



GREATER MEKONG SUBREGION



TOURISM SECTOR STRATEGY
2016-2025

GREATER MEKONG SUBREGION TOURISM SECTOR STRATEGY 2016–2025

THE GREATER MEKONG SUBREGION TOURISM WORKING GROUP
MEKONG TOURISM COORDINATING OFFICE
ASIAN DEVELOPMENT BANK

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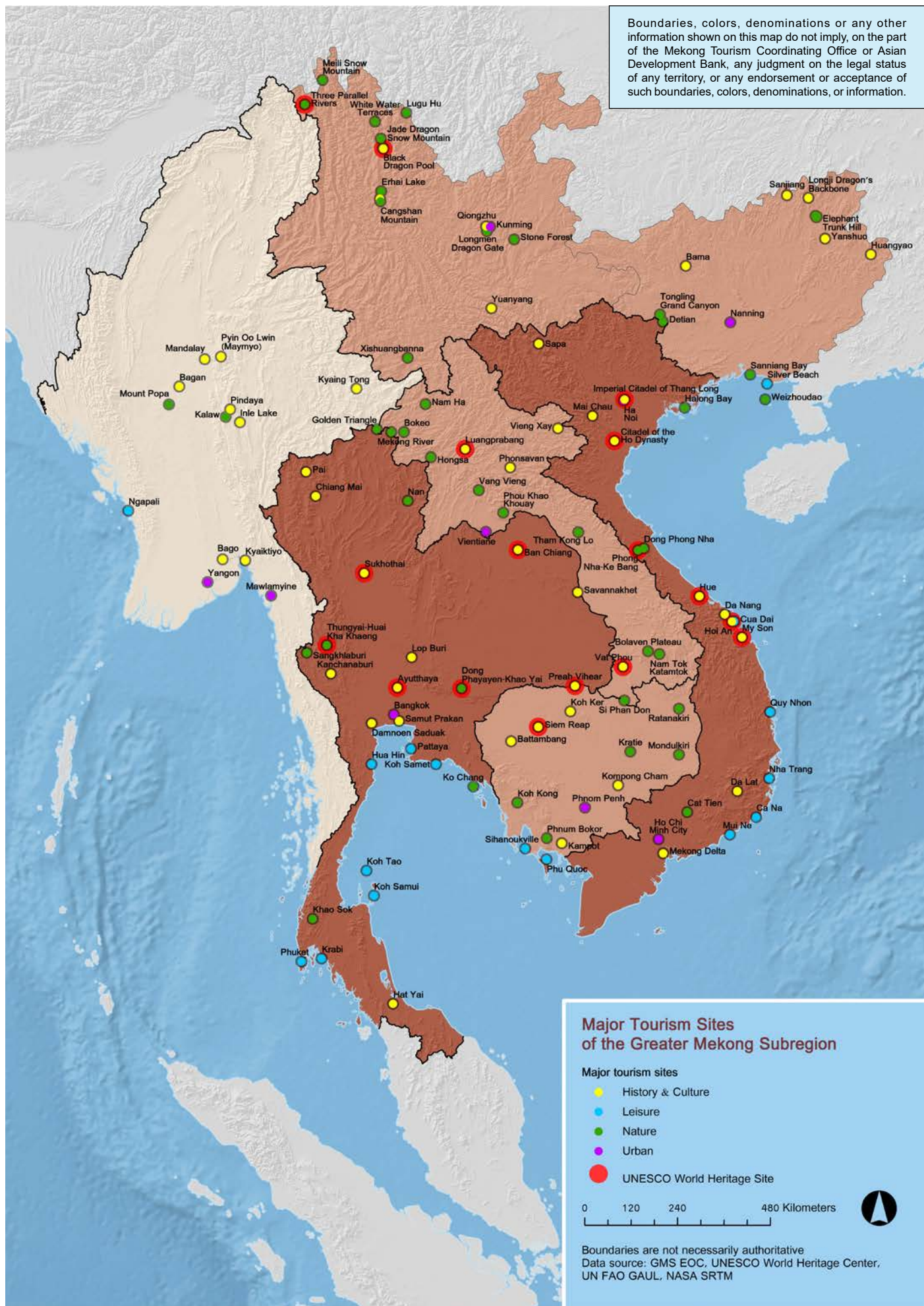
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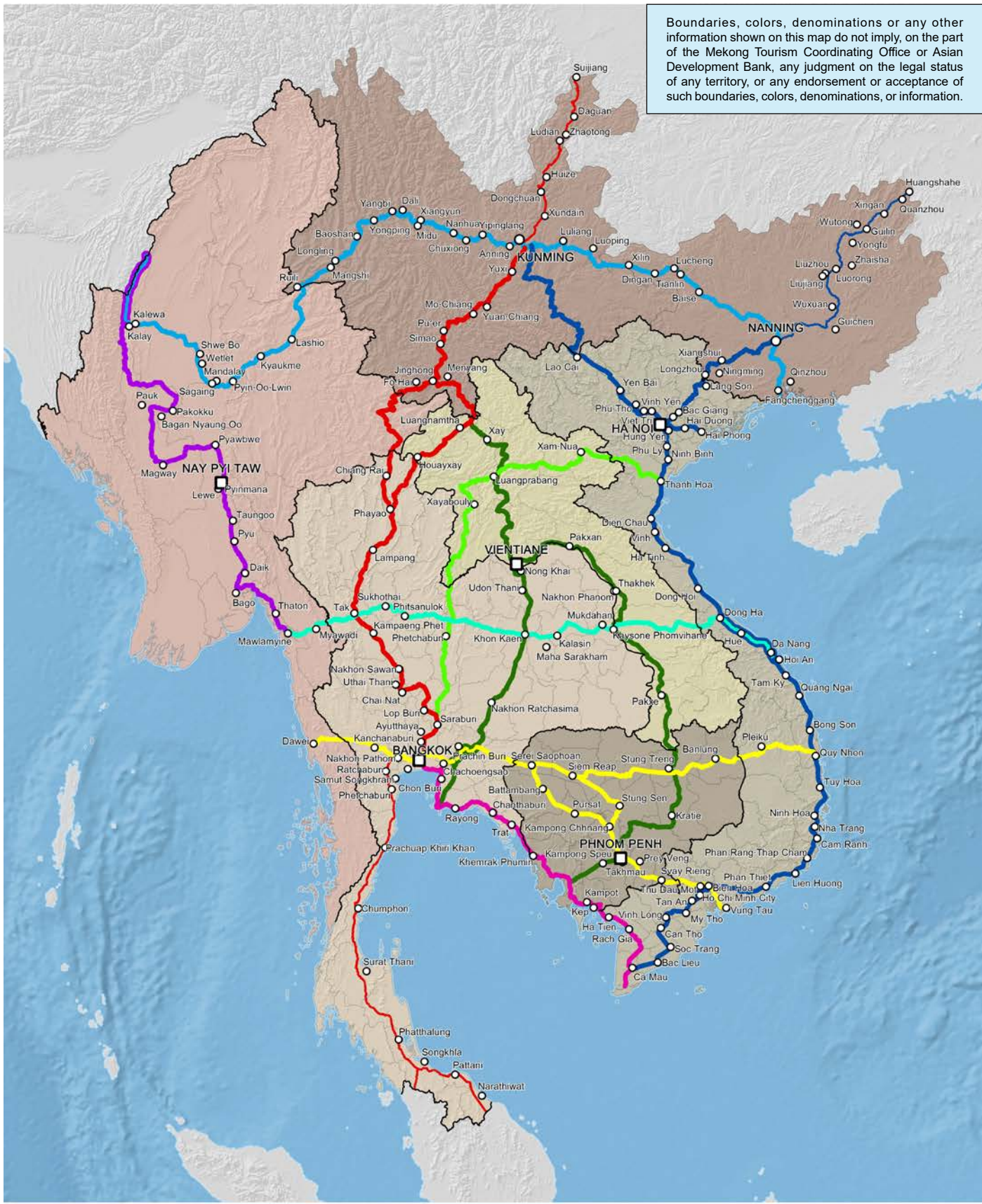
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GREATER MEKONG SUBREGION MAJOR TOURIST ATTRACTIONS



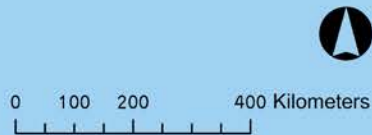
GREATER MEKONG SUBREGION TRANSPORT CORRIDORS

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Transport Corridors of the Greater Mekong Subregion

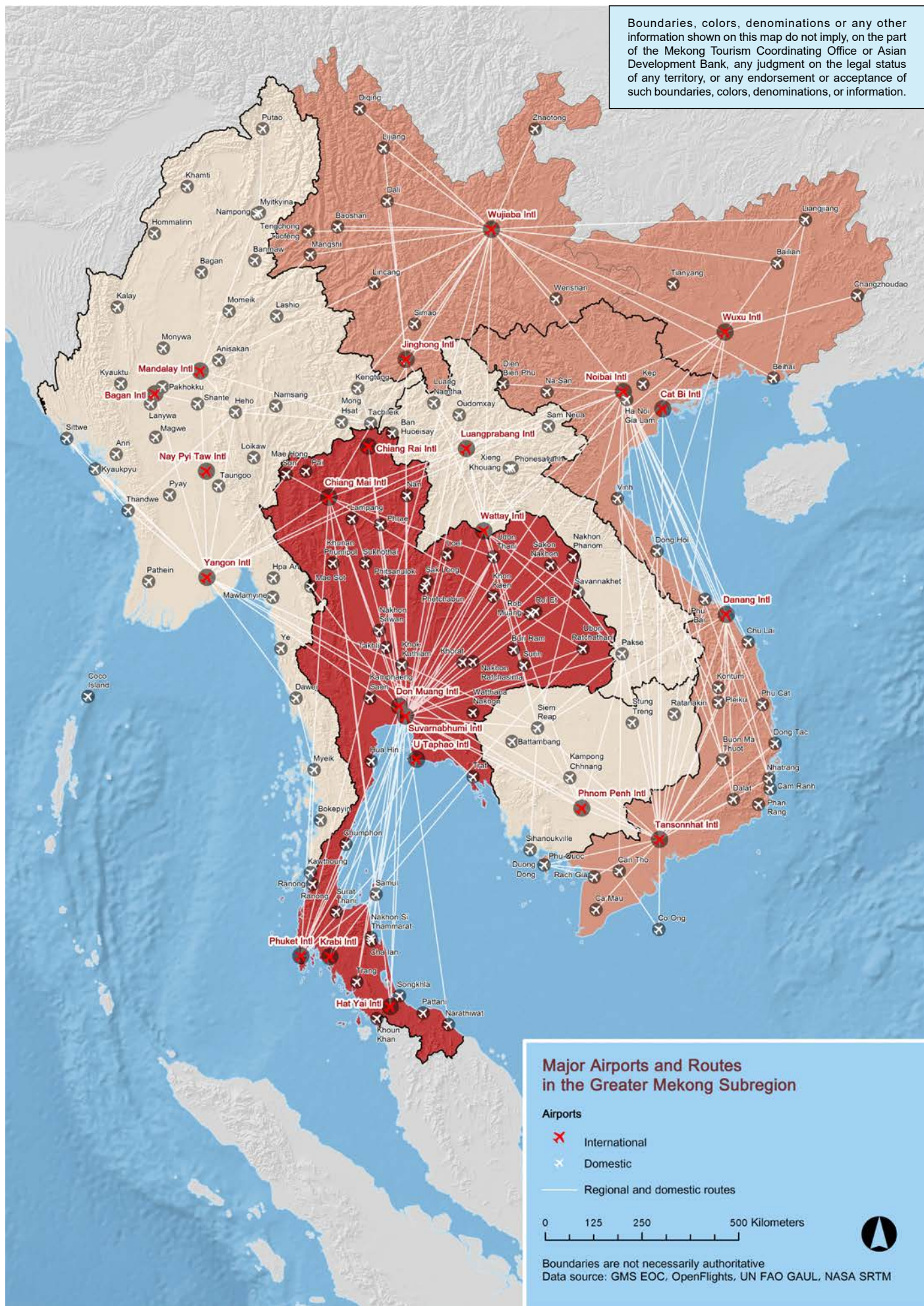
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|--------------------------------|----------------------------------|-------------------------|
| Economic Corridor Roads | — North-South Corridor Extension | □ National capital |
| — Central Corridor | — Northeastern Corridor | ○ Administrative center |
| — East-West Corridor | — Northern Corridor | ○ Corridor town |
| — Eastern Corridor | — Southern Coastal Corridor | |
| — Eastern Corridor Extension | — Southern Corridor | |
| — North-South Corridor | — Western Corridor | |



Boundaries are not necessarily authoritative
Data source: ADB, GMS EOC, UN FAO GAUL, NASA SRTM

MAJOR AIRPORTS AND ROUTES IN THE GREATER MEKONG SUBREGION

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Major Airports and Routes in the Greater Mekong Subregion

Airports

- ✕ International
- ✕ Domestic

— Regional and domestic routes



Boundaries are not necessarily authoritative
 Data source: GMS EOC, OpenFlights, UN FAO GAUL, NASA SRTM

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ABBREVIATIONS

ASEAN	-	Association of Southeast Asian Nations
GDP	-	Gross Domestic Product
GMS	-	Greater Mekong Subregion
Lao PDR	-	Lao People's Democratic Republic
PRC	-	People's Republic of China
UNESCO	-	United Nations Educational, Scientific and Cultural Organization
UNWTO	-	United Nations World Tourism Organization









INTRODUCTION

BACKGROUND

The Greater Mekong Subregion (GMS)—comprising Cambodia, Yunnan Province and Guangxi Zhuang Autonomous Region in the People’s Republic of China (PRC), the Lao People’s Democratic Republic (Lao PDR), Myanmar, Thailand, and Viet Nam—is united by the iconic Mekong River and home to millions of hospitable people. It is one of the world’s most dynamic tourist destinations and offers outstanding tourism and hospitality services that are tailored to all major markets.

Regional tourism cooperation is a GMS priority. GMS countries are committed to developing competitive, inclusive, and sustainable tourism that improves socioeconomic well-being. The GMS Economic Cooperation Program Strategic Framework 2012–2022, GMS Tourism Marketing Strategy and Action Plan 2015–2020, national tourism plans, and the recently endorsed Association of Southeast Asian Nations (ASEAN) Tourism Strategic Plan 2016–2025 share these common objectives. All GMS countries endorse the United Nations Sustainable Development Goals, which recognize tourism’s potential to help promote inclusive and sustainable economic growth, generate productive employment and decent work, conserve and sustainably use natural resources, and build global partnerships to foster peaceful societies and sustainable development.

The GMS Economic Cooperation Program has adopted an overall strategy based on the “3 Cs,” whereby GMS countries focus on building large economic infrastructure and the institutions needed to improve physical and nonphysical **connectivity**. Complementary actions to facilitate cross-border movement of goods and people and to integrate markets, production processes, and value chains improve the subregion’s **competitiveness**. Other initiatives strengthen human resources to address shared social and environmental concerns and enable a strong sense of **community**.

