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# 35th Meeting of the Greater Mekong Sub-region Tourism Working Group (TWG-35)

Da Nang, Viet Nam  
16 June 2015

**Draft Summary of Proceedings**

Mekong Tourism Coordinating Office (MTCO)



# ■ Introduction

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1. The 35th Meeting of the GMS Tourism Working Group (TWG-35) was held in Da Nang, Viet Nam on 16 June 2015, attended by representatives of the National Tourism Organizations (NTOs) of five GMS countries (Cambodia, Lao PDR, Myanmar, Thailand, and Viet Nam), the Mekong Tourism Coordinating Office (MTCO), and the Asian Development Bank (ADB). Representatives of PRC were unable to join. A List of Participants is in Appendix 1.

## Opening Session

2. **Welcome Remarks** by Viet Nam National Administration of Tourism (VNAT): Mr. Dinh Ngoc Duc, Acting Director, International Cooperation Department, VNAT, extended his warm welcome to all participants but conveyed PRC's regret for being unable to join the meeting. He underscored the Tourism sector's important contribution to the realization of the ASEAN Economic Community and looked forward to TWG-35's discussion on the new GMS Tourism Marketing Strategy and Action Plan 2015-2020 and other initiatives to build up the GMS as a single tourist destination.



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3. **Welcome Remarks** by Mekong Tourism Coordinating Office: Mr. Jens Thraenhart, Executive Director, MTCO, expressed thanks to VNAT and ADB for their support in organizing the meeting. He was pleased to be working with all the TWG members over the past 10 months since his appointment as MTCO Executive Director and looked forward to discussing the forward-looking initiatives for further tourism development in the subregion.
  
  4. **Welcome Remarks** by ADB: In his opening remarks, Mr. Andrew Head, Deputy Country Director, ADB Viet Nam Resident Mission, commended the Tourism Working Group for its many accomplishments and good progress toward achieving the shared objectives of increased and more equitable distribution of tourism benefits in the subregion, and better social and environmental sustainability. He noted that in 2014, the GMS welcomed close to 52 million arrivals, a slight increase compared to 2013, and generated about \$60 billion in tourism receipts that sustained about 6 million jobs. The strong commitment to subregional tourism cooperation has contributed greatly to the countries' shared vision of an integrated, prosperous, and equitable subregion. He mentioned that based on TWG-35 discussions, a brief progress report will be prepared for presentation to the GMS Ministers at the upcoming 20th GMS Ministerial Conference to be held in Nay Pyi Taw, Myanmar in September 2015. ADB recently approved \$108 million for the GMS Tourism Infrastructure for Inclusive Growth Project to be implemented in Cambodia, the Lao PDR and Viet Nam from 2015 to 2019, and has indicatively programmed \$130 million for a second phase of the project, scheduled for approval in 2018. ADB also stands ready to support preparation of the Second GMS Tourism Sector Strategy 2016–2026, and looks forward to continued cooperation with other development partners, the private sector, and civil society on this important initiative.







# Agenda Item 1

## Adoption of Agenda

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5. The meeting adopted the provisional agenda as shown in Appendix 2.



# Agenda Item 2

## Business Arrangements

6. Representative of VNAT briefed the participants on business arrangements for the open session of TWG-35 and the closed session of the MTCO Board, as well as the social functions and technical tours scheduled in the succeeding days.





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# Agenda Item 3

## Report and Follow-up of TWG-34

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7. Representative of Lao PDR briefed the meeting on the outcome and follow-ups of TWG-34 held in November 2014 in Luang Prabang, Lao PDR (Appendix 3).
8. Thailand mentioned the directive emanating from the 5th GMS Summit regarding arrangements for MTCO to get legal status and encouraged TWG members to attend the triathlon and other related activities being arranged jointly by Thailand and Cambodia this year. Invitation will be sent out by Thailand shortly.



# Agenda Item 4

## Implementation of the Mekong Tourism Thematic Routes





# Agenda Item 5

## GMS Tourism Marketing Strategy

9. These two items were discussed simultaneously.
10. Mr. Peter Semone, Consultant, briefed the meeting about the Mekong Tourism Thematic Routes and proposed a lead country for each route, as well as the roles and responsibilities of the lead country. There are 11 routes of which 7 are firmly committed (i.e., with country volunteers), 2 are proposed tentatively subject to confirmation by countries concerned, and 2 are without any country commitment as yet. He emphasized the need for ownership and leadership by the lead countries for their designated tour routes. (Copy of document in Appendix 4.)
11. Mr. Steven Schipani, ADB, supplemented the presentation with a brief background on what transpired previously to put into context Mr. Semone's presentation. He noted that most TWG members attended the preparatory workshop held earlier in the year. The preparation of the GMS Marketing Strategy report including the multicountry tour routes has taken into account the countries' inputs, ideas, and guidance on where they want the strategy to go, and supplemented by good marketing analysis which helps to justify the decisions of the countries. There are a few pending information needs with regard to thematic events and what the countries want to prioritize, but overall, the draft strategy has benefited from the guidance of TWG on identification of priorities from the workshop held in Thailand, and looks forward to having the strategy presented at the 20th GMS Ministerial Conference in September 2015.



12. To allow TWG to better appreciate the thematic routes in the context of the overall strategy, the Meeting agreed that the presentation of the Draft Tourism Marketing Strategy be advanced, and then to look again at the proposed thematic routes later.
13. Mr. Semone then proceeded to present the Draft Marketing Strategy and Action Plan covering its contents, implementation arrangements, cost and expected outcomes (see page 61) if implemented seriously and successfully. Page 54 outlines the vision and expected outcomes.

## 14. Action Points:

(I) Mr. Semone requested countries to provide him with their respective high resolution tourism logos for incorporation in the report.

(II) Mr. Semone requested Myanmar, Thailand, and Viet Nam to provide their respective thematic events for incorporation in Appendix 5, if possible during TWG-35 so that the report could be finalized immediately.

(III) Countries were requested to confirm the country information, profile, and statistics contained in the report based on 2013 baselines. Viet Nam suggested that the picture be changed.

(IV) Mr. Schipani suggested for countries to comment on the overall format and design of the report.

(V) At the suggestion of the Chair, Mr. Semone identified the items that the meeting needs to focus on for purposes of discussion. These are the activities under Group 1.1 of Pillar 1 on page 54, and the sub-activities outlined in page 68, on page 76 on multi-country tour routes, and on page 78 on thematic events.



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15. Cambodia suggested addition on page 23 of [cambodiatourism.org](http://cambodiatourism.org). and on page 78, put in November-December for Sea Festival. On page 76, Cambodia agreed with the multicountry tour routes.
  16. Lao PDR confirmed agreement with route on page 76, and on page 78, location is in Vientiane between July-December.
  17. Myanmar confirmed agreement on route 8 instead of route 5 on page 76; proposed cancellation of Myanmar for route 5.
  18. Thailand confirmed agreement on route 6 on page 76. Thailand will do scouting of the route by land and air as the mode of transportation is important. They will have to identify products, tourist attractions along the route, and will need help from MTCO to put related information into the website. Thailand will organize media familiarization trip to communicate to the world that the route is now possible. Final step is agent educational tour to sell to the market.

## 19. Action Point:

Chair requested Thailand to present at the next meeting a detailed activity report to share knowledge and experience with the other countries on how to develop a specific route.

20. Viet Nam suggested addition of other websites on page 33, e.g., vietnam.tourism.org and vietnamtourism.com (as consumer websites). On page 55 Table 17, Viet Nam suggested addition of more destinations like Lao Bao and route no. 8. In EWEC, Viet Nam is planning to expand the route to connect with other provinces of Viet Nam and Lao PDR.
21. Thailand suggested that implementation plan be reviewed at length and very carefully. Some activities can be deleted with only 6 months remaining for the year. MTCO agreed that this is a relevant point to manage expectations, and to consider what resources are required. Some of these initiatives would be added to the MTCO operations plans, and a new/future team taking over the incumbent MTCO staff should be able to understand the forward looking plan. Chair noted that TWG can only implement the strategy upon formal approval and suggested that countries keep the deadline set for comments.

## 22. Action Point:

Chair suggested that there be flexibility in the timeframe/timelines for activities so as not to be restrictive. Mr. Semone was requested to modify the draft accordingly.

23. Mr. Semone inquired which country could take on no. 11 on EWEC, No. 5 is empty, and so are numbers 9 and 11. Subsequently, Viet Nam agreed to accept route 11; Thailand agreed to take route no. 9; and Cambodia agreed to take route no.1. Chair suggested that Appendix 4 should add one more column for supporting country, and for Mr. Semone to consult PRC if they are willing to take route no. 5, and to leave route no. 8 blank for the time being.





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24. Viet Nam, seconded by the Chair, stressed that there should be a link between the GMS vision and ASEAN's vision. Mr. Semone replied that there are efforts to synchronize the strategy at the country, subregional, and regional levels as reflected in the situational analysis.
25. MTCO commented that they would need to break down the many activities assigned to MTCO into more manageable elements, and noted that MTCO is already working and has some head start on some activities including the development of a new website, organizing an investment summit and other marketing work, developing a mobile app to better connect with TWG members, and publication of tourism statistics online.
26. In response to Chair's query on possible sources of funding for the activities outlined in the Strategy and Action Plan, Mr. Schipani noted that each year TWG agrees on a work plan, and thus far, there are a lot of things that are already happening in 2015 and government budget is already in place for such events. Given that countries have budgets earmarked to implement the activities that are relevant at the country level, it might be worthwhile for TWG to consider which activities to put in their budget plans for 2016. Another approach would be for MTCO to mobilize in-kind contributions from partners for the multi-country tourism-related events. ADB is one development partner that assists countries for subregional marketing and promotion including promoting multi-country events. Cambodia, Lao PDR, and Viet Nam may use loan proceeds under the current GMS Tourism Infrastructure for Development project to support select subregional marketing activities. Chair suggested for MTCO to work closely with Thailand which has had a lot of experience in engaging the private sector on tourism promotion activities.

