Mekong Tourism

EXPERIENCE MEKONG

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

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

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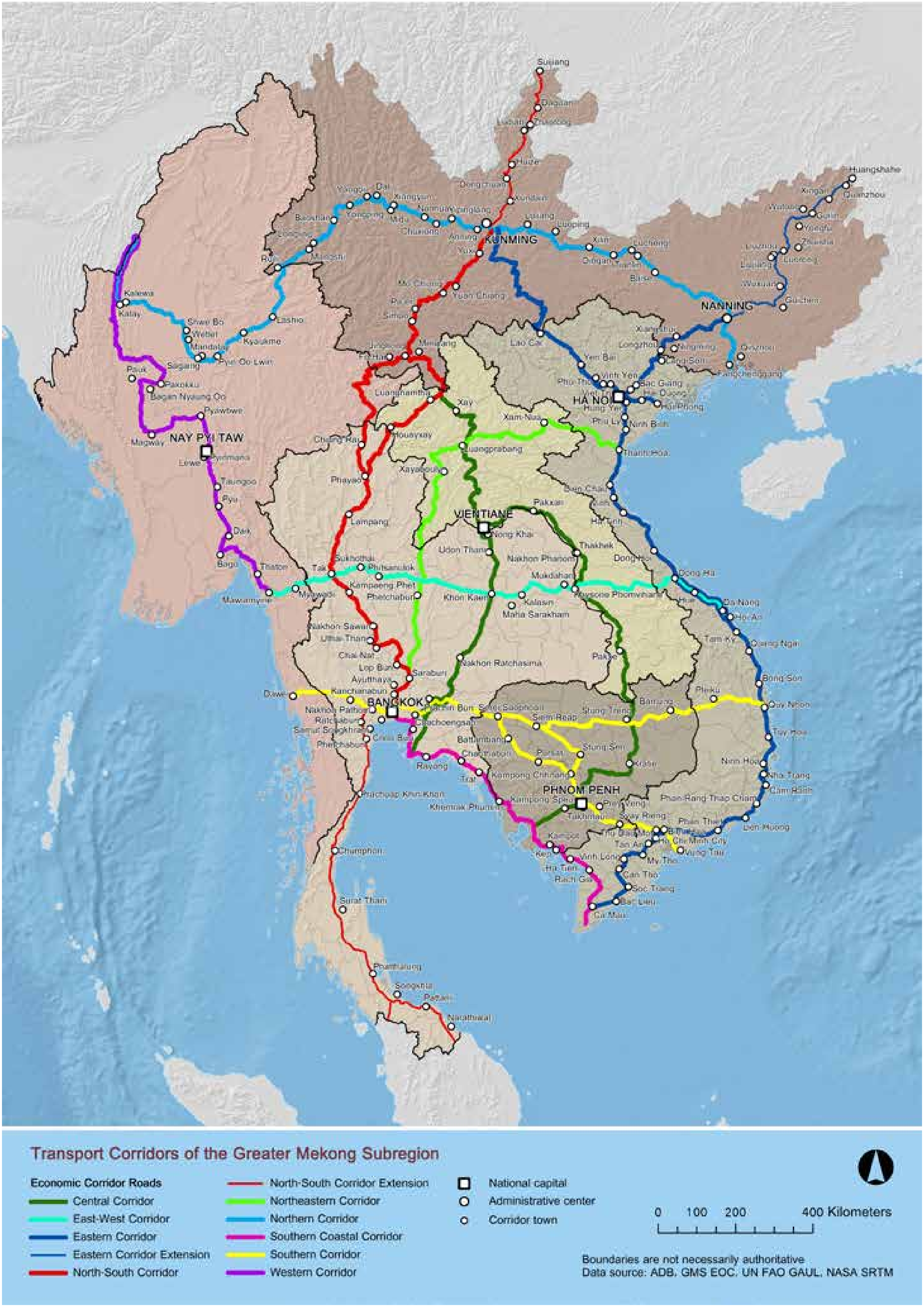
In this document "$" refers to US Dollars, unless otherwise stated.

Transport Corridors of the Greater Mekong Subregion



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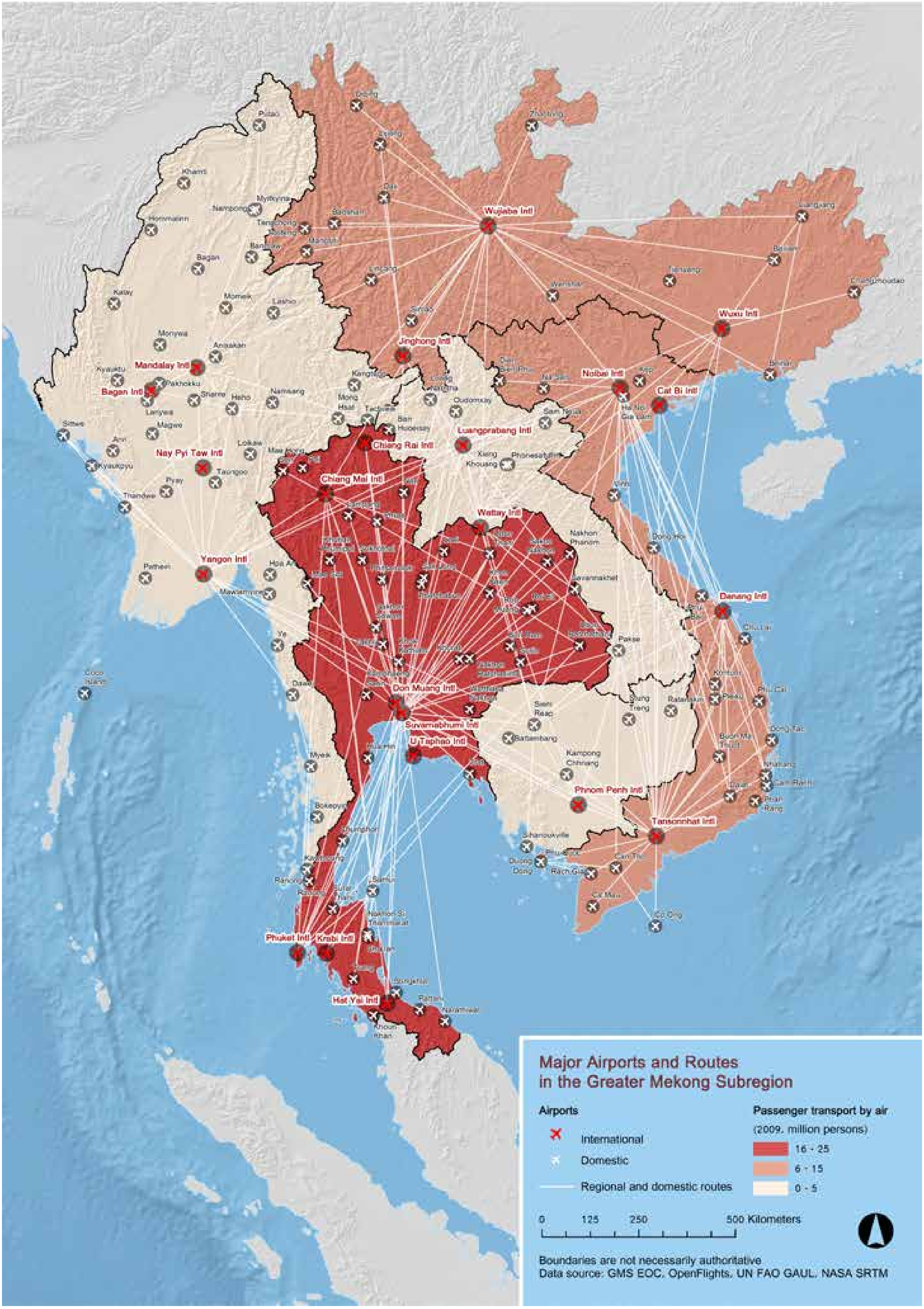

