chain is broken by Mt. Chilbo south of Kyongsong Bay, where fantastic views are to be seen

from Chonbul Peak, and good surroundings for yachting and sailing exist. 10 to 50 kilometres

away from the coastline in the mountains there are numerous hot springs, the best known

ones situated in Paldam, Panjang, Ryongchon, Onpo, Kyongsong, Kwanmo, Posang, Champo, Sibil, Sechon and Songhung. Medicinal waters in Chonghak and

Chungbong could

prove to be of interest to tourists. The Ssanggye Temple may present some opportunities for

attracting more tourists, as some other historical remains. There should be a critical inventory

of all such attractions in the province.

The Rajin-Sonbong area can combine the properties of a maritime resort with mountain

sceneries and hot springs. There are many rivers and lakes. The Rajin-Sonbong Free

Economic and Trade Zone has 8 bays, 10 capes and many islands along the coastline south

from the mouth of Tumen River. On the sea in the zone there are 21 islands, including Al

Island about 5 kilometres from Uamri. Al Island, which has a lighthouse, has an area of 0.66

km². It is a beautiful island which serves as a rest place for 20 species of rare migratory birds

on their way to and from Siberia in the spring and autumn.

New attractions can be built to fit in the needs of vacationers. There are seaports suitable for

tourist traffic and rail connections to the neighbour countries. The legal basis for foreign

investments in the Rajin-Sonbong area is sound, although the tourism policy needs defining.

The existing connections between TREDAs and the rest of the DPRK are amiss.

The area between Man and Sobon lakes and the sea can become a maritime resort site. An

airstrip is under construction 6 kilometres away from Tumengang station. The importance of

the area to migrating birds is to be taken into consideration when founding tourist facilities

there. Sea fishing is possible in the area, which can also become a centre for wind surfing and

sailing. Nowadays the only facility available in the Rajin-Sonbong area is that of boating. The

area may have some potential for diving. Sandy beaches stretch along the shore in the Rajin-Sonbong area and the sea is ideal for bathing. The lakes in the Rajin-Sonbong area cover a total of 44 km². They contain a variety of fish and the rich mud of the lakes is used for medical treatment. This gives the area a potential of becoming popular resort for resting, fishing and receiving medical treatment possibly involving also traditional medicinal herbs of the area and ginseng. The Onpo Hot Spring is well known for the scenic beauty of the surroundings. Other places near the Rajin-Sonbong Free Economic and Trade Zone are hot springs in Hwangjinri and mineral waters in Chonghak and Songjinsan. The Chilbo Mountains are about 130 kilometres from Rajin port. Their name (seven treasures) refers to the ancient belief that they contain seven kinds of valuable minerals. The Chilbo Mountains cover a wide area of 250 km². They are divided into Outer Chilbo, Inner Chilbo and Sea Chilbo, each of them with plenty of beauty. There are oddly-shaped rocks and peaks, waterfalls and the beautiful scenery of the sea. Many species of animals and plants can be found on the mountains. The area has potential for sight-seeing, mountaineering, resting and bathing. There are also remains and relics of the Kulpo culture from the Paleolithic age giving a glimpse of the ancient history of the area.

MONGOLIA

Mongolia has plenty of unspoiled nature, unique scenery, rare animal and plant species and a certain number of prehistoric and historical remains. Furthermore, Mongolia has a special nomadic culture and abundant folklorist traditions. There are excellent possibilities for fishing, hunting and camping. Mongolia is situated geographically along the way between Europe and East Asia. On the other hand, the distances from one tourist attraction to another are long, the infrastructure is still to be developed, services are insufficient and there is a serious lack of local capital available for investments. The country has still limited legal mechanisms for developing tourism and securing foreign investments.

Ulaanbaatar Region

Almost all foreign tourists to Mongolia start their visit in Ulaanbaatar, which receives the

international flights and trains. The major part of the city is quite new and there is a limited number of historical sites and famous pieces of architecture. There are the Bogd Khan Palace Museum with an adjoining temple full of art treasures, Choijin Sum (or Temple) Museum, Dashchoillin Khiid Sum, Geser Sum and Chin Van Khanddorjiin Urguu in the city. On the edge of town is the capital's most obvious tourist attraction, the Buddhist Gandan Monastery, still in use and chambering statues, paintings and ancient manuscripts in Mongol, Tibetan and Manchu. Other points of interest in the town are the Fine Arts Museum housing much of Mongolia's exquisite Buddhist art along with modern masterpieces, the State Central Museum, the Natural History Museum with its fine collection of dinosaur fossils, and the Geological Museum with a good collection of specimens, presenting the country's geology and mining industry. Nairamdal Park is a fantasy land for children. The Opera and Ballet Theatre and the Academic Drama Theatre present also folk performances, and the spacious State Circus is the scene for Mongolia's world-renowned acrobats. Just before the mid-July the Nadaam or National Sports Festivals are held for three days in Ulaanbaatar, showing wrestling, archery and horse-racing. The Bogd Mountains, 46 kilometres from Ulaanbaatar, were turned into a natural park over 300 years ago. There are the ruins of the ancient Mandshir Monastery, which are open for visitors from May through October. The major part of the temple is seriously damaged. Stone floors of some buildings are remaining. The icon made of stone is damaged. In late autumn tourists have the chance to see Tsam mask dancing, a Buddhist ritual dating from the 8th century in Mongolia. In the neighbourhood there is also a museum displaying relics from tombs, old statues, rock pictures, hunters huts, animals, furs, plants, stone collections and articles made of natural materials. Visitors can hike on forested mountain slopes and admire wild flowers on meadows or look for wild animals and stay overnight in snug Mongolian yurts (or ger) of a tourist camp, which offers also shows of national entertainment, horse trips around the mountains, and a golf driving range. There are plans to make a road or construct a

cable car line to take tourists to the top of the mountain. The Chinggis Khuree tourist camp some 20 kilometres from Ulaanbaatar is located in the picturesque Jargalant Valley of the Bogd Mountains. The resort is built according to the old Mongolian khuree plan with a large central ger surrounded by smaller gers. The big ger is a restaurant capable of serving 50 clients. It specializes in traditional Mongolian cuisine but can also prepare other foods as a special order. The smaller gers are for accommodating the visitors staying overnight. The resort has facilities for archery and other traditional games. Visitors can tour the huge gers on carts and other props used in filming the movie "Chinggis Khan" and visit a museum exhibiting Chinggis Khan artifacts. The pine-covered mountains and surrounding meadows are ideal for hiking and horseback riding. There is beautiful scenery and fresh air for those who just want to relax. Open round the year, Terelj Resort is set in a spectacular valley some 80 kilometres from Ulaanbaatar. Visitors can stay overnight in gers or in a hotel, and take strolls on green meadows, go to mountain slopes or wander along the wooded banks of a mountain stream, which is ideal for angling. There are many interesting places along the way from Ulaanbaatar. Spectacular stone formations like Turtle Rock and Horseman Rock are followed by dinosaurs made of concrete. The valley of River Tuul offers beautiful views, and Gunjin Temple is a good spot for a camping tour with tents. Other historical and cultural attractions in the Ulaanbaatar region include damaged Dapi Ekhiin temple in Amgalan and Princess Temple. In Delgerhaan Sum of Central Province there is the Scripted Monument of Tsogt Taij, some scripts of which are affected by natural erosion. The surrounding area is polluted. The Monument of Tonyukuk Sage of Turek in Halaih town and the inscriptions on it are seriously damaged.

Gobi Region

The Gobi Desert, stretching along the border of Mongolia and China and occupying the southern and southeastern fifth of Mongolia, holds many thrilling surprises. The tourist may have a chance to see in the Great Gobi Reserve rare animals like argali sheep, snow leopard, ibex, Przhivalsky's horse and wild Bactrian camel. Herds of over 1,000 antelopes can be seen

grazing on the steppe. Gobi is a treasure chest of fossilized dinosaur bones and eggs. Nestled between the beautiful peaks of the Gurvansaikhan Mountains, towering 3,000 meters above the surrounding steppe, Yolyn Am Canyon shelters ice-banks which remain frozen even during the hottest summer. The Gobi being the northernmost desert in the world has a unique topography, flora and fauna, and even includes small mountain areas with alpine climates. Much of the Gobi is made up of flat rocky deserts with a sparse vegetation. Sand dunes and mountains occupy only a small part of the Gobi. The Gobi Sands at Duut Mankhan cover a vast area and the sand dunes reach a height of at least 300 meters. Notably these dunes rise from an oasis and spring, where a large number of tents and livestock are found. The sands are lined with red sandstone formations and a saxaul forest. The up to three meters high saxaul trees provide grazing for the herders' camels during the winter. A locally owned and managed ger camp with a view of the largest dunes has been recently opened. The Dinosaur Graveyard at Nemegth in Western South Gobi is a series of canyons formed in enormous eroded red loose sandstone formations. The canyons are very spectacular as seen from the top of the plateau. Due to the sensitivity of the single spring found in this area, tourist visitors should only be allowed to view the canyons from the plateau. Another dinosaur graveyard at Bayanzag in Bulgan Sum needs reparation as the dug part is recovered by soil. In the Gobi desert and semi-desert there are good possibilities of watching various gazelles, flocks of Asian wild ass and the Corsac fox. There are some small mammals like jerboas and gerbils in great numbers. Argali sheep and ibex can be seen in the mountains of Gobi. Spectacular bird species can be seen, e.g. golden eagle in the mountain areas and pygmy cotton goose in the oases. Also reptiles should be mentioned. The Bactrian camels are part of domesticated herds and a camel ride is as easy to obtain as are camel products. Gurvansaikhan Mountains offer a very diverse mountain steppe flora with 620 species of plants. The fauna is also very rich and includes 52 species of mammals and more than 200 species of birds. During the months of July and August the Gobi is most

spectacular with a wide range of flowering plants, many endemic to this desert. The Khalzan Stoned wood at Bultan in Hurmen Sum is also of interest to tourists. It is partly affected by soil accumulation and damaged. Another attraction needing protection and restoration is Toly Had rock in Noyon Sum.

Orhon River Valley Region

Orhon valley region contains plenty of remains from the ancient history and culture of Mongolia. Functionally it comprises areas from Darhan through Bulgan and Harhorin to Terhiin Tsagaan lake and Arvayheer. There are three important subregions, those from Amarbayasgalant to Harhorin, from Horgo to Harhorin, and from southeastern Hangai Nuruu to Harhorin.

Darhan is a good starting point for excursions towards Hotol, Erdenet and Bulgan. There is the beautiful Amarbayasgalant Monastery, which has been restored and some lamas now live there again. The ancient Mongolian architecture can be seen at Khashaat, Battsengel and Ulseet in Arkhangai province, in the city of Bulgan and at Modot, Orkhon, Bugat and Hangal in Bulgan province, in the city of Erdenet and the Erdenesuu Temple, and at Kharbalgas in Selenge province. In the area there are Lake Ogii, the Shibirt health water resort, Mt. Erdenet and other attractions. The Mausoleum of Hatanbaatar Magsarlav in Bulgan town is eroded and needs restoration.

Between Horgo and Harhorin there is the beautiful landscape of Hangai Mountains. The city of Tsetserleg and Chuluut Gol riverside campsite and the ger camp in Horgo are good supports for walks to Mt. Horgo, the numerous rivers in the area and Terhiin Tsagaan, a lake formed by a volcanic lava dam. Other attractions are Tayhar Chuluu, a volcanic formation with ancient inscriptions, the 8th century Turkish monuments to Bilge Kagan and Kultegin at Hoshoo Tsaydam, ruins of the 9th century Uighur capital Har Balgas in Hotont, and Zajyn Monastery.

Natural attractions include also Tsenkher, South Terhiin and North Tamir rivers as well as Khudee and Khunt lakes.

The area southwest from Harhorin, the site of the ancient Mongolian imperial capital Karakorum, is full of historical relics. A central point is the city of Hujirt, famous of spas. In the neighbourhood there are Shanch Monastery and Mongolia's oldest Buddhist

monastery

Erdene Dzuu from the 16th century, having 108 stupas. Trips can be made to the 24 meters

high waterfall on Orhon river at Ulaantsutgalan, to Temeen Chuluu (Camel Stone), 8 lakes, the

Modotyn health water resort and Khorgoikhurem and Hujirt health water resorts. Those visiting

the Hujirt tourist camp can visit gers of the livestock-breeders and taste the well-known airag, fermented mare's milk.

Dornod Steppe Region

The eastern steppe region with vast steppe landscape has plenty of wildlife, bizarre stone

formations and historical sites. These include Dagshinbulag, Zuun Busluur, Lhachinvandan

and Bayantsgaan mountains, Hiyangany mountain branch, Moltsoog sand, Ganga, Tsagaan

and Buir lakes and Khalthyn river. There are the stone men at Horgo valley in Dariganga,

somewhat damaged and with the surrounding area polluted, and the stone man in Halh Gol,

which is eroded and suffering of soil accumulation with grass coverage. There are also

reminders of World War II, monuments to Mongolian and Russian soldiers in Sumber and Halh

Gol and graveyards of Japanese soldiers.

In Dariganga there are 13th century stone mosaic pictures of Ikh Burhant complex, partly

damaged and covered by soil. Birds can be seen at Lake Ganga. Mt. Shiliynbogd with caves is

about 60 km from Dariganga. Other attractions in the southern part of the steppe region are

Ereentolgoi mineral springs and extinct volcanoes, and prehistoric stone figures at Altanovoo

and Hoogiynhondiy. Steppe deer can be seen at Lhachinvandan reserve. In Choybalsan there

is a sight-seeing tower in urgent need of reparation. In the vicinity there are the ruins of Turkish

and Mongol town Herlen Bars.

The eastern steppe areas have become popular among hunters, but also offer excellent

opportunities for photographing, video taping or filming wildlife. There are packs of wild

gazelles and elks as well as flocks of birds especially on migration season. Cranes and

bustards are frequently seen. Lake Buir is rich of fish. The exploitation of oil in the eastern part

of the country with activities such as laying of rails for trains may open an opportunity for

tourists to reach the area more easily, but may also affect the movements of the animals and

change their breeding possibilities.

Altai-Hangai Mountain Region

This area includes Bayanulgii province and parts of Khovd, Uvs and Zavhan provinces. It

consists of mountains with eternal snow and ice as well as rivers and lakes. Bayanulgii is

inhabited by Turkish-speaking Kazakhs, whose way of life differs from that of the Mongols.

They can be seen herding their yaks and goats and hunting with their trained eagles. In

addition of folk traditions, the tourists can become acquainted with magnificent sceneries from

the Altai Tavan Bogd mountain, Hankhuhkii mountain branches and Tsambagarav mountain,

which offer various ascent opportunities. Tsagaan Gol river and Khurgan and Dayan lakes

present nice surroundings for horseback trips or hiking and camping.

Khovd river provides opportunities for fishing, hiking, viewing the landscape and wildlife as well

as for rafting on the river for several days. Munkh Khairkhan mountain near Tsenher is ideal for

mountaineering. At Hot Tsenheriin there are 15-20,000 years old cave drawings and traces of

ancient inhabitants, although the place needs some measures against stone release from the

wall and other preparations for making it a tourist attraction. At Tahilt Hotgor there is a Hun

burial ground used from 3 BC to AD 99.

Zavhan province is partly wooded mountains and partly desert and specializes in sheep

raising. Otgontenger mountain is one of the main goals there for mountaineers, and

Otgontenger mineral spring resort hotel is a practical base for walk or horse ride tours and

camping with tents.

Around Delgermoron there are many places to ride horses or yaks and suitable for

mountaineering with tents. Rafting down river is also possible. Between Delgermoron and

Ulaangom there are stone figures and 9th century Turkish and Uighur inscriptions at

Doloodoyn Bulsh, which need reparation. The stone man and scripted monuments in

Underhangai are interesting, however the polluted surroundings should be cleaned.

Huvsgul Lake Region

The Huvsgul region, stretching from Moron town to the northern border of Mongolia, contains

lakes, rivers, mountains capped with snow, and special vegetation. Lake Huvsgul, located in

the far north, is probably Mongolia's best kept secret. Covering an area of

over 3,400 km², the lake's crystal clear fresh water is surrounded by pine-covered mountains and lush meadows where horses are herded. Lake Huvsgul basin is a taiga reserve, classified as a National Park.

Over 90 rivers flow to Lake Huvsgul, which is probably the clearest lake in the world. The lake is a main point for bird migrations, and it contains plenty of important game fishes.