Endorsement of the first GMS Tourism Sector Strategy (2005–2015) was guided by the “3 Cs”. Its objectives were to develop and promote the Mekong subregion as a single destination with diverse, quality, and high-yielding subregional products that distribute tourism benefits widely and contribute to poverty reduction, women’s empowerment, and sustainable development. Over time, the GMS steadily improved destination marketing, heritage conservation, travel facilitation, tourism-related infrastructure, and the business-enabling environment for tourism.

Despite these achievements, gateway destinations still receive a disproportionately large share of visitors and tourism benefits. GMS tourism stakeholders recognize that high tourism intensity can undermine inclusive economic growth, degrade the environment, and diminish interactions between visitors and hosts. To address these challenges, GMS national tourism organizations and the GMS Tourism Working Group have increased their efforts to promote more competitive, balanced, and sustainable tourism development.¹

The updated GMS Tourism Sector Strategy (2016–2025) will guide this initiative. It was formulated based on a robust situational analysis and meaningful consultations with public, private, and civil society organizations, development partners, academic institutions, and the media. A series of regional and national workshops identified common concerns and strategic priorities. More than 500 public and private stakeholders actively participated. Subject matter experts were consulted to validate key issues and proposed solutions. Stakeholders were also invited to submit their concerns and feedback to the GMS Tourism Working Group through its freely accessible website, www.mekongtourism.org.

Strategic directions, programs, and projects support GMS tourism stakeholders' shared vision of an integrated, prosperous, and equitable subregion. They are estimated to cost \$58.7 billion. Implementation and financing arrangements follow the established GMS tourism cooperation framework with enhanced private sector participation.

The Mekong Tourism Coordinating Office will continue to lead and facilitate joint GMS marketing activities, disseminate tourism knowledge products, and coordinate results monitoring. The GMS Tourism Working Group will provide GMS tourism ministers and industry stakeholders with progress reports on priority programs and projects as part of the annual Mekong Tourism Forum and other subregional events. GMS ministers will receive similar reports during their annual ministerial conference, for elevation to GMS leaders at the triennial GMS summit.

¹ The GMS national tourism organizations and GMS Tourism Working Group include the Ministry of Tourism, Cambodia; the [People's Republic of] China National Tourism Administration; the Ministry of Information, Culture and Tourism, Lao People's Democratic Republic; the Ministry of Hotels and Tourism, Myanmar; the Ministry of Tourism and Sports, Thailand; and the Viet Nam National Administration of Tourism, Ministry of Culture, Sports and Tourism, Viet Nam.



A large crowd of people is gathered at night for a festival or concert. The scene is illuminated by vibrant, multi-colored light displays, including vertical strings of lights in red, green, blue, and yellow. A bright, circular light source, possibly a stage light or a large screen, is visible in the center-right background, casting a strong glow. The overall atmosphere is festive and energetic.

SITUATIONAL ANALYSIS

GLOBAL TOURISM TRENDS AND INFLUENCES

GROWTH AND DEMAND

Tourism is growing rapidly worldwide. It substantially contributes to economic and social progress and is resilient to economic downturns. International visitor arrivals surpassed 1.18 billion in 2015, a 40% increase compared to 2005. The wider travel and tourism industry generates about 10% of global gross domestic product (GDP) and supports 284 million jobs.² According to the United Nations World Tourism Organization (UNWTO), international visitor arrivals will continue growing by 3.3% per year and will reach 1.8 billion by 2030. The number of international visitors to emerging destinations is expected to increase by 4.4% per year on average, which is nearly double the rate of advanced economies. About 53% of global tourists travel for leisure, recreation, and holidays. Visiting friends and relatives, health, or religious reasons account for 25% of tourist movements, and business travel accounts for 14%. Remarkably, 80% of global visitor arrivals are intraregional.³

Tourism growth in Asia and the Pacific outpaces global averages. International visitor arrivals are increasing by 5.4% per year, reaching 277 million in 2015. Long-term UNWTO forecasts estimate that growth will average 4.9% per year and international visitor arrivals will exceed 535 million in 2030. The World Travel & Tourism Council estimates that tourism currently contributes 2.7% (\$635.9 billion) to Asia and the Pacific's GDP and supports 65 million jobs. By 2025, tourism is expected to generate \$3.7 trillion annually and to sustain about 200 million jobs. In 2015, 6 of the top 20 global city destinations for international tourism were in Asia and the Pacific, along with the 5 fastest-growing city destinations.⁴

DEMOGRAPHIC CHANGE

A sharp increase in younger travelers is shaping new patterns of tourism demand. In 2015, 270 million tourists 15 to 29 years old generated approximately \$283 billion in international visitor expenditure.⁵ This newly influential market segment (millennials) is technology savvy and seeks socially responsible travel experiences that can be independently planned. Millennials place a premium on environmental sustainability and are more inclined than other age groups to share their experiences and views about a destination on social media.

² World Travel & Tourism Council. 2016. *Travel & Tourism Economic Impact 2016: World*. London.

³ United Nations World Tourism Organization. 2015. *World Tourism Barometer*. Madrid.

⁴ Yuwa Hedrick-Wong and Desmond Choong. 2015. *MasterCard 2015 Global Destination Cities Index*. MasterCard.

⁵ World Youth Student and Education Travel Confederation. 2015. Fast Facts. www.wysetc.org/research/fast-facts.

Tourism supports 65 million jobs in Asia and the Pacific

World Travel and Tourism Council

Tourists over 60 years old (seniors) also have a strong affinity for travel. Globally, the number of seniors is expected to increase from 901 million in 2015 to 2.1 billion in 2050, led by growth in Asian and North American source markets such as the PRC, India, and the United States.⁶ Seniors generally have more time and financial resources to travel, and many pursue premium personalized services. Seniors, millennials, and other age groups are all part of the growing global middle class, which is expected to reach 4.9 billion by 2030. Two-thirds of this growth will be in Asia.⁷

URBANIZATION

More than 50% of the world's population lives in cities, and urban areas now account for more than 80% of global GDP.⁸ Forecasts suggest that the urban population will reach 60% worldwide in 2025. As cities become more densely populated, prosperous, and connected, urban residents tend to consume more tourism and recreation services. Vibrant cities are also important tourism assets that promote creativity and innovation. However, if environmental and social services are inadequate, rapid urbanization can negatively affect residents' quality of life. When a city is a tourist destination, the challenges become more complex because urban planners must balance the needs of residents and visitors.

INFORMATION TECHNOLOGY

Information technology is transforming the tourism industry. Globally there are more than 3.5 billion Internet users, 1.6 billion of whom live in Asia and the Pacific. About 60% of travelers research their trip online and 43% purchase tourism services online. Social media provides consumer-generated content to more than 2.3 billion users worldwide and allow small and medium-sized enterprises to affordably connect with global markets. Technological advances help tourism businesses quickly understand and respond to changing visitor expectations. Peer-to-peer travel technology platforms enable richer local experiences and help small operators to distribute globally online. Mobile applications that use global positioning systems are evolving quickly, giving tourists access to real-time information that makes travel safer and more convenient. Emerging technologies such as augmented reality have great potential to further enhance visitor experiences. Given the tourism industry's rapid adoption of information technology, online travel and tourism sales are expected to reach \$818 billion by 2020.⁹

Online travel and
tourism sales are
expected to reach
\$818 billion by 2020

Statista

⁶ United Nations. 2015. *World Population Aging Report*. New York.

⁷ Future Foundation. 2015. *Future Traveler Tribes 2030: Understanding Tomorrow's Traveler*. London.

⁸ World Bank. 2016. Urban Development: Overview. <http://www.worldbank.org/en/topic/urbandevelopment/overview>.

⁹ Statista. 2014. *Digital travel sales worldwide from 2014 to 2020*. <https://www.statista.com/statistics/499694/forecast-of-online-travel-sales-worldwide>.

SHARING ECONOMY

Growth and influence of the sharing economy is driven by consumer-friendly technology and rising demand for authentic experiences and value for money. In 2014 and 2015, sharing-economy platforms providing accommodations, ground transportation, and other tourism services mobilized about \$18 billion in new investment.¹⁰ The main attributes of sharing-economy transactions are trust between consumer and service provider, cost-effectiveness, and convenience. Sharing-economy platforms provide another venue for individuals and for small and medium-sized enterprises to reach global markets.

SUSTAINABILITY

The United Nations General Assembly's adoption of *Transforming Our World: The 2030 Agenda for Sustainable Development* and its 17 Sustainable Development Goals (2015) affirms global commitments to achieve economic, social, and environmental sustainability. Tourism's role in promoting sustainable and inclusive economic growth, sustainable consumption and production, and sustainable use of ocean and marine resources is enshrined in three targets:

- **Target 8.9.** By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.
- **Target 12b.** Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.
- **Target 14.7.** By 2030, increase the economic benefits to small-island developing states and least-developed countries from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture, and tourism.

Building on this historic agreement, the United Nations General Assembly declared 2017 the International Year of Sustainable Tourism for Development. The Beijing Declaration on Sustainable Tourism as a Driver of Development and Peace (2016) reinforces government, industry, and civil society commitment to raise tourism's contribution to sustainable and inclusive development, poverty reduction, and peace.

Government, industry, and civil society commit to raise tourism's contribution to sustainable and inclusive development, poverty reduction, and peace

Beijing Declaration on Sustainable Tourism, 2016

¹⁰ Eric Newcomer. 2016. The Sharing Economy. <http://www.bloomberg.com/quicktake/sharing-economy>.

CLIMATE CHANGE

The United Nations Framework Convention on Climate Change (1992) and the Paris Agreement (2015), under the Convention, unify international efforts to mitigate the release of greenhouse gases into the atmosphere and adapt to climate change. Major climate change issues that affect tourism include the increasing incidence of severe weather events, changing rainfall patterns, rising temperatures, more frequent forest fires, and rising sea levels. With tourism highly dependent on pristine beaches, coastal cities, agriculture, forests, and well-functioning public infrastructure, governments recognize that countering climate change is an urgent priority.

TOURISM IN GREATER MEKONG SUBREGION

ECONOMIC CONTEXT

The GMS covers 2.6 million square kilometers and has a diverse, multiethnic population of approximately 329 million people. Economic growth is driven mainly by industry and services, including tourism. Agriculture provides the most jobs, but young people are less interested in farming and typically migrate to urban areas seeking better economic opportunities. Subregional GDP was close to \$3 trillion in 2015, with Myanmar's GDP growing fastest, followed by Cambodia, the PRC, the Lao PDR, and Viet Nam (Table 1). GDP growth in the subregion is projected to average 3.6% to 8.3% per year over the period 2016 to 2020; however, income inequality is a growing problem, as reflected by Gini coefficients ranging from 30.8 to 42.1.

GDP growth in the GMS is projected to average 3.6% to 8.3% per year over the period 2016 to 2020

Asian Development Bank

Table 1: Economic and Social Indicators

	POPULATION (MILLION)	GROSS DOMESTIC PRODUCT GROWTH (%)	PER CAPITA GROSS NATIONAL INCOME (\$)	TOURISM, PERCENTAGE OF SERVICE EXPORTS	POVERTY RATE (%)	GINI COEFFICIENT
Cambodia	15.4	7.0	1,020	69.8	13.5	30.8
People's Republic of China	1,374.6	6.9	7,400	25.0	7.2	42.1
Lao People's Democratic Republic	6.5	6.7	1,660	78.1	23.2	37.9
Myanmar	52.1	7.2	1,270	45.9	25.6	-
Thailand	67.2	2.8	5,780	71.4	10.9	39.3
Viet Nam	91.7	6.7	1,890	71.7	8.4	38.7

Sources: ADB. 2016. *Basic Statistics. Manila*; ADB. 2016. *Asian Development Outlook. Manila*; ADB. 2016. *GMS Statistics on Growth, Infrastructure and Trade. Manila*.

Women hold only one-third of senior hospitality management positions

Grant Thornton, 2015

Total intra-GMS trade volumes rose from \$79 billion in 2005 to more than \$413 billion in 2014. While tourism already accounts for 25% to 78% of GMS countries' service exports, it also stimulates merchandise exports by reducing variable trade costs. Recent studies suggest that a 1% increase in visitor arrivals to an exporting country increases that country's exports to the visitor's home country by 9%.¹¹ Moreover, each 1% increase in visitor arrivals is associated with a 0.12% reduction in the number of poor people in a destination.¹²

Tourism investment and tourism characteristic subsectors such as hotels, retail, transport, and leisure and recreation services that deal directly with visitors contribute significantly to GMS economies (Table 2). In 2015, international visitor expenditure reached a record high of \$66.8 billion. The direct contribution of travel and tourism to GDP is currently growing fastest in Thailand (19.2%), Viet Nam (16.9%), and Myanmar (16.2%); however, long-term forecasts for average annual growth in tourism's contribution to GDP are highest for Myanmar (7.6%) and Viet Nam (6.6%).¹³

Table 2: Tourism's Contribution to Gross Domestic Product and Employment, 2015

	CAM	LAO	MYA	THA	VIE	YUN	GUA
International visitor arrivals (million)	4.77	4.68	4.68	29.88	7.94	3.82	2.09
International visitor expenditure (\$ billion)	3.01	0.73	2.12	47.97	9.56	2.42	0.94
Direct contribution to GDP (%)	13.5	4.6	2.6	9.3	6.6	23.3	16.6
Tourism investment (\$ billion)	0.41	0.37	2.5	6.50	5.09	4.49	1.69
Tourism workers (million)	1.03	0.12	0.66	2.40	2.78	2.48	0.94
Women's share of employment (%)	54	50	~50	65	70	~50	~50
Average expenditure per tourist (\$)	631	156	453	1,605	1,204	628	449

CAM = Cambodia; GDP = gross domestic product; GUA = Guangxi Zhuang; LAO = Lao People's Democratic Republic; MYA = Myanmar; THA = Thailand; VIE = Viet Nam; YUN = Yunnan.

Sources: National tourism organization estimates; World Travel & Tourism Council; ADB. 2009. *Gender-Related Impacts of the Global Economic Slowdown in the Greater Mekong Subregion: Emerging Trends and Issues*. Manila.

Tourism directly employs more than 10.4 million GMS workers in a range of service and production industries. Jobs are openly accessible to women and youth, but women tend to work in lower-skilled jobs paying lower wages. This situation is consistent with global benchmarks, wherein women comprise only one-third of senior management in hospitality professions and 27% of leadership positions in food and beverage services.¹⁴

¹¹ M. Santana-Gallego, F.J. Ledesma-Rodriguez, and J.V. Perez-Rodriguez. 2015. International Trade and Tourism Flows: An Extension of the Gravity Model. *Economic Modelling*. 52(B). pp. 1026-1033.

¹² Asia-Pacific Economic Cooperation. 2016. *Tourist Arrivals and Inclusive Growth*. Singapore.

¹³ World Travel & Tourism Council. 2015. *League Table Summary*. London.

¹⁴ Grant Thornton. 2015. *Women in Business: The Path to Leadership*. London.

To sustain economic growth and address rising income inequality, GMS countries are investing heavily in physical infrastructure and social services, promoting small and medium-sized enterprise development, and strengthening regional value chain integration. The GMS tourism industry is a key driver and beneficiary of these initiatives.

INTERNATIONAL VISITOR ARRIVALS

GMS international visitor arrivals are growing by 10.6% per year and reached 57.9 million in 2015. As shown in Table 3, Thailand receives the largest share. Myanmar's average annual growth is highest, followed by the Lao PDR and Cambodia. Yunnan Province and Guangxi Zhuang Autonomous Region receive a lower share of international arrivals but welcome more than 200 million domestic tourists each year.