## 27. Action Point:

Meeting agreed to set the deadline for countries' final comments/feedback and additional inputs on the Draft Strategy, particularly on Appendix 5- Thematic Events i.e., by 30 June 2015. MTCO will send out reminder to TWG by Monday next week, copied to Mr. Semone, so that country comments could be incorporated in a revised draft by 28th June. Consultant will update information, send out by 15 July 2015 the final document for review, and secure no objection by countries' tourism authorities by end of July 2015.

28. Mr. Schipani suggested that the 20th GMS Ministerial Conference in September could be an important venue for formal endorsement of the Strategy through an appropriate ceremonial presentation to the GMS Ministers. Alternatively, the Strategy could be endorsed by the countries at the national level, to be followed by a ceremonial presentation at the Ministerial Conference. Chair agreed that the Ministerial Conference in September would be a good occasion politically. However, Thailand mentioned that their Tourism Minister will be in Colombia at that time and suggested that endorsement be done at ACMECS ministerial meeting but that would mean that PRC (a non-ACMECS member) will need to be invited. Another alternative is to wait for the next GMS Tourism Ministers' Meeting but that could take some time to organize.

## 29. Action Point:

Chair proposed and the meeting agreed that the strategy be endorsed by TWG internally and for TWG to also seek their respective ministers' endorsement, then announcement can be done at the GMS Ministerial Conference in September 2015 in Nay Pyi Taw. Mr. Schipani stated that the document would be printed in August for presentation to the 20th Ministerial Conference in September.



# Agenda Item 6

## Launch of mekongtourism.org

- 14
30. Mr. Jens Thraenhart, MTCO, presented the new website MekongTourism.org which is a big component in implementing the Strategy. He presented the features including the digital platform for social media and common domain for social media. User volume is currently low but there is some traction going on with the promotional campaign for the MTF. 70% of users do not engage in multiple pages. First thing focused on was to secure domain name and control over it and the social media domain, evolving from explore Mekong to experience Mekong. He presented key features of the site which is image-rich, including a collective mosaic of country images that a user could click and lead to content about a particular country. Another section is multi-country journeys, written in a story-telling manner and in a public-private sector collaboration, with search functionality. Other features are an Experience Mekong Magazine that is social media friendly, a Library containing documents like the Myanmar Tourism Master Plan, etc. that can be downloaded for free; a Mekong Tourism photo gallery; an events section linked to the country host's site; a Twitter account; and an interactive map that would plot the multi-country journeys. MTCO is also working on a mobile app for the GMS and a monthly newsletter and would like to get content from the TWG. The Mekong Responsible Tourism website would be integrated with the new website.

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### Open Discussion:

31. Countries congratulated MTCO for the initiative. Mr. Schipani noted that MTCO has been exercising prudence regarding country contents and noted that the website is a good tool and could help mobilize resources from the private sector. MTCO could welcome documents for the library in local languages and put these up in the website for public use.
32. In response to the Chair's query on which logo would be used for the website, Mr. Thraenhart replied that the Mekong Tourism logo which people now recognize is being used. Countries supported the use of the current logo, and suggested to use only that logo. Still, Chair remarked that the current logo does not fully represent Mekong tourism and suggested that it may be time to think of a new logo. Cambodia noted however that it took TWG two years to agree on the current logo.

### 33. Action Point:

In the end, the meeting reached consensus to use the current logo for the website.



# Agenda Item 7

## Mekong Tourism Trends and Statistics

- 16
34. Ms. Pawinee Sunalai, ADB Consultant, presented the latest GMS Tourism performance scorecard for 2014 (Appendix 5) showing the latest indicators with regard to tourist arrivals, tourism receipts, top market sources, etc. She said that there was still some missing information although the statistics have been uploaded in the website. Information is currently being updated annually but could be done quarterly provided data are made available by TWG to MTCO for compilation.
  35. Chair and other TWG members expressed appreciation to MTCO for its efforts and suggested for MTCO to expand the database to include statistics concerning possible source markets. Mr. Schipani noted that the current Tourism Infrastructure project could include work on the expanded information in the remaining time that Ms. Pawinee is on board.
  36. Thailand commented on need to concentrate on data on Yunnan and Guangxi instead of the whole PRC. Chair requested MTCO to convey this message to PRC.



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37. Thailand also inquired about plans to sustain this initiative by MTCO. Mr. Thraenhart responded that initial discussions are being done with Thammasart University to continue this forward. Thailand also remarked that the figures need to be analyzed so that the TWG would know what the figures mean. Chair agreed that the figures should be able to provide guideposts on the directions that TWG should take.

## 38. Action Point:

Mr. Schipani requested Ms. Pawinee to prepare a two-page analysis and implications of available data/figures for presentation at the next TWG meeting.



# Agenda Item 8

## Positioning the GMS: Leveraging Food

39. Mr. Thraenhart suggested that a decision be made by TWG on what to focus on and to get their ideas on how to better position the GMS by leveraging food. Airlines and hotels could be involved towards preparing collaterals relevant to the GMS. A food documentary could also create a lot of exposure, supplemented by real life stories exploring food, as a public-private collaboration. He raised two main discussion points for the meeting:

1. Should we focus on one theme?
2. Which theme would be relevant for the countries?

### 40. Action Point:

Chair requested MTCO to prepare a concept paper on food as a theme that could be incorporated in the promotional activities outlined in the Strategy and Action Plan.



## Other Matters:

41. The meeting discussed options on holding the GMS Tourism Ministers' Meeting.
42. Mr. Schipani observed that developments regarding MTCO's legal status are an item that would require discussion at the Ministerial level and should be included in the agenda of the next Tourism Ministers meeting.

### 43. Action Point:

Meeting agreed to have the next GMS Tourism Ministers' Meeting in Cambodia back to back with MTF next year. Cambodia confirmed readiness to host the next GMS Tourism Ministers' Meeting in 2016 back to back with MTF and TWG-37. Exact venue and dates will be confirmed and communicated by Cambodia to TWG and MTCO later

### 44. Action Point:

For the next TWG meeting (TWG-36) to be hosted by Thailand, Thailand would communicate the invitation to TWG three months in advance.

## Closing Session:

Chair expressed his thanks and appreciation to the TWG for their active contribution to the success of the meeting.









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# Appendices

35th Meeting of the  
Greater Mekong Sub-region  
Tourism Working Group  
(TWG-35)



# Appendix 1

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## List of Participants



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## List of Participants

No	Full Name	Position	Organization
1	H.E. Tith Chantra	Secretary of State	MOT, Cambodia
2	Men Phearom	Chief Officer	MOT, Cambodia
3	Sok Sokun	Director	MOT, Cambodia
4	Yin Nat	Deputy Director	MOT, Cambodia
5	H.E. Chaloeune Warintrasack	Vice Ministry	MICT, Laos
6	Sounh Manivong	Director General	MICT, Laos
7	Somxay Sipaseuth	Director, Division	MICT
8	Tay Zar Oke Kyaw	Assistant Director	Myanmar
9	Urairatana Naothaworn	Director, Inter'al Affairs Division	MoTS, Thailand
10	Areewan Ponchan	General Administration Officer	MoTS, Thailand
11	Singhapiya Vichanna	Legal Officer, Professional Level	MoTS, Thailand
12	Boonserm Khankaew	General Affairs Division Director	DOT, Thailand
13	Witchanee Vuthipongse	Chief of Inter'al Cooperation Section	DOT, Thailand
14	Kittipong Prapatpong	Director, ASEAN and South Asia and South Pacific Market Division	TAT, Thailand
15	Niti Vongvichasvadi	Marketing Officer	TAT, Thailand
16	Thitirat Sookphartjaroen	Chief of Marketing Cooperation	TAT, Thailand
17	Woramon Subsrinunjai	Marketing Officer	TAT, Thailand
18	Pornwilai Pumilai	Associate Program Manager	Mekong Institute
19	Supawadee Photiyarach	Research Coordinator	TRF, Thailand
20	Dinh Ngoc Duc	Director General	VNAT, Viet Nam
21	Tran Thi Phuong Nhung	Official	VNAT, Viet Nam
22	Steven Schipani	Senior Portfolio Manager Specialist	ADB
23	Andrew Head	Country Manager Viet Nam	ADB
24	Tran Van Ngoi	Director	ADB Project Vietnam
25	Flor Melendez	Consultant	ADB
26	Peter Semone	Consultant	ADB
27	Nida Ouk	Senior Project Officer	ADB
28	Jens Thraenhart	Executive Director	MTCO
29	Krisda Dhiradityakul	Operations Manager	MTCO
30	Tran Thi Ly	Official of Project	ADB Vietnam
31	Tran Thi Mo	Official of Project	ADB Vietnam
32	Tran Ngoc Bao	Director of Ha Tinh Project	ADB Vietnam
33	Tran Thi Thanh Huyen	Official of Project	ADB Vietnam
34	Nguyen Thi Thuy Trang	Official of Project	ADB Vietnam
35	Nguyen Van Sau	Director of Kien Giang Project	ADB Vietnam
36	Nguyen Tan Khoa	Deputy Director of Kien Giang Project	ADB Vietnam
37	Nguyen Thanh Giang	Official ADB	ADB Vietnam