Unfortunately, the lake is used in winter for transporting fuel from Russia by lorries on ice, and at least 10 full fuel lorries have been lost in the lake during the later years. In summertime there is ship traffic on the lake, which has a popular island. It is possible to walk along shores of this beautiful lake and camp in tents on the banks of the rivers, e.g. Egiyn Gol. Between the lakeside town of Hatgal and Moron there are the Deer Stones from the Bronze Age.

Other attractions in the region include the Alpine landscape of the Seven Mountains, the cave of Dayandeerkhi, the Arsai river valley, Uuryin river and some smaller lakes. In the winter, the region is most suitable to various winter sports, including mountain and cross country skiing.

Fishing can be done on the ice of the lakes, possibly also of the rivers. Gurvan Gol Area

Gurvan Gol (three rivers) is a watershed region about 400 km northeast from Ulaanbaatar.

Chinggis Khan was born at Deliu Boldog on the River Onon near the junction of River Balji.

The area is mainly associated with the early life of Chinggis Khan, who is also believed to be buried there.

Not far from the airstrip of Dadal, there is a country tourist camp Gurvan Nuur (three lakes) in pine forests near three small lakes. It is popular among hikers. The ruins of Chinggis Khan's palace and monument of Chinggis Khan built to honour the 800th anniversary of his birth in

Deliu Boldog as well as the museum in Dadal can be visited from there. Other local

attractions are visits to Buryat national craftsman's family and Bural caves for picnic and folk

music. Also Seruun Temple and Bereevin Monastery are in the region, like also the Soronzon

Tshuluu magnetic stone, which stands in Batshiret.

PRIMORSKY KRAI AND OTHER RUSSIAN FAR EAST

The Russian Far East consists of several territories and regions. Chukotka, the Kamchatka

Peninsula, Magadan, Khabarovsk, Sakhalin Island, and Primorsky Krai are on

the coast, and Yakutia and Amursky are in the interior. Primorsky Krai, which contains the major port city of Vladivostok, has strong interest in developing tourism in connection with TREDAs, because the southern part of the territory has several national parks and protected areas, which prevent establishing concentrated industrial regions. Primorsky Krai has a climate fairly similar to that of Northern California. Khabarovsk, just north of Primorsky Krai, has a Southern Canadian like climate, which can be hot in summer but severely cold in winter. Primorsky Krai has a special European character unique in Asia. It has a beautiful seashore suitable for many kinds of leisure activities, interesting inland landscapes and a number of urban attractions in addition to the rural charms. The countryside offers habitat for many kinds of wild animals, the most famous of which is the Siberian tiger living in the district of Ussuryisk. The western side of the territory contains an important migration route for birds from Hasan to Lake Hanka. Hunting and fishing opportunities can be developed further. There are many cultural activities especially in Vladivostok, which is also the headquarters of the Far Eastern Branch of the Russian Academy of Science. Tourists arrive in the province principally by sea, by air or by rail. Because of the long period of restrictions in entering the military areas, the services and infrastructure including roads are poor and should be greatly improved. The high cost level and undeveloped state of legislation in economic matters may have a negative influence in the investments in the area.

Vladivostok

Vladivostok is obviously the most European city in Asia and thus an appealing place to visit for many Asians. Its pre-revolutionary architecture, the spectacular harbour with merchant and navy ships, and its hills and beaches form interesting surroundings for a variety of attractions. The oldest parts of the city derive from 1860's when the military fortress was built. In 1889, the fortress was expanded and extended, including a network of tunnels under the city. The most famous of these tunnels was called Holodilnik (refrigerator) and used for storing food. It is hoped that in the near future several of the tunnels would be reconstructed for safety and be opened for tourism. There is plenty of architecture left from the turn of the

century.

Vladivostok's Golden Horn Bay, a natural protected harbour, is an important port which has been closed by ice for almost three months a year, but industrial dumping of warm water into the harbour has been sufficient to keep the port open for many years. The international passenger terminal has limited capacity and immigration and customs control of arriving foreign passengers takes much time. Sea cruises for visiting the eastern coast of Primorsky Krai, Kamchatka, Sakhalin and the Kurils start in Vladivostok. Vladivostok is home to more than 800,000 people, many of them sailors or fishermen, the administrative capital of the region, and also a city of students. The presence of a university and seven academic institutions has made it into a lively cultural centre. The topography, trolley cars, architecture and artists' community draw admiring comparisons to San Francisco. Vladivostok boasts one of the oldest museums in the country, the Arseniev Folklore Museum, which has exhibits on the exploration of Primorsky Krai and on the area's indigenous populations. Chekhov even worked there for a time. The Far Eastern Branch of the Academy is one of the nation's leading schools of maritime studies. There are ten institutes, maritime stations and a fleet which are engaged in fundamental research. Boats equipped for fishing, scuba diving or underwater photography can be rented for tours guided by professional marine biologists. Vladivostok has also a Sealife Museum with a good collection of specimens and a lot of aquaria. A dolphinarium is situated in the sea close to the museum. There is plenty of space in the same area for founding restaurants and other tourist facilities to make it a lively centre of summer tourism. A geological institute and a museum of regional studies are also located in Vladivostok. A large botanical garden with a showcase of the Russian Far East's exotic fauna is situated in the northern side of the town opposite of Sadgorod health resort and on the way to the most popular beach resort in Vladivostok. In Sadgorod the bathing season of the sanatoria lasts from June to October. This over 70 year old health resort receives around 6,000 people a year. The hard salty (3%) water in the Amur Bay contains over 60 micro-elements including gold and

is used for medicinal purposes. To the east from the botanical garden there is a large camping and beach area on the shore of the Ussuryisk Bay. It has a great recreational potential and seems also suitable for resort hotels, but establishing of any extended activities in the area needs strict planning and building of water supply, sewage purification and waste disposal systems, because the area and the waters are very sensitive there. There is an art museum and three art galleries in Vladivostok. Other museums include the Museum of the Russian Pacific Fleet, the warship Red Pendant, and the Museum of Military History in a former Lutheran church, which is planned to be restored if a suitable building for relocation of the museum can be found and afforded. Vladivostok has many places of entertainment. There are three theatres, cinemas, an opera hall and about 50 concert halls, 6 of which are for more than 500 people. In addition of the Philharmonic Society's symphony orchestra, there are many orchestras and chamber music groups, and it is fairly cheap to arrange even private concerts for tourist groups. Also gambling is carried on in 20 casinos, which are offering roulette, card games, bar services and karaoke. A license is needed for running a casino, and a tax of about 70% is levied on the profits.

Hasan Region

The Hasan region is the southwestern strip of Primorsky Krai stretching from the delta of River Razdolnaya at the upper end of Amur Bay 250 km to the Tumen River. It has a great recreation potential by nature, and it can be easily approached from the sea and from the neighbouring countries. The coast, washed by warm southern current, has several harbours and many beaches. Two state marine reserve areas are in the southern part of the region, and in the middle of the region there is a natural reserve. There is even lotus growing in the vicinity of the town of Hasan. There are plenty of rivers running across the region from the mountainous border area to the sea. Many of them are rich in fish such as trout, and in six of them salmons are said to be spawning. The climate in the region is favourable for tourism. The season suitable for recreation on beach usually has a length of 100 days, and the period warm enough for touring lasts up to 230 days. During the cold winter period the air is rather dry and snowfall is

scanty, which limits the possibilities for winter sports. Fishing from the ice on the sea is possible from December until the end of March, and considerable catches of herrings are usual. The delta of River Razdolnaya in the northernmost corner of Hasan region allows great opportunities for fishing and bird watching. Especially wild ducks and wading birds are numerous. In the northern part of the region between the towns of Barabash and Primorsky Krai and extending far to southwest there is the Kedrovaya Padie nature and ecology reservation with specific plants and animals. The mountains to the west from Kedrovaya Padie may be interesting for mountaineering and climbing. Close to Philippovka and near the coast outside Veregovoye, Slavyanka, Bezverhovo and Perevoznaya there are small nature protection areas. The ones close to Philippovka and near Slavyanka close to Bamburova railway station can be easily reached from the Ussuryisk-Kraskino road. By the road opposite of the latter area which offers beautiful valley scenery towards the sea there are several small summer houses. Attractive is also the Lebyazhya Lagoon seen from the top of Yankovski Peninsula, which also offers an impressive view towards the sea and the offshore islands as well as to the Bay of Slavyanka. There are several beaches used for recreation on the shore between Slavyanka and Posiet. Many of them have camping sites and some have areas filled with summer cottages, which are not very attractive for demanding tourists. Several companies and other organizations have a number of holiday houses near the beaches, some of them for the year round use. The Bay of Boysman has such sites with beaches of black pebbles and gravel farther and sand nearer the shoreline, and e.g. near Cape Krasnyy Utes there has been tried to run a riding resort in an area where also a sanatorium has been planned. The local administration seeks for cooperation with private companies in order to erect holiday villages on the shores of the Bay of Boysman. In the coasts of the Bay of Troitsa and the Bay of Vitgaz there are sand shores reserved for tourism. There are already some summer cottages, and foreign investors are looked for. The development possibilities of the area include diving, fishing, hunting and

ecotouring. The purity of water is rather good and underwater visibility is at least 2 m. The fresh winds in the area call for use of wind power to generate electricity for the new tourist facilities. There is a deer farm in Andreyevka and in three other sites in the region. The estimated total number of deer in the region is 17,000. On the other side of Cape Gamov there is the State Marine Reserve that stretches out to include the Rimsky-Korsakov Islands. It is possible to dive in the reserve area under guidance of marine biologists. There are many excellent diving places in the Bay of Peter the Great between Russiskiy Island and Kalevala Bay. There are at least 3 wrecks, and the main underwater creatures are giant octopus, king crab, starfishes, grey seals and plenty of fishes. Visibility is better than 12 meters in most places by the offshore islands.

In Zarubino there is a port for vessels of up to 20,000 dwt. The quay depth is 8 to 10 meters and the fairway is 30 m deep and 2 km wide. It is an important landing port for tourists to the Yanbian prefecture in China. The construction of a new passenger terminal is just commencing. The harbour company has plans to buy the club building of the Far East Fishing and Shipping Company and convert it to an international club and tourist restaurant. A private road from Zarubino to Hunchun is being planned. There is a plan of a tourist village in Zarubino with 200 cottages, the first 5 of which should be built during 1994. A new sanatorium is being built and expected to be ready quite soon. There are limited services for tourists in the town, mainly a couple of small restaurants and cafes.

In Posiet there is an efficient cargo port, which also could be developed into a tourist port by expanding the facilities. There is a tiny local museum in Posiet. The Peninsula of Novgorod contains a 30 m deep deposit of therapeutic mud. The Peninsula of Krabbe could be developed into a tourist resort. The facing Cape Suslov, Kalevala Bay and Furugelm Island belong to a second State Maritime Reserve, which includes the Bay of Syvuchia. There are many interesting scenes from the Mt. Butakov and Lake Talmi, Lake Sakpau and Lake Doritsni behind with their surroundings are important for migrating birds. The town of Kraskino which has a hotel and two restaurants is suitable for developing to a

catering centre for tourists, as the town is by the railroad to Tumengang and the road to Hunchun. It could be a good base for tourists making trips around the Expedition Bay, to the lowlands between Kraskino and Hasan, and to the lower Tumen River area of China and the DPRK. There are no significant attractions in the town yet.

Other Regions of Primorsky Krai

The area beyond the port city of Nakhodka is home to the Ussuryisk tiger. Nakhodka's harbour is among the world's most beautiful and its coastal areas resemble the headlands of Northern California in the USA. Nakhodka is a free economic zone, and there is much international shipping in the port, which also has a satisfactory international passenger terminal. A yacht club where international regattas can take place is located in Nakhodka. The Ussuryisk nature reservation in the valley of Komarovka and Artemovka rivers offers many natural attractions. In the mountain-taiga research station over 250 species of medicinal herbs are cultivated, and on the basis of the research there a specialized state farm Ginseng was established. Since the 1950s, magnetic and sun observation stations have been operating in the Ussuryisk area.

V. Arsenyev, who travelled with his devoted guide Dersu Uzala around the Ussuryisk taiga, put up in the small village of Semyonovka, which has since grown into a modern city and been named Arsenyev in his honour. The city has a monument to the great explorer. To the north from the cities of Ussuryisk and Arsenyev there is the great Lake Hanka, which is an important stopover site for migrating birds. There are five nature reservation areas on the Russian shores of this lake, which is crossed by the border between China and Russia, one of those stretching some 40 kilometres northeast from the lake alongside of the border.

The railway from Nakhodka runs in a river valley and turns towards west after having passed through Partizansk, a coal-mining town since 1883. The natural beauty of the Partizansk region is amazing and has much potential for tourism. Beyond the mountains 60 km to the east from Partizansk there is the Lazovskiy nature reservation, which can be reached by road from Lazo or by sea through Preobradzenye.

There are many mineral springs in the central Primorsky Krai. Rich possibilities for hunting

exist in the forests and mountains. Many rivers are suitable for fishing, which can be combined with rafting. There are many kinds of plants in taiga, even grape, and a lot of relic animals. Plenty of caves, some with underground lakes, exist in the inner parts of the territory as well as on the coast. They are of special interest for paleontologists, and some of those have not yet been much studied. Most caves are in bad condition and need development before tourists can enter them. Winter tourism has not yet been widely organized in Primorsky Krai. There are, however, many possibilities including skiing, fishing and hunting. All kinds of winter festivals can be arranged. Because the cultural life is active especially in the areas of Vladivostok and Nakhodka, there is a good chance of creating internationally interesting cultural events in the winter time and high-quality hotels can be used for congresses and other international meetings.

Khabarovsk

Situated on the banks of the Amur river not far from the border of China, Khabarovsk is nowadays the centre of a bustling border trade. The city occupies a series of rolling hills and steep banks along the river and, with its 19th century wooden houses, has a simplicity and grace rare in many cities of monotonous cement-block buildings. In Khabarovsk there is a fine Art Museum with a wide variety of icons and works of the famous Russian itinerant painters Repin, Shishkin and Levitan. The Khabarovsk region contains villages of various ethnic groups native to the region. The village of Sikachi-Alin, which can be reached also by a helicopter from Khabarovsk, is famous of prehistoric rock paintings.

Sakhalin Island and Kamchatka Peninsula

Sakhalin island was opened to tourists in 1992. The island is a veritable botanical garden of birch, yew, fir and acacia trees. Even wild grapes grow there. Sakhalin has deep-sea fishing, downhill skiing and sulphur baths for the health-conscious tourist. Tunaicha lake has resorts for relaxation. The Gorny Vozdukh mountain tourist centre can be reached by a cable railway. The island served for a long time as a penal colony for prisoners of the imperial Russia. In addition to the Russians, the island has an Asian heritage as well. It was home to the Japanese when they occupied the island for 40 years after the Russo-Japanese

war, and the Japanese governor's house still stands in Yuzhno-Sakhalinsk, and there is a Japanese war cemetery. The island's strongest link with Asia today is its minority population of 43,000 ethnic Koreans, many of whom were bought to the island as labourers by the Japanese during World War II. To attract both Korean and Japanese tourists, there are a number of Asian restaurants scattered throughout Sakhalin.

Kamchatka peninsula is one of the world's last wildernesses. More than 200 volcanoes dot the peninsula, 29 of which are active. The highest, Klyuchevskaya Sopka, is the Fuji of Kamchatka. The Kronotsky Nature Preserve contains the last major geyser basin in the world open to visitors. In 1991 the Kronotsky management began to issue permits to a limited number of foreign visitors. To the south from Kronotsky there is the Avachinsky Gulf with a view to the bluish cones of Avachinsky, Koryaksky and Viliuchinsky volcanoes in the distance. The city of Petropavlovsk-Kamchatsky is on the coast of that bay, and from there tourists can visit the curative springs of Paratunka or go and meet volcanologists.