Travelers booked 3.4 million multicountry air trips within the GMS in 2015

ForwardKeys

Table 3: International Visitor Arrivals, Greater Mekong Subregion, 2005–2015

	2005	2010	2014	2015	AVERAGE ANNUAL GROWTH RATE 2005–2015 (%)	SHARE 2015 (%)
Cambodia	1,333,000	2,508,289	4,502,775	4,775,231	13.6	8.2
Lao People's Democratic Republic	1,095,315	2,513,028	4,158,719	4,684,429	15.6	8.1
Myanmar	660,206	791,505	3,081,412	4,681,020	21.6	8.1
Thailand	11,567,341	15,936,400	24,809,683	29,881,091	10.0	51.6
Viet Nam	3,467,757	5,049,855	7,887,012	7,943,651	8.6	13.7
Guangxi Zhuang	1,477,099	1,996,452	2,957,606	3,824,880	5.4	6.6
Yunnan	1,502,787	2,729,783	2,865,550	2,094,900	8.2	3.6
Total	21,103,505	31,525,312	50,262,757	57,885,202	10.6	100.0

Source: National tourism organizations.

More than 65% of international arrivals are from within Asia and the Pacific, led by the PRC (19.1%), Malaysia (6.9%), the Republic of Korea (5.4%), Viet Nam (4.9%), Thailand (4.8%), and Japan (4.1%). Intra-GMS tourism is even more significant. The PRC was the first- or second-largest source market for Cambodia, Myanmar, Thailand, and Viet Nam in 2015. Thailand is the main source market for the Lao PDR and Myanmar, while Viet Nam is Cambodia's top source market.

Overall, Europe accounts for approximately 16% of international arrivals and the Americas for 5%. Bangkok is the city that receives the most international visitors (18.2 million), followed by Ho Chi Minh City (3.4 million), Phnom Penh (2.1 million), Yangon (1.2 million), and Vientiane (1.7 million).

Other popular city destinations are Bagan, Da Nang, Chiang Mai, Guilin, Hanoi, Jinghong, Luang Prabang, Mandalay, Phuket, and Siem Reap.

According to the market research firm ForwardKeys, travelers booked 3.4 million multicountry air trips within the GMS in 2015. The source markets with the highest share of multicountry air bookings are Asia and the Pacific (3%), followed by Europe (2.4%) and the Americas (0.3%). Nearly 30% of visitors from the Americas stay for six to nine days, compared to 24% of Europeans and only 10% of visitors from Asia and the Pacific. It is estimated that up to 30% of long-haul markets visit more than one GMS country by combining air, ground, and water transport options.

TOURISM PRIORITIES AND TARGETS

Table 4 shows GMS and ASEAN tourism development priorities and targets. There is common focus on human resource development, infrastructure and connectivity, quality experiences and services, marketing and promotion, private sector development, tourist safety, and travel facilitation. All GMS countries strive to protect tourism resources, better balance international visitor arrivals across destinations, address seasonality, and to boost tourism spending and employment. GMS national tourism organizations coordinate strategic planning and policy dialogue with other government agencies and private enterprises through national advisory boards, sector working groups, and industry associations. The private sector plays an important role as investor, provider of goods and services, and destination marketer.

Table 4: Tourism Priorities and Targets

PRIORITIES		SELECT TARGETS
Cambodia	<ul style="list-style-type: none"> • Enhance tourism product development and product quality • Human resource development • Improve marketing and promotion • Improve tourism safety and negative impact management • Improve travel facilitation, transport, and regional and international connectivity • Strengthen legal systems and management mechanisms 	By 2020 <ul style="list-style-type: none"> • 7.5 million international visitor arrivals • \$5.0 billion international visitor expenditure • 1 million new jobs
Guangxi Zhuang, PRC and Yunnan, PRC	<ul style="list-style-type: none"> • Create innovative tourism products with special characteristics • Human resource development • Infrastructure development • Promote quality leisure, cultural, and educational tourism; host large events • Promote tourism among older citizens • Ensure tourist safety 	By 2020 <p><u>Guangxi Zhuang</u></p> <ul style="list-style-type: none"> • \$126 billion total visitor expenditure <p><u>Yunnan</u></p> <ul style="list-style-type: none"> • 6 million international tourists • \$126 billion total visitor expenditure • 2 million new jobs

	PRIORITIES	SELECT TARGETS
Lao People's Democratic Republic	<ul style="list-style-type: none"> Effectively implement regulations, standards, and zoning Human resource development Improve tourism infrastructure and develop products and circuits that link subnational areas Improve tourism research, information, marketing, and promotion Increase public and private investment to enhance the quality of tourist destinations and products 	<p>By 2020</p> <ul style="list-style-type: none"> 4.5 million international visitor arrivals \$800 million international visitor expenditure 100,000 new jobs
Myanmar	<ul style="list-style-type: none"> Build human resources and services quality Build Myanmar's image, position, and brand Develop quality products and services Improve connectivity and tourism-related infrastructure Strengthen safeguards for destination planning and management Strengthen the institutional environment for tourism 	<p>By 2020</p> <ul style="list-style-type: none"> 7.5 million international visitor arrivals \$10.2 billion international visitor expenditure 1.5 million new jobs
Thailand	<ul style="list-style-type: none"> Develop quality tourism attractions, products, and services based on sustainability and "Thainess" Develop tourism facilities and infrastructure that conforms with needs of local communities and the environment Human resources development Marketing and branding Promote integration and involvement of key stakeholders in tourism management and international cooperation 	<p>By 2021</p> <ul style="list-style-type: none"> 10% cumulative annual growth rate in tourist expenditure Travel and Tourism Competitiveness Index top 30 ranking 39 provinces achieve more than \$171 million in annual tourism receipts Environmental Performance Index top 100 ranking
Viet Nam	<ul style="list-style-type: none"> Develop tourism to become a key economic sector based on Vietnamese values Enhance quality, professionalism, and modernization while ensuring sustainable development Promote investment in tourism infrastructure and facilities Strengthen tourism destination management and administration Improve tourism promotion and marketing with focus on brand enhancement Create a favorable environment for tourism businesses 	<p>By 2020</p> <ul style="list-style-type: none"> 16-17 million international visitor arrivals \$32.5 billion international visitor expenditure, 10% direct GDP contribution 3.5 million new jobs, including 1.05 million direct jobs
Association of Southeast Asian Nations	<ul style="list-style-type: none"> Attract tourism investment Enhance travel facilitation Ensure safety, security, and protection of heritage sites Environmental protection and climate change responsiveness Expand connectivity and destination infrastructure Implement and expand ASEAN tourism standards Intensify marketing and promotion; diversify tourism products Raise capacity and capability of human capital Upgrade community and public-private tourism value chains 	<p>By 2025</p> <ul style="list-style-type: none"> Tourism contributes 15% to ASEAN's gross domestic product Tourism's share of employment is 7% Average spending per visitor is \$1,500 300 enterprises achieve ASEAN tourism standards

ASEAN = Association of Southeast Asian Nations, GDP = gross domestic product, PRC = People's Republic of China
Source: National tourism organizations and ASEAN Secretariat.

STRENGTHS AND OPPORTUNITIES

Outstanding tourist attractions

The GMS has diverse, world-class cultural, natural, and urban tourism assets. Other advantages are the subregion's genuinely hospitable workforce and reputation as a safe destination. There are 22 United Nations Educational, Scientific and Cultural Organization-listed World Heritage Sites and more than 690 natural protected areas, covering more than 547,000 square kilometers. Long coastlines with pristine beaches and tranquil islands offer experiences that can be tailored to all price points. Vibrant cities offer exceptional shopping, cuisine, museums, monuments, and cultural events. The high density of tourism assets and good connectivity enables tourists to easily visit multiple attractions and presents tour operators with many options to develop themed multicountry experiences. This is a tremendous competitive advantage.

There are 22
World Heritage Sites in
the GMS

UNESCO

Great gateway infrastructure

GMS gateway cities welcome international visitors with modern airports, seaports, and quality accommodations. GMS countries also are constructing and updating transnational railway networks to provide safe, lower-carbon transport options for passengers and freight. There are more than 41,000 registered hotels and guesthouses, with 1.2 million rooms. Accommodation standards range from basic, family-run enterprises to premium five-star international brands with full-service luxury amenities. Occupancy rates average about 60% but can reach full capacity during the high season (November through February). More than 17,000 registered tour companies and 136,000 tour guides provide professional travel services.



Excellent air transport infrastructure facilitates visitor movements to, from, and between GMS gateway destinations. Scheduled air services are increasing rapidly, in step with airport modernization and the expansion of low-cost and premium airline fleets (Table 5).

Table 5: International Inbound Scheduled Air Passenger Traffic, 2014–2016

	INBOUND FLIGHTS			CHANGE 2014–2016 (%)
	2014	2015	2016	
Cambodia	27,879	28,594	30,298	8.7
Guangxi Zhuang and Yunnan	---	---	---	---
Lao People's Democratic Republic	9,881	10,286	11,091	12.2
Myanmar	16,087	16,350	18,830	17.1
Thailand	165,322	191,318	205,360	24.2
Viet Nam	57,355	66,032	73,212	27.6
Total	608,454	698,931	758,613	24.7
	INBOUND SEATS			CHANGE 2014–2016 (%)
	2014	2015	2016	
Cambodia	4,210,176	4,489,779	4,733,705	12.4
Guangxi Zhuang and Yunnan	---	---	---	---
Lao People's Democratic Republic	1,166,067	1,266,651	1,353,943	16.1
Myanmar	2,740,364	2,761,174	3,131,529	14.3
Thailand	36,664,195	42,398,176	45,775,299	24.9
Viet Nam	11,427,500	13,018,655	14,584,034	27.6
Total	124,888,062	144,545,715	161,036,304	28.9

Source: SRS Analyzer via Pacific Asia Travel Association mPower.

Note: Estimated international inbound air seat capacity for Guangxi Zhuang (Nanning) and Yunnan (Dali, Jinghong, Kunming, and Pu'er) was 34 million in 2015.

Most GMS urban centers are linked by new transnational highways and bridges, which has considerably reduced overland travel times. This presents an attractive value proposition for time-constrained consumers. Better roads also encourage expansion of international tourist coach services and use of personal vehicles for intraregional travel. As evidence, 54,000 buses and 97,000 personal vehicles used the second Lao PDR–Thailand Mekong Friendship Bridge (connecting Mukdahan, Thailand, to Savannakhet, Lao PDR) in 2011. This is a 560% increase in personal vehicle crossings and a 412% increase in bus traffic compared to 2007. Similar traffic growth occurs each time an international Mekong bridge is completed.

PRC has been the world's fastest-growing outbound tourism market since 2011

UNWTO

Openness

The ease of crossing GMS borders is steadily improving. More than 46 land checkpoints and about 20 gateway airports have modern immigration facilities that offer tourist visa-on-arrival for up to 180 countries. Cambodia is ranked as the most open in the subregion, followed by the Lao PDR and Thailand (Table 6). Cambodia, the Lao PDR, Myanmar, Viet Nam, and Thailand have endorsed the ASEAN Framework Agreement on Visa Exemption, releasing passport-holding citizens of ASEAN countries from the obligation to obtain a tourist visa to visit other ASEAN countries. The PRC recently introduced 72-hour visa-free policies in Kunming and Guilin, simplifying travel formalities for transit passengers from more than 50 countries. Viet Nam and Myanmar are expanding their visa-on-arrival programs and electronic visa services to address their lower openness rankings.

Table 6: Visa Openness, 2013–2015

	RANK 2013 (1–140)	RANK 2015 (1–141)	CHANGE 2013–2015 (+/-)
Cambodia	30	8	+22
People's Republic of China	139	135	+4
Lao People's Democratic Republic	---	23	---
Myanmar	---	132	---
Thailand	90	25	+65
Viet Nam	15	119	-104

Source: World Economic Forum.

Asia's affinity for travel

Rising affluence in Asia and the Pacific, together with Asia's developing affinity for leisure travel, creates extraordinary demand for GMS tourism. Increasing wage employment with paid annual leave and the growing number of seniors who receive a pension are expected to provide additional impetus for growth. According to the World Travel and Tourism Council, Myanmar, the PRC, Thailand, and Viet Nam will rank among the world's top 10 fastest-growing destinations for leisure travel spending between 2016 and 2026. Remarkably, the PRC has been the world's fastest-growing outbound tourism market since 2011, with more than 120 million outbound Chinese travelers spending about \$200 billion worldwide in 2015.

KEY ISSUES

The GMS is committed to addressing the issues that restrain more competitive, balanced, and sustainable destination development. These include human resource and policy constraints that affect service quality and the business-enabling environment; infrastructure shortages, mainly in secondary destinations and a few emerging gateways; and institutional constraints that influence destination management. More creative marketing and experience development is needed to direct visitors to new destinations, alongside efforts to remove the remaining barriers to seamless cross-border travel.

Human resources

Quality human resources are an essential component of tourism competitiveness. Public and private GMS institutions are steadily expanding tourism vocational training and education programs, but industry stakeholders report that demand for skilled hospitality workers still far outstrips supply. Emerging destinations are the most affected. The World Economic Forum Travel and Tourism Competitiveness Index (2015) ranks human resources and the labor market lowest for Myanmar (117 of 141 economies assessed), followed by Cambodia (72), the Lao PDR (67), and Viet Nam (55). In comparison, Singapore ranks third worldwide. The PRC's rank is 16 and Thailand's rank is 29.

Low service quality correlates with lower tourist spending. On average, in 2015 international visitors spent only \$631 per trip in Cambodia, \$453 in Myanmar, and \$156 in the Lao PDR. This is much lower than Asia and the Pacific's \$1,500 benchmark. Substandard service also reduces occupancy rates and weakens the financial performance of hotels. For example, revenue per available room in Cambodia and Myanmar is 12% to 34% lower than Southeast Asia's \$79 average.

Initiatives to address skills shortages and facilitate labor mobility include the ASEAN Common Competency Standards for Tourism Professionals and the ASEAN Mutual Recognition Arrangement on Tourism Professionals. Regional standards endorsed by Cambodia, the Lao PDR, Myanmar, Thailand, and Viet Nam, cover 32 job titles and 52 specific qualifications for hotel and travel services professions. While this is recognized as an important framework to help improve service quality, implementation is slow due to funding and capacity constraints. Scaling up of ASEAN's common tourism vocational standards and the PRC's vocational qualification and certification system is critically needed to improve service quality and consistency across the GMS.

In addition to skills training for frontline hospitality workers, public officials and industry associations require capacity building to strengthen destination management and improve the overall business-enabling environment for tourism. This includes reforms and business support services that help small and medium-sized enterprises gain access to national and regional value chains—particularly women- and youth-owned businesses—to increase tourism’s net contribution to GMS economies. Destinations must source more goods and services locally to reduce foreign exchange leakage, particularly in Cambodia, the Lao PDR, and Myanmar.¹⁵ The World Bank’s *Doing Business 2016* report highlights the need to simplify business registration processes, improve the predictability of tax policies, increase access to training and affordable finance, and strengthen contract enforcement.¹⁶

Secondary destination infrastructure

GMS efforts to upgrade air transport infrastructure in gateway cities, build transnational highways, and expand access to public utilities in major urban areas are extraordinary. However, transport and urban infrastructure investment in many secondary destinations does not match demand. This is mainly due to funding and capacity constraints for construction and maintenance, along with a lack of decentralized planning. More public and private investment is needed to improve and climate-proof transport infrastructure and expand the coverage and reliability of piped water supply, sanitation, electricity distribution systems, and wastewater treatment. With the GMS urban population projected to reach 166 million by 2030, better urban infrastructure and services are essential to ensure that cities remain livable for residents and attractive to visitors.¹⁷ Table 7 compares GMS infrastructure competitiveness with Asia and the Pacific benchmarks.