# Appendix 2

Agenda for TWG Meeting  
on 16th June, 2015



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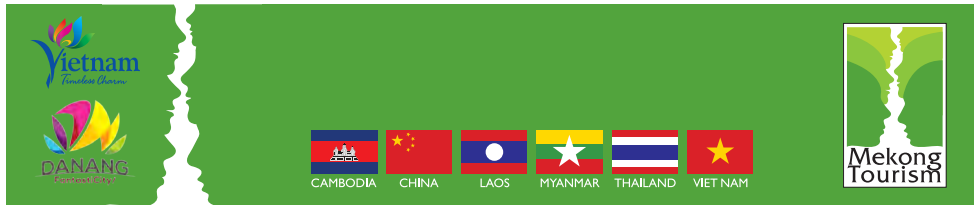
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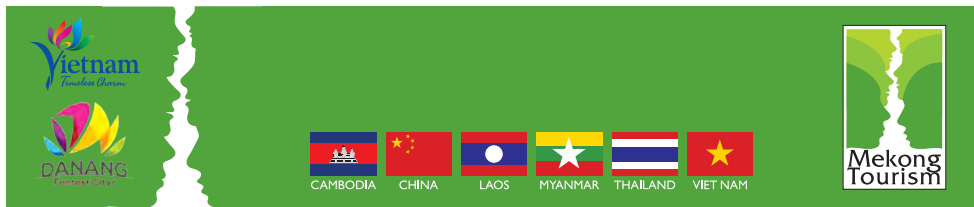


**Tuesday – June 16, 2015**

**THIRTY-FIFTH MEETING OF THE GMS TOURISM  
WORKING GROUP**  
08.00 – 14.30, 16 June 2015  
*and*  
**MTCO BOARD MEETING (CLOSED DOOR)**  
15.00 – 17.30, 16 June 2015  
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**35th Meeting of the GMS Tourism Working Group**

0800 – 0830	Registration
0830 – 0900	<b>Welcome and Opening Remarks</b> Remarks by Viet Nam National Administration of Tourism (VNAT) Remarks by Mekong Tourism Coordinating Office (MTCO) Remarks by Asian Development Bank (ADB)
Agenda Item 1:	<b>Adoption of the Agenda</b>
Agenda Item 2:	<b>Business Arrangements</b> Viet Nam National Administration of Tourism
Agenda Item 3:	<b>Report and Follow-Up of the 34th GMS Tourism Working Group Meeting</b>
0900 – 0915	<i>Ministry of Information, Culture and Tourism, Lao PDR</i> will brief the meeting on the outcomes of the 34th GMS Tourism Working Group Meeting held in November 2014 in Luang Prabang, Lao PDR.



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**Agenda Item 4: Implementation of the Mekong Tourism Thematic Routes**

**0915 – 0945**

Representatives of the countries will discuss the agreed strategy on implementing thematic routes. During TWG-34, all countries agreed to lead one thematic route. This session is to develop an implementation plan for countries to report during TWG-36.

**Facilitated by Jens Thraenhart (MTCO) and Peter Semone (ADB)**

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**Agenda Item 5: GMS Tourism Marketing Strategy**

**0945 – 1045**

The draft-final GMS Tourism Marketing Strategy and Action Plan 2015–2020 will be tabled for discussion and endorsement by the TWG.

**1045 – 1115**

**Coffee Break**

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**Agenda Item 6: Launch of mekongtourism.org**

**1115 – 1130**

MTCO will introduce the new mekongtourism.org digital platform which includes multiple websites including e-library, visitor information, e-magazine, e-newsletter, as well as social media.

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**Agenda Item 7: Mekong Tourism Trends & Statistics**

**1130 – 1200**

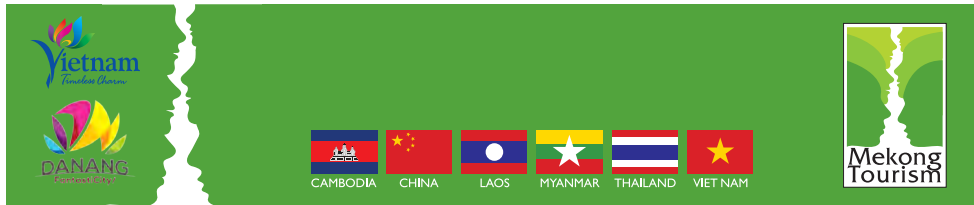
The latest statistics on global and regional tourism trends and how they relate to the GMS are important for public and private sectors in making business decision. TWG has decided to provide statistics on a regular basis, leveraging the new mekongtourism.org digital platform. This session is to discuss next steps in implementing this strategy.

**Facilitator: John Koldowski – College of Innovation, Thammasat University**

**1200 – 1300**

**Lunch**

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**Agenda Item 8: Positioning the GMS: Leveraging Food**

1300 – 1330

Discussion with TWG members and select private sector members to discuss how the GMS can be positioned when it comes to thematic product development, focusing on Food-based Tourism.

**Facilitator:**

- > John Koldowski – College of Innovation, Thammasat University
- > Jens Thraenhart – MTCO

1330 – 1400

Other Business

1400 – 1430

Wrap-up and Closing

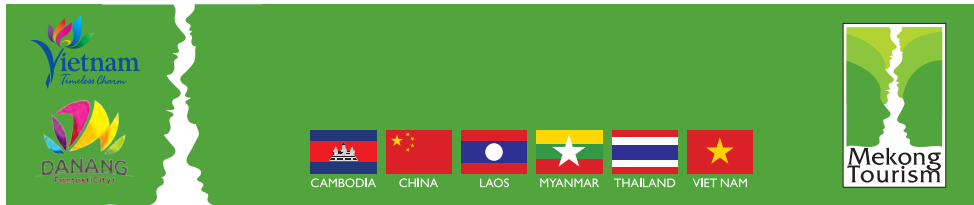
15.00 – 17.30

MTCO Board Meeting (Closed Door)

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**Attendance restricted to MTCO Board Members**

1500 - 1530

**Agenda Item 1: MTCO Operations by MTCO Executive Director**  
MTCO Executive Director will present a report on MTCO operations:  
a. MTCO Activities Report  
b. Financial Report for 2015 (Q –Q3)  
c. Launch of updated mekongtourism.org website

1530 - 1600

**Agenda Item 2: MTCO Legal Status**  
MTCO ED and Thailand will brief the Meeting on work undertaken to upgrade the legal status of the Mekong Tourism Coordinating Office

1600 - 1630

**Agenda Item 3: Review Progress in Implementing the TWGs 2015 work plan**

1630 - 1645

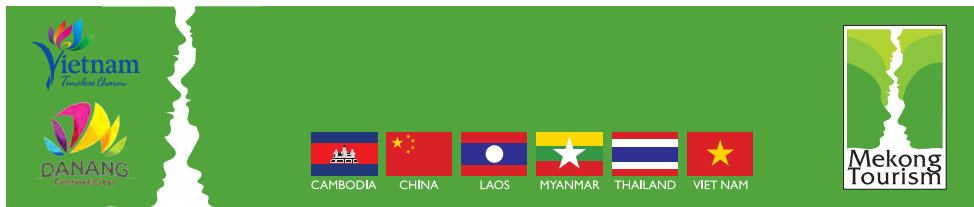
**Agenda Item 4: Introduction to the GMS Regional Investment Framework Implementation Plan Monitoring System**  
GMS sector working groups are requested to prepare a brief progress report on implementation of priority projects agreed in the GMS Regional Investment Framework Implementation Plan, for presentation to the GMS Ministers at the upcoming 20th GMS Ministerial Conference in September 2015. ADB will introduce the monitoring system and seek the TWGs inputs for preparation of the progress report.

1645 – 1715

**Agenda Item 5: MTCO Executive Director Performance Review**

1715 – 1730

**Agenda item 6: Other Matters**



### Wednesday – June 17, 2015

#### GMS TOURISM INFRASTRUCTURE FOR INCLUSIVE GROWTH STEERING COMMITTEE MEETING

Greater Mekong Subregion Tourism Infrastructure  
for Inclusive Growth Project  
First Meeting of the Subregional Project Steering  
Committee

08:30–12:15, Wednesday 17 June 2015

#### Provisional Agenda

##### Registration

08:00–08:30 Participants register and receive meeting documents

##### Opening Remarks

08:30–08:45 Opening remarks by Ministry of Culture, Sports and Tourism, Viet Nam

08:45–09:00 Opening remarks by Asian Development Bank

##### Summary Reports: Project Launch

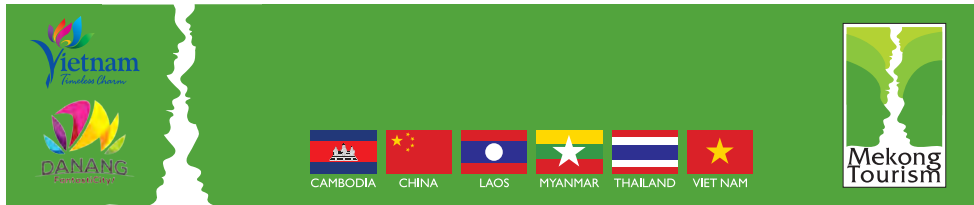
Cambodia, the Lao PDR and Viet Nam will brief the meeting on progress made establishing project offices and staffing, consultant recruitment and procurement, preparation of the first annual work plan and budget, and project activities completed during Q1 – Q2, 2015.