Irkutsk and Ulan Ude are situated close to Mongolia and thus their tourism can be connected with tourism to Mongolia. Irkutsk, a city of 500,000 inhabitants on the banks of the Angara River, is the administrative and cultural centre of eastern Siberia. It was the starting point for caravans heading for China and Mongolia in the 17th century. Irkutsk is one of the oldest cities in Siberia. It is famous for its wooden houses with carved windows. 18th and 19th century homes can be found just a few minutes from the main street. Outside of Irkutsk there is a museum of wooden architecture in the form of a well-preserved 18th century Siberian village. For outdoor people there are many recreational possibilities in Irkutsk. Fishing for pike and salmon, camping, hiking through the cedar forests, biking along old spurs of the Trans-Siberian Railroad and bird watching are recommended summer activities. Visitors to Irkutsk from 25 December to 5 January can catch the city's winter festival and take a troika ride. Irkutsk is only 70 km from Lake Baikal, one of the nature's true wonders, which can be reached from the city by bus or in summer by hydrofoil. Baikal is the world's deepest

lake at more than 1,600 m and contains 20% of the freshwater on the Earth's surface. On the other side of the lake there is Ulan Ude, the capital of Buryatia, the home of Russian Buddhism. The largest Buddhist temple, or datsan, is located 25 km from Ulan Ude. Buddhism has undergone a revival in recent years. Travellers can take tours of the monastery and visit open-air Ethnography Museum of the Trans-Baikal Peoples outside Ulan Ude.

REPUBLIC OF KOREA

The Republic of Korea can offer a great variety of tourist attractions for linking with those in the other TREDAs participating countries. It is also an important source of tourists to the neighbouring countries. There is nowadays a considerable experience in tourism development and skills in marketing and promotional activities, which all can be useful for the other countries. The ROK can thus have an important consultative role in TREDAs. On the other hand, development of transport connections together with the neighbouring countries can result in a great increase of tourism in TREDAs. The tourist market for the ROK is heavily influenced by the political situation and stability in the Northeast Asia. 79% of foreign visitors to the ROK arrive in Seoul by air, and only 5% of all visitors arrive in the ROK by boat. 82% of departures of Koreans take place in Seoul airport. This means that the flow of tourists is concentrated in the western parts of the country. It would be most important for tourism development to increase the attractiveness of the eastern and southern coasts and create new job opportunities in such parts of the country where the attractions can easily receive a swelling number of tourists. Also the investments would be relatively less expensive than in the region of the capital. Therefore this report is focused on the tourism potential of the western and southern parts of the country, and the attractions elsewhere are reviewed only if they are specifically related to more exclusive themes in other TREDAs.

Kangwon Province

The combination of mountains and beaches makes the Kangwon province an ideal vacation area. Historical sites and colourful everyday scenes are to be seen in the small coastal towns as well as deep within the forested mountains of the region, which also boast recreational

opportunities at ski resorts. The Yongdong Expressway connects the city of Kangnung with Seoul and passes near Odaesan and Chiaksan national parks and the city of Wonju. National road No. 7 runs along the east coast and is followed by the Tonghae Expressway between Kyongpodae and Tonghae.

The main attractions in Kangnung are the Ojukon Villa, where Yi Yul-gok, a great statesman and Confucian scholar of the Choson dynasty, lived with his mother Shin Saimdang, who was a famous painter, calligrapher and poet, and Songyojang, a nobleman's mansion constructed about 200 years ago. The Tano Festival is celebrated annually nationwide on the 5th day of the 5th lunar month, and the one held in Kangnung has always been the largest and most famous of these rituals. Ssirum wrestling, the silent Kwanno Mask Drama, swinging, and other folk games are enjoyed there.

There are several towns and excellent beaches north of Kangnung. Kyongpodae is a fine sandy beach for swimming and sea fishing, also famous for its seafood restaurants and the Kyongpodae Pavilion, built in 1326. The 300 km² Mt. Odaesan National Park, to the west from Kyongpodae, is the site of Wolchongsa Temple, one of the oldest temples of the Shilla Kingdom, and Sangwonsa Temple, famous for its bronze bell cast in 725. In the southern part of the park there is the Kang-won camping site, and Yongpyeong Ski Resort lies in the Taegwallyong Pass south of Mt. Odaesan. This is the largest ski resort in the ROK, has 19 slopes and 15 lifts and is equipped with artificial snow machines. An annual snow festival takes place here. In Yongpyeong there is also a golf course with 18 holes.

Hajodae, Naksan and Sorak beaches in Tonghae Provincial Park, Uisangdae Pavilion and Naksansa Temple are situated south of Sokcho, whose fishing port is especially noteworthy. Since 1993, there has been passenger ship traffic in summertime from Sokcho to Zarubino in Russia to carry Korean tourists going to the Changbai Mountains. Just outside of Sokcho there is a newly opened resort with excellent spa facilities, the Choksan Hot Springs.

Sokcho is also a gateway to Mt. Soraksan National Park, a magnificent area of 354 km² with granite peaks, dense forests, green valleys and clear streams. Piryong, Towangsong and

Taesung waterfalls, Osaek hot springs producing the famous Osaek Mineral Water, and Shinhungsa Buddhist temple and Kyejoam hermitage are also in the park area. Near the entrance to Mt. Soraksan there is the Sorak-dong resort village with hotels, camping sites, inns, stores, parking lots and other public facilities. A cable car connects the park entrance with an old mountain-top Shilla fortress Kwon-gumsong. Tourists approaching the park from the town of Inje will visit Paektamsa Temple, which is the other gateway to Mt. Soraksan. There are good opportunities for hiking in the park, possibly also for mountain climbing.

North of Mt. Soraksan National Park, there is the Sorak Plaza golf course with 18 holes. The Alps Ski Resort is situated in the Chinburyong Pass. It has 8 slopes and 5 lifts, and has the longest skiing season in the ROK: from early December to late March. Further to the north lies Kansong Wanggok Folk Village. On the coast there are Sogjiho, Kojin and Hwajinpo beaches.

In the neighbourhood of Tonghae there are Chosan and Mangsang beaches, Mangyongdae Pavilion and the village of Muko, starting point of cruises to Ullungdo island, the site of an extinct volcano, famous for its scenery, crystal clear waters and two small villages of hardy squid fishers. Some 20 km from the coast, there are Mt. Tutasan, Murung valley and Yongchu waterfalls, and Taeidonggul cave is situated somewhat farther away. The inland city of Chongson has an annual folk song competition, the Chongson Arirang Festival, in October.

South of Tonghae on the coast there is the town of Samchok. It has long been a major fishing port and one of the chief shipping centres on the east coast. To the south from Samchok there are several fine beaches such as Hujin, Kundok and Yonghwa. Chodangdonggul cave is also in the area.

In the western part of Kangwon province, midway between Sokcho and Seoul, the landscapes of Soyangho and Chunchonho lakes offer impressive views. There is Chunchon Lake Resort on an island in the lake, and Chungcheon golf course has 27 holes to play. A new golf course with 27 holes as well, Uksung Grand, will be opened in Chunsong by the end of 1994. In the area there are several waterfalls such as Tungson, Kugok and Kusong. In the neighbourhood

of the Kusong waterfall there is Chongpyongsa Temple. Namisom Resort is situated close to the Kugok waterfall.

North Kyongsang Province

From Tonghae south along the coast to Kyongju in the southern part of the North Kyongsang province the road winds along precipitous mountainsides, past fishing villages and narrow beaches. The scenery is memorable, but facilities along the way are still rudimentary.

In the vicinity of Uljin there are Mang-yang and Chukpyon beaches, the remarkable Songnyugul cave, Puryong valley, Kuryong waterfall and Puryongsa Temple. Near the village of Pyonghae there is a beach and on the slopes of Mt. Paegamsan lies Paegam hot spring resort. Between Pyonghae and the city of Pohang there are five major beaches and from Yongdok a drive of some 20 km leads to Chuwangsan National Park known for Talgi mineral water and Yongchu waterfalls. It is ideal for moderate hiking. Farther inland there are Imhaha and Andongho lakes, Andong dam and Hahoe Folk Village and Hahoe Mask Atelier near Pungsan. In Andong and Hahoe the Andong Folk Festival takes place in every June. In the northern part of Andongho lake there are Pogwangsa Temple, Tosansowon Confucian Academy, and Chongnyangsan Provincial Park. Kounsa Temple is situated south of Andong.

From the town of Pohang, by the Yong-il Bay, it is possible to take a ship to Ullung island. Songdo beach is situated in Pohang, and behind the cape east of Yong-il Bay there is Kuryongpo beach. Oosa Temple lies south of Pohang.

Kyongju, capital of the ancient Shilla Kingdom from the year 313 until 939, is the prime tourist attraction in the province and, in fact, of the whole country. The town itself is quiet, but all around lie the remains of what was once a city of a million people, with palaces, monasteries, a wall with 20 gates and a brilliant flowering of art, literature and technology. In the town the Kyongju National Museum preserves much of the Shilla heritage, including magnificent gold crowns, pottery, Buddhist artifacts, and stone sculptures. The museum also houses the three meters high Divine Bell of King Songdok. Many of the treasures in the museum come from the Chonmachong Tomb excavated in 1974 in Tumuli Park, which contains 20 of the more than

200 royal tombs in Kyongju. The tomb itself is open for viewing. Other attractions are scattered around the edges of Kyongju: tombs of kings and generals, former palaces, ponds and pleasure pavilions of the Shilla royalty, Buddhist images, and Chomsongdae, the world's earliest extant observatory, a 7th century stone structure admired by archaeologists worldwide. The annual Shilla Cultural Festival is held in Kyongju in October. National classical music concert, dances, parades and various contests highlight the festival. Pulguksa Temple lies about 8 km southeast of Kyongju on the lower slopes of Mt. Tohamsan. It is a famous monument to both the skill of Shilla architects and the depth of Buddhist faith at the time. All the stone bridges, stairways and pagodas are the originals. The cave of Sokkuram, with its renowned granite Buddha and bas-relief stone work dating from 751, nowadays protected from humidity by a glass panel, is 3 km from Pulguksa up a steep path offering excellent views between scruffy souvenir and drink shops. Between Pulguksa and the residential area of Kyongju is Pomun Lake Resort, opened in 1978. The 10 km² resort complex, which was partly financed by the World Bank, centres on an artificial lake set between wooded hills and includes four super deluxe hotels, a convention centre, a casino and a wide range of sports and recreation facilities. Near the hotels on the lake front is an amenity centre which houses dozens of specialty shops and snack bars. Boating, water skiing, swimming, tennis and a 36-hole golf course are available. Shuttle bus service connects downtown Kyongju with the resort area. Several golf courses in the province are situated close to the Kyongbu Expressway from Kyongju to Taejon. There are Taegu golf course with 27 holes in Kyongsan, Kyugbuk golf course with 18 holes in Waegwan, and Palgong golf course in Palgongsan Provincial Park near Tonghwasan and Unhaesa Temples.

South Kyongsang Province

The core of South Kyongsang province, the city of Pusan, is the main seaport and second business, industrial and population centre of the ROK. The city itself is of no great tourist interest, but it is an important gateway to Korea from the sea. Special places of interest in downtown Pusan are Yongdusan Park and Pusan Tower next to the central shopping and

entertainment districts, the Chagalchi fish market which is a colourful spectacle every morning, Dong-A University Museum and Pusan Municipal Museum. South of the downtown area on the tip of Yongdo island is the forested Taejongdae park with rugged cliffs dropping down to the sea. On the northeastern shore are Kwang-alli beach, Pusan Yachting Centre and Haeundae beach with the Haeundae Hot Spring. North of the downtown Pusan there are Pusan Children's Grand Park, Sajik Stadium and Tongnae Hot Springs. Kumgang Amusement Park is located in a beautiful natural setting in Tongnae, and a cable car links it to the mountain above. A little farther to north there are the ruins of the ancient Kumjongsan Fortress and the 7th century Pomosa Temple. There are eight golf courses situated less than 35 km away from Pusan. Two of those, the 36-hole Tongdo and the 27-hole Ulsan, are in the vicinity of Naewonsa Temple. Not far from there is Tongdosa, an elaborate monastery complex with 45 outlying hermitages and nunneries scattered about a wide, forested valley beside a small river. Also Pyochungsa Temple is nearby. Chinhae Cherry Blossom Festival is held in the southern naval port of Chinhae in spring when the cherry blossoms are in full bloom. Twelve days of events include, in addition to cherry blossom viewing, a memorial service for Admiral Yi Sun-shin, a parade, sports contests, folk games, and traditional music performances. In Chinju, a city with long historic and cultural traditions, Kaecheon Arts Festival is held in every November. The festival features traditional archery, classical music and sword dances. In the northwestern corner of the province, there is Chirisan National Park including Sanggyesa and Taewonsa temples. The Hallyo Haesang National Park stretches from Kojedo and Hansando islands in the east, past Chungmu, Samchonpo and Namhaedo Island, and finally on to Odongdo Island and Yosu in the west. This marine park, dotted with some 400 mainly uninhabited islands and islets, is an area of outstanding scenery. Hydrofoils operate regular services between Pusan and Yosu. Kojedo Island has a beautiful nature with innumerable sea birds, and a number of monuments and shrines commemorating Admiral Yi and his first victory by Hansando Island. There is a fine beach at Kujora, and small, rocky reefs add to the enchantment of the island. Haegumgang is

a dramatic outcrop of rocks lying south of Kojedo Island. Samchonpo is a special sanctuary for the white heron, a protected species. Namhaedo Island is connected to the mainland by the longest suspension bridge in the Orient. In the southern shore of the island there is the beautiful Sangju beach.

South Cholla Province

Odongdo Island is the terminus of the Hallyosudo Waterway and has a very special type of bamboo tree. The island has unpolluted water, steep cliffs and unusual rock formations, plentiful fresh seafood and rich local traditions. Odongdo island is linked to the nearby port of Yosu by a 720 meters long breakwater. From Yosu it is about 60 km to Chogyesan Provincial Park, where Sonamsa and Songgwangsa temples are situated. The latter is one of the largest temples in the ROK. It was first built in the late Shilla Era and then reconstructed in 1205.

Seungju golf course with 27 holes is in the same region. Between Hwasun and Najuh Lake there are two golf courses, the 18-hole Nam Kwangju and the 27-hole Taeju golf course, which will be opened by the end of 1994. In Kwangju National Museum the precious Chinese porcelains salvaged from a Chinese trading ship that was wrecked 600 years ago are exhibited. Unjusa Temple lies by the Najuh Lake. Near Taedok there are the old Taegu Ceramic Kilns. The southern islands on the coast belong to Tadohae Haesang National Park, which includes also Kwanmaedo and Chungni beaches facing the Cheju Strait. The port city of Mokpo is the main ferry terminal for islands of the southwestern coast, with ferries to places such as Chejudo Island in south and Hongdo Island in the far west. The archipelago outside Mokpo is large and variable. The biggest island in southwest, Chindo Island, is connected to the mainland by Chindo Bridge. This island is a fascinating place to be in the springtime, when due to the extreme spring tides, a 2.8 km causeway is revealed from the village of Hoedong to the small island of Modo. This Korean version of Moses' sea parting miracle is celebrated with a variety of folk dances and performances in April.

Cheju Province

Chejudo Island, "Korea's Honeymoon Capital", is the largest and most famous of the Korean islands. Lying far from the mainland, Chejudo has developed its own unique

culture. The island's subtropical climate, green fields and forests, the volcanic formations of basalt rock and clear waters have created an interesting place for tourism. Boating can be enjoyed aboard glass-bottom boats which afford a good view of life in the sea. Fishing is a year-round shore and deep-sea sport. Swimming is a pleasure on the dozen fine beaches along the coastline. Scuba diving and submarine trips are ideal ways of enjoying the island's undersea world. Chejudo is famous for its female divers who gather abalone and seaweed and for the extinct Mt. Halla volcano, the country's highest peak. Mountain climbing is readily at hand on this island, and hunting can be enjoyed, duck and pheasant being the most popular game birds. There are also more than half a dozen casinos on the island.

Cheju City, located along the north shore, has an international airport and is the island's main tourist centre. Kwanndokchong Pavilion, built in 1448 and used for military training, represents the typical decorative patterns of the Choson Period. The Chejudo Folklore and Natural History Museum features a significant collection of folk handicraft, tools and equipment as well as plants, animals and minerals. The Cheju Folklore Museum has a fine collection of clothes and tool used by the islanders in the past. The unusual lava formation of Yongduam lies on the coast in western Cheju City. The descendants of the three island's founding families gather together in April, October and December at Samsonghyol Holes to venerate their forefathers. Nearby Mok Suk Won Park displays a whole variety of unusual rocks and storm-polished pieces of wood. The 27-hole Ora and 18-hole Cheju golf courses are farther towards Mt. Halla.