The need to improve inland and marine ports is another important issue as coastal leisure cruising and river excursions become increasingly popular. The Cruise Lines International Association estimates that the number of cruise passengers in Asia grew from 1.5 million in 2013 to 3.2 million in 2016 and will reach about 4 million passengers per year by 2020.¹⁸ Key constraints include outdated terminals and other port infrastructure, congestion, and unclear immigration procedures, particularly at older Mekong River passenger ports.

The number of cruise passengers in Asia will reach about 4 million per year by 2020

Cruise Lines International Association, 2016

¹⁵ The term “leakage” refers to expenditure on imported goods and services to meet the needs of tourists.

¹⁶ World Bank. 2016. *Doing Business 2016: Measuring Regulatory Quality and Efficiency*. Washington, DC.

¹⁷ ADB. 2016. *Urban Development in the Greater Mekong Subregion*. Manila.

¹⁸ Cruise Lines International Association. 2016. *State of Asia Cruise Industry & Research Findings*; Teresa Ooi. 2014. Cruise Experts Predict Huge Growth for Asia. *ASEAN Cruise News*. 26 November. <http://www.aseancruising.com/cruise-experts-predict-huge-growth-asia>.

Table 7: Infrastructure Competitiveness, 2015

	AIR TRANSPORT		GROUND AND PORTS		TOURIST SERVICES ^a		HEALTH AND HYGIENE ^a	
	VALUE ^b	RANK ^c	VALUE ^b	RANK ^c	VALUE ^b	RANK ^c	VALUE ^b	RANK ^c
Cambodia	2.1	103	2.6	116	2.9	108	3.9	112
People's Republic of China	4.3	25	3.9	53	3.0	102	5.3	68
Lao People's Democratic Republic	2.3	89	3.0	96	3.2	97	4.3	108
Myanmar	2.0	115	2.2	132	2.1	137	4.4	101
Thailand	4.6	17	3.4	71	5.7	21	4.9	89
Viet Nam	2.7	68	3.1	87	2.9	105	5.0	83
Asia-Pacific Average	3.58		3.83		3.68		5.14	

^aTourist services infrastructure includes hotels, resorts, and other facilities developed specifically to respond to visitor demand. Two of six indicators for health and hygiene are concerned with sanitation and clean water supply.

^bValue range = 1–7. A higher number indicates better performance.

^cRank = 1–141. A lower number indicates better performance.

Source: World Economic Forum. 2015. *The Travel and Tourism Competitiveness Report 2015*. Geneva.

Infrastructure deficiencies are a double burden for GMS tourism. They deter visitors from visiting secondary destinations and discourage private investors from expanding tourism services into new areas. This contributes to the pattern of high visitor intensity in GMS gateways. For instance, Yangon receives more than 90% of Myanmar's international overnight visitors, Bangkok receives 60% of Thailand's visitors, and 53% of Cambodia's visitors congregate in Siem Reap. On the other hand, emerging destinations with good tourist attractions but underdeveloped transport infrastructure and urban services are quickly overwhelmed if tourist numbers surge, causing congestion, environmental degradation, and economic losses. This is an important issue. Studies estimate that Cambodia, the Lao PDR, and Viet Nam lose more than \$169 million per year due to reduced tourist spending because of poor sanitation and hygiene.¹⁹ Another factor destination planners must consider is how to fund the cost of public services used by tourists.

Visitor experiences

To effectively compete with other regional tourist destinations, tap new markets, and encourage repeat visits, GMS tourism stakeholders recognize the need to consistently generate quality visitor experiences and protect cultural, natural, and urban heritage assets. According to a survey of 34,000 international travelers from 32 source markets, key motivations to travel are the desire to visit a new destination (74%), to learn something new (67%), and to try new activities (63%). Moreover, 48% of travelers mention social or

48% of travelers
mention social or
cultural reasons as the
principal considerations
when selecting a
destination

Ipsos and TripAdvisor, 2016

¹⁹ World Bank. 2008. *Economic Impacts of Sanitation in Southeast Asia*. Jakarta: Water and Sanitation Program; World Bank. 2009. *Economic Impacts of Sanitation in Lao PDR*. Jakarta: Water and Sanitation Program.

cultural reasons as the principal considerations when selecting a destination, highlighting the importance of sound destination management and quality thematic interpretation.²⁰

Marketing the GMS as a safe, quality, and experience-rich destination requires more expert guiding and language skills, universal accessibility, and consistent service standards. These issues could be partially addressed by implementing ASEAN common standards for clean tourism cities, community-based tourism, food and beverage services, green hotels, homestay, public restrooms, and spa services, along with continued refinement and expansion of the PRC's scenic area rating system.

Destination management

Facilitative tourism policies without proper management controls can result in overcrowding, resource degradation and, eventually, tourism decline.²¹ GMS stakeholders also recognize that poorly managed tourism can lead to exploitation of children. According to ECPAT International, children working as street vendors, as tour guides, and in entertainment venues are especially vulnerable to abuse, with an elevated risk of becoming entangled in sex work and trafficking.²² Cooperation between government and industry stakeholders, together with stringent law enforcement, better urban planning, adherence to environmental and social safeguard policies, and efficient resource allocation for heritage conservation are needed to improve destination management.

Marketing

Despite geographic advantages and numerous cultural and historic themes that transcend national borders, GMS tourism stakeholders have not taken full advantage of opportunities to develop and jointly promote multicountry experiences. Constraints include coordination difficulties, inconsistent Mekong brand messaging, insufficient funding, and uneven capacity to conduct joint marketing and promotion campaigns—especially using online tools and social media. Less effective marketing undermines GMS objectives to attract higher-spending visitors, promote new destinations, and counter seasonality. The Mekong Tourism Coordinating Office and the GMS Tourism Working Group have started to address these issues by establishing public-private marketing advisory groups and launching content contributor programs such as Mekong Moments and Mekong Storytellers.

²⁰ Ipsos and TripAdvisor. 2016. *TripBarometer, Travel Trends, 2016*.

²¹ Peter Haxton. 2015. *A Review of Effective Policies for Tourism Growth*. OECD Tourism Papers, 2015/01. Paris.

²² ECPAT International. 2014. *The Commercial Exploitation of Children in East and Southeast Asia: Developments, Progress, Challenges and Recommended Strategies for Civil Society*. Bangkok.

Travel facilitation

The remaining barriers to seamless GMS travel include slow implementation of open-skies agreements, visa policy gaps, and underdeveloped secondary land- and water-border checkpoints. Visa-on-arrival and/or electronic visa services should be expanded in all countries, with a view toward allowing visa-free travel when and where appropriate. Inadequate border facilities, variable immigration service standards, and cumbersome visa requirements diminish visitors' experience and deter repeat visits. Restrictive visa policies and narrow operating hours at many border crossings also discourage multicountry overland travel. Recent research suggests that introduction of facilitative visa policies can shift growth in arrivals from concerned markets upward by 5% to 25% per year.²³

Full ratification of the ASEAN Open Skies agreement by all ASEAN member states was completed in 2016. This agreement requires ASEAN member states to fully open international airports and to grant third, fourth, and fifth freedom air traffic rights to carriers based in other member states, with no flight frequency or capacity restrictions. However, national legislation and policies constrain implementation. Further development of a highly competitive, single aviation market could lead to seventh freedom rights and unrestricted domestic operations by foreign carriers. ASEAN also is engaging with its dialogue partners to conclude air transport agreements that permit third, fourth, and fifth freedom traffic rights and more flights from medium-haul and long-haul source markets.

On the ground, GMS countries will continue to implement the GMS Cross-Border Transport Agreement protocols, which are key measures to streamline the subregional movement of goods, vehicles, and passengers. The challenge here is to reconfigure border infrastructure and conclude bilateral agreements that allow single-stop, single-window, secure inspection, and clearance systems. A good practice example of how to do this is found at the Dansavanh, Lao PDR–Lao Bao, Viet Nam, border checkpoint.

Facilitative visa policies
can shift growth in
arrivals from concerned
markets upward by
5% to 25% per year

UNWTO & WTTC, 2014



²³ World Tourism Organization and World Travel & Tourism Council. 2014. *The Impact of Visa Facilitation in ASEAN Member States*. Madrid.

SUMMARY OF STRENGTHS, OPPORTUNITIES, AND KEY ISSUES

More than 20 years of GMS tourism cooperation has laid a sturdy foundation for the future. GMS countries are committed to working together to build a prosperous and sustainable tourism industry. Strengths and opportunities to build on include the GMS custom of graciously welcoming guests, outstanding tourism assets, short travel times to and from major source markets, excellent gateway connectivity, and robust private sector engagement. Technological advances enable the participation of more local enterprises in the tourism value chain and lower transaction costs for marketing and promotion. The rising affluence of developing Asia and its strong affinity for leisure travel is expected to underpin high and resilient GMS tourism growth for the foreseeable future.

GMS stakeholders are committed to improving the business-enabling environment for tourism. Government and the private sector recognize the need to expand industry relevant education and training programs to help meet surging demand for skilled workers and qualified destination managers. In parallel, there is a need to change negative views about pursuing a career in the tourism industry to help attract and retain talented employees. The necessity of improving transport infrastructure, urban infrastructure and services, and border infrastructure to facilitate tourism growth in new areas remains an urgent priority. Remaining nonphysical barriers include incomplete implementation of open skies agreements and some restrictive visa policies. Consistent Mekong brand messaging is needed to increase consumer awareness about the year-round availability of quality multicountry experiences, help counter seasonality, and steer higher-spending visitors to secondary destinations.

Capable human resources, quality infrastructure, better destination management, creative marketing, and seamless travel will help counter key risks to more competitive and sustainable tourism. These risks include overcrowding of primary destinations, particularly during the high season; environmental degradation; and increased vulnerability to climate change. Although GMS tourism has proven to be incredibly resilient, shocks such as economic downturns, natural disasters, and political instability could destabilize growth, as could increasing competition from other destinations. The main strengths, opportunities, constraints, and threats are summarized in Figure 1.

Figure 1: Summary of Strengths, Constraints, Opportunities, and Threats

STRENGTHS	CONSTRAINTS
<ul style="list-style-type: none"> • Well-established Greater Mekong Subregion tourism cooperation framework • More than 300 million hospitable residents • Outstanding variety of natural, cultural, and urban tourism assets • Safety and security • Close to major source markets • Excellent gateway connectivity • Quality tourism infrastructure and services in gateway destinations • High-caliber hospitality companies and tour operators • Good value for money 	<ul style="list-style-type: none"> • Shortage of skilled tourism workers and destination managers; low awareness of tourism career opportunities • Cumbersome business and regulatory environment • Underdeveloped transport and urban infrastructure in secondary destinations • Lack of integrated destination planning and management • Variable service standards • Low awareness of private investment opportunities in secondary destinations • Seasonality • Inconsistent Mekong brand messaging • Lack of funding and personnel for joint marketing • Visa restrictions and inconvenient border services • Slow implementation of open skies and cross-border land transport agreements
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Increasing affluence of developing Asia with a strong affinity for travel and tourism • Sharing economy and social media marketing channels • High demand for skilled tourism workers • Broadened access to regional value chains • Expanding regional standards-based education and training • Renewed global emphasis on environmental and social sustainability • Abundant underdeveloped new experiences, attractions, and multicountry itineraries • Improving public–private coordination and collaboration 	<ul style="list-style-type: none"> • Overcrowding of primary attractions • Environmental degradation • Competing destinations • Climate change • Economic downturns • Natural and human-induced disasters • Child sex tourism and human trafficking • Political instability

Source: Greater Mekong Subregion Tourism Working Group and stakeholder consultations.







**GREATER MEKONG
SUBREGION TOURISM
SECTOR STRATEGY
2016–2025**

VISION

The GMS Tourism Sector Strategy sets out a 10-year framework to guide cooperation between GMS national tourism organizations and other tourism industry stakeholders. The collective vision for GMS tourism is aligned with the overarching GMS Strategic Framework 2012–2022 and its vision of an integrated, prosperous, and equitable subregion. Mindful of the Paris Agreement and the United Nations Sustainable Development Goals, the vision statement also embraces resilience, partnerships, and knowledge management:

“Tourism in the Greater Mekong Subregion is integrated, prosperous, equitable, and resilient, with effective partnerships and knowledge management.”

EXPECTED OUTCOME

The expected outcome of GMS tourism cooperation is “more competitive, balanced, and sustainable destination development.”

- Competitiveness focuses on enhancing factors and policies that enable sustainable travel and tourism development—that is, the business-enabling environment, travel and tourism policy and enabling conditions, infrastructure, and natural and cultural resources—as measured by the World Economic Forum Travel and Tourism Competitiveness Index.
- Balance refers to more equitable distribution of international visitors and destination expenditure within and among the GMS countries.
- Sustainable destination development means promoting tourism that takes full account of its current and future economic, social, and environmental impacts and that addresses the needs of visitors, the industry, the environment, and host communities, as defined by the United Nations World Tourism Organization.