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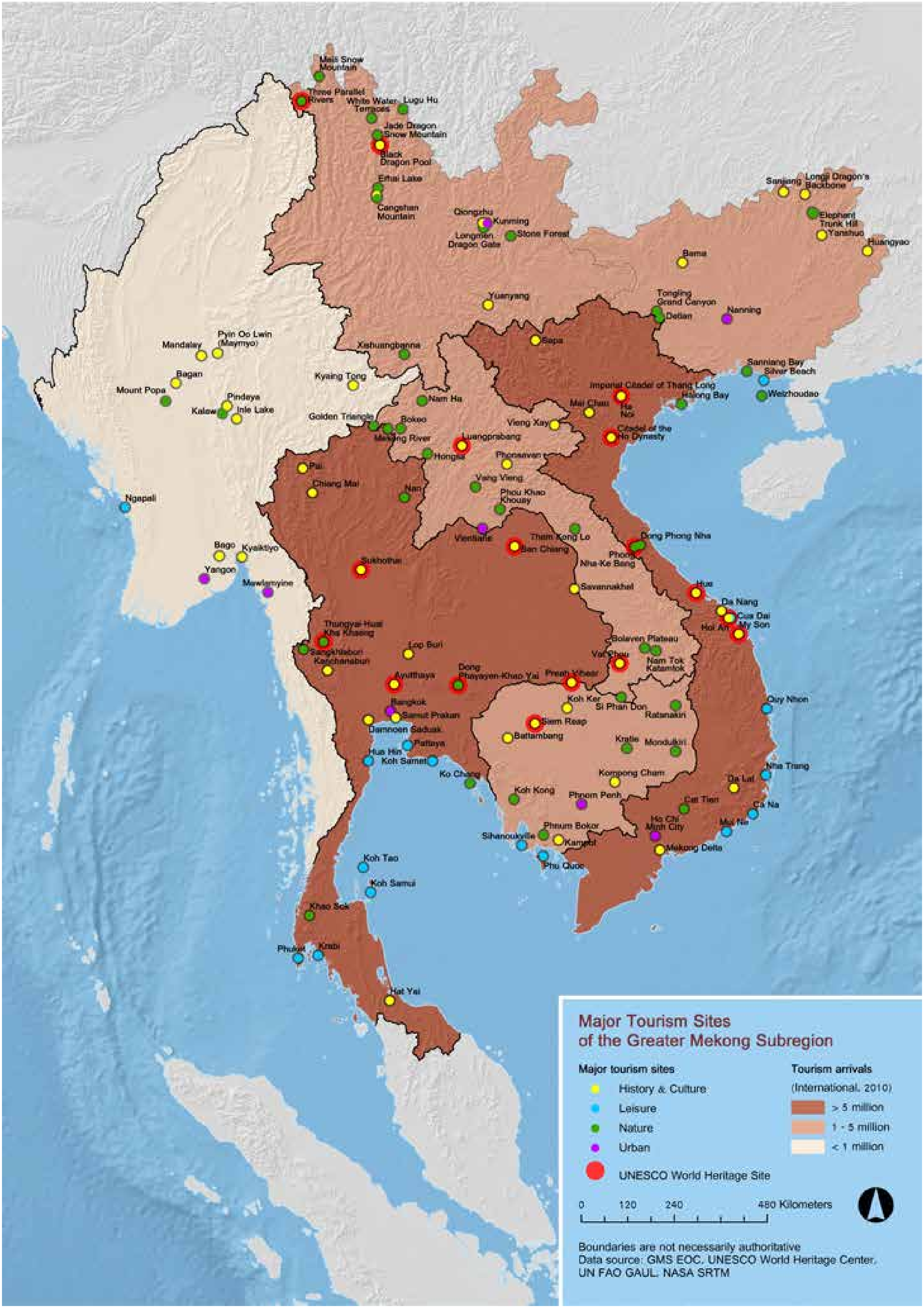


SAIGON COOKING CLASS
Menu on Wednesd
Fried spring rolls w/po
Fresh lotus stems sala
Char grilled beef w/ Be
leav


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INTRODUCTION

BACKGROUND

The six Greater Mekong Subregion (GMS) countries – Cambodia, the Lao People's Democratic Republic (Lao PDR), the People's Republic of China (PRC), Myanmar, Thailand, and Viet Nam – prioritize joint tourism marketing in the GMS Tourism Sector Strategy and the GMS Strategic Framework 2012–2022.[1] The national tourism strategies of each GMS country also emphasize joint marketing between countries because it can be a cost effective way to raise market awareness and increase market penetration.

While all GMS National Tourism Organizations (NTOs) appreciate the potential benefits of joint marketing, it is important to recognize that the subregion comprises a diverse group of countries with distinct cultures, histories, and unique selling points. This makes it challenging to develop a common Mekong brand identity that resonates with target markets, in particular markets from within the GMS or the Association of Southeast Asian Nations (ASEAN).

Given each GMS country is pursuing its own unique marketing and branding strategy, this document is designed to complement national efforts and identify opportunities where synergies can be achieved, with a view to boost multicountry visits and tourist spending, increase visits to secondary destinations, and increase return visits.

This GMS Tourism Marketing Strategy and Action Plan 2015-2020 ("the marketing strategy") deliberately aligns with GMS member countries' shared objectives to develop thematic multicountry tour programs and promote secondary destinations to help distribute tourism benefits more widely. The focus on joint marketing of multicountry tours is also consistent with the ASEAN Tourism Strategic Plan and ASEAN Tourism Marketing Strategy.[2]

Preparation of the marketing strategy was led by the Greater Mekong Subregion Tourism Working Group (TWG). The TWG is comprised of senior officials from the six GMS NTOs, members of private sector associations, development partners, academia, and the media. The Mekong Tourism Coordinating Office (MTCO) provided technical inputs and logistical support in its role as TWG Secretariat.[3]

The process to develop the marketing strategy started in November 2014 and concluded with TWG endorsement of this document in June 2015. As a first step, the *Explore Mekong Marketing Plan 2008–2011* was reviewed together with the national tourism marketing plans of each GMS country to determine

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1 ADB. 2005. *Greater Mekong Subregion Tourism Sector Strategy 2005–2015*. Manila; ADB. 2012. *The Greater Mekong Subregion Economic Cooperation Program Strategic Framework, 2012–2022*. Manila.