The main city on the south coast is Sogwipo. This fishing port is situated in a tangerine and pineapple producing area, which offers spectacular sceneries including two great waterfalls. Chongbang waterfall plunges straight into the sea and Chonjiyon waterfall falls into a gorge surrounded by lush, subtropical vegetation. The Tonneko Resort is some 10 km north of Sogwipo, and about 20 km west of the city there is the spacious Chungmun Resort Complex by the beautiful Chonjeyon waterfall and white beaches. Chungmun is the second of the ROK's international tourist resort developments. The emphasis there is on

sports and leisure,
and the resort already has hotel facilities, a golf course, an oceanarium, a botanical garden, a shopping complex etc. The development continues. There are many attractions around on the island. These include the Hallim Weavers' Village and the nearby Hyopchae beach and Hyopchaegul cave. The cave contains stalactites and stalagmites. On the opposite side of the island there are two lava tubes, the Kimnyongsagul cave and the 13 km long Manjanggal cave, which is the longest in the world. On the southwest coast there is the Sanbanggulsa Temple in a natural grotto. In mid-April the cultivators hold the Rapeseed Festival when the rape fields carpet the island with their yellow flowers. The festival includes such events as a celebrity show and photographic contest. In October the Halla Cultural Festival takes place with various cultural activities, exhibitions and concerts.

Other areas

Nine ski resorts operate in the country. In addition to those mentioned earlier, there are skiing possibilities at present in four resorts close to Seoul, in Suanbo Aurora Valley Resort in Chungwon, and in Muju Resort in Muju. The season lasts for 2 to 2.5 months, but there are year-round leisure activities such as golfing, swimming, and tennis. In Kyonggi province and between Chonan and Taejon there are more than 50 golf courses. Hot springs in Ichon and Ichon Ceramic Village are neatly situated close to the crossing of Yongdong and Chungbu expressways. Yong-in Farmland is an open zoo, where visitors ride in mini buses through the natural animal environment. It also includes an amusement park, the Global Village exhibiting various traditional cultural scenes from 21 different countries, and the Hoam Museum displaying a private art collection.

A huge new international airport has been planned on Yongjongdo island outside of Inchon. Inchon recently emerged as a tourist spot when it was found to be the original site of making the world famous Choson white porcelain. The potters in the area have rediscovered the art of making Koryo celadon. Songdo Recreation Area south of Inchon is an ideal picnicking area with possibilities for boating on a lake and observing wildlife. Suwonsong Fortress has been restored and is now the main tourist attraction in the city of Suwon. A

narrow-gauge railroad

dating back to pre-industrial days operates three times a day between Suwon and Incheon.

In October three interesting festivals take place. Sejong Cultural Festival at Yoju honours King

Sejong with a lantern parade, a circular chanting procession, farmers' dances, a mock royal

parade and Confucian rituals. Paekche Cultural Festival is one of the three main cultural

festivals in the ROK. Since the capital of the ancient Paekche Kingdom was first Kongju and

later Puyo, the site of the festival alternates each year between these two cities. Moyanngsong

Fortress Festival is held in Kochang. During the festival some 5,000 women and girls clad in

beautiful traditional Korean dresses walk around the top of the fortress walls. There are also

singing and archery contests.

There are 15 hotels around the country which operate casinos and gambling.

Gambling is

allowed for foreign visitors only.

TOURISM IN TRENDA

CHINA

The main volume of tourism in China comes from the domestic tourism. About 330 million

people were involved in domestic travel in 1992, an increase of 10% from the previous year.

105.6 million or 32.0% of them participated in organized tours and an additional 28.2 million

travellers used individual travel arrangements marketed by the travel services. The number of

nights spend by Chinese in hotels in 1992 already exceeded the number of nights spend by

the foreigners. The number of tourists from China to abroad was approx. 3 million in 1993.

According to the advance figures for 1993, China received 7 million organized visitors in that

year, representing an increase of 11% over 1992, including 4.5 million foreign visitors, whose

number increased by 18% from the preceding year. There were 38.1 million visitors arriving in

China in 1992. 4.0 million of them were of foreign nationality, 0.2 million were Chinese citizens

residing in foreign countries, and 33.9 million were Chinese residing in Hong Kong, Macao or

Taiwan. 3.1 million of these were participants in tours organized by tourism agencies and 3.2

million were invited by non-tourism organizations for trade and business or scientific and

technical exchange. Those participating in organized tourist tours included

1.2 million foreigners and 1.9 million compatriots, the visitors received by other organizations included 2.6 million foreigners (of which 0.5 million crew members of international airlines, ships and trains), 0.1 million overseas Chinese and 0.5 million crew members of airlines and ships from Hong Kong, Macao and Taiwan.

The greatest number of foreign tourists to China came from Russia and other former Soviet Union countries and amounted to 895,000. One fifth of them, however, returned during the day of their arrival, which leaves 716,200 tourists who spent at least one night in China. Japan was the main source of tourists who stayed in China for at least one night, their number being 791,500. The next 10 source countries of tourists to China in 1992 were the USA (346,300 tourists in 1992), Singapore (152,800), Thailand (147,200), Philippines (137,900), United Kingdom (129,800), Germany (121,300), France (116,200), Canada (93,100), Australia (75,600) and Italy (45,400). 46.1% of the foreign tourists came from Asia and 37.9% from Europe, the latter figure including tourists from the Asian areas of the former Soviet Union. 12.4% of the foreign tourists came from the Americas, 2.6% from Oceania and 0.9% from Africa and elsewhere. In 1993, the greatest increase occurred in the number of tourists from the ROK, which grew by 58% into 110,600. The number of tourists from the USA grew by 10%.

Out of the three northeastern provinces, only Liaoning has been actively marketed in the major western tourist market, while Jilin and Heilongjiang have been receiving less attention. Shenyang and Dalian in Liaoning province are the main cities attracting tourists. In Heilongjiang province, Harbin receives a great number of tourists from Russia. Tourism was least developed in Jilin province because there were many areas closed from foreigners. Now the rate of development seems to be greatest in Jilin province. Changbai mountain and the city of Jilin have been important centres of development. Investments will be directed also to Songhua lake, Hunchun city and Tumen city. Already now Changchun and Yanji are remarkable starting points for tourist routes. The vast majority of tourists visiting Yanji area comes from the Republic of Korea. Inner Mongolia receives less tourists than

any Chinese province except Ningxia and Qinghai. Heilongjiang, Jilin and Liaoning provinces and Inner Mongolia received 456,000 tourists in 1992. 323,000 of them were foreigners. 38% of the foreigners were Japanese and 25% were Russians. 5% of the foreign visitors came from North America, 5% from Europe and 4% from Southwest Asia. 22% of these foreigners visited Jilin province. Seven major cities in the area, Harbin, Yanjin, Jilin, Changchun, Dalian, Shenyang and Hohhot, received 355,000 tourists, among them 237,000 foreigners.

DEMOCRATIC PEOPLE'S REPUBLIC OF KOREA

About 2.2 million people were involved in domestic travel in the DPRK in 1992. Tourist trips were mainly made in groups, which spend about 15 days in average in the tour. This travel involves quite much seasonality, but the tour seasons for different kinds of groups are either overlapping or completely separate from each others, thus evening the load to the tourist industry.

From the figures available from the DPRK it can be seen that there were 117,500 foreign visitors to the DPRK in 1992. 104,500 of them were of foreign nationality and 13,000 were overseas Koreans. The majority of these foreign visitors came from China and amounted to 82,500. From Japan 2,300 foreign visitors have been received. The Japanese statistics give 4,300 residents having departed for the DPRK in 1992, which probably means that some 1,900 of them are Koreans residing in Japan. 600 of all visitors from Japan were businessmen.

The total of visitors from East Asia and the Pacific was 99,300, including 8,300 overseas Koreans.

The next countries as a source of tourists to the DPRK were Russia (1,800 visitors in 1992), Germany (1,200) and Taiwan (1,000). The total amount of foreign visitors from all Asian countries was 91,700 including 700 visitors from the Middle East. From West Europe there was a total of 4,800 visitors and from East Europe excluding Russia there were 2,100 visitors.

Also 2,100 foreign visitors came from the Americas, and 1,900 came from Africa.

MONGOLIA

The tourist statistics in Mongolia are rather defective. It was known that people crossed

Mongolian borders approx. 2 million times in 1993. The other half of these were Mongolians, because 500,000 Mongolians made a trip abroad. 77,000 were transit passengers who mainly traveled across the country in train. It is assumed that some 250,000 people from Russia, about 200,000 people from China and some thousand people from Kazakhstan visited Mongolia during the year. They were mainly involved in trade, and only a small fraction entered Mongolia for visiting friends and relatives or as a tourist. In the vast majority of these visitors returned on the day of their arrival. Of the rest, about 10,000 were tourists from East Asia (Japan, Taiwan, Hong Kong, ROK), Western Europe (Germany, France, Italy, United Kingdom, the Netherlands, Scandinavia), Australia and the USA. The number of Japanese visitors in Mongolia in 1993 was estimated as 5,400. Some 2,000 of these Japanese had Mongolia as their first destination, and almost 500 were businessmen. Information obtained concerning the number of other nationalities was irreconcilable. The main tourist season in summer is short, in the Gobi area not more than 5 months, in many other parts of the country like Ulaanbaatar only some 2 months in July-August, and 70 to 80 % of tourists visit Mongolia during the summer season. Nowadays mainly Japanese students and some other budget travellers from developed countries visit Mongolia in winter.

PRIMORSKY KRAI

There were 250,000 tourists in Primorsky Krai in 1993, mainly from Russia. In 1993 Primorsky Krai was visited by 28,200 foreign tourists from China, Japan, the DPRK, the ROK and Mongolia. 1,400 visitors from the USA came to Russia through Primorsky Krai. These figures include only those foreign visitors who entered Russia in Primorsky Krai. There is no count on such foreigners visiting Primorsky Krai who have first entered Russia somewhere else. The recorded foreigners come mainly by air or by sea, but the Chinese tourists come by train or by car. Over 50% of foreign tourists are Chinese. The Japanese statistics reveal that 46,000 Japanese had Russia as their first destination abroad in 1992. 25,200 of them were recorded as tourists. It is unknown how many of them did visit Primorsky Krai, but a local estimate states 6,100 visitors.

REPUBLIC OF KOREA

There were 3.3 million visitors arriving in the ROK in 1993. 3.0 million of them were of foreign nationality, 0.3 million were overseas Koreans. 1.1 million of these were participants in group tours organized by tourist enterprises. Approx. 400,000 of the foreign visitors were transit passengers who didn't stay overnight.

Two thirds of foreign visitors came from Asia. Pleasure tourists' share of all visitors was highest among the Japanese and the Taiwanese, about 88%. Tourists accounted for 75% of visitors from Hong Kong. The purpose of visit was something else than tourism for the majority of visitors from all other countries. The greatest number of foreign tourists to the ROK came from Japan and amounted to 1,492,100. 325,400 foreign visitors came from the USA, a slight decrease from the previous year. The next 10 countries as a source of tourists to the ROK were Hong Kong (151,700 visitors in 1993), which outnumbered Taiwan (145,300), Philippines (133,600), Thailand (75,900), Singapore (36,100), United Kingdom (35,900), Germany (34,800), Indonesia (28,600), Canada (26,200) and Malaysia (23,300). 75.7% of these foreign visitors came from Asia and 12.3% from the Americas. 10.8% of the foreign tourists came from Europe, 0.9% from Oceania and 0.3% from Africa and elsewhere.

The average length of stay of tourists from abroad varied between 3.1 and 4.8 nights in 1970-1991. During the latest years, the average length of stay has remained rather constant at 4.0 to 4.2 nights per tourist. Tourists from Japan, Taiwan, Hong Kong and Thailand stayed on average for less than 4.2 nights. Visitors from Brunei, the USA, Canada, Argentina, Germany, the Scandinavia, Australia and the Middle East stayed for the longest periods.

According to the Domestic Pleasure Travel Survey in 1992, more than 88% of Koreans aged 13 years or over participated in at least one pleasure trip for one day or longer. Koreans make pleasure trips to visit natural attractions or famous places, to rest and relax, and to enjoy recreational activities and entertainment. Trips to escape the summer heat are most popular among Koreans, and 40% of all overnight pleasure trips are made in July and August. Skiing in winter is also gaining popularity. 38% of overnight travellers spent only one night away from home, 34% spent two nights and 19% three nights.

MAIN MARKETS

GENERAL OUTLINE

The Pacific Rim region has enjoyed the reputation of being the fastest growing tourist arrival zone in the world over the past decade. Tourists arrivals to selected 13 countries of the region (Australia, China, Hong Kong, Indonesia, Japan, Macau, Malaysia, New Zealand, Philippines, the ROK, Singapore, Taiwan and Thailand) exceeded 46 million in 1992 and international tourism receipts totalled around US\$ 36 billion. Some 55% of all arrivals were from Asia, 25% were from Western Europe or North America, and Japan alone accounted for 17%. The annual growth rate has been around 9%. Total arrivals are expected by some analysts to grow to over 73 million in 1997 and could exceed 112 million by 2002. A WTO study predicts an average annual growth rate of 6.8% for East Asia and the Pacific region for the next eight years, which would mean 64 million arrivals in 1997 and 89 million in 2002. It is obvious that the main tourist market for the TREDATA participating countries is in Asia. There Japan has the greatest immediate tourist potential with almost 10 million tourist trips abroad, followed by the Taiwanese with 4.6 million trips abroad. The Taiwanese have already replaced the Japanese as the biggest spenders among Asian tourists. Next follows Hong Kong with some 2.5 million tourist trips abroad (and about 30 million other visits to various parts of China), and then the ROK with 1.1 million tourist trips. In the future China may prove to be the principal source of tourism to the neighbouring countries, as the domestic tourism already involves more than 10 million people. Tourism in the Asian part of Russia is also increasing, although the trips abroad are usually very short and do not stretch far from the border. The Mongolians make some 0.5 million trips a year abroad, mainly for shopping. Southeast Asian countries are constantly increasing their tourism abroad. In a survey in April-June 1944, conducted by Asia Studies Ltd., the subscribers of Far Eastern Economic Review in 10 Asia-Pacific countries were asked questions concerning their holidays and pleasure trips. Among the Asian pleasure destinations visited by them in the preceding 12 months, Malaysia was most popular (22.4 % had visited Malaysia), followed by Hong Kong (22.2 %), Singapore (21.8 %), Thailand (20.0 %), Indonesia (13.7 %), China

(11.5 %) and Japan (10.6 %). Two-thirds of the respondent from the ROK would choose a cultural or sight-seeing holiday, while less than one-fifth would head for a beach. Two-thirds of the Taiwanese also would visit temples and museums, with just one-fourth preferring the beach. The Japanese like a variety of holidays, but are more likely (21 % of them) to opt for a sporting break than any other group in Asia. The Malaysians were the front runners when it came to shopping holidays, with 9 % of them taking a long shopping list abroad. The Thais are classic beach people; only 5 % would spend a vacation shopping, while 38 % would head for the sand and surf. The USA is another market whose tourists are clearly present in East Asia. They are mostly among the top five nationalities visiting these countries. The Europeans outnumber the Americans in most countries, but come from many countries of different languages, which makes it technically more difficult to approach them. Americans and Europeans usually stay 2-3 times longer in one destination than the Asian tourists. Therefore these long haul tourists represent more value per trip and may therefore be more economical targets for marketing than tourists from most nearby countries.

JAPAN

Despite the recent stagnation, the fact remains that the potential of the Japanese outbound market is enormous. Perhaps the biggest challenge facing Japan's travel industry comes not from the slipping economy but from changing patterns of consumption and travel. Asia attracts by far the largest share of the Japanese outbound market with 44% of the total, followed by North America with 33%. However, both areas have lost market share in recent years and Oceania and Europe have increased their shares, which amount to 10% and 12%, respectively. The top destination for the Japanese was Hawaii (1.64 million Japanese visitors), regaining the position from the ROK which was number one destination for 1989-1991 and holds now the second position. The ROK received 1.40 million Japanese visitors (as much as the whole Europe), of which 1.22 million were tourists and 0.17 million were businessmen. These two destinations were followed in popularity by the continental USA,

Hong Kong and Singapore. China is gaining interest in Japan and is showing the greatest growth of Japanese arrivals in Asia, although it is still far from the top of the list. Another big draw for the Japanese is Bali, which attracts about 65% of all Japanese visitors to Indonesia. Taiwan, the ROK and Hong Kong have suffered a sharp drop in Japanese arrivals. The Japanese are looking for new destinations as motivations change and the number of repeat travellers increase. In Taiwan, a lack of new attractions and resort developments, and a limited appeal among younger Japanese, are all said to have contributed to the decline. Both Taiwan and the ROK are reportedly close to lifting the visa requirement for Japanese visitors. For Hong Kong, reduced interest in shopping and high hotel rates together with relatively expensive air fares have contributed to the weakening of Hong Kong's appeal. The Japanese, especially repeat travellers, are also said to be looking for new or different types of products that reflect the locality and culture of the place they are visiting, and thus for new tourism areas.