09:00–09:20 Report by Project Coordination Unit, Ministry of Tourism, Cambodia

09:20–09:40 Report by Project Coordination Unit, Ministry of Information, Culture and Tourism, Lao PDR

09:40–10:00 Report by Project Coordination Unit, Ministry of Culture, Sports and Tourism, Viet Nam

10:00 – 10:30 Break



### Subregional Activities: Joint Planning and Implementation

The meeting will discuss subregional activities that support tourism statistics harmonization, joint marketing, and implementation of ASEAN tourism standards, for involvement and benefit of all GMS countries. Country teams will present proposed activities and confirm the role of the 'lead country' in supporting joint implementation. \*

10:30–11:00	GMS Tourism Statistics Harmonization, facilitated by the Ministry of Tourism, Cambodia
11:00–11:30	GMS Marketing and Promotion Program, facilitated by the Ministry of Information, Culture and Tourism, Lao PDR
11:30–12:00	ASEAN Tourism Standards Implementation, Ministry of Culture, Sports and Tourism, Viet Nam

### Summary and Conclusions

12:00–12:05	Date and venue of the Second Subregional Project Steering Committee Meeting
12:05–12:15	Closing remarks by the meeting Chairperson
12:15	Lunch

Note: *The Mekong Tourism Investment Summit will be held in parallel with the meeting. All participants are encouraged to join the Summit in the afternoon.*

\* During the 32nd Meeting of the GMS Tourism Working Group Cambodia proposed to lead the project's GMS Tourism Statistics Harmonization Program; Lao PDR proposed to lead the GMS Marketing and Promotion Program; and Viet Nam proposed to lead the ASEAN Tourism Standards Implementation Program.



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# Appendix 3

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34th Report  
and Follow-Up Of The GMS  
Tourism Working Group Meeting

18 November 2014  
Louang Prabang, LAO PDR



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## 34<sup>TH</sup> REPORT AND FOLLOW-UP OF THE GMS TOURISM WORKING GROUP MEETING, 18 NOVEMBER 2014, LOUANG PRABANG, LAO PDR



PREPARED BY MINISTRY OF INFORMATION,  
CULTURE AND TOURISM



## Introduction



The 34th Meeting of the GMS Tourism Working Group (TWG-34) was held in Luang Prabang, Lao PDR, on 18 November 2014, attended by representatives of the National Tourism Organizations (NTOs) of the six GMS countries (Cambodia, PRC, Lao PDR, Myanmar, Thailand, and Viet Nam), the Mekong Tourism Coordinating Office (MTCO), and the Asian Development Bank (ADB).

Representatives of development partners including Swisscontact, GIZ and Luxembourg Development Cooperation.



## Opening Session



In his welcome remarks, Mr. Saysamone Khomthavong, Vice Governor of Luang Prabang province, extended his warm welcome to all delegates to historic Luang Prabang, the center of Lao culture and declared in 1995 by UNESCO as a World Heritage site.

Because of its strategic location, Luang Prabang has hosted several national and subregional conferences.

Recently, Luang Prabang received the prestigious ASEAN Environmentally Sustainable City Award which was endorsed by the ASEAN Environment Ministers at the ASEAN Ministerial Meeting held in October





## OPENING SESSION



H. E. Mr. Chaleune Warintrasak, Vice-Minister, Ministry of Information, Culture and Tourism (MICT), Lao PDR, recalled that Lao PDR last hosted the Mekong Tourism Forum in 2011 in Champasak Province. Lao PDR highly values the cooperation under the GMS Strategic Framework.

Mr. Jens Thraenhart, Executive Director, MTCO, expressed his gratitude to the host and all the participants, including ADB for their support, in organizing the meeting. He stated that this was his first TWG meeting as MTCO Executive Director, and expressed his commitment to collaborate with the TWG in promoting tourism in 5 the subregion.







## Opening Session



- ❖ Mr. Steven Schipani, Senior Portfolio Management Specialist, ADB Lao Resident Mission, noted that the subregion has seen international tourist arrivals increase from 10 million in 1995 to 52 million in 2013, placing it among the world's fastest-growing tourist destinations.
- ❖ while this growth is contributing to broad economic and social development in all GMS countries,





## IMPLEMENTATION OF THE GMS TOURISM SECTOR STRATEGY 2011-2015 ROAD MAP



- ❖ **Sub-regional Marketing and Product Development** (i) Tourism-related Human Resource Development; (ii) Pro-poor Sustainable Tourism Development, and (iii) Sub-regional Marketing and Product Development.
- ❖ **Cambodia: Community Development through Tourism**
- ❖ **PRC: ADB PPP Tourism Management in the GMS Learning Program**





## IMPLEMENTATION OF THE GMS TOURISM SECTOR STRATEGY 2011-2015 ROAD MAP



- ❖ **Myanmar: E-visa** they launched an E-visa system in September 2014 for 43 countries. An additional 24 countries were added in October 2014, reaching a total of 67 countries that are now allowed to use the E-visa system. He outlined the major requirements for E-visa application
- ❖ **Thailand: GMS Thematic Routes and Southern Economic Corridor**

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## IMPLEMENTATION OF THE GMS TOURISM SECTOR STRATEGY 2011-2015 ROAD MAP



- ❖ **Viet Nam: GMS Tourism Cooperation: It's Time to Make It Better**
- ❖ **Lao PDR: ASEAN Homestay Standard**
- ❖ **MTCO: Explore Mekong Single Destination Marketing**
- ❖ **ADB: GMS Tourism Performance Scorecard 2013-2014**





## REGIONAL INVESTMENT FRAMEWORK IMPLEMENTATION PLAN AND M&E SYSTEM - PRIORITIZED LIST FOR TOURISM SECTOR

Mr. Shunsuke Bando, Senior Regional Cooperation Specialist, Regional Cooperation and Operations Coordination Division, Southeast Asia Department, ADB, briefed the meeting on developments regarding the preparation of the GMS Regional Investment Framework Implementation Plan (RIF IP) and M&E System .

as a key deliverable for the upcoming 5th GMS Summit scheduled in December 2014 in Bangkok, Thailand.

Included in the RIF IP are 6 top-ranked tourism projects (3 investment and 3 technical assistance projects). He noted that the tourism sector is on track in implementing its priority projects under the RIF IP.

Mr. Bando also outlined the elements of the M&E System and mentioned tourism-related paragraph of the Draft Joint Summit Declaration (JSD) to be issued at the conclusion of the 5<sup>th</sup> GMS Summit.





## Regional Tourism Cooperation Initiatives and Lessons: Development Partners, Country-to-country assistance and private sector collaboration

- ❖ **LANITH;** Ms. Saysavath Chasane of Lao National Institute of Tourism and Hospitality shared their experience under a Luxembourg Development Cooperation bilateral assistance program on improving tourism service quality with Lao PDR. LANITH's mission is to build a tourism and hospitality center of excellence to educate, train, innovate, communicate and unite the next generation of career-minded hospitality and tourism professionals and service sector leaders.
- ❖ **Mekong River Race & Canoe Trail** Dr. Gayle Mayes, Professor, University of the Sunshine Coast, Australia, presented a proposal for a Mekong Discovery Canoe/Bike Trail to cover CLV with possible extension to include the entire Mekong Basin.
- ❖ **Mekong Tourism Forum 2015 and TWG-35** Viet Nam briefed the meeting regarding plans for MTF 2015 and TWG-35 planned on 16-19 June 2015 in Da Nang, Viet Nam, including tourism sites, accommodation facilities, international and domestic flight routes, and cuisine. He showed a video brief about Da Nang.