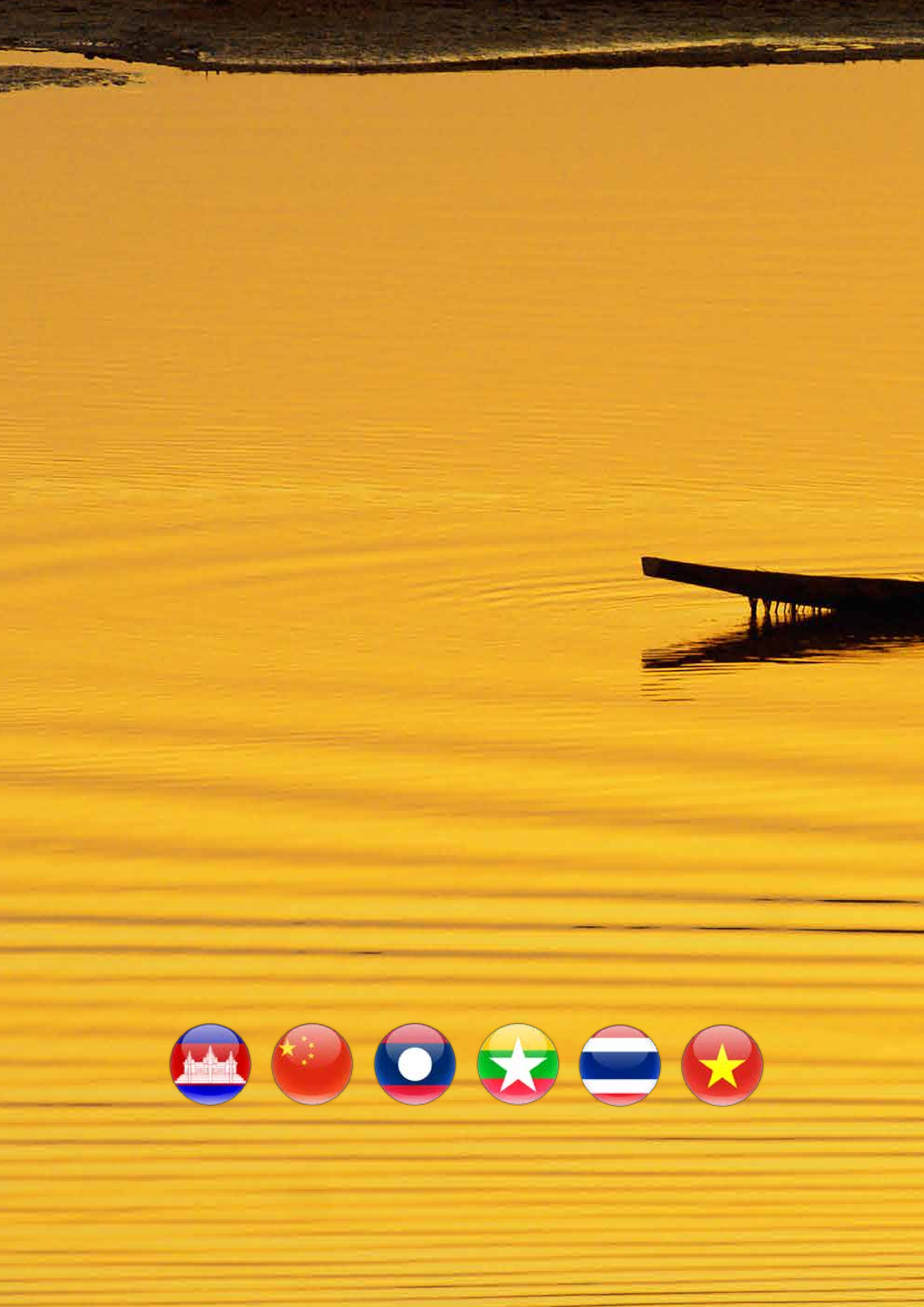
2 ASEAN Secretariat. 2011. *ASEAN Tourism Strategic Plan 2011–2015*. Jakarta; ASEAN Secretariat. 2012. *ASEAN Tourism Marketing Strategy 2012–2015*. Jakarta.

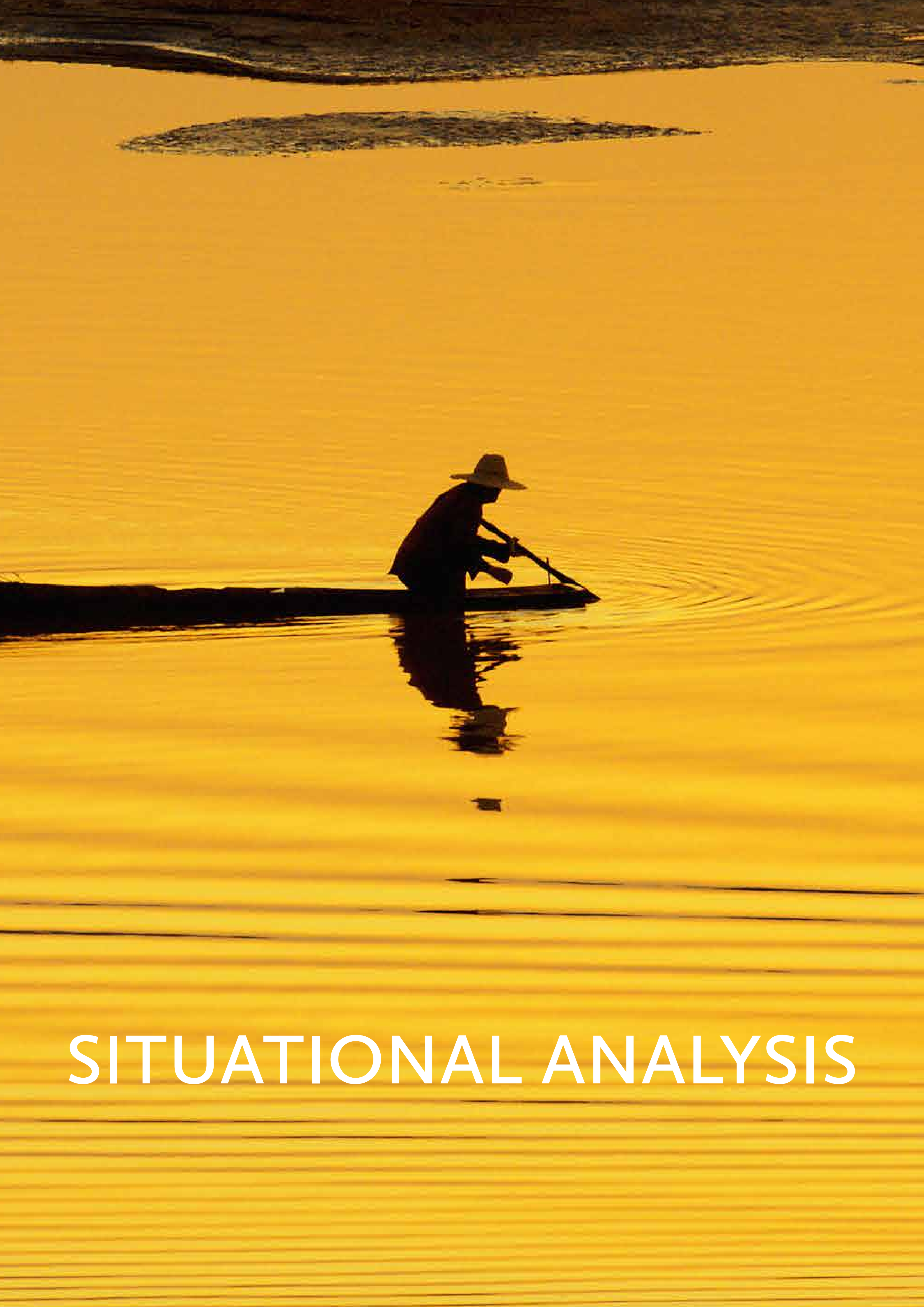
3 The Mekong Tourism Coordinating Office was formally established as TWG Secretariat under the 2005 *Siem Reap Declaration on Mekong Tourism*.

where strategic priorities overlap. A situational analysis of global and regional trends that influence tourism demand in the GMS followed. Based on the situational analysis and consultations with industry stakeholders, priority markets and market segments were selected. Taking into account the preferences of priority markets and market segments, thematic multicountry tour products, thematic events, and secondary destinations were selected for inclusion in the marketing strategy. A distribution plan emphasizing partnerships with the private sector was developed, considering resource availability and the mandate of MTCO and GMS NTOs.