Japan's key tourist market segment seems to be women in their early 20s. Young women have been instrumental in redefining the purpose of travel and dictating the destination booms of the last few years. In their later years these women are likely to be the decision-makers when it comes to making honeymoon and family travel plans. Recently there has been a remarkable increase in young family travel, particularly to resort-based destinations such as Hawaii, Australia and Micronesia. It is a market that the travel industry has only just started to enter by introducing discounts for children and one that offers a potential for growth. A survey reported that 85% of Japanese honeymooners went overseas. The average duration of their trip was 8.5 days and the most popular destinations were Australia or New Zealand, Hawaii and Europe. The average honeymoon expenditure is declining, however, and the total overseas honeymoon expenditure was 1.1 million JPY.

The rapid aging of the Japanese population will certainly have an impact on travel trends. Already those aged 50 and over accounted for 26% of the outbound market in 1992. This share can only get bigger. Big developments are expected in the company-

sponsored travel sector of the market in the wake of the Ministry of Finance's belated decision to widen the tax break on company-sponsored travel to four nights and five days. These travels have been limited to East Asia and Micronesia, but may run to more distant destinations in the future. This market is expected to boost to around 200 billion JPY annually. The organized or package tours have been largely influenced by increasing numbers of young Japanese travelling individually or in small groups. At the same time, the organized graduation trips abroad and the senior student's overseas travels have shown reduction and also this market is expected to veer towards more independent travel in the future. This will certainly increase the demand among younger Japanese for more individual low cost package tours to popular beach resort destinations in Southeast Asia, Micronesia and Hawaii, but will allow space for new destinations to be developed e.g. in the continental Northeast Asia. The change from fully organized, mass package tour travel to cheaper, semi-organized tour travel and individual travel will most probably happen first in the young age group. Departures by air regularly account for 99% of all outbound traffic from Japan, with Tokyo and Osaka the two biggest departure points. Total departures decreased since 1992, Kagoshima, Tokyo/Haneda and Osaka being the biggest losers. However, Sendai, Niigata and Nagoya recorded growth for a second year in succession. Lack of airport capacity has long restricted opening of new flight routes to and from Japan. Recently, new airports have been opened at Fukushima and Hiroshima. However, the major event for 1994 is the opening of the Kansai International Airport near Osaka, which will see the start of direct services between Japan and several new countries. Mongolia is one of the countries awaiting for such opportunity. Some Japan's regional airports could develop new connections with destinations close to Japan, but increase in scheduled short haul international flights may be quite modest. Areas where demand is seasonal or limited may present better opportunities for the use of charters. The enthusiasm that greeted the arrival of Japan's domestically created cruise industry has waned considerably. Cruising has yet to become a significant part of the Japanese travel

market. In 1992 there were 76,800 Japanese passengers on international cruises and 120,300 on domestic cruises. The cruise market has grown in Japan less than expected, perhaps because of the unfamiliarity with the concept of cruising, the limitations on vacation time and the perceived high cost of cruising. Also the travel trade still appears lukewarm about handling cruise products and Japanese cruise operators are burdened with a high cost structure.

However, projections by Japan Oceangoing Passenger Ship Association forecast 198,400 passengers for international and 301,500 for domestic cruises in 1997.

REPUBLIC OF KOREA

The outbound travel from the ROK has increased more than five times since 1987. There were 2.42 million departures of Koreans in 1993, an increase of 18% from 1992. In the first years of the 1990s, the travellers from the ROK spent around US\$ 2,000 on average during their trip abroad. Tourism in foreign countries gains popularity in the ROK, and the growth rate of leisure trips abroad is almost double in comparison with the growth rate of other trips.

Asia was also in 1993 the most important tourism destination for the people of the ROK, attracting 69% of the tourism, which here is including trips for pleasure and visiting friends and relatives. North America is the next with a 21% share. Oceania and Europe are far behind with their respective shares of 6% and 5%. The top destination was Japan, receiving 37% of the tourists abroad from the ROK. It is followed by the USA (20%), where Hawaii and Guam were the main goals. The rest of the top ten are Thailand (12%), Hong Kong (6%), Taiwan (4%), Singapore (4%), Philippines (3%), Australia (2%), the UK (1%) and France (1%). Philippines and Thailand show the largest growth as a holiday destination, although Singapore and Australia are still gaining popularity. Japan and Taiwan have lost their share in this market.

China has been of interest in the ROK, but now when a special permission is no longer needed, the forecasts for tourism from the ROK are very incoherent, the most optimistic estimations forecasting a share of 20% as a destination to be reached in three years. Since April 1994, the load factor on the Seoul-Shanghai flight has been 85%, and daily charter flights are now operated in this route. Mt. Paekdu (Mt. Changbai) is very important

attraction to all Koreans, and tourism there is expected to increase. The main routes from the ROK to Mt. Paekdu are either via Beijing and Shenyang or via Zarubino and Hunchun, as far as the approach from the DPRK is not allowed. Outside of Yanbian, other frequently visited attractions in China are Beijing, the Great Wall, Tianjin and Shanghai. There are approx. 22,000 ethnic Chinese in the ROK, and their favourite destinations in China are different from those of the Koreans.

A survey was conducted in the ROK asking 424 respondents to name three places in the DPRK they wanted to visit. Of them, 84% picked Mt. Paektu, 81% Mt. Kungang, 43% Pyongyang, 19% Mt. Myohyang, 14% Kaema heights, 11% the city of Kaesong, 3% Hamhung, 3% Wonsan and 3% Shinuiju as places they wanted to visit. Also beaches like Songdowon and Monggumpo are interesting the citizens of the ROK.

Recently the number of tourists from the ROK to Russia is on steady growth. Most of this increase is due to direct flight services to Moscow. The level of interest in visiting the Russian Far East is low, because no specific attractions are known and the deep-rooted negative image of Siberia (cold, inconvenient, undeveloped, transport problems) dominates.

In the ROK there has been no significant interest in tourism to Mongolia. This is mainly due to the absence of advertising for Mongolia's tourist attractions. Another factor is the lack of direct or convenient flight connections between the ROK and Mongolia.

60% of those travelling in leisure abroad from the ROK are women, and 78% of women travelling abroad are on a leisure trip. Housewives are the largest group of tourists, followed by students. Increased student travels can be seen in the average price of trips, which is decreasing. These budget travellers have caused also a striking growth in travels during the winter season, especially in February, and January equals nowadays July and August in travellers' number. The key tourist market seems also here to be women between 20 and 30 years of age. They represent more than a quarter of all women visiting foreign countries.

Women over 50 years are still, however, the most frequent travellers. They slightly outnumber women between 20 and 30 years as travellers abroad, although their share in

population is smaller.

Of all travellers abroad from the ROK, those between 30 and 40 years of age are most numerous. However, the biggest age group of travellers to Thailand is that of those between 20 and 30 years of age, and also the proportion of travellers between 50 and 60 years is relatively large. The age structure of travellers to the UK and Oceania is resembling to that of travellers to Thailand. Singapore, Australia, The Americas and Italy attract proportionally much more Koreans at age of 61 years or above.

RUSSIA

Tourism from Russia to the countries of Northeast Asia has been focusing on short visits across the border. Harbin is the main destination from the Russian Far East because of the flight connection from Khabarovsk and the rail connection from Ussuryisk through Suifenhe, and it is visited by 20,000 Russians a year. 28,000 Russians from Primorsky Krai visited foreign countries in 1993, mainly China, the DPRK, Japan, Mongolia and the ROK. China was visited by a total of 716,200 tourists from Russia. Some 60,000 Russians in all visited Mongolia by rail via Sukhbaatar and less than 10,000 by air from Moscow and Irkutsk. It was estimated that less than 10,000 Russians in all visited the ROK. The number of Russians from other parts of the country visiting Primorsky Krai is quite high and apparently increasing all the time, despite the increasing cost of domestic travel. One reason may be the decrease in the number of domestic beaches on Black Sea shores following the breakdown of the former USSR. Also there are in Moscow and St. Petersburg increasing amounts of businessmen who can afford to take their families with them when visiting distant countries like Japan. They might find many attractions in TREA countries interesting and it is possible to give them value for their money.

CHINA

There were 3 million Chinese tourists abroad in 1993, and this number is expected to increase considerably in the future. The complete distribution of their destinations was not available, but it is reported that 1.73 million of them visited Hong Kong, 261,000 visited Thailand, 214,000 went to Singapore, 85,000 visited the DPRK, 40,000 visited Mongolia and 14,000 went to

Primorsky Krai.

The Chinese are the greatest potential source of tourists in Asia. People from the southern provinces would like to see the attractions of the northeastern provinces, which can prove to be a refreshing experience during the hot summer in the south. Increasing interest in winter sports may also give rise to tourism in the northeast during the winter season. Those living in the northeastern provinces would like to see the sea. Beaches on Russian and Korean coast are thus very attractive to them in summertime. The ethnic Koreans living in China will find it especially easy to visit Korean tourist sites. Primorsky Krai in general, and Vladivostok particularly, can demonstrate European culture to the Chinese in a way incomparable in Asia. It is thus probable that Chinese tourists will greatly contribute to the use of tourist facilities in the coastal area and the inland sites could also be increasingly appealing to them.

OTHER ASIAN COUNTRIES

Taiwan is a remarkable source of tourists in the Asian market. In 1993, as much as 4.6 million Taiwanese travelled abroad, 10% up from the previous year. Their most popular destination was Hong Kong, which received 1.5 million of them. Mainland China was in the second place with 1.3 million visits. The next important destinations are Japan and Thailand with more than 0.5 million arrivals from Taiwan. Then follow Singapore with 0.4 million visitors and Malaysia with nearly 0.25 million visitors. The ROK, which received 0.3 million visitors from Taiwan in 1992 got 51% less in 1993, when only 145,300 Taiwanese arrived in ROK. For 1995, 5 million departures of the Taiwanese are predicted by the local authorities. Taiwan travellers are increasingly willing to visit non-Chinese areas. About 30% of the business of Thailand's entire tourism industry is generated by Taiwan tourists. Taiwan is Malaysia's fourth largest tourism market. For Australia Taiwan is the third major source of Asian tourists and is believed to become the second largest source in 1995. Taiwan is now New Zealand's sixth largest source of visitors and ranks second among Asian countries after Japan. Outbound Taiwanese are nowadays younger, prefer travelling with a few friends instead of being part of large tour groups, and have higher expectations of the

facilities at tourist destinations. Even though most travellers still buy typical tourist packages, they are also demanding more sophisticated arrangements. Three main target groups can be identified among Taiwan tourists. The most important segment constituting almost 50% of the overall market consists of 30 to 55 years old mature travellers, who earn at least US\$ 36,000 a year. The next group of independent culture seekers, making up only 10% of the market, is regarded as having the broadest potential for growth. They are usually in their twenties or thirties, generally attracted to outdoor activities and more adventuresome preferring to make their own travel arrangements once they reach their destination. The third major category is the young office lady market. Made up usually of small groups of female friends or co-workers, they are usually first-time travellers hunting for advantageous package tour purchases. Despite the growing trend of younger independent travellers, most Taiwan tourists are known more for their shopping habits than for their interest in the culture of the country they are visiting. In Thailand they are attracted to beach resorts, local food, karaoke clubs, golf courses and water sports. The latter is an indication of growing interest in snorkelling, diving, and sailing. In Malaysia the activities offered to Taiwan tourists range from cave exploration and hiking in the jungle or national parks to relaxing at a hot springs resorts. Golf courses, tennis, scuba diving and snorkelling are also promoted. Singapore, Malaysia, Indonesia and Thailand are turning into tourism generating countries at the same time when they receive more tourists than ever. Familiar with the high standard of their newest domestic tourist resorts, they are looking more and more for developed destinations. Group travel is still, and probably will be during the next 10 years, the main way of touring abroad. Interest in getting to know other cultures is arising. Different nature and sceneries will attract tourists from these countries, and they are fascinated by opportunities to try new sports, but they are not so keen in ecological aspects. The Mongolians visited mainly China and Russia. Chinese statistics count 19,000 Mongolian tourists. Their arrivals in Primorsky Krai amounted to 600 only. However, there should be

almost 500,000 Mongolian visitors to China and Russia, but as they are engaged in border trade and return on the same day, they are not included in the number of tourists. They visit mainly Erenhot and Ulan-Ude, some go to Borza and Manzhouli. Seoul appears as a new destination to Mongolian tourists.

USA AND CANADA

Tourism from the USA to both Japan and the ROK declined in 1993, but to China and Taiwan

increased for third successive year. The rate of increase was, however, slowing down in all

major East Asian destinations, which shows that the Americans would need new interesting

attractions there to visit the area anew. The classic appeals for Americans considering tourism

abroad still prevail, a mixture of fun and cultural reasons, seeing historical places and a

different way of life. Interest in "green tours" (ecology) is increasing although still engaging only

the minority, like appetite for gourmet tours.

As in the past, the leading attractions Americans seek are interesting cities, beautiful

countryside, and historical places, followed by entertainment, and museums and art galleries.

Beaches, night life and sporting facilities (for tennis and golf) - all activities that Americans can

find at home - fall far behind as criteria for selecting a destination. In the category of facilitators

(factors that make travel easier or more comfortable), affordable prices are first, followed by

easy-to-get-around and honest people. Cost and safety are the most remarkable serious

concerns about travel to Asia. Hotel cost seems to be the first aspect of cost concern, now

even higher than airfare, which earlier has been of greatest concern.

There is a continuing trend to travel independently, with some growth, however, in the

purchase of partial packages to achieve savings. The likelihood of travel in the off-peak

months of October through April is increasing, perhaps to take advantage of lower costs.

EUROPE

The main trend in Europe has recently been exploring the northern and eastern parts of the

continent, although the Mediterranean countries and Northwest African islands are still very

popular. However, Italy has lost more than 10% of her foreign tourists in 1993, especially in the

lake resorts, but beaches, spas and art cities seem still to be well-liked. Spain has lost her

popularity in UK and Netherlands, the Belgian tourists have retained their interest and the proportion of German tourists departing for Spain has increased. France has gained inclusive tour travellers from all other European countries and is now wooing tour operators from Europe's most traveled North European markets, in an attempt to boost visitor arrivals and receipts. Italy has become more popular among Swiss and Austrian tourists, but lost a great deal of British and French tourists. Disturbances in Balkan, Middle East and North Africa have cut tourist flow to these areas, and some states in the USA like Florida have also lost their popularity because of violence against tourist. The well-known safari areas in central Africa have suffered from uncertainties as well. The new destinations found by the Europeans are in the Caribbean area, which already received 2.3 million tourists from Europe in 1993, Argentina, which experienced double-digit growth, and Southeast Asia, where Thailand has lost their market share to Indonesia and Malaysia, although the Europeans still make up a quarter of the number of tourists to Thailand. The Pacific Rim is interesting an increasing amount of European travellers and is expected to pass the Caribbean in the near future. The top five European markets for European tourists are France, Germany, Italy, Spain and the UK, followed by the Benelux countries and the Scandinavian countries.

TOURISM DEVELOPMENT TARGETS IN TRED A

For estimation of market potential in TRED A countries it has been assumed that political situation in Northeast Asia will be stable, international relations will develop favourably between all countries in the area and with the USA, TRED A will have 500,000 inhabitants in the year 2000 and 1 million inhabitants in the year 2005, the transportation infrastructure and tourist services have developed in accordance with demand, and marketing efforts related to the tourism opportunities in the area have been concerted and optimized.