## Regional Tourism Cooperation Initiatives and Lessons: Development Partners, Country-to-country assistance and private sector collaboration

- ❖ **Preparing the Ministerial Meeting (during ATF 2015 in Myanmar)**
- ❖ **Preparing the Tourism Working Group 2015 Work Plan**

### ✓ **CLOSED MEETING OF MEKONG TOURISM COORDINATING OFFICE (MTCO) BOARD** 18

November 2014

- ✓ **MTCO Operations by MTCO Executive Director**
- ✓ **MTCO Legal Status**
- ✓ **Recruitment of MTCO Operations Manager and Interns**
- ✓ **GMS TWG Workplan 2015 & MTCO Strategic Operational Plan 2015-2017**
- ✓ **Discussion and Adoption of GMS TWG Work plan 2015**



## TECHNICAL TOUR 17 AND 19 NOVEMBER 2014

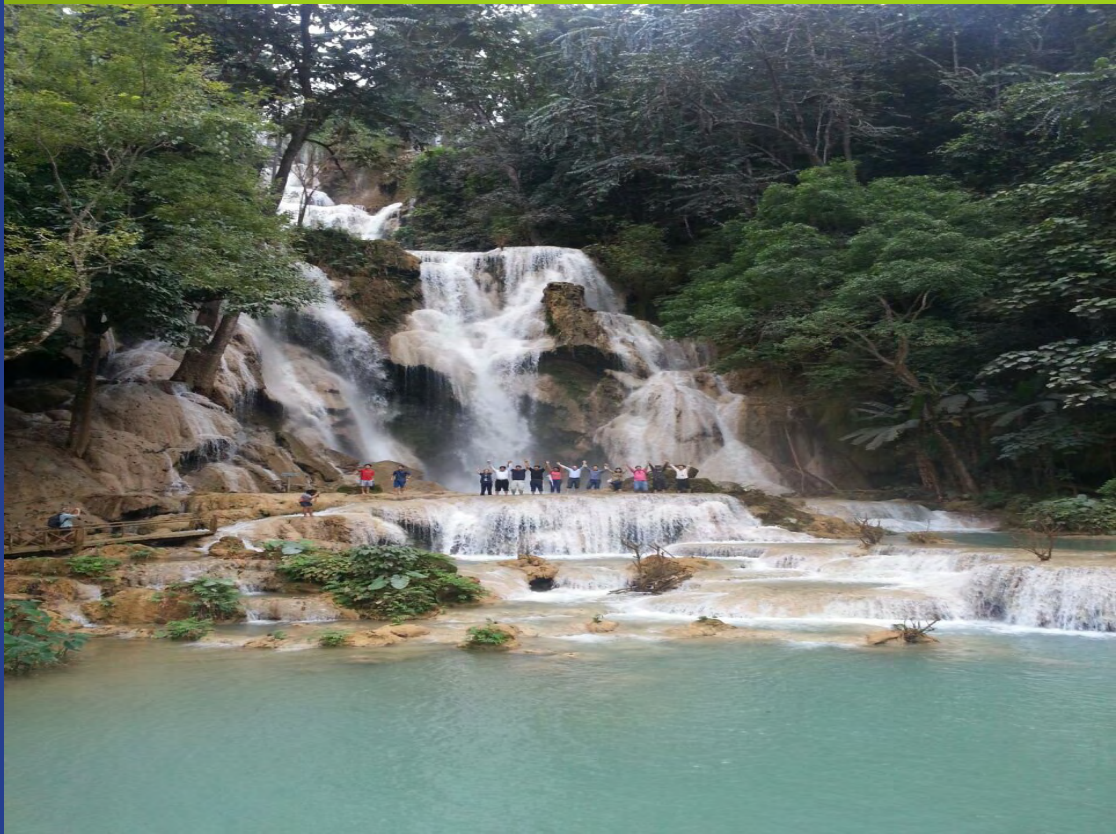


- ❖ **City Tour (Pre Tour) to Visit Royal Palace Museum, Wat Xieng Thong Temple and Night Market 17 November 2014**
- ❖ Field Learning Program to the Kuang Si Waterfall and Lao National Tourism and Hospitality Institute
- ❖ visit the Lao National Institute of Tourism and Hospitality – Luang Prabang Campus
- ❖ visit Kuangsi Waterfall Park and Tat Kuang Si Bear Rescue Centre
- ❖ Cultural Program and Farewell Dinner at The Grand Hotel, Hosted by the Ministry of Information, Culture and Tourism.



## CITY TOUR







## NATURAL BASED TOURISM PRODUCT



## TECHNICAL TOUR LANITH







## FOLLOW-UP OF THE GMS TWG'S RESULTS

- Regional Workshop on the Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 26 – 27 February 2015.
- Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020 supported by ADB
- Good progress of MTCO legal status (prepare by THAILAND)
- Launching MTCOs New Online GMS Tourism Knowledge Center and *The Mekong Tourism e-Library*
- CLOSED MEETING OF MEKONG TOURISM COORDINATING OFFICE (MTCO) BOARD AND ELUVATION.
- Golden Triangle triton (Thailand)



## THANK YOU FOR YOUR ATTENTION



Kob Chai  
Lai Lai





# Appendix 4

Implementation of  
the Mekong Tourism  
Thematic Routes



CAMBODIA



CHINA



LAOS



MYANMAR



THAILAND



VIET NAM

# Agenda Item 5: GMS Tourism Marketing Strategy

35<sup>th</sup> Meeting of the GMS TWG  
Tuesday June 16, 2015  
Danang, Viet Nam



## Strategy and Action Plan Content

- 1) Introduction
- 2) Situational Analysis
- 3) Marketing Strategy and Action Plan
- 4) Appendices

## Strategy and Action Plan Content

Introduction

Situational Analysis

Marketing Strategy and Action Plan

Appendices

## Background

- GMS Tourism Sector Strategy and GMS Strategic Framework 2012–2022 call for Joint Marketing as priority
- Designed to complement national efforts and identify opportunities where synergies can be achieved
- The marketing strategy aligns with shared objectives to develop thematic multicountry tour programs and promote secondary destinations to spread benefits
- Preparation of the was led by the GMS TWG with technical assistance from the ADB. MTCO provided technical inputs and logistic support in its role as the GMS TWG Secretariat.
- Financing and other resources needed for implementation are expected to be sourced from government, the private sector, and development partners.

## Working Draft Content

Introduction

Situational Analysis

Marketing Strategy and Action Plan

Appendices

# Country Profiles and Market Analysis

	2006	2008	2010	2012	2013	CHANGE 2012-2013 (%)	SHARE (%)
Cambodia	1,700,041	2,125,465	2,508,389	3,584,307	4,100,155	775	8.1
Lao PDR	1,115,106	1,736,787	2,523,018	3,320,072	3,726,490	335	7.3
Myanmar	263,914	193,319	794,505	1,058,995	1,044,307	-98.0	3.9
Thailand	13,838,488	14,584,210	15,936,400	21,303,065	26,785,583	39.9	51.6
Viet Nam	3,581,486	4,107,595	5,049,555	6,847,678	7,577,852	10.6	14.6
Guangxi Zhuang, PRC	1,707,729	1,600,466	1,996,452	3,022,900	3,123,249	-29.9	4.1
Yunnan, PRC	1,111,744	2,044,483	2,729,783	3,927,746	5,310,000	35.2	10.3
Total	23,410,108	26,511,635	31,535,312	44,102,017	51,775,046	17.4	100.0

RANK	CAMBODIA	PRC	LAO PDR	MYANMAR	THAILAND	VIET NAM
1	Viet Nam	Korea	Thailand	Thailand	PRC	PRC
2	PRC	Japan	Viet Nam	PRC	Malaysia	Korea
3	Korea	Russia	PRC	Japan	Russia	Japan
4	Lao PDR	USA	Korea	Korea	Japan	USA
5	Thailand	Viet Nam	France	USA	Korea	Taipei, China
6	Japan	Malaysia	USA	Malaysia	India	Cambodia
7	USA	Mongolia	Japan	Singapore	Lao PDR	Malaysia
8	Australia	Philippines	UK	France	Singapore	Australia
9	Russia	Singapore	Australia	UK	UK	Thailand
10	France	Australia	Germany	Germany	Australia	France

## Request for Additional Information Number 1

High quality national tourism brand logos

Table 2: Tourism Marketing Objectives in the Greater Mekong Subregion

COUNTRY	OBJECTIVES
 CAMBODIA <i>Kingdom of Heaven</i>	<ul style="list-style-type: none"> <li>Develop new products to relieve overcrowding of Angkor Wat and diversify to the coastal zone, northeast, and Tonle Sap</li> <li>Promote quality culture and nature-based tourism and the "clean city, clean resort, good service" experience</li> <li>Target fast growing markets from Asia-Pacific, Europe, and North America</li> <li>Encourage visits by Cambodian nationals living in Cambodia and abroad</li> <li>Strengthen market research and distribution channels</li> <li>Develop air routes to Cambodia from medium and long haul markets</li> </ul>
 CHINA <i>SEEK NEVER BEFORE</i>	<ul style="list-style-type: none"> <li>Promote the diversification of tourism products and develop new hotspot areas for tourism consumption</li> <li>Promote inbound tourism by undertaking large overseas promotional programs</li> <li>Strengthen systems to disseminate tourism information</li> <li>Improve the quality of tourism services by enriching the cultural dimensions of tourism and promoting environmental protection</li> <li>Promote balanced tourism development among different regions</li> <li>Focus on domestic tourism development and promote outbound tourism in an orderly fashion</li> </ul>
 LAOS <i>Land of Smiles</i>	<ul style="list-style-type: none"> <li>Improve tourism product quality and develop tourism circuits and destinations that can be linked to subregional/ASEAN tourism products</li> <li>Transform Lao PDR into a global destination for ecotourism</li> <li>Target higher-spending Asian, European, and North American markets</li> <li>Improve market intelligence and results monitoring</li> <li>Improve dissemination of tourism information</li> <li>Strengthen public-private cooperation for product development and marketing</li> </ul>
 မြန်မာနိုင်ငံတော် <i>THE BURMESE WAY</i>	<ul style="list-style-type: none"> <li>Improve market intelligence to determine supply, demand, and gap characteristics of the tourism system</li> <li>Create a marketing strategy to address seasonality, geographic spread, segmentation and yield</li> <li>Raise internal awareness of responsible tourism</li> <li>Create and position a brand image for Myanmar</li> </ul>
 THAILAND <i>By the Sea, in the Heart of Asia</i>	<ul style="list-style-type: none"> <li>Emphasize "Thainess" to the world</li> <li>Raise awareness of Thailand as a quality destination with a broad diversity of experiences</li> <li>Balance source markets and refocus on high-end markets</li> <li>Reduce visitor congestion in popular destinations by better balancing the distribution of visitors nationwide</li> <li>Boost connectivity with ASEAN countries.</li> <li>Reduce seasonality by promoting travel in the low season</li> <li>Promote green tourism to reduce environmental impacts</li> <li>Promote social marketing to boost opportunities for visitors to network and share the experience of "Thainess"</li> </ul>
 Vietnam <i>The Heart of Vietnam</i>	<ul style="list-style-type: none"> <li>Position Viet Nam as a must-visit tourism destination in Southeast Asia based on key brand values and products in Asian and select Western markets</li> <li>Ensure Viet Nam remains the preferred holiday destination for Vietnamese residents</li> <li>Effectively communicate the diversity of Viet Nam's products and main tourism regions</li> <li>Increase visitor length of stay and local expenditure and attract return visitors</li> <li>Effectively manage cooperation with the private sector to target segments and new markets that can be cost effectively reached</li> </ul>