Implementation arrangements build on the existing GMS tourism cooperation framework, whereby the GMS Tourism Ministers provide policy guidance, the TWG directs implementation of joint marketing activities, and the MTCO plays a coordinating role to help government and the private sector develop, promote, and market tourism products and services directly through the www.mekongtourism.org website, technology providers, third-party distributors, and industry events.

Financing and other resources needed to implement the marketing strategy are expected to be sourced from government, the private sector, and development partners. The TWG will review implementation of the marketing strategy semi-annually and report progress during the annual Mekong Tourism Forum (MTF) and meetings of the GMS Tourism Ministers.





SITUATIONAL ANALYSIS

GREATER MEKONG SUBREGION TOURISM SECTOR STRATEGY AND ASEAN TOURISM STRATEGIC PLAN

In recognition of the substantial contribution that tourism can make to poverty reduction, sustainable development, and inclusive economic growth, subregional tourism cooperation has been included as a flagship program in the GMS Economic Cooperation Program since its inception in 1992. The current GMS tourism sector strategy aims to enhance tourism's contribution to the Millennium Development Goals and the GMS countries' vision of an integrated, prosperous, and equitable subregion. The overall objectives of the strategy are to

> *"develop and promote the Mekong as a single destination, offering a diversity of good quality and high-yielding subregional products that help to distribute the benefits of tourism more widely; add to the tourism development efforts of each GMS country; and contribute to poverty reduction, gender equality and empowerment of women, while minimizing any adverse impacts of tourism."*

These objectives, together with directives issued by the GMS Tourism Ministers in 2011 to focus on joint development and marketing of thematic multicountry tour circuits linked to the Mekong River, provide the context for joint tourism marketing in the GMS.[4]

The GMS tourism strategy is considered an important building block of the broader plan to develop ASEAN as a single tourist destination by 2025. The core strategic objective of the ASEAN Tourism Strategic Plan 2016–2025 is to increase competitiveness by (i) intensifying promotion and marketing; (ii) diversifying ASEAN tourism products; (iii) enhancing investment in tourism infrastructure, products and services; (iv) raising the capacity and capability of tourism human resources; (v) implementing and expanding standards for facilities, services and destinations; (vi) improving and expanding connectivity and destination infrastructure; and (vii) enhancing travel facilitation.[5] The ASEAN Tourism Strategic Plan aims to ensure sustainable and inclusive tourism outcomes by mainstreaming local community and public-private participation in the tourism supply chain at the destination level, strengthening tourist safety and security, prioritizing protection and maintenance of natural and cultural heritage, and increasing responsiveness to climate change.

[4] ADB. 2010. *GMS Tourism Sector Strategy Midterm Review & Road Map 2011–2015*. Manila; Third GMS Tourism Ministers Meeting. 2011. *Joint Ministerial Statement*. Phnom Penh.

[5] ASEAN Secretariat. 2015. (in preparation). *ASEAN Tourism Strategic Plan 2016–2025*. Jakarta.

STRATEGIC MARKETING OBJECTIVES IN THE GREATER MEKONG SUBREGION AND ASEAN

Table 1 shows the joint tourism marketing and product development objectives of the GMS and ASEAN. The focus is clearly on boosting multicountry visits and intraregional travel. This is to be achieved by enabling the private sector to develop, promote, and operate competitive nature-based tourism, cultural and heritage tourism, community-based tourism, and cruise- and river-based tourism products that can be linked in multicountry itineraries.

Table 1: Joint Tourism Marketing and Product Development Objectives

GREATER MEKONG SUBREGION	ASEAN
• Position the GMS as a single tourism destination • Promote multicountry tourism in the GMS economic corridors • Target high-yield markets • Improve the business-enabling environment for product development by the private sector • Emphasize development of pro-poor tourism • Improve quality standards for accommodation, food, and tourist site management • Promote intra-GMS travel	• Increase the number of tourists traveling to Southeast Asia • Increase multicountry visits in Southeast Asia • Develop experiential regional tourism products • Position ASEAN as a preferred destination by focusing marketing and promotion efforts of the national tourism organizations • Harness the benefits of marketing to help meet social, economic, and cultural goals • Promote intra-ASEAN travel

Sources: ASEAN Tourism Marketing Strategy 2012–2015; Greater Mekong Subregion Tourism Sector Strategy 2005–2015.

The tourism marketing objectives of each GMS country are shown in Table 2. Common interests include (i) product development to boost arrivals in secondary destinations and achieve a more balanced spread of visitors throughout the year, (ii) improvement of market linkages with neighboring countries, (iii) expansion of product distribution channels and dissemination of promotional information, and (iv) strengthening market intelligence and public-private collaboration.

Table 2: Tourism Marketing Objectives in the Greater Mekong Subregion

COUNTRY	OBJECTIVES
CAMBODIA Kingdom of Wonder	• Develop new products to relieve overcrowding of Angkor Wat and diversify to the coastal zone, northeast, and Tonle Sap • Promote quality culture and nature-based tourism and the "clean city, clean resort, good service" experience • Target fast growing markets from Asia-Pacific, Europe, and North America • Encourage visits by Cambodian nationals living in Cambodia and abroad • Strengthen market research and distribution channels • Develop air routes to Cambodia from medium- and long-haul markets
CHINA LIKE NEVER BEFORE	• Promote the diversification of tourism products and develop new hotspot areas for tourism consumption • Promote inbound tourism by undertaking large overseas promotional programs • Strengthen systems to disseminate tourism information • Improve the quality of tourism services by enriching the cultural dimensions of tourism and promoting environmental protection • Promote balanced tourism development among different regions • Focus on domestic tourism development and promote outbound tourism in an orderly fashion
LAOS Simply Beautiful	• Improve tourism product quality and develop tourism circuits and destinations that can be linked to subregional/ASEAN tourism products • Transform Lao PDR into a global destination for ecotourism • Target higher-spending Asian, European, and North American markets • Improve market intelligence and results monitoring • Improve dissemination of tourism information • Strengthen public–private cooperation for product development and marketing
myanmar	• Improve market intelligence to determine supply, demand, and gap characteristics of the tourism system • Create a marketing strategy to address seasonality, geographic spread, segmentation and yield • Raise internal awareness of responsible tourism • Create and position a brand image for Myanmar
amazing THAILAND	• Emphasize "Thainess" to the world • Raise awareness of Thailand as a quality destination with a broad diversity of experiences • Balance source markets and refocus on high-end markets • Reduce visitor congestion in popular destinations by better balancing the distribution of visitors nationwide • Boost connectivity with ASEAN countries • Reduce seasonality by promoting travel in the low season • Promote green tourism to reduce environmental impacts • Promote social marketing to boost opportunities for visitors to network and share the experience of "Thainess"
Vietnam Timeless Charm	• Position Viet Nam as a must-visit tourism destination in Southeast Asia based on key brand values and products in Asian and select Western markets • Ensure Viet Nam remains the preferred holiday destination for Vietnamese residents • Effectively communicate the diversity of Viet Nam's products and main tourism regions • Increase visitor length of stay and local expenditure and attract return visitors • Effectively manage cooperation with the private sector to target segments and new markets that can be cost effectively reached

Sources: Cambodia Tourism Development Strategic Plan 2012–2020; The Opinions of the State Council on Speeding up the Development of the Tourism Industry (2009) and The Outline for National Tourism and Leisure (2013–2020); Lao PDR Tourism Strategy 2012–2020; Myanmar Tourism Master Plan 2013–2020; Tourism Authority of Thailand Marketing Plan for 2014; Viet Nam Tourism Marketing Strategy to 2020 and Action Plan 2013–2015.