NORTHEAST CHINA

China has a great market potential for tourists all over the world. It should be noted, however, that the domestic tourist potential is very high and will be realized along the increasing leisure time and regular vacations. Introduction of a free Saturday every second week from 1993 will

gradually increase the domestic travel and cause an estimated annual growth of 7 to 10% in the use of hotel beds. Establishing of new holiday arrangements for employees will greatly stimulate domestic tourism further. The annual growth of domestic tourism can be 15 to 20% during the last years of the 1990's. Forecasts published by the Financial Times predict 10 million foreign tourists to China in 1997 and 19.5 million in 2002, not including tourism to Hong Kong, where 10 million domestic and foreign tourists in 1997 and 14 million in 2002 have been perhaps too optimistically predicted. The number of domestic tourist to the four northeastern provinces of China was 133,000 in 1992. Inevitably that number will rapidly increase. For the northeastern part of the country it is reasonable to predict that in 10 years the number of domestic tourists will exceed the number of foreign tourists, when nowadays only 29% of tourists in the area are Chinese. The target in Heilongjiang, Jilin and Liaoning provinces and Inner Mongolia for the year 2000 could be 1.2 million tourists including 650,000 foreigners, and for the year 2005 around 2 million tourists including 850,000 foreigners. Jilin province would receive over 30% of these tourists from the year 2000, and 250,000 foreign tourists to China would visit Yanbian prefecture in 2005. The number of visitors from the ROK and Japan is especially expected to grow rapidly, but will decrease rapidly at the time when it will be possible for them to visit Mt. Changbai in the Korean territory. Relieved border formalities and visa practices could soon, however, attract also those visitors to explore Yanbian and other areas in the northeastern China just like the other international tourists.

DEMOCRATIC PEOPLE'S REPUBLIC OF KOREA

The DPRK will, in accordance with the tourism development programme, receive 240,000 foreign tourists in 2000 and 310,000 foreign tourists in 2005. Domestic tourism will increase by 50,000 from the present number in 2000 and by 150,000 in 2005. 35% of foreign tourists will visit the eastern coast, 50% Mt. Paekdu and 70% Pyongyang. North Hamgyong province would thus receive approx. 90,000 new tourists, mainly foreigners, and Ryanggang province approx. 150,000 new tourists in 2000. The corresponding figures for 2005 would be 150,000

and 250,000. The majority of the tourists visiting these two northeastern provinces would be overseas Koreans or come from Asia Pacific countries, especially from mainland China, Taiwan, Japan and the Russian Far East. 12-20% would come from Europe and 6-8% from the Americas.

MONGOLIA

Mongolia will receive 75,000 foreign tourists in 2000 and 120,000 foreign tourists in 2005. Domestic tourism will not increase considerably. Japan, Europe and Southwest Asia will be the main sources of tourists to Mongolia because nature would be more attractive to them than to tourists from the Americas or Australia. Tourism from China and Russia will increase mainly by increasing the length of the stay, not so much the arrivals. The majority of the tourists will visit Gobi. Other main tourism areas would be Ovorhangay and Tov region, Hovd and Uvs region, Hovsgol region and Sukhbaatar region.

PRIMORSKY KRAI

Primorsky Krai is expected to receive Russian tourists in greatly increasing amounts. Domestic tourism will increase to 400,000 visitors in the year 2000 and remain steady thereafter. There will be 100,000 foreign tourists in 2000 and 150,000 in 2005. The main destination for these tourists will be Vladivostok before the year 2000, since then Hasan district will receive the majority of them irrespective the port of arrival. Lake Hanka, the taiga and areas for hunting will be the attractions elsewhere in the territory that are important to tourism. Foreign tourists will come from Japan, the ROK, inland China and the other continental Asian countries, and the Americas. The share of European tourists will remain under 10%. The distribution of tourists of different nationalities will depend very much on the degree of collaboration with the other TREDA participating countries in attracting tourists.

REPUBLIC OF KOREA

Tourism in the ROK can be encouraged by the growing tourism in TREDA. The stagnating tourism in the ROK will increase again and reach 3.6 million visitors in 2000 and 4,1 million visitors in 2005. In most forecasts for Pacific Rim tourism, the ROK does not feature as a major growth destination. The Financial Times, however, predicts as much as 5.2 million tourist arrivals in 1997 and 7.2 million in 2002. In this study a more moderate

growth is considered likely, especially since the boost from the Visit Korea Year 1994 campaign seems to have faded away because of the tense political situation sustained so far in the peninsula. Nearly half of the increase comes from tourists visiting some other TREA participating country. It will vitalize especially the tourism in the eastern coast, where even 400,000 such tourists would visit in the year 2000 and 850,000 in 2005, if the crossing of the DPRK border can be normalized. The share of tourists from China, Singapore and Europe will increase considerably, if effective marketing is executed in those countries. It is possible that the ROK could offer a new interesting alternative for such Europeans who have already been visiting Thailand, Indonesia and Malaysia; for instance in Thailand 57% of tourists come from East Asia and 26% from Europe.

DEVELOPMENT STRATEGIES

East Asia has been able to sustain rapid tourism growth because of the strong intra-Asian regional travel demand and penetration into the key long haul holiday markets. For a remarkable future growth in the northeastern China, the east coast of the Korean peninsula, the Russian Far East and Mongolia, it is necessary to create new tourism products and develop the existing ones further. This will mean continuous investments by the public sector in attractions and non-commercial tourist facilities, but also increasing activity of the private sector in investing in the commercial tourist facilities and generating new programs, much in collaboration with the tourist industry in the other countries of the area. To make the investments internationally competitive and attractive to foreign investors, a high degree of utilization should be achieved in all tourist facilities. Thus it is necessary to have sound seasonal strategies for new investments, fresh promotional strategies, and harmony with the development of general infrastructure. In order to sustain the growth in demand, the region will need to adapt its product development, marketing and promotion strategies to accommodate changing tourist demands. As in the other parts of the world, these will include increased short break holidays, growing

environmental awareness and concern for improved quality, as well as desire for less structured itineraries. In the whole East Asia and the Pacific Rim area new tourism products are continuously produced, but convention and incentive travel, the cruise and senior citizen markets remain under-exploited sectors. In these sectors the TREDAs participating countries would achieve good cooperative results if they launch their products before the market has stabilized. An area having the image of a new great experience will be able to launch successfully novel products among the first ones. Like the Caribbean, which in 1993 attracted 7.7 million foreign tourists from the USA and Canada and 2.3 million from Europe, the areas specifically dealt with in this report could be able to attract 4 million tourists from Asia and 2 million from Europe and the Americas in the year 2000, provided that also the cruise market products can be properly developed.

GREEN SEA CONCEPT

A central element in developing tourism programs for the TREDAs participating countries is the sea surrounded by them. A major difficulty arises from the marketing point of view, as there are two names used for this sea in different countries - the Sea of Japan and the East Sea of Korea. Both names are unsuitable for effective marketing campaigns and promotion of the region as they refer to a single country instead of creating an image of a larger region or the properties of the region. It would, therefore, be necessary to find a new name for this sea, suitable for use in all kinds of joint promotional activities and free from national overtones. Such name could become a central feature in all kinds of campaigns and promotional publications by all countries in the region. In addition to being easily memorized, the name should create positive associations and suggest the region as an ideal destination for a successful holiday as well as promote the zone as a region of harmony and peace, suitable for all kinds of international business activities.

It would thus be in the best interests of the participating countries to find a new name for this sea. This would signal the fair economic participation by all countries of the area in developing the region. It would create confidence in the future of the economic cooperation between the

TREDA participating countries.

The Consultant discussed this topic with Mr. Young-Hoon Kwaak, Architect-Planner of ESPRI.

Mr. Kwaak suggested that the sea in question be named Green Sea, which would reflect the

brilliant nature of the lands surrounding the sea and the quality of water in the sea as well as

the harmony between all the nations in the area. The Consultant considers this suggestion

extremely suitable because it would fit in a series of famous geographical names such as

Yellow Sea, Black Sea, and Red Sea. From promotional point of view, the name Green Sea

would work excellently in various marketing connections.

It is thus suggested that the UNDP bring this suggestion to the TREDA participating countries

and Japan for their acceptance and proposal to the Seventh United Nations Conference on the

Standardization of Geographical Names, to be held in 1997. It should also be submitted to the

United Nations Group of Experts on Geographical Names, which has the responsibility of

considering the naming of features beyond a single sovereignty.

SEASONAL STRATEGIES

TREDA's peak tourism season is from August through October, and the period from March to

July has a performance slightly above the average. From November through February the

number of tourists stays well below the average and some 25% behind the peak months.

Developing tourism in the winter season has the advantage of demanding less investments in

accommodation than does creating new tourism in the peak season. Some of the investments

in winter sports resorts can be partly used in the other seasons, e.g. the lifts allow tourists view

the scenes from hilltops and the downhill skiing slopes can be furnished with summer coasting

runs. On the other hand, a beach resort with hotels in the northern area can be converted into

a winter resort where ice fishing and skating take place in the open water areas, and the

indoor baths can be enjoyed in the winter as well. It is more problematic to develop winter

activities in areas that lack frost and snow. Sometimes the attractions can be used only in

summer because the nature prevents the access in the snowy season, as is the case with Mt.

Changbai. One of the main subjects in future development studies should be a thorough

planning of winter tourism. It would be possible to create such programs

where the various parts of the TREDAs countries could combine their resources for winter tourism, and not necessarily limited to winter sports. All kinds of cultural activities should be encouraged in off-season. East Asia has the greatest current market potential for classical music, and the existing resources could be completed to make a series of music festivals around the area. Also competitions for various instrumentalists could be arranged, thus attracting audience from foreign countries. Opera, theatre and circus performances are usually abundant outside the normal summer holiday season. Art collections should be set up as theme exhibitions which could either be coordinated to allow special tours to visit several museums, or for an exhibition to be moved from one museum to another in tour. International congresses and sports contests can be arranged in off-seasons, where facilities for such events exist. It is possible to design special tours for their participants and spectators in order to get them to visit other areas of the region. For all kinds of tourist activities in winter, it is advisable to have good food available in a variety of places, and opportunities for other social gatherings like karaoke and dancing parties, especially in the evenings. Indoor show programs are more important in winter than at other times. Winter season is attractive for people from Southeast Asia, who cannot enjoy snow in their own countries. The techniques of various winter sports and outdoor activities should be introduced properly to visitors from those countries. Therefore it is necessary to have instructors and experienced guides available, in addition to local rent and sales of equipment, and courses for winter sports techniques could be marketed abroad. When once attracted to a special kind of winter sports, a tourist can make repeated visits to the same area. Hunting is another activity well suited to the winter season, and some hunting areas may be within easier reach when the surface is covered by snow. Spring and autumn can become a refreshing season for people from tropical countries, where they seek for relief from all the year round heat. Tourists from the moderate and cooler climate, like North Europe, are accustomed in outdoor activities and tourism in temperatures well below 20 C, and would welcome an opportunity to visit Northeast Asian resorts

either in advance of or after the local high season. Outside of the usual opening times of the regular attractions these tourists would like to attend a recital or concert of classical western or traditional local music, they would be interested in circus performances etc. The best season for observing migrating animals, especially birds, would be in early spring and late autumn. Fishing can be done in spring and autumn, and hunting may be done especially in autumn. Cooler seasons are especially suitable for hiking and mountaineering at moderate heights, although it is too chilly to approach any of the highest mountains. It can be clearly seen that the peak months for tourists from many European countries to East Asia are in spring or in autumn. This is partly due to the timing of term holidays, but in many countries especially in Scandinavia there is an increasing tendency to take a vacation of one or two weeks outside the usual summer holiday period. For instance, in China the peak of visitors from France occurs in March, from Sweden in April, and from the UK, Germany and Finland in October, when also the peak of visitors from the Americas and Oceania takes place. Italy is an example of South European countries, where August is the traditional summer holiday month and thus also the peak of visits to China. April is most popular for visitors from African countries. The peak of visits from Singapore is in June and from Russia in August. Japanese visitors are most numerous in September. The peak of visits from Thailand occurs in October and from the Philippines in December. In the process of extending the season, all countries should have their own geographical strategies. In Mongolia the main strategy suggested is to concentrate as much new tourism and transport investments in Dalandzadgad and other South Gobi area as possible, because the tourist season there is more than twice as long as in Ulaanbaatar and better utilization of the investments would thus be expected. In the ROK the season in Cheju Island is much longer than on the peninsula where again the southern coast has best possibilities of attracting tourists early and late in the season. It is possible to gain a better return of investments in such areas where the overall utilisation rate will become higher than in short season areas. For

China, the DPRK and Primorsky Krai special winter attractions are suggested, and in Mongolia the easily movable gers can be used both in summer and in winter tourism areas, thus minimizing the need for investment in stationary accommodation in short season areas. This suggests the general seasonal strategy for marketing. In winter the target is in Southeast Asia and Oceania, and successful existing products should be marketed more effectively while expanding the scope of product development and creating tours which include several countries. American tourists should be persuaded to discover Northeast Asia in November. The flow of tourists from Japan, United Kingdom and Germany should be encouraged in November and extended into December. January and February are the most problematic months, and a new approach will be needed in developing suitable products. The market is much easier in March, and tourists should be drawn from the southern destinations to visit places in more northern areas. North Europe may turn out to be a particularly good source of tourists in March and April. May and June can attract more visitors from Southeast Asia, the Americas and Europe. In July there is much international competition between the holiday resorts, but it seems probable that new tourists could be lured from the southern hemisphere. The northernmost regions could attract people especially from the Mediterranean region and the CIS countries. Tourist flow will be strongest in August, and it is advisable to concentrate in shifting the demand to July and September. Then regional variation is high, and a careful analysis should be done to reveal ways to attract tourists from the most popular regions to less known ones. In October such areas as the DPRK and Mongolia should receive more attention, because tourists are moving around in the other countries anyway. Investments should be encouraged in areas with long or versatile seasons, like South Gobi in Mongolia or Cheju Island in the ROK. Places with shorter seasons but good international traffic connections would be developed into shopping centres for duty free goods. It should be reminded how Hong Kong, a city of little scenic beauty, serves as a gateway for outsiders to China, South Asia and the South Pacific, and has great service industries. Although it makes

no economic sense for tourists to pay increased travel costs to buy duty free goods from a great distance, thousands of tourists still go to Hong Kong to shop. TRED has similar potential with equal capacity.

TRANSPORTATION

Convenient transport is obviously necessary for future growth of tourism in Northeast Asia.

Therefore it is important to develop transport systems in order to facilitate easy movements of

tourists and materials needed for tourism. Passenger traffic and transport of goods are linked

together in many ways. Feasibility of air travel depends on a good balance between passenger

and cargo traffic, and availability of effective air cargo routes contributes to decisions in

locating certain production. Sea transport, especially of loaded trucks, offers good

opportunities for profitable tourist traffic in areas suitable for short cruises. Rail traffic is usually

feasible only when the railway is justified by the needs of cargo transport, unless the

passenger flow is so high that very frequent super express trains are needed.

Light rail traffic

for short distances can be feasible in densely inhabited urban areas. All

other forms of

passenger traffic need complementary road transport, especially tourist groups buses.

From the energy consumption or environmental points of view there are differences between

the various forms of transport. It takes on average 400 kJ to convey one adult a distance of 1

km by train or boat, 700 kJ by bus, 1,100 kJ by aircraft and 2,500 kJ by taxi. Therefore sea and

train traffic should be preferred as far as possible, and regular bus routes should take care of

conveying tourists between airports and hotels as well as between the most popular attractions

instead of taxis, although the general availability of taxis in tourist centres would be increased.

There are some limitations in Northeast Asia at present, preventing tourists from using the

straight routes and the most energy sparing transportation modes. The lack of diplomatic

relations between some countries precludes air-services agreements necessary for setting up

scheduled flights. Limitations in air traffic control systems determine the available channels for

flights, and elimination of such difficulties would result in shorter routes from Northeast China

and Mongolia to Japan and the ROK as well as between Vladivostok and Niigata.

Establishing

rail connections between the DPRK and the ROK would greatly promote tourism in Northeast

Asia allowing the DPRK to channel a considerable tourist flow through its territory and attract

more easily tourists into TRED A from all directions. Connecting Hunchun to the Russian rail

network north of Kraskino would add new choices of routing tourists in TRED A.

Developing

road infrastructure between the mouth of Tumen River and Yanji, including the Changbai

mountain region, would make the tract more easily accessible and lengthen the tourist season,

especially if a modern road condition forecast and control system is introduced.

Further information about transportation can be found in Report C, "Conceptual Infrastructure

Master Plan".

ATTRACTIONS

Continuous efforts will be made to perfect and promote the traditional tourist products while

some intensive measures will be taken to develop and market a set of culture-related sight-

seeing tourist products and to expand the seasonal use of many attractions.

At the moment, it

can be estimated that in 1995-1999 some US\$ 40 million would be needed in Yanbian

prefecture, US\$ 35 million in North Hamgyong and Ryanggang provinces, US\$ 20 million in

Mongolia and US\$ 60 million in Primorsky Krai for development of public attractions and non-

commercial tourist facilities, and for directing tourism into environmentally reasonable routes

and controlling tourist movements and behaviour in sensitive areas. In addition to restoring the

historical monuments and sites, plenty of border offices with prompt and polite services and

information offices for tourists along the tourist routes will be needed.