## Drivers of Demand

- Improved connectivity
- Diverse tourism attractions
- Visa policies
- Information technology
- Growing affluence of developing Asia

## Key Constraints and Threats

- Unbalanced of tourism and its benefits
- Shortage of quality tourism services in secondary destinations
- Inadequate marketing and promotion
- Ineffective dissemination of tourism information
- Seasonality
- Scarcity of published aggregated market research
- Insufficient public-private partnership
- Low 'Mekong' brand awareness in medium- and long-haul markets



# Strategy and Action Plan Content

Introduction

Situational Analysis

Marketing Strategy and Action Plan

Appendices



# Implementation Arrangements

Shared Roles and Responsibilities

- GMS National Tourism Organisations
- Mekong Tourism Coordinating Office
- Industry Associations
- Destination Management Organisations and Companies
- Mekong Tourism Advisory Group
- The Media
- Development Partners

## Cost of the Strategy and Expected Outcomes

STRATEGIC PILLAR	ESTIMATED COST (\$)
Jointly package and promote thematic multicountry tour products and thematic events in secondary destinations	6,042,500
Refine the Mekong Tourism brand and position the GMS as a must visit destination in Asia	855,500
Strengthen institutional arrangements for joint tourism marketing and promotion among public and private stakeholders	821,000
<b>Total</b>	<b>7,679,000</b>

COUNTRY	NATIONAL TOURISM ORGANIZATION PROJECTIONS WITHOUT THE MARKETING STRATEGY		SUCCESSFUL IMPLEMENTATION OF THE MARKETING STRATEGY		HIGHLY SUCCESSFUL IMPLEMENTATION OF THE MARKETING STRATEGY	
	IVA	Receipts (\$ billion)	IVA	Receipts (\$ billion)	IVA	Receipts (\$ billion)
Cambodia	7,000,000	5.00	7,140,000	5.085	7,560,000	5.340
Lao PDR	4,700,000	0.643	4,900,000	0.675	5,100,000	0.705
Myanmar	7,500,000	10.10	7,650,000	10.17	8,100,000	10.28
Thailand	37,000,000	55.00	37,750,000	56.00	39,000,000	57.50
Viet Nam	10,500,000	19.00	10,750,000	19.35	11,340,000	20.55
<b>Total</b>	<b>66,700,000</b>	<b>89.743</b>	<b>68,190,000</b>	<b>91.28</b>	<b>71,100,000</b>	<b>94.375</b>

## Strategy and Action Plan Content

Introduction

Situational Analysis

Marketing Strategy and Action Plan

Appendices

## Appendices

1. Implementation Plan 2015-2020
2. Design and Monitoring Framework
3. Baseline Information for Priority Destinations
4. Multi-country Tour Routes
5. Description of Thematic Events
6. Guidelines for Organising Green Events

## Request for Additional Information Number 2

Provide and verify missing baseline information

### APPENDIX 3 – BASELINE INFORMATION

	INT'L TOURIST ARRIVALS	DOMESTIC VISITORS	SCHEDULED INBOUND SEATS	HOTEL/GUESTHOUSE ROOMS	INT'L BORDER	
Cambodia 2015	Phnom Penh	1,075,573	2,248,073	2,900,033	14,035	Y
	Kampot	113,260	654,600	0	0	Y
	Kep	48,840	638,490	0	775	N
	Koh Kong	47,448	96,080	0	1,045	Y
	Kratie	22,776	46,548	0	687	Y
	Sihanoukville	393,325	731,604	17,430	4,293	Y
	Siem Reap	2,312,286	2,292,000	2,002,860	14,274	Y
Stung Treng	12,240	120,312	0	485	Y	
Dat			505,461		N	
China 2015	Debian			0		Y
	Ganlaba			0		N
	Jinghong			2,399,398		Y
	Kunming			2,050,244		Y
	Nanning			2,552,934		Y
Lao PDR 2015	Puler			448,072		N
	Bolao	202,386	24,322	0	83	Y
	Bolikhamxay	199,031	54,103	0	1,666	Y
	Champasak	493,180	254,071	182,283	4,072	Y
	Khammouane	477,948	124,793	0	1,130	Y
	Luang Prabang	340,402	125,354	471,405	4,108	Y
	Luang Namtha	305,608	101,644	32,145	1,296	Y
Myanmar 2015	Chadonay	172,231	303,280	22,294	1,365	Y
	Sayabouli	87,276	78,492	0	1,437	Y
	Savannakhet	1,467,154	499,671	88,182	1,662	Y
	Bago	...	...	0	396	N
	Kengtung	...	...	66,331	451	N
Thailand 2015	Kyaktiye	220,000	21,000,000	0	543	N
	Hpa-an	...	...	0	180	N
	Myawaddy	1,262,210	...	0	...	Y
	Thachikie	...	...	0	121,183	Y
	Yangon	87,699	...	0	10,175	Y
	Buriram	3,287	248,292	6,208	2,284	N
	Chanthaburi	26,107	1,521,044	0	3,833	N
Viet Nam 2015	Chang Fai	264,648	1,383,349	670,607	14,939	Y
	Lampang	74,411	687,412	55,720	2,331	N
	Mekong	199,890	1,283,823	0	2,040	Y
	Nan	16,273	609,497	63,375	1,330	Y
	Nakorn Phanom	71,484	801,441	130,624	1,999	Y
	Tak	31,343	1,618,292	72,044	4,019	Y
	Trat	62,921	356,092	72,180	1,245	Y
	Ubon Ratchasani	109,858	1,471,688	465,311	4,066	Y
	An Giang	55,468	5,703,000	0	3,990	Y
	Cao Bang	24,120	435,431	0	1,288	N
Viet Nam 2015	Da Nang	690,008	2,028,650	2,534,038	10,320	Y
	Dieu Bien	65,000	295,000	48,725	3,000	Y
	Ha Tinh	61,352	1,620,460	0	3,000	Y
	Hanoi	2,200,000	12,828,000	8,425,048	18,830	Y
	Quang Nam	1,420,000	1,330,000	0	4,444	N
	Thua Thien Hue	867,904	1,676,286	272,302	6,255	Y
	Kien Giang	142,000	1,390,000	0	5,293	Y
Tien Giang	141,000	646,000	0	2,361	N	

China = People's Republic of China, Lao PDR = Lao People's Democratic Republic, N= no, Y= yes, ... = data not available, INTL=International  
Note: International borders include international airports, land borders and sea ports with tourist visa on arrival.  
Source: GMS National Tourism Organizations, Annual Schedule Analysis.

[DRAFT FINAL REPORT]

## Request for Additional Information Number 3

Countries that have not yet done so are asked to provide details of proposed thematic events

### APPENDIX 5 – THEMATIC EVENTS

	EVENT	MAIN ACTIVITIES	LOCATION	DATES
CAMBODIA	Sea Festival	Live concerts and entertainment, international food festival, presentation of projects and beach and water activities	Kep, Kampot, Sihanoukville and Koh Kong (rotates)	Annually in December
	Mekong River Festival	Promote the tourism potential in the Mekong region through performances and exhibitions with the goal of protecting the remaining 100+ Irrawaddy dolphins	Kratie	March, beginning in 2015
LAO PDR	Luang Prabang Food and Craft Festival	Local food tastings, cooking demonstrations, top chef competition, craft market, design and production demonstrations and performing arts	Luang Prabang Town, Luang Prabang	Annually in December beginning 2015
	Lao Coffee Festival	Exhibitions, coffee tasting, production and roasting demonstrations, seminars and competition and awards	Pakse Town, Champasak	Biennially October 2016, 2018 and 2020
MYANMAR	ASEAN Ecotourism Forum	Conference and trade show, with familiarization tours for media and tour operators.	TBD	2016 - TBD
THAILAND				
Viet Nam				

Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China, TBD = to be determined  
Source: Mekong Tourism Coordinating Office and GMS National Tourism Organizations

## Guidance Note

- Please check for overall accuracy of country-specific data and information;
- Please provide high resolution version of country-specific marketing brand/logo;
- China and Myanmar please provide missing data points for Appendix 3; and
- China, Myanmar, Thailand and Viet Nam please provide information on country-specific thematic events for Appendix 5.