GLOBAL AND REGIONAL TOURISM TRENDS

GLOBAL TOURISM TRENDS

According to the United Nations World Tourism Organization (UNWTO), international tourist arrivals reached 1.08 billion in 2013. International tourist receipts generated in destination countries from expenditure on accommodation, food, local transport, shopping, entertainment and other goods and services was equivalent to $1.4 trillion in the same year, representing about 9% of global gross domestic product. France was the most visited country, with over 83 million international arrivals. Two GMS countries were among the top 10 international tourist destinations for both international arrivals and tourism receipts: the People's Republic of China recorded 55.7 million international arrivals and $51.7 billion in tourism receipts and Thailand counted 26.5 million arrivals that generated $39.2 billion.

Leisure travel accounted for 52% of total international arrivals. The other main reasons for travel were visiting friends and relatives, pilgrimage, and business. The majority of international tourism is intraregional, with about 80% of global arrivals originating in the same region. Between 2010 and 2030 worldwide growth in international tourist arrivals is expected to continue at an average pace of 3.3% per year to reach 1.8 billion by 2030. Remarkably, in 2013 outbound Chinese tourists spent $129 billion, $42.4 billion more than any other outbound source market. Other top spenders are the United States, Germany, the Russian Federation, and the United Kingdom.[6]

ASIA AND THE PACIFIC

In 2013 Asia and the Pacific received 248 million international tourists, an increase of 6% compared to 2012. Tourism receipts totaled $359 billion, up $30 billion compared to 2012. This represents 23% of global international tourist arrivals and 31% of global tourism receipts. UNWTO is forecasting Asia and the Pacific will remain the fastest growing region in the world through 2030, when international arrivals are expected to reach 535 million and represent 30% of global market share.

THE GREATER MEKONG SUBREGION

The GMS was the fastest growing subregion in Asia and the Pacific in 2013, showing a 16.9% increase in international tourist arrivals compared to 2012 (Table 3). This was more than double the growth rate in Asia and the Pacific and significantly higher than ASEAN's 11% increase.

[6] United Nations World Tourism Organization. 2014. *UNWTO Tourism Highlights, 2014 Edition*. Madrid.

During 2002–2013 international tourist arrivals grew at an average annual rate of about 12%. Although Thailand's share of total GMS arrivals declined from 61% in 2004 to 51%, in 2013 it remains the major international gateway to the subregion. International tourist arrivals are growing fastest in Myanmar, a result of the extensive political and economic reforms that began in 2011. While Yunnan Province and Guangxi Zhuang Autonomous Region have a modest share of international arrivals to the subregion, it is important to note that each received over 130 million domestic visitors in 2013. The number of annual domestic trips in Thailand (over 100 million) and Viet Nam (over 35 million) is also significant.

Table 3: International Tourist Arrivals to the Greater Mekong Subregion 2006–2013

	2006	2008	2010	2012	2013	CHANGE 2012–2013 (%)	SHARE (%)
Cambodia	1,700,041	2,125,465	2,508,289	3,584,307	4,210,165	17.5%	8.2%
Lao PDR	1,215,106	1,736,787	2,513,028	3,330,072	3,779,490	13.5%	7.3%
Myanmar	263,514	193,319	791,505	1,058,995	2,044,307	93.0%	4.0%
Thailand	13,821,802	14,584,220	15,936,400	22,353,903	26,546,725	18.8%	51.5%
Viet Nam	3,583,486	4,207,895	5,049,855	6,847,678	7,572,352	10.6%	14.7%
Guangxi Zhuang, PRC	1,707,729	1,620,466	1,996,452	3,027,900	2,123,149	-29.9%	4.1%
Yunnan, PRC	1,111,744	2,044,483	2,729,783	3,927,746	5,310,000	35.2%	10.3%
Total	**23,403,422**	**26,512,635**	**31,525,312**	**44,130,601**	**51,586,188**	**16.9%**	

Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China.
Source: National Tourism Organizations.

MARKET MIX IN THE GREATER MEKONG SUBREGION

In 2013 the GMS welcomed 51.6 million international tourist arrivals, representing a 3% share of the global market. Over 60% of international visitors originate in Asia and the Pacific, led by the PRC, Japan, Malaysia, the Republic of Korea, Thailand, and Viet Nam. The PRC is the first or second largest source market in Cambodia, Myanmar, Thailand, and Viet Nam, and the third largest source market in the Lao PDR (Table 4). Thailand is the top source market for the Lao PDR and Myanmar, and visitors from Viet Nam form the largest share of international tourist arrivals in Cambodia. Long-haul source markets from Europe comprise approximately 20% of international tourist arrivals and those from the Americas about 7%.

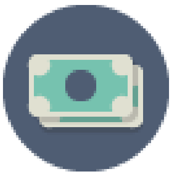
Table 4: Top 10 Generating Markets in the Greater Mekong Subregion 2013

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

Korea = Republic of Korea, PRC = People's Republic of China, UK = United Kingdom, USA = United States of America.
Source: National Tourism Organizations.

COUNTRY PROFILES

CAMBODIA



$2.54
billion
tourism receipts

4.2
million
tourist arrivals

International tourist arrivals to Cambodia reached 4.2 million in 2013, a 17.5% increase compared to 2012. Viet Nam is the largest generating source market, comprising 20% of international tourist arrivals, followed by PRC (11%), the Republic of Korea (10%), the Lao PDR (10%), and Thailand (5%). Overall, in 2013 international tourist arrivals from ASEAN member countries increased by 21% when compared to 2012.

In addition to the Republic of Korea, other significant medium- and long-haul source markets are Japan, which accounts for 5% of international tourist arrivals, the United States (4.4%), France (3.1%), Australia (3%) and Russia (3%). The fastest growing markets from a substantial base are the Lao PDR, with a remarkable annual increase of 63% to 0.4 million arrivals in 2013; PRC, up 39% to 0.46 million arrivals; and the Russian Federation, up 32% to 0.13 million arrivals.[7]

International tourists that visit as part of a package tour stay on average 4.6 days, while free independent travelers stay for seven days. Average daily spending across all international markets is about $120 per day.

[7] A substantial base is defined as at least 25,000 annual arrivals from the source market considered.

The international airports in Phnom Penh and Siem Reap together receive 48% of all international tourist arrivals, 50% enter the country through overland borders, and 2% enter by water. The busiest border checkpoints are Poipet (Cambodia–Thailand) and Bavet (Cambodia–Viet Nam), which each account for about 18.6% of international tourist arrivals.

Not surprisingly, Siem Reap and the temples of Angkor are the most popular destinations, welcoming 44% of all international tourist arrivals in 2013. In comparison, Phnom Penh received 39% and no other destination received more than 6%. Leisure was the main purpose of visit (91%), followed by visits to friends and relatives (4%) and business (4%).[8]

PEOPLE'S REPUBLIC OF CHINA: GUANGXI ZHUANG AUTONOMOUS REGION AND YUNNAN PROVINCE

The PRC received 55.7 million international tourists in 2013, a 3.5% decrease compared to 2012. Guangxi Zhuang welcomed 2.13 million international tourists, equal to 3.8% of all international visitors to PRC. Yunnan received 5.31 million international tourists, or 9.8% of PRC's international visitors. In 2013 Guangxi Zhuang recorded a 30% decrease in international tourist arrivals compared to 2012 while Yunnan saw international arrivals rise by 35%.

55.7
million
tourist arrivals

[8] Ministry of Tourism, Cambodia. 2013. *Tourism Statistics Annual Report 2013*. Phnom Penh.