Audio-guide systems for

the most important attractions would be prepared. Public toilets of high standard, parking

places, guidance and signposts to the attractions etc. are to be constructed. Further

investments in 2000-2005 would require US\$ 10 million in Yanbian, US\$ 20 million in Rajin-

Sonbong area, US\$ 12 million in Mongolia and US\$ 15 million in Primorsky Krai.

To raise necessary funds, in countries of limited public resources a special fixed (not

proportional to room price) daily tourist tax might be collected from those who accommodate

tourists. For tourism planning, product development and improving tourism and environmental legislation, the countries would need assistance from international consultants, which would call for initial costs of US\$ 300,000-500,000 per country, including international coordination of the tourism programs and joint development of new tourist itineraries. The ROK has already gained much experience in such activities and might be willing to coordinate joint projects in the TREDAs participating countries. Some countries have already received certain assistance in their promotional projects from Japan, which at present would not be ready to extend such aid to TREDAs collectively because of unsettled problems in relation to some countries.

China

In the northeastern provinces of China a variety of attractions from volcanic mountain landscapes to historical sites could be further developed. The winter season in Inner Mongolia has not yet been commercialized very far and could be better utilized by winter sports activities in the northern parts of the territory. In winter the snow-bound Xishan Mountains provide an ideal ground for skiing. Lake Hulun near Manzhouli, Sun Island in the Yimin River at Hailar, tours in Hohenaer grasslands and horse riding tours near Zalantun could be upgraded to attract more international tourists. In Ulanhot region the Mausoleum of Chinggis Khan in Gandeli steppe could have additional tourist services in the vicinity. The natural preserve area near Xilinhot and the neighbouring Da Hingganling Mountains is recommended to be developed into a new centre for nature fans. The activities in Xilamuren and Gegendala summer resorts can be further developed. The Wudang Lamasery south from Baotou, constructed on mountain slopes, is a natural centre of developing new activities around the countryside to attract more visitors. Heilongjiang already has a reputation as a world of winter attractions, where Harbin receives plenty of tourists from December to February. Winter sports and the famous two-month-long Ice and Snow Festival attract a number of visitors. An analysis should be carried out to see what kind of new attractions visitors from tropical and subtropical regions would like to see in wintertime in addition to cross-country skiing, sledging in forests and

taking part in winter game hunting. The activities on the frozen Songhua River may be possible to develop further, and the art galleries could have interesting events. The fame of Harbin in the field of music could be extended into spring and late autumn. The existence of accommodation makes it feasible to seek for development of new attractions for quieter seasons outside of Harbin and route especially summer tourists through Heilongjiang. In the more remote parts of Heilongjiang there are plenty of opportunities for outdoor life. Development could be made in Zhanhe River, Yichun and Jingpo Lake, and more extensively in the Jinpohu tourist area. Taoshan Tourist District and Liaodong Peninsula could be the extremities for a Northeast China Culinary Tour. The Chinese kitchen in general belongs to the great kitchens of the world, and foreign tourists arriving at Dalian would be interested in tasting the northeastern food in authentic surroundings. A tour including everything from seafood to the specialties of the mountain area can be arranged here. On the way tourists could see Bingyu Valley, the temples in the Mt. Qianshan area and the famous caves in Benxi. In Changchun city, the Film City, which features tourism, recreation and filmshooting simultaneously, could be made the central attraction for tourism, around which a versatile programme of North China would be constructed. The main theme would be the history of the 20th century, and various film performances as preludes for visiting Jilin province could be an integral part of the tour programs. The development project for Songhua Lake will be continued and in all kinds of sightseeing possibilities can be invested in this scenic area covering 550 km². The area contains many opportunities for winter activities including hunting. Mt. Daqing already has a skiing resort, and can contain more tourist facilities. The ancient tombs with frescoes in Tonghua, the eastern pyramids, and the Donggou tombs south of Jilin City could also be developed into an interesting entity attracting tourists from spring to late autumn. The Tonghua Grape Wine Festival and entertainment created for that event can be used as basic elements for promoting the whole area, which is within easy reach from the Changbai Mountains. The tourists arriving from Tumen via Yanji and Antu could

continue to Tonghua area and further to the west, if a suitable tour packet would be available.

The relics between Tumen and Dunhua should be restored and sufficient tourist facilities erected in the area.

In the mouth of the Tumen River the holiday resorts can be extended. The Yanbian region offers plenty of Korean traditions still practised in the old manner, and will be attracting tourists in increasing numbers. New products based on Korean culture can be developed. Tours of the Tumen River have already become especially popular, and it would be advisable to develop a tour of the "golden delta" of Hunchun, with its Tumen, Yalu and Songhua rivers, Korean customs and new frontier villages.

Democratic People's Republic of Korea

Because of lack of detailed information from the DPRK, it is not possible to evaluate the condition of various attractions in the country. There has been much work done on restoration of historical monuments of the DPRK, the foremost examples from the recent years being the renovated Tomb of King Tongmyong in Pyongyang and the Jongrung Temple in front of the tomb. Mt. Myohyang seems to have a great tourism potential with many temples, plenty of waterfalls, the Kumgang Cave and great views from the peaks to the valleys. Possibly there is a need for investments in tourism facilities in order to develop the area and make it into a still more popular site among foreign tourists.

The Kumgang Mountains exhibit a variety of attractions, which could be enjoyed by a much greater number of tourists if Wonsan, which already has good rail and road connections to several parts of the country, could be made into an important tourist port. The temples in Kumgang area may need continuous conservation. Songdowon, Myongsasimni and Lake Sijung would be included in a comprehensive development programme with an aim to create a starting point to trips along the coast, where new resorts could be constructed.

In Ryanggang province, the area around Kim Jong Suk might have rich potential in becoming a modern tourist region. The combination of possibilities on Amnok river, in the mountains and in the valleys is interesting and should be studied more closely. The medicinal waters add more features to the concept, which would also include developing the mountain

regions into an area of long season for hikers and mountain trekkers. The beaches along the eastern coast of Korea and Mt. Chilbo south of Kyongsong Bay exhibit good possibilities for international tourism, and good surroundings for yachting and sailing exist. There are numerous hot springs and medicinal waters which could prove to be of interest to tourists. The area has potential for sight-seeing, mountaineering, resting and bathing. It is advised to give some attention to upgrade the Ssanggye Temple and some other historical remains into a well-marketed tourist attraction. An inventory of all attractions in the North Hamgyong province is suggested. Also the opportunities of developing tourist interest in the known and possibly existing unknown remains and relics of the Kulpo culture from the Paleolithic age are worth of analyzing.

In the Rajin-Sonbong area the properties of a maritime resort with mountain sceneries and hot springs can be combined. It is advised to build exclusive resorts and new attractions in the area to fit in the needs of vacationers. The legal basis for foreign investments in the Rajin-Sonbong area is sound, although the tourism policy needs defining. The connections between TREDAs and the rest of the DPRK would then be developed according to the plans how foreign tourists should approach the area. A casino built on an island would fit well in the maritime resort concept, if viable from legal reasons.

The area between Man and Sobon lakes and the sea can be developed into a maritime resort site, especially taking the importance of the area to migrating birds into consideration when founding tourist facilities there. Boating, sea fishing, wind surfing and sailing can be developed. The area may also have some potential for diving. The Rajin-Sonbong area has a potential of becoming popular resort for resting, fishing and receiving medical treatment possibly involving also traditional medicinal herbs of the area and ginseng. Development of the hot springs in Onpo and Hwangjinri and mineral waters in Chonghak and Songjinsan are worth of studying.

Mongolia
Development of tourism in Gobi region is the principal recommended step in advancing tourism in Mongolia, because the area has the longest continuous season for tourism.

There the canyons known as dinosaur graveyards would be protected and trimmed, and special areas reserved for watching the canyons. The Khalzan Stoned Wood should be protected, restored and prepared for tourism. Also Toly Rock needs protection and restoration. Wildlife watching would be planned and organised, and local people should be trained to act as guides for tourists. The ger camps would provide opportunities for tourists to become acquainted with the nomadic traditions and customs, and entertainment would be organised. New hotels with versatile opportunities to enjoy big shows and other entertainment would add feasibility to the public infrastructure development programs. In Ulaanbaatar region much attention would be paid to setting up a good array of cultural events and art supply to interest tourists. The local attractions should be properly maintained, and furnished with facilities needed by tourists. The Princess Temple should be cleaned and restored and the Dapi Ekhiin Temple reconstructed and restored. The Mandshir Monastery should be restored and made into a central tourist attraction in the area, which could have a uniform promotional appearance. The plan to build a road or cable car line to the top of Bogd Mountain should be again evaluated from the landscape protection viewpoint, and if an acceptable solution can be found, the plan should be realised as soon as possible. There are also some other attractions needing protection and restoration, e.g. the scripted monument to Tsogt Taij and the monument to Tonyukuk sage of Tureg. In the Orhon Valley region a couple of remains of ancient history and culture would be grouped together to form special visit programmes in the area. Therefore in each subregion relevant attractions should be repaired and equipped with appropriate facilities. In Arkhangai province the surroundings of the Zegt Nuur tomb would be cleaned. The mausoleum of Hatanbaar Magsarlav in Bulgan needs restoration. The remains of Tamiryn Ulaanhoshuu town should be properly studied and rehabilitated. Scripted stones and monuments in the area would need restoration to become useful tourist attractions. The Karakorum area in Hahorin has all necessary elements to remain as one of the most attractive sites in central Mongolia. The

attractions there would be organized to make a uniform tourist programme. The Dornod steppe region could be developed into an excellent wildlife observation area, and an institutional organization should be established to manage nature-oriented tourism there.

The monuments to Mongolian and Russian soldiers and graveyards of Japanese soldiers

should be rehabilitated and included in tourist programmes. Ikh Burhant complex has a great

tourist potential and should be cleaned, the surroundings constructed for tourism and the

mosaics restored. The stone men in the area should be restored and the surroundings

cleaned. The sightseeing tower in Choybalsan is worth of repairing.

In Altai-Hangai mountain region the opportunities for fishing, hiking, rafting and mountaineering

would form the core of tourism development. The traditional life style of Kazakhs can also

become an attraction to tourists, and tourism should be organized so that it doesn't interfere

with the life of the herdsmen. The ancient cave with drawings should be prepared for tourist by

protecting them against stone release from walls and organizing the visits properly. The stone

figures and 9th century inscriptions in the area can be made more attractive by some

reparation and cleaning their surroundings.

The Huvsgul region has all qualifications to become an important object of nature-oriented

tourism. The lakeside offers good opportunities of developing camping and hiking in a discreet

way, and the area in general is most suitable to various winter sports.

Fishing can be done in

all seasons. In Gurvan Gol area tourism can be developed further around the history of

Chinggis Khan and the ruins of his palace. Other historic attractions might be found in the

area, which can also be developed as a hiking tract.

Primorsky Krai

In Primorsky Krai the first step would be to develop attractions on the coast and along the

Transsiberian railway line. Vladivostok and Nakhodka would develop especially their cultural

attractions. Art galleries, music, dance and drama can be furthered and all kinds of scientific

applications including museums and displays would be advanced. In Vladivostok the old

fortress and the tunnels might be constructed into a great tourist attraction with also a dark

show train featuring the history of Northeast Asia and some characteristic restaurants.

However, it is necessary to develop the nearby camping areas and sanatories to versatile holiday resorts. Nakhodka could be developed as an international yachting centre with favourable opportunities to duty free shopping for larger goods. In the coastal area between Vladivostok and Hasan the main attractions developed in the first phase would be summer resorts with water sports activities and areas for wildlife observation. This needs also development of alternative ways of entertainment for utilizing the accommodation capacity in off-season. In wintertime ice fishing would be an alternative to indoor activities. The places with natural beauty along the Transsiberian railway would be included as stops of package travels after their facilities will be developed. The second step would include development of inland attractions in Arsenyev and southwest from Lake Hanka, and in smaller coastal places like Ternej. Mineral springs, taiga and caves would be the important attractions to be put into service. More ecotours would be created. The possibilities between Lake Hanka and the Chinese border would be used for hiking and nature watching. It is obvious that much new construction is needed in developing the potential tourist attractions in Primorsky Krai into commercial tourist enterprises. Therefore it is recommended that a detailed plan for tourism development strategies in Primorsky Krai would be prepared, including possibilities for cooperation with other TREDAs participating countries, and interests of potential international investors would be surveyed closely in that connection.

Republic of Korea

In the ROK there is already an extensive development policy for tourism resources, including developing of attractions. Tourist products such as folk festivals, local ethnic games or events, and local indigenous products are also expected to be developed together with tourist resorts. In this connection it can be only pointed out that developing the east and south coasts of the Korean peninsula is more important and feasible in connection of a general plan to develop tourism in a concerted or cooperative way together with the other TREDAs participating countries. This strategy means that development of natural resorts, natural parks, hot spring

resorts and holiday farms would be prioritized in the eastern coast area, and special attention should be paid there to restoring and promoting temples and other attractions of ancient culture.

ACCOMMODATION

China

Accommodation strategy in the northeastern area would be concentrated in creating comfortable tourist facilities to domestic and foreign guests first in Yanbian area to ease tourist flow from the other riparian countries. Hotel capacity has already been increased in Changbaishan area, Yanji, Tumen and Hunchun. New facilities for tourist accommodation and catering would still be erected. In ten years the northeastern areas in China should triple their hotel capacity and build new camping areas. In Jilin province the accommodation capacity is mainly needed in Yanbian prefecture, especially in Hunchun which constantly suffers from a shortage of hotel rooms. In other areas of Jilin province the hotel room utilization rate can be increased and new building should be first focused on constructing small hotels of higher quality. 300 new hotel rooms should be built in Yanbian before the year 2000 and additional 650 rooms will be needed before 2005. New restaurants will be needed in towns but also along the tourist routes.

Democratic People's Republic of Korea

In the DPRK the main interest of building new accommodation capacity lies in North Hamgyong and Ryanggang provinces. In the former, construction of hotels in the Rajin-Sonbong area and in the coastal resort areas in general is important. In the latter, Mt. Paekdu area needs more hotel capacity between Hyesan and the Tumen River. 400 hotel rooms will be needed in North Hamgyong province and 450 rooms in Ryanggang province before the year 2000, and other areas, mainly the coast in Kangwon province, would need some 200 hotel rooms to be built in the same period. In 2000-2005, an additional total of 750 hotel rooms should be needed in the same areas. When the recent hotel constructions in Pyongyang will be completed, the demand for hotel rooms there should be satisfied for a long time. Plenty of tourist restaurants will be needed in the new resorts.

Mongolia

In Mongolia the building of new hotels should be limited in the key cities, and these hotels should be of at least three star level and small in size. Dalanzadgad area should have some of these, if a new international airport will be built there. The Chinggis Khan hotel project in Ulaanbaatar could be completed as well as some resort hotels under construction in the countryside around Ulaanbaatar, but otherwise there is no need to increase hotel capacity in Ulaanbaatar beyond that, because there are three newly opened smaller hotels of reasonable international standard. As much as possible of the new accommodation capacity should be built as yurts or ger, which can be moved from one location to another according to the season. New more sophisticated types of luxury ger should be developed by combining a main ger with a smaller one which would function as a private bathroom. A total of 300 rooms in hotels and ger camps should be built in provincial areas in 1995-2000, followed by additional 200 rooms in 2000-2005. New tourist restaurants are needed all over the country where tourists are visiting.

Primorsky Krai

In Primorsky Krai new hotel rooms, holiday cottages and camping sites are needed on the coast, in the taiga and in the major inland resort areas. The greater Vladivostok area would need in the first place new camping facilities with modern communal techniques including waste handling and sewage purification systems. Also certain sanatoria would need modernization. In the countryside, some 300 hotel rooms should be built in Hasan region towns of Slavyanka, Zarubino and Kraskino and also in Ussuryisk, Dalnerechensk and Nakhodka in 1995-2000. New holiday cottages should be erected in the coastal areas of Hasan region. Further 250 hotel rooms should be built in 2000-2005, including also resort hotels in places like Krabbe island, Kalevala bay, Boysman bay and Ternej. Holiday villages in the existing recreation zones should be renovated and upgraded.