### Request for Additional Information Number 1

High quality national tourism brand logos

Table 2: Tourism Marketing Objectives in the Greater Mekong Subregion

COUNTRY	OBJECTIVES
	<ul style="list-style-type: none"> <li>• Develop new products to relieve overcrowding of Angkor Wat and diversify to the coastal zone, northeast, and Tonle Sap</li> <li>• Promote quality culture and nature-based tourism and the "clean city, clean resort, good service" experience</li> <li>• Target fast growing markets from Asia-Pacific, Europe, and North America</li> <li>• Encourage visits by Cambodian nationals living in Cambodia and abroad</li> <li>• Strengthen market research and distribution channels</li> <li>• Develop air routes to Cambodia from medium and long haul markets</li> </ul>
	<ul style="list-style-type: none"> <li>• Promote the diversification of tourism products and develop new hotspot areas for tourism consumption</li> <li>• Promote inbound tourism by undertaking large overseas promotional programs</li> <li>• Strengthen systems to disseminate tourism information</li> <li>• Improve the quality of tourism services by enriching the cultural dimensions of tourism and promoting environmental protection</li> <li>• Promote balanced tourism development among different regions</li> <li>• Focus on domestic tourism development and promote outbound tourism in an orderly fashion</li> </ul>
	<ul style="list-style-type: none"> <li>• Improve tourism product quality and develop tourism circuits and destinations that can be linked to subregional/ASEAN tourism products</li> <li>• Transform Lao PDR into a global destination for ecotourism</li> <li>• Target higher-spending Asian, European, and North American markets</li> <li>• Improve market intelligence and results monitoring</li> <li>• Improve dissemination of tourism information</li> <li>• Strengthen public-private cooperation for product development and marketing</li> </ul>
	<ul style="list-style-type: none"> <li>• Improve market intelligence to determine supply, demand, and gap characteristics of the tourism system</li> <li>• Create a marketing strategy to address seasonality, geographic spread, segmentation and yield</li> <li>• Raise internal awareness of responsible tourism</li> <li>• Create and position a brand image for Myanmar</li> </ul>
	<ul style="list-style-type: none"> <li>• Emphasize "Thainess" to the world</li> <li>• Raise awareness of Thailand as a quality destination with a broad diversity of experiences</li> <li>• Balance source markets and refocus on high-end markets</li> <li>• Reduce visitor congestion in popular destinations by better balancing the distribution of visitors nationwide</li> <li>• Boost connectivity with ASEAN countries.</li> <li>• Reduce seasonality by promoting travel in the low season</li> <li>• Promote green tourism to reduce environmental impacts</li> <li>• Promote social marketing to boost opportunities for visitors to network and share the experience of "Thainess"</li> </ul>
	<ul style="list-style-type: none"> <li>• Position Viet Nam as a must-visit tourism destination in Southeast Asia based on key brand values and products in Asian and select Western markets</li> <li>• Ensure Viet Nam remains the preferred holiday destination for Vietnamese residents</li> <li>• Effectively communicate the diversity of Viet Nam's products and main tourism regions</li> <li>• Increase visitor length of stay and local expenditure and attract return visitors</li> <li>• Effectively manage cooperation with the private sector to target segments and new markets that can be cost effectively reached</li> </ul>

## Request for Additional Information Number 2

Provide and verify missing baseline information

### APPENDIX 3 – BASELINE INFORMATION

	INT'L TOURIST ARRIVALS	DOMESTIC VISITORS	SCHEDULED INBOUND SEATS	HOTEL/GUESTHOUSE ROOMS	INT'L BORDER	
Cambodia 2015	Phnom Penh	1,075,579	2,248,073	2,900,033	14,035	Y
	Kampot	113,260	654,600	0	0	Y
	Kep	48,840	638,498	0	775	N
	Koh Kong	47,448	98,080	0	1,046	Y
	Kratie	22,776	46,546	0	687	Y
	Sihanoukville	393,325	731,604	17,430	4,293	Y
	Siem Reap	2,312,286	2,292,000	2,002,860	14,274	Y
Stung Treng	12,240	120,353	0	485	Y	
Dat			505,461		N	
China 2015	Debian			0	0	Y
	Ganlaba			0	0	N
	Jinghong			2,399,398		Y
	Kunming			2,050,244		Y
	Nanning			2,552,334		Y
Puler			448,072		N	
Lao PDR 2015	Bolao	202,386	24,327	0	83	Y
	Bolikhamxay	199,031	54,303	0	1,666	Y
	Champasak	493,180	254,071	182,283	4,072	Y
	Khammouane	477,948	124,793	0	1,130	Y
	Luang Prabang	340,402	125,354	471,495	4,106	Y
	Luang Namtha	305,608	101,644	32,148	1,236	Y
Myanmar 2015	Chadonay	172,219	303,280	22,294	1,365	Y
	Sayabouli	87,276	78,492	0	1,437	Y
	Savannakhet	1,487,154	499,673	88,182	1,662	Y
	Bago	...	...	0	396	N
	Kengtung	...	...	66,331	451	N
Thailand 2015	Kyaktiye	220,000	21,000,000	0	543	N
	Hpa-an	...	...	0	180	N
	Myawaddy	1,262,210	...	0	...	Y
	Thachoke	...	...	0	1,003	Y
	Yangon	87,699	...	1,310,183	10,375	Y
	Buriram	3,287	248,292	6,208	2,284	N
Viet Nam 2015	Chanthaburi	26,107	1,521,044	0	3,833	N
	Chiang Mai	284,648	1,383,349	670,607	14,939	Y
	Lampang	74,411	687,412	55,720	2,331	N
	Mekong	199,890	1,283,823	0	2,040	Y
	Nan	18,273	609,987	63,375	1,330	Y
	Nakhon Phanom	71,484	801,441	130,624	1,999	Y
	Tak	31,343	1,648,292	72,044	4,099	Y
	Trat	62,921	358,092	75,180	1,245	Y
	Ubon Ratchasani	109,858	1,471,688	465,311	4,066	Y
	Xieng Khouang	55,498	2,703,000	0	3,990	Y
Viet Nam 2015	Cao Bang	24,120	435,430	0	1,288	N
	Da Nang	690,008	2,028,650	2,534,038	10,320	Y
	Da Nang	690,008	2,028,650	2,534,038	10,320	Y
	Diem Bien	65,000	395,000	48,725	3,000	Y
	Ha Tinh	64,352	1,620,460	0	3,000	Y
	Hanoi	2,200,000	12,828,000	8,425,048	18,830	Y
	Quang Nam	1,420,000	1,330,000	0	4,444	N
	Thua Thien Hue	867,904	1,676,286	272,302	6,255	Y
	Kien Giang	162,000	1,398,000	0	5,293	Y
	Tien Giang	141,000	684,000	0	2,350	N

China = People's Republic of China, Lao PDR = Lao People's Democratic Republic, N= no, Y= yes, ... = data not available, INTL=International  
Note: International borders include international airports, land borders and sea ports with tourist visa on arrival.  
Source: GMS National Tourism Organizations, Annual Schedule Analysis.

[DRAFT FINAL REPORT]

## Request for Additional Information Number 3

Countries that have not yet done so are asked to provide details of proposed thematic events

### APPENDIX 5 – THEMATIC EVENTS

	EVENT	MAIN ACTIVITIES	LOCATION	DATES
CAMBODIA	Sea Festival	Live concerts and entertainment, international food festival, presentation of projects and beach and water activities	Kep, Kampot, Sihanoukville and Koh Kong (rotates)	Annually in December
	Mekong River Festival	Promote the tourism potential in the Mekong region through performances and exhibitions with the goal of protecting the remaining 100+ Irrawaddy dolphins	Kratie	March, beginning in 2015
LAO PDR	Luang Prabang Food and Craft Festival	Local food tastings, cooking demonstrations, top chef competition, craft market, design and production demonstrations and performing arts	Luang Prabang Town, Luang Prabang	Annually in December beginning 2015
	Lao Coffee Festival	Exhibitions, coffee tasting, production and roasting demonstrations, seminars and competition and awards	Pakse Town, Champasak	Biennially October 2016, 2018 and 2020
MYANMAR	ASEAN Ecotourism Forum	Conference and trade show, with familiarization tours for media and tour operators.	TBD	2016 - TBD
THAILAND				
Viet Nam				

Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China, TBD = to be determined  
Source: Mekong Tourism Coordinating Office and GMS National Tourism Organizations