GUIDING PRINCIPLES

GMS stakeholders will uphold the following principles to guide GMS tourism cooperation:

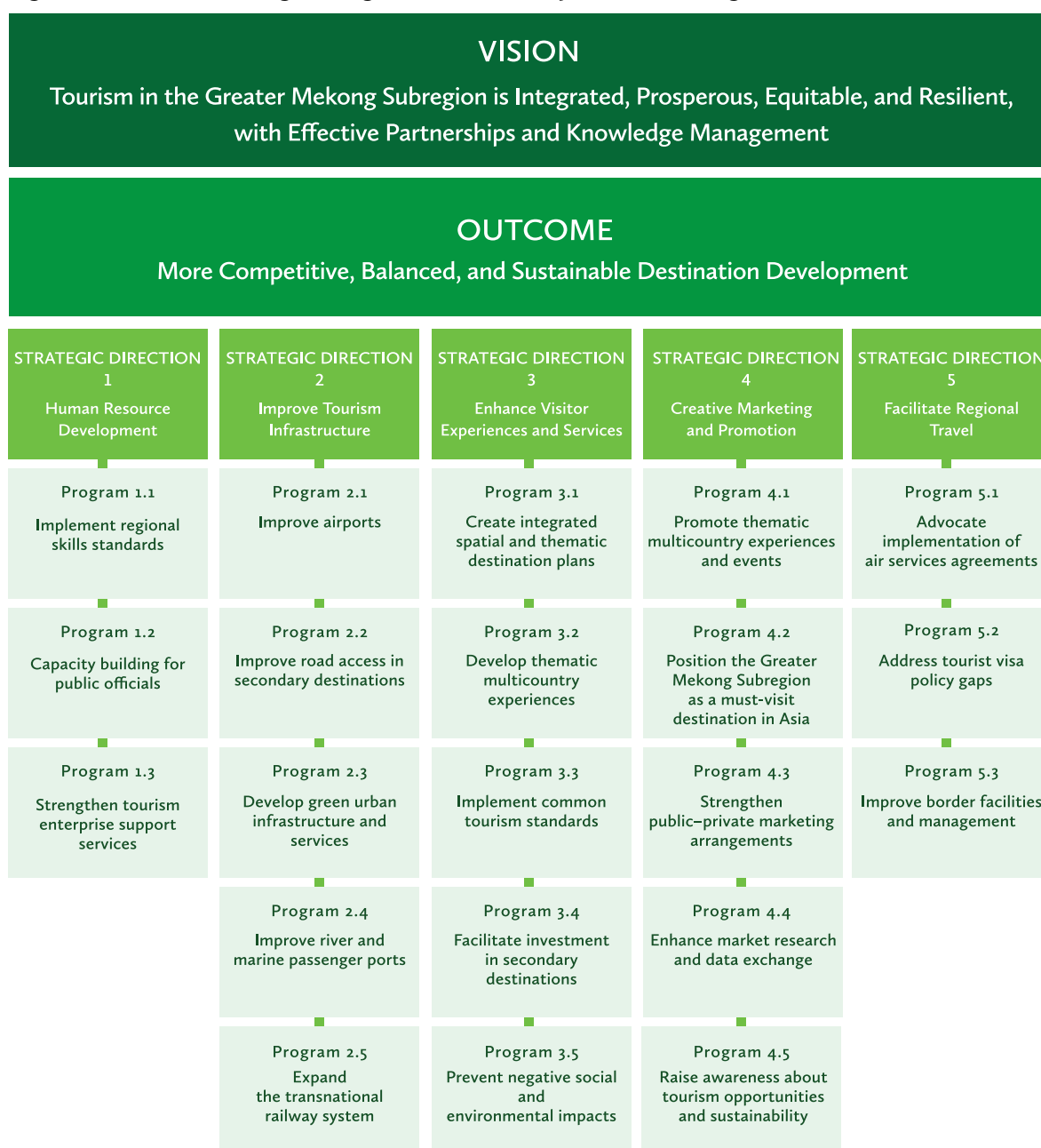
- generate benefits for more than one GMS country;
- protect cultural, natural, urban, and other tourism assets;
- emphasize secondary destination development and destination development along the Mekong River;
- promote continuous service quality improvement;
- enable meaningful and beneficial experiences for visitor and host;

- ensure safe and accessible destination development;
- strengthen the business-enabling environment for small and medium-sized enterprises;
- disseminate consistent messages and a visual identity that communicate the Mekong brand characteristics of nature, culture, and community; and
- encourage cooperation and collaboration among all stakeholders.

STRATEGIC FRAMEWORK

The updated strategic framework for GMS tourism cooperation is presented in Figure 2.

Figure 2: Greater Mekong Subregion Tourism Cooperation Strategic Framework



Source: GMS Tourism Working Group.

CROSSCUTTING THEMES

Seven crosscutting themes will be mainstreamed in all strategic programs and projects.

- **Integrated destination planning and management.** Initiatives will align with national commitments to localize the Sustainable Development Goals (Figure 3). They will strengthen coordination among diverse stakeholders to define the local objectives for tourism and develop incentives that balance economic growth with environmental and social sustainability.

Figure 3: The Sustainable Development Goals



Source: United Nations.

- **Gender equality.** Tourism and tourism-related policies, programs, and projects will be formulated and implemented based on sound gender analysis. Women and men will have equal rights and equal access to resources, economic opportunities, education, training, and decision making.
- **Private sector development.** GMS tourism stakeholders will continue to promote private investment; strengthen the predictability of policies, laws, and regulations; strengthen property rights and contract enforcement; and provide a level playing field for domestic and international investors.
- **Environmental sustainability.** Tourism programs and projects will incorporate appropriate environmental safeguards and measures to mitigate and adapt to climate change. Effective disaster risk management and mitigation will accompany these efforts.

- **Partnerships.** Public–private partnerships will be considered to develop and operate tourist attractions such as natural areas, museums, historic buildings, and theme parks as well as larger economic infrastructure and associated services. Partnerships among government, industry associations, development partners, and individual enterprises will be strengthened to improve tourism marketing and promotion.
- **Universal access.** People with disabilities will have access to tourist attractions and recreation facilities as well as tourism-related economic opportunities. Special needs of the increasing proportion of older travelers will be incorporated into destination planning and management.
- **Community participation.** Community participation and engagement will ensure that culturally appropriate tourism development reflects local needs and aspirations, provides memorable visitor experiences, and promotes public–private–community partnerships.

STRATEGIC DIRECTIONS AND PROGRAMS

The five strategic directions for 2016–2025 build on GMS Tourism Sector Strategy 2005–2015 objectives to improve human resources, infrastructure, heritage conservation and social impact management, subregional marketing, private sector development, and travel facilitation. Corresponding programs and projects (Appendix 1) were selected with consideration for their strong potential to enable more competitive, balanced, and sustainable destination development. Other common characteristics include

- clear links to regional development objectives and priorities;
- involvement of at least two GMS countries or a national initiative with substantial regional dimensions;
- geographic focus on secondary destinations and underdeveloped segments of the GMS corridors;
- support for product and experience development that appeals to diverse market segments and higher-spending visitors;
- strong public and private stakeholder support; and
- financing has been identified or is likely to be identified.

The five strategic directions for 2016–2025 aim to improve human resources, infrastructure, heritage conservation and social impact management, subregional marketing, private sector development, and travel facilitation

GMS Tourism Working Group

Table 8: Greater Mekong Subregion Tourism Cooperation Indicative Targets

INDICATOR	2015	2020	2025
Visitor expenditure (\$ billion) ^a	67	95	130
Tourism investment (\$ billion) ^a	19.0	25.5	35.0
Tourism's direct contribution to gross domestic product (%) ^a	2.6–23.3	2.75–24.0	2.9–25.0
Direct tourism employment (workers)	10.4 million	12.5 million	15.0 million
Women's share of employment	> 50%	≥ 50%	≥ 50%
Environmental performance ^b	Rank: 117 Value: 3.4	Rank: 114 Value: 3.6	Rank: 110 Value: 3.8
International visitor arrivals ^c	58 million	77 million	95 million
CLMV share of GMS international visitor arrivals ^c	38%	40%	42%
Yunnan and Guangxi Zhuang share of GMS international visitor arrivals ^c	10%	11%	12%

CLMV = Cambodia, Lao People's Democratic Republic, Myanmar, and Viet Nam; GMS = Greater Mekong Subregion.

^a Based on World Travel & Tourism Council estimates.

^b Rank range = 1–141; value range = 1–7. World Economic Forum Travel and Tourism Competitiveness Index environment pillar median rank and median value.

^c Greater Mekong Subregion Tourism Working Group estimates.

STRATEGIC DIRECTION 1: HUMAN RESOURCE DEVELOPMENT

Recognizing the need to increase the availability of skilled tourism labor and to lift service quality, GMS stakeholders will expand innovative, industry-responsive, multidisciplinary education and training programs as well as non-formal training to reach disadvantaged populations. This extends to support for employment services and labor market activation programs. The key objective of capacity building for public officials will be to strengthen their effectiveness as destination managers. Better tourism enterprise support services will help to address constraints on the business-enabling environment and deepen local involvement in national and cross-border tourism value chains. Programs will promote entrepreneurship and expand economic opportunities for youth, particularly girls.

Program 1.1: Implement regional skills standards

This program supports implementation of the ASEAN Common Competency Standards for Tourism Professionals and the PRC's Vocational Qualifications and Certification System. It builds on the recently signed agreement (2016) to establish a regional secretariat to coordinate ASEAN mutual recognition arrangements on tourism professionals and to develop an ASEAN tourism professionals' registration system. Public-private partnerships and regional resource sharing will be promoted to cost-effectively accelerate expansion

of learning opportunities. Curricula and skills will be upgraded to improve task management, contingency management, and the ability to transfer competencies to any given situation. Existing job titles for hotel services (front office, housekeeping, food production, and food and beverage services) and travel services (travel agencies and tour operations) will be expanded into areas such as meetings, incentives, conventions, and exhibitions; spas and wellness; and destination management. Language training for frontline tourism workers will be expanded as part of vocational training and non-formal education programs.

Program 1.2: Capacity building for public officials

The program will support short-term training courses that strengthen the competencies of public officials to develop and implement policies, programs, and projects that engender sustainable destination development. Courses will sharpen analytic, problem-solving, and consensus-building skills by applying case studies, field visits, group discussions, and simulation exercises. GMS national tourism organizations and other public agencies have identified as priorities community-based tourism, ecotourism development, cultural and natural heritage interpretation, urban planning, investment promotion, and the use of information technology for destination marketing. Learning programs could be delivered by Guilin Tourism University, the ASEAN–[People’s Republic of] China Center, the ASEAN–Korea Center, the ASEAN–Japan Center, and other regional institutions and development partners.

Program 1.3: Strengthen tourism enterprise support services

Enterprise development training and support services will be expanded to help improve the business environment for small and medium-sized tourism enterprises. The program will provide business development advice and training to industry associations, chambers of commerce, social enterprises, and individual entrepreneurs. It will boost local business productivity and participation in tourism value chains by widening access to market information, skills and knowledge transfer, and the effective use of information technology—including online training and employment services. Ongoing public and private efforts to broaden access to affordable finance and strengthen business associations, organize trade fairs, and hold business networking events will continue. A good-practice example of an industry-led human capital development program is the Pacific Asia Travel Association Academy.

GMS countries will continue to expand and modernize climate-resilient urban infrastructure and services, air transport infrastructure, railways, roads, and ports to provide safe, convenient access to tourist attractions

GMS Tourism Working Group

STRATEGIC DIRECTION 2: IMPROVE TOURISM INFRASTRUCTURE

Infrastructure quality and capacity strongly correlate with tourism competitiveness. As such, the GMS countries will continue to expand and modernize climate-resilient urban infrastructure and services, air transport infrastructure, railways, roads, and ports to provide safe, convenient access to tourist attractions. The focus is to ensure gateway airports are able to handle anticipated high demand and address tourism-related infrastructure constraints in secondary destinations. Public–private partnerships will be promoted to improve infrastructure and service delivery where appropriate.

Program 2.1: Improve airports

The program supports construction of safe, efficient new airports and modernization of existing facilities to expand passenger and cargo handling capacity. Key objectives are to improve the travel experience by addressing bottlenecks in GMS gateways, ensure airports in secondary destinations have sufficient capacity to accommodate direct flights to and from major source markets, and enable more flights between secondary destinations.

Program 2.2: Improve road access in secondary destinations

Road improvements with standardized tourism signage will provide safe, reliable, and efficient access to tourist attractions in secondary destinations. Design standards will incorporate climate resilience and beautification measures such as trees, lighting, and landscape features that complement the local ecology. Rest stops and market facilities will be developed in suitable locations alongside roads to serve self-driving and group tours, with emphasis on boosting economic opportunities for local residents. Better roads also will improve residents' access to health, education, and other social services.

Program 2.3: Develop green urban infrastructure and services

Urban infrastructure development and service improvements will be guided by the GMS Urban Development Strategic Framework and the Green City Action Plans, which emphasize economic competitiveness, environmental sustainability, and social equity in urban development.²⁴ The program will develop and upgrade urban roads and drainage, flood protection, solid waste management and wastewater treatment systems, water supply, public parks and green space, urban markets, and tourist information centers. Institutional and regulatory strengthening will

²⁴ ADB. 2015. *Greater Mekong Subregion Urban Development Strategic Framework 2015–2022*. Manila; ADB. 2016. *Green Solutions for Livable Cities*. Manila.

accompany infrastructure improvements to enable sustainable operations and maintenance. Preservation and suitable adaptation of historic urban structures will be promoted. Again, the focus is on secondary destinations to help catalyze private tourism investment and meet rapidly growing demand for urban services.

Program 2.4: Improve river and marine passenger ports

Inland river ports, marine ports, and supporting infrastructure will be improved to expand passenger and light freight-handling capacity. The key objective is to develop the facilities needed to accommodate a variety of ship sizes so that private operators can expand the availability of leisure cruises, excursions, and water transport services to meet growing demand for water-based experiences. Better ports will provide spillover economic opportunities for surrounding communities that can provide services to cruise tourists.

Program 2.5: Expand the transnational railway system

Completion of the Singapore to Kunming rail line to offer high-speed passenger services by the early 2020s—and concurrent interconnected rail development across the GMS—will significantly boost intraregional travel and tourism. Transnational rail lines also will help to increase regional merchandise trade by lowering transport costs and reducing logistics bottlenecks. Rail and tour operators will seek opportunities to introduce specialized sightseeing railcars, luxury cabins, and other services that enhance the travel experience. Good-practice examples are existing luxury rail journeys between Thailand, Malaysia, and Singapore, and the PRC's Chengdu to Kunming geological museum route.

Completion of the Singapore to Kunming rail line to offer high-speed passenger services by the early 2020s—and concurrent interconnected rail development across the GMS—will significantly boost intraregional travel and tourism

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STRATEGIC DIRECTION 3: ENHANCE VISITOR EXPERIENCES AND SERVICES

GMS tourism stakeholders know that engaging, authentic experiences, great service, and well-managed destinations are critical to gaining an edge in an increasingly competitive global tourism landscape. Strategic programs to enhance visitor experiences and services include integrated thematic and spatial planning, continued effort to develop thematic multicountry tour itineraries and experiences, scaling up common tourism standards implementation, guide training, and initiatives to facilitate tourism investment in secondary destinations. Social, cultural, and environmental assets will be protected and enhanced for the benefit of visitors and hosts.

Program 3.1: Create integrated spatial and thematic destination plans

Multistakeholder, participatory approaches that involve tourism and urban planners, transport experts, heritage specialists, social and environmental specialists, and other disciplines will work within existing frameworks to prepare integrated plans that address infrastructure, zoning, and service needs of visitors, tourism enterprises, and residents. Destination management capacity building will accompany the planning exercises. Plans will incorporate social and environmental research to define the limits of acceptable change and set carrying capacities for sensitive environments, particularly natural protected areas. Destination resource inventories will be compiled as part of processes to create engaging thematic interpretation plans. The overarching purpose is to optimize sustainable destination management practices and economic benefits for host communities, encourage environmental protection, and ensure community, visitor, and cultural well-being in line with Global Sustainable Tourism Council guidelines.

Program 3.2: Develop thematic multicountry experiences

The program supports experience development that can be linked thematically in regional clusters and routes that cover at least two countries. Themes will showcase authentic ways of life, nature, history, and culture to create value for residents and visitors. An example is the proposed GMS “heritage necklace” linking UNESCO World Heritage Sites, and the complementary UNESCO Cultural Heritage Specialist Guide Training Program. Other examples of thematic routes are shown in Table 9.