Republic of Korea

In the ROK tourism cooperation with the neighbouring countries should be coordinated to increase the utilization of the existing hotels and resorts. Increasing the hotel occupancy rate from the present 63% to 75% will provide over 2 million additional bed nights

for tourists.

Increasing amounts of tourists can be easily absorbed in the existing facilities, because tourism in the ROK is rather evenly distributed between the seasons. It is obvious that more tourists will come to the south coast archipelago and the east coast beaches, necessitating some new accommodation capacity. Also new services like restaurants are required along the most popular tourist routes, and some additional smaller hotels would be needed between Samchok and Kuryongpo to make the coastal way an unhurried route for tourists.

PERSONNEL TRAINING

New personnel will be needed in the tourist services. In the 1995-2000 timeframe, 30-40 thousand new employees will be required in hotels and restaurants, and the demand for new trained personnel will continue in 2000-2005, although in lesser amounts. Training of tourist service personnel is necessary for creating a positive service atmosphere and guaranteeing the right quality of services. In Mongolia and Primorsky Krai new institutes should be founded for the purpose. In other countries training can be carried out in existing institutes with new curricula to be created. All this will need advisers and teachers from abroad, e.g. Japan, the USA and Europe. The attention should be laid on training teachers locally and abroad, and these teachers should be the key persons in developing the training programs in each country. It should be remembered that service doesn't include only services given by the personnel in hotels, restaurants, travel agencies, transportation companies etc. but also such public services as immigration, post, telephone, police etc. The best policy in selecting candidates for training is to use local resources. Especially when ecotourism is concerned, local inhabitants already know topography, plants and animals, are used to the local life style and can advise tourists to behave in a suitable way not to disturb and destroy the ecology. Creating new jobs for local inhabitants also decreases mobility of work force in the countryside.

SAFETY

One of the selection criteria especially in Europe and North America is the safety in the destination and during the transport. Violence against tourists and other crimes including thefts have cut tourist flows to certain areas. Travel accidents attributed to local

driving habits, condition of vehicles, experience of pilots and confidence in the traffic control system are influencing the decisions of tourists. Disturbances and riots as well as political uncertainties have effectively diverted tourists to destinations that are considered to be safer. It should be in the best interests of all participating countries to keep their image as clean as possible concerning the safety of tourists and their properties. The Northeast Asian countries have traditionally honest people. The increasing crime rate in Russia has thrown some shadows on the Russian Far East, and all possible means should be used to eradicate crimes against tourists. The chance of hostilities in the Korean peninsula has had very negative influence in the prospects of tourism in the Northeast Asia. These opinions, realistic or not, directly and rapidly affect international investors and also decrease the possibilities of recruiting top personnel in development projects. One of the elements of safety is also the health care system. There should be a comprehensive system of getting medical care when needed by tourists. An insurance system protecting tourists against sudden needs of large sums of money because of emergencies would be instituted. In cases of crimes against tourists there should be an effective and simple system of receiving help and assistance in obtaining necessary documents for insurance benefits. This means that police and other civil servants should be not only easily available and accessible but also capable of understanding and speaking foreign languages. In some countries a special tourist police system has been established to create an atmosphere of safety.

PROMOTION STRATEGIES

For successful promotion of a place as a tourist destination, expectations of travel agents and travellers must be met. The cultural, historical or scenic attractions are not enough in themselves. They should be conveniently reached. All kinds of facilities for tourists are needed around the attraction. Not all countries have realized this. Although their sceneries, traditional arts, cuisine and other cultural resources have great tourism potential, they are neither well developed and packaged to form attractive tourism products nor marketed

effectively. A sufficient infrastructure is a necessary prerequisite for tourism development. The rest is purely dependent on product development and marketing. On the other hand, an attempt to increase tourism in a country which cannot provide adequate services will have long-range detrimental impacts on the success of the local tourist industry. Effective marketing is the most important prerequisite for increasing tourism in the TREDAs participating countries. It means that every country should plan a marketing action programme and prepare marketing and promotional material. The East and Southeast Asian markets offer the best opportunities for the participating countries throughout the period up to the year 2005. Still the European, American and other long haul markets should be sufficiently approached to attract tourists with considerable buying power. To reach greater attention it would be advisable to create joint tourism promotion activities (like e.g. the Nordic countries did) for some regional markets and especially for the long haul markets. Each country should, however, seek to differentiate their tourist products from those of the neighbours. For designing and supervising the marketing and promotion programs appropriate advisers may be needed. Such advisers could be found in the ROK, the observing countries of TREDAs or elsewhere. The advisers would be needed for at least the two first years of programme planning. The costs of advising would be some US\$ 50,000-80,000 per country. Marketing and promotion budgets for each country will vary depending on the degree of recent activities and the number of tourists targeted. An estimate of minimum costs needed for each country would be US\$ 500,000 for Mongolia, US\$ 700,000 for Primorsky Krai and US\$ 1,000,000 for each of Yanbian and DPRK. As pointed out in a recent report for developing tourism in the DPRK, prepared in a UNDP project executed by WTO, direct communication with the travelling public is not recommended because of great expenses. It is, however, important to recognise that the travel trade is most unlikely to support or feature a destination without any expressed interest from the public. The best way to reach the public is perhaps through the press and journalists specializing in travel articles. It would be easier for

any country in the area to attract these writers in co-operation with the other countries in the area. The overseas representation can separate the public relations and media activities from information dissemination activities with the travel trade and actual sales, and in many markets either of them could be done in co-operation with other countries. A project-like approach could in many cases involve local companies or even individual specialists to be appointed to handle all public relations and press information activities in minor potential markets. These representatives should have an intimate, accurate and up-to-date knowledge of each destination, a large number of suitable personal contacts in the market, and excellent communication skills based on pleasant, outgoing personalities. A sufficient number of representative offices and tourist information bureaus should be established in the main tourist generating markets for marketing and sales to the travel agents, for promoting the destinations and for disseminating information. The number and locations of such offices should be determined according to the market conditions. The costs of establishing a tourist office would be at least US\$ 200,000 a year, of hiring a representation company US\$ 80,000 a year, and of having a part-time representative perhaps US\$ 30,000 a year in each market. Tourist offices in the key cities of China, in Hong Kong, Japan, Singapore and Thailand should be considered by all participating countries. In addition, offices in Taipei, Seoul and Vladivostok should be thought out as well as other possible cities in the Asian market. The European, American and Australian market should receive attention in the extent relevant to the country in question. It can be estimated that at least some US\$ 2 million annually should be allocated in every country for running this representation.

SUSTAINABLE TOURISM PRINCIPLES

An overall approach to practical measures for sustainable tourism should be taken in respect to certain key principles. It is necessary to have some broad lines in setting the goals for the major issues, but also measures which may seem small can have a significant effect if they are widespread enough. In making new and additional investments in the tourist field, environmental

viewpoints should be taken into consideration from the start. In determining the location of tourist spots, enterprises and authorities should cooperate to find alternatives which place the least possible burden on the environment. Thought should be given to the future, and solutions should be of a long-term nature.

Local traditions should be taken into account in construction. Architecture should be in harmony with the environment and landscape. Tourist spots should be designed so that they follow local customs and support the preservation of local building culture.

Construction materials and technical solutions should be environmentally friendly. This includes the use of wood as a building material, the avoidance of plastic, the proper disposal of waste water and the use of ground filters and composting toilets.

Attention should be paid to landscape management. Care should be taken to preserve traditional landscapes and the diversity of nature and to see that old nomadic or farming culture and nature blend in well with one another. In planning and taking care of yards and gardens, the aim should be a natural approach. Asphalt surfaces should be avoided, and space should be saved for plants.

Traffic noise and other problems caused by traffic should be reduced as much as possible.

The distance from traffic arteries should be taken into account when tourist investments are planned. New roads and railways should be constructed in a way which does not prevent wild animals from using their customary routes.

Tourist enterprises should make use of local products and services as far as possible. In addition to labour, they should use local agricultural and handicrafts products as well as guide and programme services. Food grown without excessive use of agricultural chemicals should be given preference.

The attitudes of staff in the tourist field should be influenced through training and information.

Personnel should act in accordance with the principles of sustainable tourism in every aspect of their work. They should also be trained to guide customers in this respect.

Sustainable tourism includes the use of public transport as far as possible. Necessary transfers should be arranged in the form of group transport.

Forms of exercise which are based on the use of muscle power should be given preference.

Hiking, biking and canoeing are examples of environmentally friendly exercise, as are

horseback riding, carriage rides, goats leading or reindeer driving.

In nature areas, visitors should stick to trails. Nature programs should be designed so that they

use existing trails and routes. The goal of guided nature trips should be to improve tourists'

knowledge of the environment and awareness of nature. Tourists should not be allowed to

particularly sensitive areas in landscape and should not be allowed to do digging or other

destructive actions.

Hunting and fishing should be exercised only in such extent that they cannot endanger any

species or otherwise imbalance the nature. Hunting should be allowed only in such areas that

it will not frighten animals which should be available for watching and photographing, and

would become afraid of showing themselves in the presence of humans.

In marketing tourist products, customers should be given correct information based on fact

regarding their quality and environmental properties. Customers who appreciate sustainable

tourist products are also environmentally aware target group who expect the promised level in

this respect as well.

KEY STRATEGIES

The tourism sector in TREDATA participating countries can be developed with considerably

smaller total investments than many other sectors and, provided that the marketing is carried

out in an effective way, could give a rather quick return of investments and bring in foreign

currencies. This indicates that advancing tourism should be one of the priority courses of

development in the area. In developing infrastructure, tourism should be taken into account in

scheduling investments. New and existing tourist products should be processed into

internationally competitive entities in collaboration and co-operation with other countries of the

region, facilitating economically and environmentally sustainable development. This would

involve both bilateral and multilateral co-operation.

A new politically neutral and geographically versatile marketing concept should be created,

connecting all present and future collaborating countries in an attractive way. The Green Sea

Concept has been indicated in this report as a proposed umbrella for marketing the Northeast Asian countries' tourist products. In addition to referring to prosperity, harmony and peace, it could become connected with responsibility to the environment and sustainable development of natural resources.

It is recommended that the governments would update or create relevant regional tourism master plans. Attention should be paid to timely renovation of historical attractions, ensuring proper public support services and infrastructure, meeting the needs for tourism-related training and education, and advancing investments in the potential tourism areas.

The investments at each development site should be carefully divided into separate undertakings, integrated in common targeting and timing. This would result in flexibility in finding suitable entrepreneurs and investors, as well as create security in completing the general plans. Accidental problems can be kept in tolerable scale, receipts will be caught faster and investments for capacity increases can be partly financed from revenues. Thus the different activities in a tourism centre would be owned by separate companies, and after a start at the minimum feasible size all facilities would grow at a pace related to actual demand.

Various themes connecting attractions in different countries would make a basis for development of multi-country routes and travel packages. Promotional activities would be implemented in collaboration, and existing know-how of participating and observing countries could be used in each project. Representatives in some markets could be jointly appointed in the projects.

Governments can help attract investors and improve tourist services by actively advancing the construction of TREDAs infrastructure and inter-connections. Easier access to tourists can be facilitated by introducing simplified border crossing and visa issue procedures, thus significantly increasing possibilities for joint tourism development. Resources for environmental protection and diverse tourist services including safety and health services can be obtained by introducing a tourist tax based on nights spend in the country and levied on the companies, organizations or families providing accommodation for tourists.

PROPOSED ACTIONS

The following action plans should be adopted:

Tourism Working Group

Set up a tourism working group or some other kind of co-operation body between the participating Governments for overseeing joint tourism planning and making decisions on common planning projects and specific actions.

This organ should involve all TREDAs participating countries and consist of representatives from national tourism planning/promotion organizations, TRADP programme officer and tourism consultant(s). It should be instituted before the end of the year 1994 and stay active for as long as needed, probably not more than for 3 years. It should deal with co-operation in such matters as developing of multi-country routes and travel packages, tourism promotion planning and implementation, environmental protection guidelines for sustainable tourism, tourism safety and insurance systems, tourism service training and education, and development of infrastructure relevant to tourism. It should be financed by national organizations and UNDP could assist in finding support from outside sources. The expected administrative costs would be roughly around US\$ 60,000 a year.

Regional Master Plans

Prepare regional tourism master plans for all TREDAs participating countries. This should be done separately by national tourism planning and related organizations together with relevant consultants as projects involving national and local civil servants and national or international consultants. In 8 to 12 months from setting up of each project they should produce an updated or new regional tourism master plans for 1996-2005, taking the TRADP Tourism Study recommendations into account, containing policies and priorities for tourism products, seasonal balancing, market areas and target groups, and include development strategies, objectives, responsibilities, timeframes and financing.

The internal costs arising from normal civil servant activities should be included in national budgets. The necessary consulting costs will vary from country to country but not exceeding US\$ 80,000 in any country unless the master plans are prepared mainly by consultants. Such additional costs should be covered by national budgets and national/international agencies, with occasional international support.

Multi-country Routes and Packages

Study multi-country tourist routes and travel packages for all TREDA participating countries. The study could be conducted by national tourism planning/promotion organizations, national travel agency experts and an international consultant as an international study project carried out by a consultant and overseen by the tourism working group.

The collaborative body should reach a consensus on objectives during 1994 and elect and contract a consultant before February 1995. The study should be completed in 10 months from its commencement. It should produce a selection of routes and travel packages in TREDA area, Northeast China, Mongolia and the east and south coasts of the Korean peninsula for various target groups and markets with itinerary outlines, and find out their approximate prices for travel agencies and potential contractor information from the first targeted production season until 1998. It should also give recommendation for further product development until 2005 aiming to new tourist expenditure of over US\$ 2 billion a year.

Study costs would reach approximately US\$ 500,000 and be covered by national tourism promotion organizations, UNDP and international development banks.

Co-operative Promotion

Formulate a plan for co-operative promotion of tourism among all TREDA participating countries. It should be coordinated by national tourism promotion organizations and travel associations and carried out as an international study project by national and/or international consultants. It should be overlooked by the tourism working group or any other similar intergovernmental organization.

The first phase of preparation should aim to agree on common goals, consensus on markets where executed and contracting suitable consultant(s); the second phase should prepare a detailed plan for co-operation and suggest appropriate promotional activities. The first phase would last for 5 months and the second phase for some 8 months. The costs - US\$ 350,000 to 550,000 - could be covered by from national sources, with some support from international funds and agencies.

Tourism Legislation

Develop national legislation on tourism in all TREDAs participating countries where applicable, involving the national ministries responsible for appropriate legislation, control and guidance. It should be overseen by the tourism working group and carried out as concerted national projects advised by international consultants within three years from now.

This project should cover legislation on tourist industry authorization and control, environmental protection, and guidelines for sustainable tourism. Tourism safety and insurance systems and corresponding legislation should also be developed.

The related internal costs arising from normal civil servant activities are assumed to be included in the national budgets and consulting costs will vary from country to country but are not expected to exceed US\$ 100,000 in any country unless the proposals are prepared mainly by consultants. Some countries may already have rather ready systems and need external assistance only in their harmonization. The costs should be included in national budgets and national/international agencies may provide financial assistance.

Training and Education

Intensify tourism service training and education in all TREDAs participating countries, the ROK having a role mainly as an advisor. This activity should include all national tourism planning organizations, ministries and authorities responsible for education, and international education and service training institutes and consultants. It should be executed as national programs, but in coordination and co-operation with the other participating countries.

The initial studies, planning and national decisions would take approximately one year, the implementation would need three years. The whole project would produce study reports on demands and requirements until 2005, national education plans and curricula, and bilateral agreements on co-operation in training and education where needed. It would result in teacher training for service fields, and commencement of training courses and education programs in the regions involved.

The costs vary in different countries and are millions of dollars in most cases over the projected four-year period.

Investment

Prepare investment plans and international investment proposals for tourism in all TREDa participating countries by national authorities and international consultants in co-operation with the tourism working group. This activity should be started as national investment plan projects in collaboration with a promotional organization agreed upon in the tourism working group. During the next three years, investment plans, promotional organization and common promotional material should be created.

The estimated external costs would be US\$ 150,000 to 300,000 per country, and could be covered from national sources and international financing institutions and development banks.

The Green Sea

Change the name of the sea called the East Sea of Korea and the Sea of Japan to Green Sea. First bring the suggestion to the TREDa participating countries and Japan for their acceptance. Then submit the proposal to the Seventh United Nations Conference on the Standardization of Geographical Names, to be held in 1997, for submission to the United Nations Group of Experts on Geographical Names, which has the responsibility for considering the naming of features beyond a single sovereignty.

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