International tourists in Guangxi Zhuang mainly visit the historic town of Yangshuo, the scenic Li River and karst landscape around Guilin. In Yunnan the main attractions are Kunming, ethnic villages and botanical gardens in Xishuangbanna, the historic towns of Dali and Lijiang, and Shangri-la.

LAO PEOPLE'S DEMOCRATIC REPUBLIC

$590 million tourism receipts

3.77 million tourist arrivals

In 2013 the Lao PDR received 3.77 million international visitors, an increase of 13.5% compared to 2012. Thailand accounted for 54% of international arrivals, Viet Nam 24% and PRC 6.4%. The top long-haul markets are the United States (1.6%), France (1.4%) and the United Kingdom (1.1%). The fastest growing markets from a substantial base are the Republic of Korea (52%), Viet Nam (29%), Germany (25%), and PRC (23%).

Long-haul visitors stay on average for 8.4 days and spend $70 per day, while regional tourists entering with a passport stay for three days on average and spend about $50 per day. In 2013 about 33% of all reported arrivals were lower-spending day-trippers mainly entering through land borders at Vientiane Capital and Savannakhet and Luang Namtha Provinces.

The most visited destinations in 2013 were Vientiane Capital (1.4 million visitors), Savannakhet (1.16 million visitors), and Vientiane Province, Champassak, and Khammouane (about 0.4 million visitors each). Luang Prabang received 342,000 international visitors.

The main purpose of travel among all markets is leisure (84%) and main interests are nature (70%), culture (79%), and religious monuments (61%). Most visitors obtain tourist information from guide books/travel magazines (41%), the Internet (30%), and word of mouth (26%). Only 165,906 international visitors used the services of an inbound tour operator in 2013. Over 50% of arrivals to the Lao PDR also visit Thailand.[9]

MYANMAR

In 2013 Myanmar recorded an impressive 93% rise in international tourist arrivals to 2.04 million. Thailand is the largest source market, accounting for 16% of overnight visitors, followed by PRC (10%), Japan (7.6%), Korea (6%), the United States (6%), and Malaysia and France (4% each). These are also the fastest-growing markets.

The average length of stay for overnight tourists is seven nights and average daily spending is $145 per day. It is important to recognize that there were 1.14 million day-trippers in 2013, mainly entering the country through land borders with Thailand at Myawaddy and Thachilek. According to the *Myanmar Tourism Master Plan*, Yangon receives 94% of international overnight visitors, 27% visit Bagan, and 15% visit Inle Lake.[10] Mandalay has direct scheduled flights from Thailand and accounts for 27% of international overnight tourists.

$920 million
tourism receipts

2.04 million
tourist arrivals

[9] Ministry of Information, Culture, and Tourism, Lao PDR. 2013. *Tourism Statistics Annual Report 2013*. Vientiane.

[10] Ministry of Hotels and Tourism, Myanmar. 2012. *Myanmar Tourism Master Plan 2013–2020*. Yangon.

The main purpose of travel is leisure (77%) and business (19%). Most international tourists travel independently (67%) and are interested in culture and history (98%), food (90%), and nature/visiting protected areas (83%). About 17% of international tourists use the services of an inbound tour operator. The main sources of tourist information are the Internet, guidebooks, and word of mouth.[11]

THAILAND

$39.28 billion
tourism receipts

26.5 million
tourist arrivals

International tourist arrivals to Thailand reached 26.5 million in 2013, an 18.8% increase compared to 2012. The PRC was the largest source market, accounting for 17.5% of international tourist arrivals, followed by Malaysia (11.5%), the Russian Federation (6.6%), Japan (5.8%), the Republic of Korea (4.9%), and India (4.0%). The fastest-growing markets from a substantial base are PRC, with arrivals up by 66% in 2013 to 4.6 million; the Russian Federation, up 33% to 1.7 million; Indonesia, up 33% to 0.59 million, and Viet Nam, up 17% to 0.7 million.

International tourists that visit as part of a package tour stay on average 7.2 days and spend $166 per day, while free independent travelers stay for 10.9 days and spend $146 per day.

Suvannabhumi International Airport in Bangkok is the main air gateway to the GMS and received 15.3 million (58%) of Thailand's international tourists in

[11] Ministry of Hotels and Tourism, Myanmar. 2013. *Myanmar Tourism Statistics 2013*. Yangon.

2013. In the same year Phuket International Airport received 11%, Don Meuang International Airport received 8%, and 3.3% entered through Thailand's land border with the Lao PDR at Nong Khai.

Top destinations are Bangkok (18.5 million international visitors), Phuket (8.3 million visitors), Pattaya (7.1 million visitors), and Chiang Mai (2.3 million visitors). The main purposes of visit are leisure, medical treatment and business.

VIET NAM

Viet Nam received 7.57 million international tourists in 2013, an increase of 10.6% compared to 2012. The PRC accounts for 20.8% of international arrivals, the Republic of Korea 10.2%, Japan 8.2%, and the United States 6.4%.[12] Other important medium- and long-haul markets are Malaysia (4.2%), Australia (4.2%), France (3.1%) and Thailand (3.3%). In 2012, the fastest growing markets from a substantial base were the Republic of Korea (30.7%), Malaysia (28.3%), the Lao PDR (27.2%), Thailand (23.5%), and Japan (19.7%).

International tourists that visit while on a package tour comprise 48% of all international arrivals and stay for 10.8 days on average, while free independent travelers' average length of stay is 12 days. European free independent travelers have the longest average length of stay (15.6 days). In comparison, package tourists from Asian markets stay for 7.8 days on average.

$9.52 billion
tourism receipts

7.57 million
tourist arrivals

[12] Viet Nam National Administration of Tourism. 2012. *Viet Nam Tourism Statistics 2000–2012*. Hanoi.

Visitors from Japan spend the most per day ($160), followed by visitors from Hong Kong, China ($148), Indonesia ($143), Singapore ($136), and Malaysia ($131). The most popular destinations are Ho Chi Minh City, Ha Long Bay, Hanoi, and Da Nang.

The main purposes of travel are leisure (60%), business (17%), and visiting friends and relatives (17%). Culture and nature are the main attractions. Vietnamese cuisine is also an important tourism asset.

DRIVERS OF DEMAND

Exceptional and resilient tourism growth in all GMS countries is underpinned by improved physical connectivity with global markets, diverse tourism assets, convenient tourist visa policies, rapid advances in information technology, dynamic private sector participation and the increasing affluence of developing Asia.

IMPROVED CONNECTIVITY

International airports in the GMS received 276,524 scheduled international inbound flights with a total capacity of 56.2 million seats in 2014 (Table 5). Intra-GMS air traffic is growing rapidly in line with route expansion of low-cost and premium airlines. In 2014 the number of scheduled inbound intra-GMS seats reached nearly 11 million, representing a 29.2% increase compared to 2012 (Table 6). Of the nearly 5.6 million intra-GMS air passengers in 2013 (Table 7), Thailand had the largest share (1.9 million) and Guangxi Zhuang, PRC had the lowest share (0.07 million).

Transnational highways link most major GMS urban centers and there are five international bridges spanning the Mekong River at strategic locations in the North–South, East–West, and Central GMS economic corridors. Overland travel is being made easier by the GMS cross-border transport agreement, which is facilitating growing investment in international tourist coach services and the movement of personal vehicles across borders. Leisure cruising on the Mekong River is also growing, with scheduled services between Phnom Penh, Cambodia and several towns in Viet Nam's Mekong Delta; Jinghong, PRC and Chiang Saen, Thailand; and Chiang Kong, Thailand and Luang Prabang, Lao PDR.