Table 9: Priority Thematic Multicountry Tour Programs

ROUTE	COUNTRIES	MAIN EXPERIENCES
Southern Coastal Corridor	Cambodia, Myanmar, Thailand, and Viet Nam	Beach and islands, leisure, seafood, history, culture, community-based tourism
Largest Waterfall in Asia	Guangxi Zhuang, People's Republic of China (PRC); and Viet Nam	Nature, ethnic groups, culture
Mekong Tea Caravan Trail	Yunnan, PRC; Lao People's Democratic Republic (Lao PDR); and Thailand	River cruising, food, nature, ethnic groups, culture, ecotourism in the Golden Quadrangle
Northern Heritage Trail	Lao PDR, Thailand, and Viet Nam	Culture, nature, history, community-based tourism
Mekong Tea Caravan Trail	Yunnan, PRC; Lao PDR; Myanmar; and Thailand	Ethnic groups, culture, ecotourism
Mekong Discovery Trail	Cambodia, Lao PDR, Thailand and Viet Nam	Mekong excursions, nature, history, culture, coffee, ecotourism
Cruising the Mekong Delta	Cambodia and Viet Nam	Mekong excursions, nature, culture, food
The Middle Path	Myanmar and Thailand	Culture, history, pilgrimage
Golden Triangle Mekong River Cruising	Lao PDR and Thailand	Mekong excursions, nature, culture, soft adventure
Route 8	Lao PDR, Thailand, and Viet Nam	Nature, soft adventure, culture, history, pilgrimage, beach
East–West Corridor	Lao PDR, Thailand, and Viet Nam	Beach, culture, history

Source: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020.

Program 3.3: Implement common tourism standards

This program provides resources to implement the ASEAN common tourism standards and the PRC's scenic area rating system to build consumer confidence and attract higher-spending visitors. Additional standards will be developed based on country readiness and industry demand. Recognizing that the accommodation subsector accounts for about 20% of tourism's global carbon dioxide emissions, all GMS countries will promote adoption of energy efficiency standards by hotels and resource-efficient building design and certification programs.

Program 3.4: Facilitate investment in secondary destinations

Public and private investment promotion agencies, such as boards of investment, industry associations, business forums, and chambers of commerce will be strengthened to address information and coordination deficiencies that impede private investment in secondary destinations. The program also will benefit gateway destinations. The main activities are collection and dissemination of market data, publicizing information on investment opportunities and guidelines for investors, and matching investors with local contacts to facilitate the investment process. The process will be guided by recognized steps to successful tourism

investment promotion: prioritize and focus investment promotion efforts, develop tourism-specific knowledge, organize information and craft key messages, disseminate the information, and develop a network of partners to enhance service delivery.²⁵

Program 3.5: Prevent negative social and environmental impacts

This program will promote cooperation among government, tourism service providers, and communities to prevent tourism’s potentially negative social and environmental impacts. Activities will educate visitors and industry stakeholders about the factors that make some groups vulnerable to abuse, strengthen legal frameworks to prevent child abuse and human trafficking, and improve cooperation and investigative capacity of law enforcement agencies. Green growth strategies will strengthen environmental and social safeguard policy implementation and steer destinations toward lower-carbon, resource-efficient and inclusive tourism growth. Since tour operators interact closely with the entire tourism supply chain, they will play an important role in helping to influence businesses and consumers to adopt more socially and environmentally sustainable practices.

STRATEGIC DIRECTION 4: CREATIVE MARKETING AND PROMOTION

Creative marketing and promotion will position the GMS as a must-visit destination, strengthen public–private arrangements to conduct joint marketing, and enhance subregional research and data exchange, as articulated in the GMS Tourism Marketing Strategy and Action Plan 2015–2020. Activities to raise public awareness about tourism opportunities aim to address young people’s negative perceptions about pursuing hospitality careers. Information and education campaigns also will promote products, services, and behaviors that align with socially and environmentally sustainable tourism principles.

Program 4.1: Promote thematic multicountry experiences and events

GMS national tourism organizations, the Mekong Tourism Coordinating Office, industry associations, and media partners will produce content to promote multicountry tour programs and experiences, using mobile and fixed digital communication channels and print media. This includes auditing tourism assets to identify content, training digital content curators, and broadcasting information through www.mekongtourism.org, social media platforms, and travel bloggers. GMS countries will scale up festivals and

Creative marketing and promotion will position the GMS as a must-visit destination, strengthen public–private arrangements to conduct joint marketing, and enhance subregional research and data exchange

GMS Tourism Marketing Strategy and Action Plan 2015–2020

²⁵ World Bank Group. 2013. *Winning Tourism Investment*. Washington, DC.

events in secondary destinations. Underlying objectives of these events are to raise awareness of unique destination attributes and strengthen market linkages between local producers, tourism businesses, and visitors. Multicountry sporting events will be promoted, including the annual Mekong Triathlon, cross-border marathons and, potentially, a Tour de Mekong cycling race. The Mekong Tourism Forum will continue to be held each year in a GMS country, following an alphabetical rotation, during low-season months (May to September).

Program 4.2: Position the Greater Mekong Subregion as a must-visit destination in Asia

Mekong Tourism brand and visual identity refinements will communicate the key characteristics of GMS tourism—nature, culture, and community—to global markets. Photographs, videos, and written content will be made freely available to industry stakeholders and the public on www.mekongtourism.org. News items, stories, and GMS travel manuals that build brand awareness will be frequently disseminated to media contacts, travel agents, and consumers. GMS national tourism organizations and industry associations will be encouraged to prominently display the Mekong Tourism logo on electronic media, on printed promotional materials, and at trade shows. The Mekong Tourism Coordinating Office will maintain media and industry databases, systematically disseminate press releases and other relevant information, and partner with industry stakeholders to organize familiarization tours for the media, travel writers, bloggers, and tour operators.

Program 4.3: Strengthen public–private joint marketing arrangements

GMS national tourism organizations and the Mekong Tourism Coordinating Office will continue to collaborate with the media, airlines, tour operators, hotels, sharing economy platforms, and other industry stakeholders to promote Mekong Tourism. Apart from generating digital content, this includes producing video segments for travel shows, publishing GMS tourism stories in airline magazines, sponsoring awards programs, and other targeted awareness-building activities. Regular interaction between the GMS Tourism Working Group and private sector advisory groups will further deepen public–private engagement for joint marketing.

Regular interaction between the GMS Tourism Working Group and private sector advisory groups will further deepen public–private engagement for joint marketing

Program 4.4: Enhance market research and data exchange

To provide more powerful market intelligence, GMS national tourism organizations will adopt a standardized visitor survey and provide the Mekong Tourism Coordinating Office with data for aggregation, analysis, and production of an annual GMS tourism statistics report to inform marketers, planners, and decision makers. The report will be freely available on www.mekongtourism.org. The GMS Tourism Working Group will collaborate with academic institutions and industry associations to conduct market research and develop tools to measure visitor satisfaction.

Program 4.5: Raise awareness about tourism opportunities and sustainability

GMS national tourism organizations will work with industry associations and other government agencies responsible for education, labor, and information to develop awareness campaigns that increase public knowledge about tourism career opportunities, particularly among students and job seekers. This includes strengthening career counseling services and organizing tourism job fairs. Information and education campaigns to raise visitor and host awareness about sustainability issues will be expanded, along with awards programs that recognize sustainable tourism practices.



STRATEGIC DIRECTION 5: FACILITATE REGIONAL TRAVEL

The few remaining but important barriers to cross-border travel will be addressed to help boost aviation services, ease visa formalities, and welcome visitors with modern, secure, and convenient border facilities.

Program 5.1: Advocate implementation of air services agreements

This program will support research and public–private dialogue needed to enable policy reforms that broaden implementation of the ASEAN Open Skies agreement and bilateral open skies agreements between GMS countries and priority source markets. Key objectives are to expand the number and capacity of direct flights to secondary airports and promote intra-GMS air travel.

Program 5.2: Address tourist visa policy gaps

GMS countries will make it easier to obtain a tourist visa by expanding visa-on-arrival eligibility, reducing processing times at borders, and using information technology to widen the availability of electronic visas. Visa exemption, such as for cruise passengers on shore excursions or air-transit passengers, will be expanded for certain destinations. GMS national tourism organizations will work with ministries of foreign affairs to ensure that accurate, up-to-date information about tourist visa requirements and other tourism information is available on official websites and in multiple languages. Introduction of multiple entry visas for tourists and the feasibility of a single GMS tourist visa will be explored.

Program 5.3: Improve border facilities and management

Border infrastructure will be developed to reduce travel and trade bottlenecks. This includes modernizing existing facilities and building new checkpoints where needed. Tourism information will be available at all borders. Joint preparation of border area development plans, training, capacity building, and information technology upgrades will improve border management and enable single-window passenger and vehicle clearance, as envisaged in GMS cross-border transport agreements. Training and equipment to improve border security, including screening and risk assessment procedures, will be upgraded. Table 10 provides the preliminary list of border checkpoints prioritized for improvement. The list will be reviewed and updated regularly.

Table 10: Priority Border Points

	COUNTRIES	BORDER POINTS
1	People's Republic of China (PRC)–Myanmar	Ruili–Muse
2	PRC–Viet Nam	Hekou–Lao Cai
3	PRC–Viet Nam	Pingxiang–Dong Dang
4	PRC–Viet Nam	Dongxing–Mong Cai
5	PRC–Viet Nam	Detian–Ban Gioc
6	PRC–Lao People's Democratic Republic (Lao PDR)	Mohan–Boten
7	Myanmar–Thailand	Myawaddy–Mae Sot
8	Myanmar–Thailand	Tachileik–Mae Sai
9	Myanmar–Thailand	Htikhi–Ban Phu Nam Ron
10	Myanmar–Thailand	Kawthaung–Ranong
11	Thailand–Lao PDR	Chiang Kong–Houayxay
12	Thailand–Lao PDR	Nakhon Panom–Thakhek
13	Thailand–Lao PDR	Mukdahan–Kaysone Phomvihane
14	Thailand–Lao PDR	Nong Khai–Vientiane
15	Thailand–Lao PDR	Ban Huai Kon, Nan–Muang Ngeun
16	Thailand–Lao PDR	Phu Du–Pak Lay
17	Thailand–Lao PDR	Chong Mek–Vang Tao
18	Thailand–Cambodia	Aranyaprathet–Poipet
19	Thailand–Cambodia	Ban Phak Kad–Prom
20	Thailand–Cambodia	Hat Lek–Cham Yeam
21	Thailand–Cambodia	Chong Chom–O' Smach
22	Thailand–Cambodia	Chong Sa–Ngam–Chom
23	Cambodia–Lao PDR	Trapeang Kreal–Nong Nok Kien
24	Cambodia–Viet Nam	Prek Chak–Ha Tien
25	Cambodia–Viet Nam	Bavet–Moc Bai
26	Cambodia–Viet Nam	Ka'Am Samnor–Vinh Xuong
27	Cambodia–Viet Nam	Banteay Chakrey–Dinh Ba
28	Cambodia–Viet Nam	Trapaing Plong–Xa Mat
29	Cambodia–Viet Nam	Trapaing Sre–Va Leu
30	Cambodia–Viet Nam	Phnom Den–Tinh Bien
31	Lao PDR–Viet Nam	Dansavanh–Lao Bao
32	Lao PDR–Viet Nam	Nam Phao–Cau Treo
33	Lao PDR–Viet Nam	Pang Hok–Tay Trang
34	Lao PDR–Viet Nam	Phou Keua–Bo Y

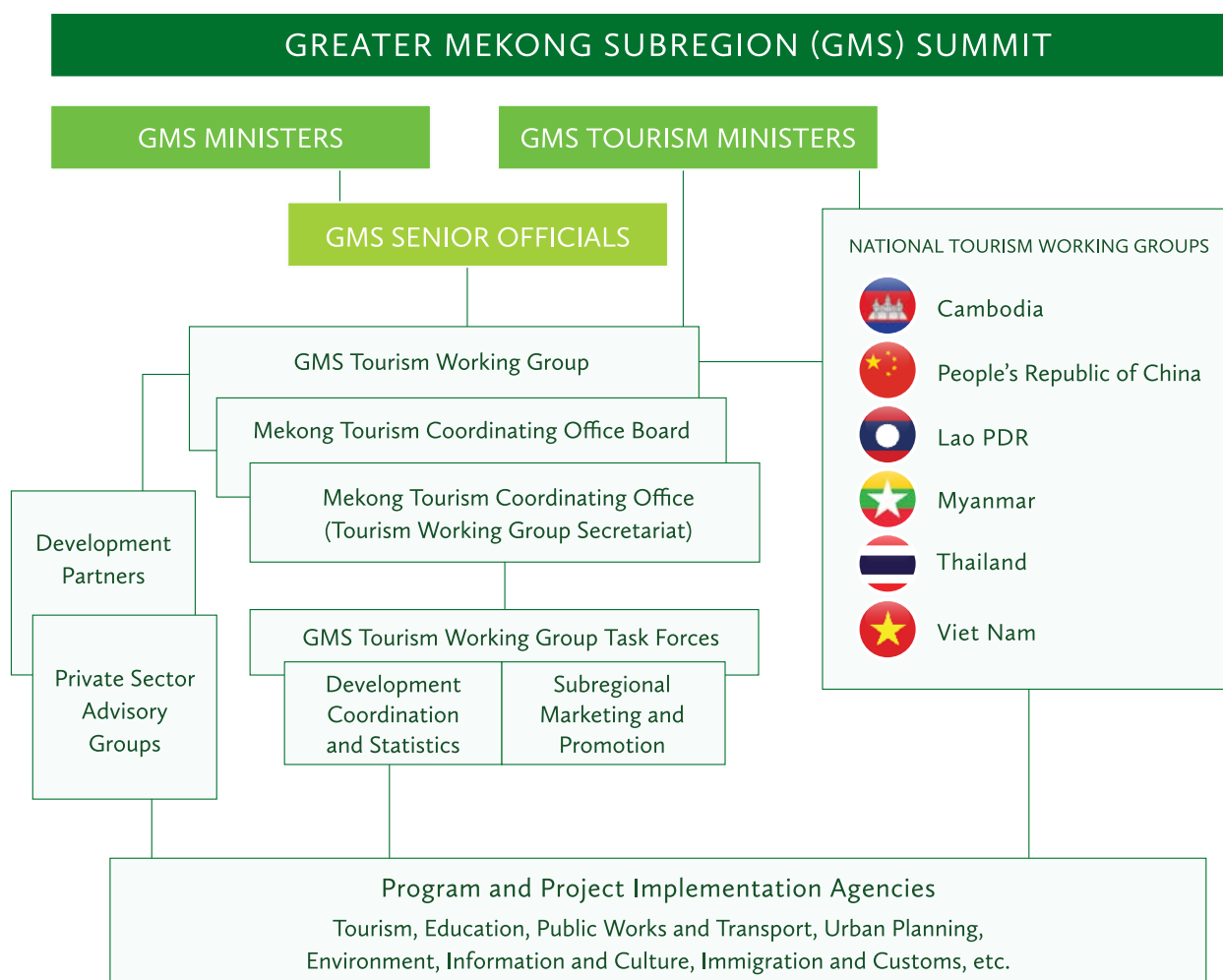
Sources: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020; Greater Mekong Subregion Urban Development Strategic Framework 2015–2022; national tourism organizations.

IMPLEMENTATION, COSTS, AND MONITORING

IMPLEMENTATION ARRANGEMENTS

Arrangements to implement and monitor strategic programs and projects follow the existing institutional mechanism for the GMS Economic Cooperation Program. Asian Development Bank will continue to act as the impartial coordinating institution for the program and serve as subregional secretariat. The organizational framework for GMS tourism cooperation (Figure 4) and the roles of various other public and private stakeholders are described below.