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# Appendix 5

GMS Scorecard  
GMS Tourism Performance 2014

16 June 2015  
Danang, Viet Nam

ADB Consultant

Under TA-8516:  
Strengthening the  
Mekong Tourism Coordinating Office



CAMBODIA



CHINA



LAOS



MYANMAR



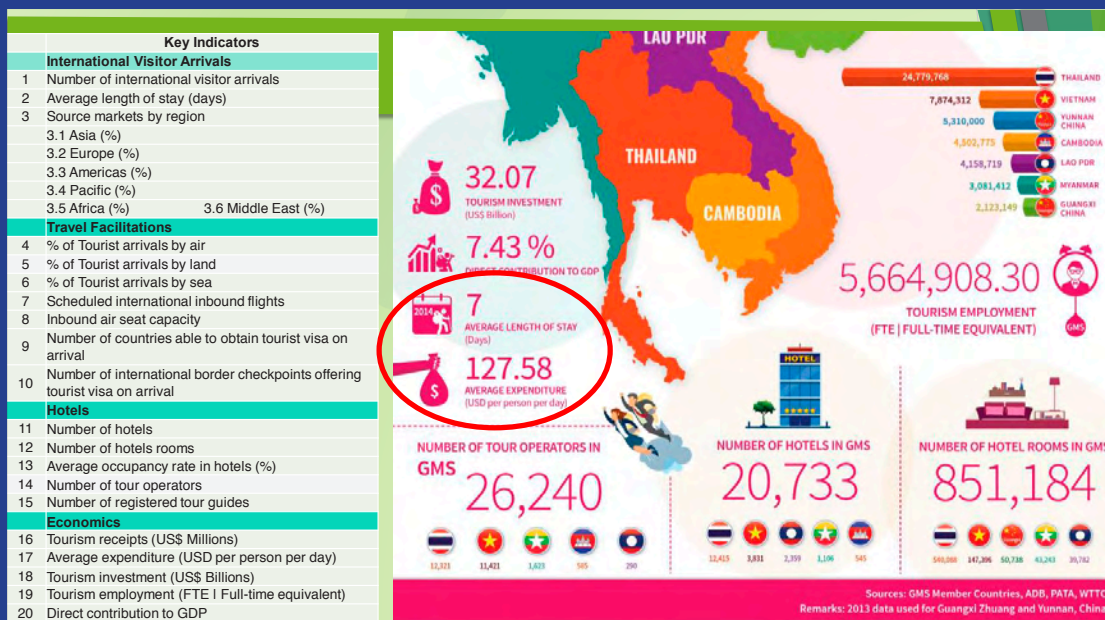
THAILAND



VIET NAM

Key Indicators	
<b>International Visitor Arrivals</b>	
1	Number of international visitor arrivals
2	Average length of stay (days)
3	Source markets by region
	3.1 Asia (%)
	3.2 Europe (%)
	3.3 Americas (%)
	3.4 Pacific (%)
	3.5 Africa (%)
	3.6 Middle East (%)
<b>Travel Facilitations</b>	
4	% of Tourist arrivals by air
5	% of Tourist arrivals by land
6	% of Tourist arrivals by sea
7	Scheduled international inbound flights
8	Inbound air seat capacity
9	Number of countries able to obtain tourist visa on arrival
10	Number of international border checkpoints offering tourist visa on arrival
<b>Hotels</b>	
11	Number of hotels
12	Number of hotels rooms
13	Average occupancy rate in hotels (%)
14	Number of tour operators
15	Number of registered tour guides
<b>Economics</b>	
16	Tourism receipts (US\$ Millions)
17	Average expenditure (USD per person per day)
18	Tourism investment (US\$ Billions)
19	Tourism employment (FTE   Full-time equivalent)
20	Direct contribution to GDP









**Scorecard | Key Indicators for GMS Tourism Performance 2014**

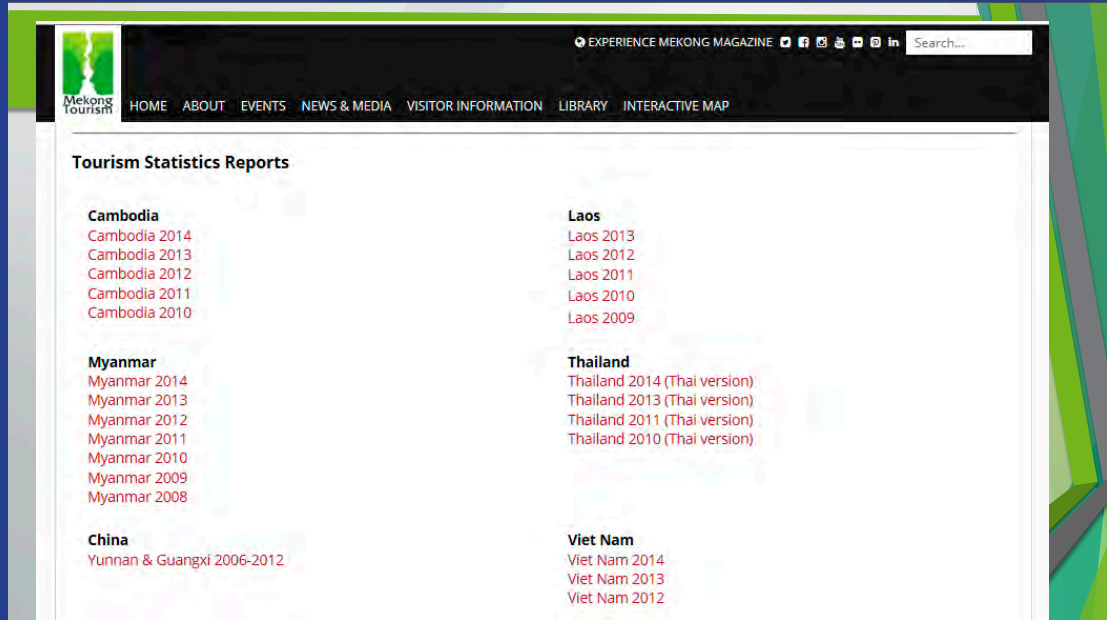
Key Indicators   Year 2014	Cambodia	Lao PDR	Myanmar	Thailand	Vietnam	China   Yunnan	China   Guangxi	Total
<b>International Visitor Arrivals</b>								
1	4,502,775	4,156,719	3,081,412	24,779,788	7,874,312	5,310,000	2,123,149	51,830,135
2	6.5	7.9	8.0	9.0	9.0		1.97	7.0
3	Source markets by region							
3.1	3,343,207	3,804,277	807,808	15,813,085	5,341,879			29,110,254.00
3.2	708,705	209,331	200,420	6,156,132	1,198,481		1,780,428	10,233,495.00
3.3	278,899	86,027	81,942	1,104,714	548,067		350,868	2,448,085.00
3.4	165,578	60,164	33,421	947,242	354,209		84,063	1,564,677.00
3.5	8,212		3,321	185,595			309	818,029.00
3.6	12,404	8,920	4,714	593,000	431,876			810,118.00
<b>Mode of arrival</b>								
4	50.40		36.72		79.00			55.37
5	47.40		63.28		20.40			43.69
6	2.20				0.90			0.94
7	28,183	9,907	14,756	165,374	57,059			275,832
8	4,143,444	1,170,409	2,495,272	36,573,658	11,465,043			55,847,826
9	All countries, except 10 countries that are required to obtain VISA in advance	All countries, except 30 countries that are required to obtain VISA in advance	50	19 (61 countries are not required to obtain VISA.)	All countries but required to have an approval letter from Vietnam Department of Immigration			
10	3 international airports & 15 border checkpoints	4 international airports & 13 border checkpoints	2 international airports	10 international airports & 32 border checkpoints	3 international airports			
<b>Accommodations and Tour Services</b>								
11	546	2,359	1,108	12,418	3,831		477	20,733
12	20,937	30,782	43,243	540,088	147,396		80,738	851,184
13	67.55	54.00		56.29	58.00			59
14	585	290	1,623	12,321	11,421			26,240
15	604	604	4,848	52,900	15,062			73,412
<b>Economics</b>								
16	2,736.00	641.64	1,789.00	35,366.83	5,952.50		15,472.98	61,958.95
17	73.30	73.30	170.00	139.44				127.58
18	0.37	0.34	0.13	7.96	3.91		19.38	32.07
19	784,000.00	123,000.00	379,000.00	2,377,000.00	2,001,000.00		908.30	6,664,908.30
20	10.40	4.70	1.60	9.00	4.60		14.30	7.43

Sources: GMS Member Countries, ADB, PATA, WTTC  
Remarks: 2013 data used for Guangxi Zhanan and Yunnan, China

The screenshot shows the Mekong Tourism website's 'TOURISM PERFORMANCE' page. At the top, there is a navigation menu with links for HOME, ABOUT, EVENTS, NEWS & MEDIA, VISITOR INFORMATION, LIBRARY, and INTERACTIVE MAP. A search bar is also present. The main heading is 'TOURISM PERFORMANCE'. Below this, the section is titled 'GMS Tourism Performance'. A paragraph states: 'The Mekong Tourism Coordinating Office tracks 20 tourism performance indicators in the Greater Mekong Sub region.' A list of 17 indicators follows:

1. International Visitor Arrivals
2. Average Length of Stay
3. Top 10 Source Markets by Region and Country
4. Percentage of Tourist Arrivals by Air
5. Percentage of Tourist Arrivals by Land
6. Percentage of Tourist Arrivals by Sea
7. Scheduled International Inbound Flights
8. Inbound Air Seat Capacity
9. Number of Countries Permitted to obtain Tourist Visa on Arrival
10. Number of International Border Checkpoints (land, sea, air) Offering Tourist Visa on Arrival
11. Number of Hotels
12. Number of Hotels Rooms
13. Average Occupancy Rate of Hotels
14. Number of Tour Operators
15. Number of Registered Tour Guides
16. Tourism Receipts
17. Tourist Expenditures

This screenshot displays the 'GMS Tourism Performance 2014' section. It features two main infographic panels. The left panel is titled 'GMS TOURISM 2014 PERFORMANCE' and includes a map of the region with various data points. The right panel is a '2014 Tourism Performance Scorecard' with multiple charts and statistics. Below these, there is a section for 'GMS Tourism Performance 2013' with similar infographic panels. A link for '2013 Tourism Performance Scorecard' is visible at the bottom of the 2013 section.





CAMBODIA



CHINA



LAOS



MYANMAR



THAILAND



VIET NAM