Table 5: International Inbound Scheduled Air Passenger Traffic 2012–2014

Destination	INBOUND FLIGHTS (TOTAL) 2012	2013	2014	CHANGE (%) 2012–2014
Cambodia	20,923	25,233	27,879	33.2
Lao PDR	8,945	10,314	9,881	10.5
Myanmar	9,376	13,548	16,087	71.6
Thailand	133,311	158,711	165,322	24.0
Viet Nam	50,240	54,227	57,355	14.2
Total	**222,795**	**262,033**	**276,524**	**24.1**
	INBOUND SEATS (TOTAL)			CHANGE (%)
Cambodia	3,064,732	3,764,955	4,210,176	37.4
Lao PDR	950,527	1,211,483	1,166,067	22.7
Myanmar	1,517,968	2,307,606	2,740,364	80.5
Thailand	31,392,086	35,944,608	36,664,195	16.8
Viet Nam	10,236,364	10,996,468	11,427,500	11.6
Total	**47,161,677**	**54,225,120**	**56,208,302**	**19.2**

Source: SRS Analyzer via PATA mPower.

Table 6: Intra Greater Mekong Subregion Inbound Air Seats 2012–2014

Destination	INBOUND SEATS (TOTAL) 2012	2013	2014	CHANGE (%) 2012–2014
Cambodia	1,596,146	1,993,343	2,103,717	31.8
Lao PDR	782,844	909,454	884,765	13.0
Myanmar	712,767	1,049,721	1,309,658	83.7
Thailand	2,992,072	3,677,178	3,957,456	32.3
Viet Nam	2,372,559	2,688,624	2,670,673	12.6
Total	**8,456,388**	**10,318,320**	**10,926,269**	**29.2**

Source: Amadeus via PATA mPower.

Table 7: Intra Greater Mekong Subregion Passenger Traffic 2013

Origin	DESTINATION Cam	Lao	Mya	Tha	Vie	Yun	GZ	Total
Cambodia	–	67,233	17,434	360,493	451,666	20,776	4,428	**922,030**
Lao PDR	68,074	–	2,873	242,462	98,948	38,492	9,364	**460,213**
Myanmar	18,270	2,770	–	494,607	26,612	49,232	6,484	**597,975**
Thailand	363,143	243,485	482,936	–	695,194	146,403	35,049	**1,966,210**
Viet Nam	458,930	103,403	26,461	711,841	–	4,886	16,194	**1,321,715**
Yunnan, PRC	4,850	9,366	6,393	35,484	16,402	–	–	**72,495**
Guangxi Zhuang, PRC	18,837	39,328	50,327	138,858	5,372	–	–	**252,722**
Total	**932,104**	**465,585**	**586,424**	**1,983,745**	**1,294,194**	**259,789**	**71,519**	**5,593,360**

Cam = Cambodia; GZ = Guangxi Zhuang, PRC; Lao = Lao People's Democratic Republic; Mya = Myanmar; PRC = People's Republic of China; Yun = Yunnan, PRC; Tha = Thailand; Vie = Viet Nam.

Source: Amadeus via PATA mPower.

DIVERSE TOURIST ATTRACTIONS

The GMS has abundant tourism assets, including the iconic Mekong River, many archaeological sites, lush tropical monsoon forests, rare wildlife, and pristine sea beaches. Diverse cultural heritage such as religious and vernacular architecture, music, literature, cuisine, and indigenous knowledge enrich the subregion and add to the appeal of its striking landscapes and vibrant urban centers. There are 22 properties inscribed on the United Nations Educational, Scientific, and Cultural Organization's (UNESCO) World Heritage List, and 692 internationally categorized natural protected areas covering 547,645 square kilometers. Expansion of the gaming industry is also a key driver of intraregional tourism.[13]

VISA POLICIES

All GMS members of ASEAN have enacted the ASEAN Framework Agreement on Visa Exemption, which exempts citizens of ASEAN member states holding valid national passports from visa requirements (to visit other ASEAN countries party to the agreement) for a period of stay of up to 14 days. Most GMS countries also offer various forms of visa exemption for priority markets based on the ASEAN+3 cooperation framework or bilateral agreements.

Regarding availability of visa-on-arrival, international visitors from up to 180 countries can easily obtain a tourist visa on arrival at 46 land borders and 19 airports, and tourist e-visas are available for travel to Cambodia, Myanmar, and Viet Nam. The World Economic Forum (WEF) ranks Cambodia as the most tourist visa-friendly economy in the GMS, followed by the Lao PDR, Thailand, Viet Nam, Myanmar and the PRC.[14]

While improving, tour operators and independent travelers often mention the lack of reliable information about visa requirements and procedures as an impediment to multicountry travel.

INFORMATION TECHNOLOGY

GMS countries have an optical fiber interconnection in place and are cooperating to promote universal access to information and communication technology, particularly for e-commerce. Broad adoption of digital, mobile and social media technologies is driving self-service and enabling spontaneous and immediate travel bookings.

In all major GMS source markets consumers increasingly use social media to decide where to spend their holiday, which suppliers to use, and as a platform to share information, images and videos during and after a holiday. For

[13] Ashton, H, and L Korpi. 2009. *Asia Awakens: The Growth of Casino Tourism*. Gambling Compliance. London.

[14] World Economic Forum. 2015. *The Travel and Tourism Competitiveness Report 2015*. Geneva.

example, TripAdvisor's various branded sites, including www.daodao.com in the PRC, reach 315 million unique monthly visitors, and contain more than 190 million reviews covering over 4.4 million accommodations, restaurants, and attractions.[15]

Social media can have a significant impact on the inspiration and planning phases of travel by potential new or repeat visitors. A favorable review on Facebook, Instagram, Sina Weibo, TripAdvisor, Twitter, WeChat or YouTube can also help boost tourism in new destinations. Similarly, tourism bloggers are an important source of information on destinations and products. Social media penetration ranges from about 20% to 60% in Asian markets, where the typical travel consumer is very tech savvy and owns a range of mobile devices. Accor, the largest international accommodation group in Asia, reports that 80% of its clients follow hotel brands on social media, with the Chinese and Vietnamese most keen, and clients from Japan, Australia and New Zealand the least.








[15] www.tripadvisor.com. Accessed 5 December 2014.

GROWING AFFLUENCE OF DEVELOPING ASIA

According to ADB, the steady economic growth enjoyed by developing Asia over the past two decades is expected to continue. Asia's gross domestic product (GDP) expanded by 6.1% in 2013 and GDP is forecast to rise 6.2% in 2014 and 6.4% in 2015.[16] Most households in Japan, the Republic of Korea, and Singapore have annual income well over $15,000, which is an enabler of medium- and long-haul outbound tourism. Meanwhile, GDP per capita is growing quickly in most ASEAN countries and the PRC (Table 8). This will continue to drive the surge in short-haul outbound tourism. Increasing wage employment with paid holidays is providing further impetus for both domestic and outbound tourism. Higher government spending on social programs such as health insurance and pensions positively influence tourism growth by reducing the need for precautionary savings, which is particularly important for the aging populations in Thailand, the Republic of Korea, Japan, and the PRC.

Table 8: Economic Indicators, Key Asian Source Markets

	POPULATION (THOUSAND)	GDP PER CAPITA ($)	ANNUAL GDP GROWTH (%)	AVERAGE MONTHLY WAGE ($)
Cambodia	14,365	2,260	7.0	121
India	1,206,000	3,444	4.4	...
Indonesia	240,676	4,458	5.8	174
Japan	126,921	31,058	1.5	4,081
Lao PDR	6,396	2,682	8.2	119
Malaysia	28,276	15,192	4.7	1,881
Myanmar	51,931	1,611	7.5	...
People's Republic of China	1,356,707	8,356	7.7	496
Philippines	93,444	3,991	7.2	206
Republic of Korea	45,454	29,219	2.8	2,624
Singapore	5,079	54,139	4.1	3,547
Thailand	66,402	8,663	2.9	357
Viet Nam	89,047	3,195	5.4	181

Lao PDR = Lao People's Democratic Republic, ... = data not available.
Sources: IMF World Economic Outlook Database, 2014; International Labor Organization; United Nations World Population Prospects, 2012; World Bank World Development Indicators, 2013.