Figure 4: Greater Mekong Subregion Tourism Cooperation Organizational Framework



Source: GMS Tourism Working Group.

The **GMS Summit** is organized once every 3 years in a GMS country, following an alphabetical rotation. It is the highest forum in the GMS Economic Cooperation Program and follows a standard structure, with a leaders' summit, plenary meetings, and an informal leaders' retreat. The GMS Summit is held triennially to

- provide broad, strategic directions for future actions under the GMS Economic Cooperation Program;
- endorse GMS strategic frameworks and related investment plans; and
- endorse other GMS policies and strategies.

GMS ministers organize an annual ministerial conference to

- coordinate government policies and other strategic issues;
- interact and coordinate with development partners and the private sector at a strategic level; and
- endorse sector strategies and studies.

GMS tourism ministers appoint national tourism organization officials to represent GMS countries at GMS Tourism Working Group meetings and other regional forums. They meet periodically to

- endorse GMS and other regional tourism sector strategies;
- communicate the GMS vision for tourism and strategic tourism directions to government and private sector decision makers;
- provide tourism-related policy guidance to the GMS Tourism Working Group, other working groups, and the Mekong Tourism Coordinating Office;
- endorse subregional programs and projects;
- promote cooperation between tourism and other sectors;
- approve resources to implement strategic programs and projects; and
- review implementation progress and recommend adjustments as necessary.

GMS senior officials act as GMS national coordinators and heads of each country's GMS national secretariat. They meet frequently to

- formulate strategies and policies for elevation to the GMS Ministers;
- review sector plans and programs formulated by the GMS working groups; and
- coordinate policy and operational aspects of the GMS Economic Cooperation Program.

The **GMS Tourism Working Group** includes senior officials from each GMS national tourism organization. It serves as the advisory body to the Mekong Tourism Coordinating Office board and provides operational leadership and technical guidance to plan, implement, monitor, and evaluate subregional activities. Two task forces will be formed in 2017; one will strengthen the coordination of development assistance and statistics reporting, and the other will focus on subregional marketing and promotion activities. The working group meets at least twice per year to

- set GMS Tourism Working Group and Mekong Tourism Coordinating Office implementation priorities;
- endorse the working group's annual work plan and budget;
- coordinate with other subregional working groups and multilateral cooperation mechanisms like the One Belt, One Road initiative and the Lower Mekong Initiative;
- maintain relations with development partners;
- monitor strategic program and project results; and
- prepare progress reports to the GMS tourism ministers and GMS national secretariats.

The **Mekong Tourism Coordinating Office** will evolve into an intergovernmental organization. Its main functions are to

- promote effective cooperation among government, the private sector, development partners and civil society organizations for tourism marketing and promotion, product development, capacity building, knowledge sharing, tourism investment, and GMS travel facilitation;
- plan, coordinate, and implement programs that increase tourism's contribution to inclusive economic growth and environmental sustainability;
- represent the GMS countries at travel trade events, conferences, seminars, and other tourism-related meetings;
- mobilize resources to effectively implement the GMS Tourism Sector Strategy and related programs;
- undertake secretariat functions for the GMS Tourism Working Group, the Mekong Tourism Coordinating Office board, and the Mekong Tourism Forum; and
- continuously upgrade and maintain the www.mekongtourism.org website.

National tourism working groups set priorities for national implementation of subregional programs and projects. They meet periodically to

- coordinate and mobilize resources to implement subregional programs and projects;
- monitor national implementation of subregional programs and projects; and
- identify issues for elevation to national tourism organizations and the GMS Tourism Working Group.

Development partners—defined here as international and bilateral finance institutions, aid agencies, civil society organizations, industry associations, academic institutions, and the media—engage with the GMS Economic Cooperation Program at all levels to

- provide knowledge and finance to support strategic programs and projects;
- support private sector development;
- provide policy advice; and
- disseminate accurate information about the GMS.

Private sector advisory groups include members of industry associations and the newly formed Mekong Tourism Advisory Group. The private sector engages with the GMS Tourism Working Group, the Mekong Tourism Coordinating Office, and national tourism working groups to

- coordinate and support multicountry product and experience development;
- support and participate in events to promote GMS tourism;
- support campaigns and events to market and promote the GMS;
- develop sustainable tourism knowledge products and services; and
- identify constraints on the business environment for elevation to GMS sector working groups and higher-level forums.

Program and project implementation agencies mainly include government agencies responsible for tourism, education, public works and transport, cultural and natural heritage management, safety and security, and urban planning. State-owned enterprises, private entities, and civil society organizations also implement programs and projects. Their main roles are to

- jointly identify, design, implement, monitor, and evaluate programs and projects;
- report progress and issues for elevation to sector working groups; and
- produce and disseminate tourism knowledge products and services.

COSTS AND FINANCING

The investment programs and projects listed in Appendix 1 were drawn from the GMS Regional Investment Framework project pipeline, the GMS Marketing Strategy and Action Plan 2015–2020, and GMS countries' public investment programs in a range of sectors. The list contains ongoing, committed, and proposed projects. Cost estimates are summarized in Table 11. The main financiers are expected to be government, the private sector, and GMS development partners.

Table 11: Cost Estimates, 2016–2025

STRATEGIC DIRECTION	COST ESTIMATES (\$ MILLIONS)
1. Human resource development	164.2
2. Improve tourism infrastructure	58,140.0
3. Enhance visitor experiences and services	119.2
4. Creative marketing and promotion	42.0
5. Facilitate regional travel	245.0
Total	58,710.4

Source: GMS Tourism Working Group estimates.

MONITORING AND REPORTING

The results framework for GMS tourism cooperation is provided in Appendix 2. Performance targets will be monitored according to established procedures and using existing data sources where available. To monitor overall visitor satisfaction and assess how well GMS experiences meet visitor expectations and ideals, a GMS specific visitor satisfaction index will be created. The Mekong Tourism Coordinating Office will track results framework indicators and compile progress reports. The main reporting platforms are GMS Tourism Working Group meetings, the Mekong Tourism Forum, GMS tourism ministers meetings, and GMS ministerial meetings. Strategic programs, projects, and indicators will be reviewed regularly at these events and will be updated as appropriate to maintain their relevance in changing circumstances. Progress reports will be public documents to encourage coordination, cooperation, and knowledge sharing among all stakeholders.







APPENDIXES

APPENDIX 1: PRIORITY INVESTMENT PROGRAMS AND PROJECTS

NO.	STRATEGIC PROGRAM	PROGRAM/PROJECT	DESCRIPTION	COUNTRIES	COST ESTIMATE (\$ MILLION)	YEAR(S)	SOURCE (STATUS)
STRATEGIC DIRECTION 1: HUMAN RESOURCE DEVELOPMENT							
1.	1.1	Strengthening Tourism Vocational Training Institutions	Establish vocational training institutions, strengthen teaching capacity, and develop curriculum and training materials that harmonize with ASEAN and PRC standards. Promote exchange and cooperation among GMS tourism schools and universities to promote better tourism management and hospitality service.	All GMS countries	70.0	2016–2019	GMS RIF (Proposed/ongoing)
2.	1.1, 1.2	Human Resource and Capacity Development in the Hotel and Tourism Sector and Ministry of Hotels and Tourism	Strengthen tourism- and hospitality-related human resources for economic development and livelihood improvement. Assist Myanmar's tourism industry to design and implement a long-term human resources development strategy and action plan in line with regional standards.	MYA	5.5	2015–2020	Luxembourg (Ongoing)
3.	1.1	Myanmar Hospitality Training Initiative	Strengthen income and job opportunities for disadvantaged people in Myanmar; increase the quality and quantity of the tourism work force; strengthen the relevance and inclusiveness of TVET.	MYA	6.0	2014–2022	SDC and Swisscontact (Ongoing)
4.	1.1	Cambodia Skills Development Programme	Vocational skills initiatives that increase income and job opportunities for disadvantaged groups in Kratie, Stung Treng, and Preah Vihear.	CAM	4.0	2016–2020	SDC and Swisscontact (Ongoing)
5.	1.1	National School of Tourism Professionals	Develop tourism vocational schools in Phnom Penh and Preah Sihanouk to assist Cambodia's hospitality sector address post-high school vocational skill gaps.	CAM	14.0	2016–2020	AFD (Ongoing)
6.	1.2	Capacity Building for Sustainable Destination Management	Strengthen the capacity of public officials to develop and manage tourism destinations sustainably. Initiatives include regional planning, policy development, service delivery, ecotourism management, and thematic interpretation.	All GMS countries	12.0	2016–2025	Multidonor (Ongoing)

NO.	STRATEGIC PROGRAM	PROGRAM/PROJECT	DESCRIPTION	COUNTRIES	COST ESTIMATE (\$ MILLION)	YEAR(S)	SOURCE (STATUS)
7.	1.2	The Initiative for ASEAN Integration	Training and capacity building to strengthen mutual recognition arrangement implementation. Organize regional business development activities with tour operators to increase regional trade.	CAM, LAO, MYA, VIE	6.7	2015–2018	BMZ and GIZ (Ongoing)
8.	1.3	Community-Based Tourism Enterprise Support Program	Business support services to facilitate community-based tourism development and local access to tourism-related value chains.	All GMS countries	30.0	2016–2025	GMS TWG (Proposed)
9.	1.3	Greater Mekong Subregion e-Commerce Support Program	Promote e-commerce solutions for small and medium-sized enterprises to increase their participation in national and cross-border tourism value chains.	All GMS countries	10.0	2017–2020	GMS RIF-IP Midterm Review (Proposed)
10.	1.3	Mekong Inclusive Growth and Innovation Programme	Strengthen responsible tourism development and management capacity and business support services to increase income and job opportunities in southern Lao PDR and southern Cambodia.	CAM, LAO	3.0	2017–2020	Swisscontact (Approved)
11.	1.3	Economic Empowerment of the Poor and Women in the East West Economic Corridor	Provide tourism-related micro and small enterprises with business support services and affordable market facilities.	MYA	3.0	2016–2019	ADB–JFPR (Ongoing)
Strategic Direction 1: Cost Estimate					164.2		
STRATEGIC DIRECTION 2: IMPROVE TOURISM INFRASTRUCTURE							
12.	2.1	Cambodia Airport Improvements					
		Phnom Penh and Siem Reap International Airport Expansion	Expand the international airport and domestic terminals to increase annual handling capacity to 5 million passengers at each airport.	CAM	100.0	2014–2017	VINCI Group and Muhibbah Masteron Company (Ongoing)
13.	2.1	Lao PDR Airport Improvements					
		Wattay International Airport Expansion Project	Expand the international and domestic passenger terminals to raise annual handling capacity to 2.8 million passengers.	LAO	61.0	2015–2018	JICA (Ongoing)

NO.	STRATEGIC PROGRAM	PROGRAM/PROJECT	DESCRIPTION	COUNTRIES	COST ESTIMATE (\$ MILLION)	YEAR(S)	SOURCE (STATUS)
14.	2.1	Myanmar Airport Improvements					
		Hanthawaddy International Airport Project	Develop Hanthawaddy International Airport with annual handling capacity of 30 million passengers.	MYA	1,500.0	2016–2022	Yongnam Holdings, JGC Corporation, Myanmar Government (Ongoing)
15.	2.1	Myanmar Secondary Airport Improvement Projects	Airport improvements in secondary destinations: Nyaung U Airport (alt. Pakokku), Mandalay International Airport, Myeik Airport, Heho Airport, Thandwe Airport	MYA	226.1	2016–2025	Myanmar Transport Master Plan (Proposed)
16.	2.1	People's Republic of China (Guangxi Zhuang and Yunnan) Airport Improvements					
		Guilin Liangjiang International Airport Expansion Project	Expand the international and domestic passenger terminals to raise annual handling capacity to 12 million passengers.	PRC	504.0	2016–2025	Civil Aviation Administration, PRC
		Nanning Wuxu International Airport Expansion Project	Expand the international and domestic passenger terminals to raise annual handling capacity to 16 million passengers by 2030.	PRC	1,000.0	2016–2020	Civil Aviation Administration, PRC
17.	2.1	Thailand Airport Improvements					
		Suvarnabhumi Airport Improvement	Expand annual handling capacity to 90 million passengers by 2029.	THA	424.0	2016–2020	Airports of Thailand Public Company Limited
		Don Mueang Airport Improvement	Expand annual handling capacity to 18.5 million passengers and promote the airport as a hub for low-cost carriers.	THA	820.0	2016–2020	Airports of Thailand Public Company Limited
		Chiang Mai International Airport Improvement	Expand annual handling capacity to 20 million passengers by 2030.	THA	363.0	2016–2019	Airports of Thailand Public Company Limited
		Mae Fah Luang Airport Improvement Project in Chiang Rai	Expand runway and improve airport facilities to handle 3 million passengers per year.	THA	177.0	2016–2020	Airports of Thailand Public Company Limited
		Hat Yai International Airport Development Project	Expand annual passenger handling capacity to 10 million passengers.	THA	434.0	2016–2020	Airports of Thailand Public Company Limited

NO.	STRATEGIC PROGRAM	PROGRAM/PROJECT	DESCRIPTION	COUNTRIES	COST ESTIMATE (\$ MILLION)	YEAR(S)	SOURCE (STATUS)
18.	2.1	Viet Nam Airport Improvements					
		Noi Bai International Airport Expansion Project	Expand annual passenger handling capacity to 35 million by 2030.	VIE	5,500	2020–2030	Ministry of Transport, Airports Corporation of Vietnam
		Tan Son Nhat International Airport Expansion Project	Expand annual passenger handling capacity to 50 million by 2025, allowing Ho Chi Minh City to retain gateway hub status.	VIE	16,000	2017–2025	Ministry of Transport, Airports Corporation of Vietnam
		Long Thanh International Airport Project	Develop the new Long Thanh International Airport with annual handling capacity of 100 million passengers by 2035.	VIE	16.3	2018–2025	Airports Corporation of Vietnam
		Cam Ranh International Terminal Expansion Project	Increase Cam Ranh International Airport's annual handling capacity to 4 million passengers per year by 2025 and 6 million per year by 2030.	VIE	180.0	2016–2030	Cam Ranh International Terminal Joint Stock Company
19.	2.1, 2.2, 2.3	Tourism Infrastructure Development in the Green Triangle Development Area	Develop tourism-related infrastructure, including small airports, access roads to tourist sites, and small-scale community-based tourism infrastructure.	CAM, LAO, VIE	75.0	2018–2023	GMS RIF Midterm Review (Proposed)
20.	2.2, 2.3	Tourism Infrastructure Development in the Emerald Triangle Development Area	Develop tourism-related infrastructure, including access roads to tourist sites, and small-scale community-based tourism infrastructure.	CAM, LAO, THA	75.0	2018–2023	GMS RIF-IP Midterm Review (Proposed)
21.	2.2	GMS Tourism Infrastructure for Inclusive Growth Project	Improve last-mile tourism access infrastructure, provide environmental services in cross-border tourism centers, and strengthen capacity to promote inclusive tourism growth and tourism knowledge management.	CAM, LAO, VIE	108.0	2014–2019	ADB (Ongoing)
22.	2.2	National Highway 14D Improvement Project	Improve 72 km highway section in Quang Nam Province (Thanh My to Lao PDR border) to facilitate land transport between Bangkok, Pakse, and Da Nang.	VIE	130.0	2018–2022	GMS RIF (Proposed)
23.	2.2	Hongsā–Chomphet Road Improvement Project	Improve the 120 km road section to facilitate tourism, trade, and investment.	LAO	90.0	2015–2019	NEDA (Ongoing)
24.	2.2, 2.3	GMS Corridor Towns Development Projects	Improve urban infrastructure and services: drainage, sanitation, solid waste and wastewater management, urban roads, flood protection, and public gardens in about 10 towns with rapidly growing tourism.	CAM, LAO, VIE, MYA	400.0	2015–2025	GMS RIF, Phase II (Ongoing) Phases III-IV (Planned)
25.	2.2/2.3	Second GMS Tourism Infrastructure for Inclusive Growth Project	Improve urban–rural access and environmental services in secondary destinations situated in GMS corridors, and improve capacity for sustainable destination management.	CAM, LAO, MYA, VIE	175.0	2019–2024	GMS RIF (Proposed)

NO.	STRATEGIC PROGRAM	PROGRAM/PROJECT	DESCRIPTION	COUNTRIES	COST ESTIMATE (\$ MILLION)	YEAR(S)	SOURCE (STATUS)
26.	2.3/2.4	Construction of the Sino–Vietnamese Detian–Ban Gioc Waterfalls International Tourism Cooperation Zone	Develop/improve river ports, market facilities, roads, water supply, electricity supply, sewage, solid waste management, and community infrastructure.	PRC, VIE	200.0	2016–2022	GMS RIF (Ongoing)
27.	2.2	Agritourism Value Chains Development	Improve cross-border rural infrastructure, access roads, and related amenities, and regional capacity to promote regional agritourism businesses.	All GMS countries	250.0	2019–2023	GMS RIF (Proposed)
28.	2.4	River and Coastal Port Improvements	Improve/develop water transport terminals to facilitate access to tourist attractions and secondary destinations.	All GMS countries	250.0	2016–2025	GMS RIF and GMS TWG (Proposed)
29.	2.3	Improve Tourism Infrastructure and Facilities in the Konglor Cave–Phong Nha Khe Bang–Nakorn Phanom Corridor	Improve small infrastructure and public tourism amenities to provide better visitor services and tourism information.	THA, VIE, LAO	1.6	2016–2025	GMS TWG (Proposed)
30.	2.3	Tourism Information Center and Roadside Rest Area Development	Develop/improve tourism information centers at primary and secondary tourist attractions, and professionalize facilities management.	All GMS countries	30.0	2018–2025	GMS TWG (Proposed)
31.	2.3	Improve Environmental Services in World Heritage Sites	Improve infrastructure and services to better manage solid waste and wastewater at UNESCO World Heritage Sites.	All GMS countries	250.0	2019–2024	GMS TWG–Lao PDR (Proposed)
32.	2.5	Regional Railways Improvement Projects					
		Singapore–Kunming Rail Link Project	Build and improve sections of the 5,000 km Singapore–Kunming railway network, including locomotives, rolling stock, telecommunications, information technology, and human resources.	CAM, MYA, PRC, THA, VIE	18,000	2016–2025	One Belt, One Road Initiative (Multiple financiers)
		[People’s Republic of] China–Lao PDR Rail Project	Develop the 414 km Boten to Vientiane railway with stations to accommodate passenger and freight services.	LAO, PRC	6,800	2016–2022	China Exim Bank (Ongoing)
		Central Line Laem Chabang–Dawai Rail Project	Build and upgrade the 64 km rail line from Laem Chabang, Thailand, to Dawai, Myanmar, to accommodate passenger and freight services.	THA, MYA	4,000	2017–2021	Thai Government and Japan
Strategic Direction 2: Cost Estimate					58,140		

NO.	STRATEGIC PROGRAM	PROGRAM/PROJECT	DESCRIPTION	COUNTRIES	COST ESTIMATE (\$ MILLION)	YEAR(S)	SOURCE (STATUS)
STRATEGIC DIRECTION 3: ENHANCE VISITOR EXPERIENCES AND SERVICES							
33.	3.1	[People's Republic of] China–ASEAN Tourism Industry Park	Develop leisure facilities and create a model for international boundary landscaping, agricultural gardens, cultural streets, and a cultural and creative industry center in the PRC–ASEAN Free Trade Area.	PRC	37.0	2018–2023	GMS RIF (Proposed)
34.	3.1	Cambodia, Lao PDR, Viet Nam Development Triangle Tourism Development Plan	Promote the natural and cultural values of the area to enhance visitor experiences and services and support the local communities.	CAM, LAO, VIE	1.0	2017–2018	GMS TWG (Proposed)
35.	3.1	Strengthening Coordination of GMS Tourism Product Development and Promotion	Strengthen the Mekong Tourism Coordinating Office's capacity to coordinate multicountry experience development, marketing, and knowledge services.	All GMS countries	0.5	2017–2020	GMS RIF–IP Midterm Review (Proposed)
36.	3.1	Integrated Destination Planning and Management Support Program	Develop integrated destination management plans to boost local economic development and strengthen cultural, natural, and urban heritage management.	All GMS countries	20.0	2016–2025	GMS TWG (Proposed)
37.	3.2	Formulation of Travel Guidelines along the Main GMS Corridors	Inventory data on travel formalities and border gates along the main GMS corridors to develop tourist travel guidelines that help enhance visitors' experience and improve service quality.	All GMS Countries	0.2	2018–2019	GMS TWG (Proposed)
38.	3.2	Program to Create Tourism Routes that Connect Royal Projects in Thailand with Destinations in Other GMS Countries	Promote tourism sites related to His Majesty King Bhumibol Adulyadej's initiatives to support self-sufficiency and protect natural resources.	All GMS countries	--	2017	Thai Government
39.	3.2	Tourism Product Development for Lao–Thai Heritage Quadrangle	Develop experiences linked to Lanexang and Lanna heritage resources.	LAO, THA	4.0	2017–2021	GMS TWG (Proposed)
40.	3.2	Mekong Cruise Promotion Program	Promote cruising packages along the Mekong River.	All GMS countries	1.0	2019–2024	GMS TWG (Proposed)
41.	3.2	UNESCO Cultural Heritage Specialist Guide Training Program	Improve tour guides' skills to interpret and safeguard heritage sites, enhance educational experiences, and create economic opportunities for residents.	All GMS countries	6.0	2016–2025	Additional Financing Sought (Ongoing)
42.	3.3	Common Tourism Standards Implementation Program	Strengthen and expand implementation of ASEAN common tourism standards and the PRC's scenic area rating system.	All GMS countries	12.0	2017–2019	GMS TWG (Proposed)

NO.	STRATEGIC PROGRAM	PROGRAM/PROJECT	DESCRIPTION	COUNTRIES	COST ESTIMATE (\$ MILLION)	YEAR(S)	SOURCE (STATUS)
43.	3.4	Mekong Business Initiative	Foster startup and innovation ecosystems by supporting angel investing, business incubation, and technology commercialization in selected industries, including tourism.	CAM, LAO, MYA, VIE	10.5	2015–2017	ADB and DFAT (Ongoing)
44.	3.4	Mekong Tourism Investment Promotion Initiatives	Strengthen investment promotion agency activities, hold the annual Mekong Tourism Investment Forum, and organize other events to promote investment in secondary destinations.	All GMS countries	12.0	2016–2025	GMS TWG and Private Sector (Ongoing)
45.	3.5	Child-Safe Tourism Program and GMS Conference on Preventing Child Sex Tourism	Strengthen information, education, and communication activities to equip government, tourism enterprises, and communities with the knowledge and skills needed to make tourism safe for children.	All GMS countries	3.0	2016–2025	Additional Financing Sought (Ongoing)
46.	2.3, 3.5	Climate Resilience and Green Growth Planning Program	Develop green growth strategies to promote climate-resilient, lower-carbon, and socially inclusive tourism.	All GMS countries	12.0	2017–2025	GMS TWG (Proposed)
Strategic Direction 3: Cost Estimate					119.2		
STRATEGIC DIRECTION 4: CREATIVE MARKETING AND PROMOTION							
47.	4.1	Secondary Destination Events Program	Organize the Mekong Tourism forum and other thematic events to raise the profile of secondary destinations.	All GMS countries	8.0	2016–2025	Additional Financing Sought (Ongoing)
48.	4.1	GMS Tourism Information Development Program	Produce and continuously update engaging promotional content and disseminate it widely using online tools, print media, and tourist information centers.	All GMS countries	6.0	2016–2025	GMS TWG (Proposed)
49.	4.1	Multicounty Tour Promotion Program (Networking, Agent and Media Familiarization Trips)	Support public and private efforts to develop and market multicountry travel experiences and travel to secondary destinations, e.g. Lao-Thai Lane Xang Heritage Quadrangle, Emerald Quadrangle, Golden Quadrangle, 5 Chiangs, and other emerging destinations.	All GMS countries	3.0	2016–2025	GMS TWG (Proposed)
50.	4.1	World Heritage Necklace Promotion Program	Develop and market tour packages and itineraries that link World Heritage Sites in multiple destinations.	All GMS countries	6.0	2017–2025	GMS TWG (Proposed)
51.	4.2	Mekong Tourism Branding Initiative	Build industry and consumer awareness of the Mekong tourism brand and visual identity.	All GMS countries	6.0	2016–2025	GMS TWG (Proposed)
52.	4.3	Explore Mekong Digital Marketing Initiatives	Improve the functionality and usability of the www.mekongtourism.org website, including the #Mekong Moments campaign, Mekong Storytellers, and other public-private digital marketing partnerships.	All GMS countries	3.0	2016–2025	Additional Financing Sought (Ongoing)

NO.	STRATEGIC PROGRAM	PROGRAM/PROJECT	DESCRIPTION	COUNTRIES	COST ESTIMATE (\$ MILLION)	YEAR(S)	SOURCE (STATUS)
53.	4.4	Improve Subregional Tourism Data Collection and Analysis	Harmonize methodologies for collecting tourism statistics and produce an annual GMS tourism statistics report. The program includes establishment of a GMS Tourism Big Data Center in PRC.	All GMS countries	6.0	2016–2025	GMS TWG (Proposed)
54.	4.4	Monitoring GMS Visitor Satisfaction	Develop and implement a GMS Visitor Satisfaction Index to track multiple dimensions of the visitor experience, including attractions, hotels, immigration restaurants, retail shops, and transportation services.	All GMS countries	1.0	2016–2025	GMS TWG (Proposed)
55.	4.5	Sustainable Tourism Awareness-Raising Program (Including Ecotourism Market Opportunities Workshop)	Design and implement public information campaigns to increase visitors' and residents' awareness about sustainable tourism practices and career opportunities in the tourism sector.	All GMS countries	3.0	2016–2025	GMS TWG (Proposed)
Strategic Direction 4: Cost Estimates					42.0		
STRATEGIC DIRECTION 5: FACILITATE REGIONAL TRAVEL							
56.	5.1	Air Transport Facilitation Program	Support research and dialogue needed to accelerate formulation, implementation, and expansion of open skies agreements.	All GMS countries	3.0	2016–2025	GMS TWG (Proposed)
57.	5.2	Tourist Visa-on-Arrival Expansion Program	Improve technology, facilities, and human resources needed to boost the efficiency and security of tourist visa-on-arrival services.	All GMS countries	30.0	2016–2025	GMS TWG (Proposed)
58.	5.2	Electronic Visa Program	Improve information technology to widen the availability and ease of obtaining an electronic tourist visa.	All GMS countries	12.0	2016–2020	GMS TWG (Proposed)
59.	5.3	Border Facilities Improvement Program	Upgrade border infrastructure, information technology, and management systems to improve passenger and vehicle clearance efficiency, safety, and security.	All GMS countries	200.0	2016–2025	GMS RIF and GMS TWG (Proposed)
Strategic Direction 5: Cost Estimates					245.0		

ADB = Asian Development Bank; AFD = Agence Française de Développement; ASEAN = Association of Southeast Asian Nations; BMZ = German Federal Ministry of Economic Cooperation and Development; CAM = Cambodia; DFAT = Department of Foreign Affairs and Trade, Australia; GIZ = Deutsche Gesellschaft für Internationale Zusammenarbeit; GMS = Greater Mekong Subregion; GMS RIF = GMS Regional Investment Framework; GMS RIF-IP = GMS Regional Investment Framework Implementation Plan; JFPR = Japan Fund for Poverty Reduction; JICA = Japan International Cooperation Agency; LAO = Lao People's Democratic Republic; MYA = Myanmar; NEDA = Neighboring Countries Economic Development Cooperation Agency (Thailand); PRC = People's Republic of China; RIF = Regional Investment Framework; SDC = Swiss Agency for Development and Cooperation; THA = Thailand; TVET = technical and vocational education and training; TWG = Tourism Working Group; UNESCO = United Nations Educational, Scientific and Cultural Organization; VIE = Viet Nam.

APPENDIX 2: RESULTS FRAMEWORK

	PERFORMANCE TARGETS	2015 BASELINE	DATA SOURCES
VISION Tourism in the Greater Mekong Subregion (GMS) is integrated, prosperous, equitable, and resilient with effective partnerships and knowledge management	By 2025: The percentage of multicountry visitors from long-haul source markets is more than 30%	30%	Tourism statistics reports
	Travel and tourism's direct contribution to gross domestic product increases	2.6%–23.3%	World Tourism and Travel Council
	Cambodia, the Lao People's Democratic Republic (Lao PDR), Myanmar, and Viet Nam generate at least 30% of GMS international visitor expenditures	24%	World Tourism and Travel Council; National Tourism Organizations
	University of Notre Dame Global Adaptation Index median overall rank = 100 or better	112	University of Notre Dame, Global Adaptation Index
OUTCOME More competitive, balanced, and sustainable destinations	By 2025: GMS international visitor arrivals exceed 95 million	57,885,202	Tourism statistics reports
	Cambodia, Guangxi Zhuang and Yunnan, the Lao PDR, Myanmar, and Viet Nam receive at least 54% of GMS international visitor arrivals	48%	Tourism statistics reports
	Travel and Tourism Competitiveness Index median overall rank = 81 or better	Median rank 86	World Economic Forum
	Travel and Tourism Competitiveness Index environmental sustainability pillar median overall rank = 112 or better	Median rank 117	World Economic Forum
STRATEGIC DIRECTIONS			
Human resource development	Travel and Tourism Competitiveness Index human resources and labor market median overall rank = 56 or better	Median rank 61	World Economic Forum
Improve tourism infrastructure	Travel and Tourism Competitiveness Index infrastructure median overall rank = 92 or better	Median rank 97	World Economic Forum
Enhance visitor experiences and services	GMS Visitor Satisfaction Index score = 75 or better	Not available	Mekong Tourism Coordinating Office
Creative marketing and promotion	Travel and Tourism Competitiveness Index effectiveness of marketing and promotion median overall rank = 52 or better	Median rank 57	World Economic Forum
Facilitate Subregional Travel	Travel and Tourism Competitiveness Index international openness median overall rank = 78 or better	Median rank 83	World Economic Forum

Source: Mekong Tourism Coordinating Office and national tourism organizations.





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