[16] ADB. 2014. *Asian Development Outlook 2014*. Manila.

IMPEDIMENTS TO MORE INCLUSIVE GROWTH

Despite the favorable outlook for tourism, the distribution of benefits in the GMS is highly asymmetrical (Table 9). In 2013, Thailand generated $39.2 billion in international tourism receipts, compared to $0.92 billion in Myanmar, and $0.59 billion in the Lao PDR. There are also wide disparities in average revenue per international visitor: Thailand and Viet Nam generate over $1,200 per international visitor, compared to $605 in Cambodia and only $157 in the Lao PDR. As mentioned, Angkor Wat receives 44% of Cambodia's international tourists while 43% of international arrivals to the Lao PDR visit only Vientiane Capital. In Thailand, Phuket receives 31% of Thailand's international tourists and the resort town of Pattaya receives about 27%. In Viet Nam, half of all international tourists visit Ho Chi Minh City and 32% congregate in Ha Long Bay. The concentration of international tourist arrivals is even more pronounced in Myanmar, where Yangon accounts for 94% of overnight visitors.

Table 9: Tourism Indicators in the Greater Mekong Subregion, 2013

	CAMBODIA	LAO PDR	MYANMAR	THAILAND	VIET NAM
International tourist arrivals	4,210,165	3,779,490	2,044,307	26,546,725	7,572,352
International receipts ($ billion)	2.54	0.59	0.92	39.28	9.52
Average revenue per visitor ($)	605	157	452	1,480	1,257
Direct contribution to GDP (%)	10.40	4.70	1.60	9.00	4.6
Tourism investment ($ billion)	0.34	0.32	0.19	7.46	3.91
Tourism employment	735,000	120,000	338,000	2,563,000	1,899,000
Women's share of employment (%)	54	50	–	65	70
Scheduled international inbound flights	25,233	10,314	13,533	158,711	54,227
Scheduled inbound air seat capacity	3,764,955	1,211,483	2,307,606	35,944,608	10,996,468
Arrivals by air (%)	47.90	32.40	44.03	80.99	78.97
Arrivals by land (%)	50.30	67.60	55.97	16.35	18.48
Arrivals by water (%)	1.80	–	–	2.66	2.55
Hotels	545	2,359	923	12,415	3,831
Hotel rooms	29,937	39,782	34,834	540,088	147,396
Registered tour guides	–	604	3,667	52,900	15,214

GDP = gross domestic product, GMS = Greater Mekong Subregion, Lao PDR = Lao People's Democratic Republic.
Sources: National Tourism Organizations; ADB. 2009. 'Gender-Related Impacts of the Global Economic Slowdown in the Greater Mekong Subregion: Emerging Trends and Issues'. Manila; Innovata; World Travel & Tourism Council.

SHORTAGE OF QUALITY TOURISM SERVICES IN SECONDARY DESTINATIONS

The past focus on promoting a limited number of flagship destinations has led to a shortage of investment in tourism facilities and services in secondary destinations, despite an abundance of good cultural and natural assets. A lack of affordable tourism vocational education and training is another underlying cause of substandard service quality in many secondary destinations.

INADEQUATE MARKETING AND PROMOTION

While improving, all GMS countries except for Thailand are ranked low by the WEF for effectiveness of marketing and branding to attract international tourists. Thailand is ranked 23 of 141 economies assessed, the Lao PDR 47, PRC 53, Cambodia 61, Myanmar 83, and Viet Nam 102. The main constraints are insufficient public financial resources for marketing and promotion, poor coordination between industry stakeholders, and the lack of capacity to design and implement effective destination marketing campaigns, particularly using online tools like social media to reach out to consumers directly.

INEFFECTIVE DISSEMINATION OF TOURISM INFORMATION

GMS NTOs and the private sector disseminate tourism information using the Internet, social media, online travel agencies, television and print media. Well-resourced NTOs also have a large presence at international tourism trade shows such as the International Tourism Borse in Berlin and Singapore, World Travel Market in London, and the China International Travel Mart in Shanghai. All GMS NTOs and industry associations actively participate in the annual ASEAN Tourism Forum and most regional tourism trade events. The Mekong Tourism Forum (MTF) is organized by a GMS country each year in cooperation with MTCO to promote sustainable tourism in secondary destinations. Despite these efforts, both tour agents and international tourists frequently mention the lack of accurate and easily accessible online tourism information as a major impediment for planning multicountry tours.

The Tourism Authority of Thailand website provides a good-practice example of effective electronic dissemination of tourism information (Table 10).[17] In comparison, the MTCO website www.mekongtourism.org could do more to focus on specific audiences and make the online experience more relevant and fully utilize social media to distribute content and drive traffic to the site.

[17] The global rank is calculated by the web-analytics firm Alexa using a proprietary methodology that combines a site's estimated average of daily unique visitors and its estimated number of page views over the past three months. www.alexa.com. Accessed 28 November 2014.

Table 10: Traffic Rank of Tourism Websites in the Greater Mekong Subregion

WEBSITE	REGIONAL COMPARATOR	GLOBAL
www.tourismthailand.org	1	35,058
www.vietnamtourism.com	2	235,725
www.tourismcambodia.org	3	494,245
www.myanmartourism.org	4	640,707
www.tourismlaos.org	5	862,858
www.cnto.org	6	1,054,852
www.aseantourism.travel	7	1,342,275
www.ecotourismlaos.com	8	2,534,982
www.mekongtourism.org	9	4,253,969
www.aseanta.org	10	14,612,713

Source: www.alexa.com (November 2014).

SEASONALITY

Analysis of seasonal differences in the aggregate number of international tourist arrivals to Cambodia, the Lao PDR, Myanmar, Thailand, and Viet Nam in 2013 shows there is a 27.7% difference in visitor volumes between the peak month of December and the slowest month, May (Table 11). The largest difference is in Cambodia (47%) followed by Thailand (41%) and Myanmar (41%). The difference between the peak and low season in Viet Nam is 38%. While industry stakeholders consider seasonality a major constraint in the Lao PDR, the difference in international tourist arrivals between the busiest month, January, and slowest month, June, is 27%. GMS-wide, the high season generally includes the cooler and drier months of October through March, while the low season coincides with the hotter, wetter months of April to September. When implementing promotional strategies to counter seasonality, it is important to consider timing, as international leisure tourists typically begin planning vacation travel three to four months in advance, and select their destination about one to two months before departure.

Table 11: International Inbound Trips by Month 2013 ('000)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Cambodia	404	385	382	327	292	301	338	342	283	334	386	431
Lao PDR	345	349	308	331	296	273	297	308	282	326	331	328
Myanmar	104	110	104	81	78	71	79	77	78	104	125	121
Thailand	2,317	2,367	2,322	2,013	1,846	2,056	2,223	2,469	2,056	2,065	2,399	2,598
Viet Nam	651	570	587	613	558	567	658	676	614	628	731	772
Total	**3,821**	**3,781**	**3,703**	**3,365**	**3,070**	**3,268**	**3,595**	**3,872**	**3,313**	**3,457**	**3,972**	**4,250**

Note: Numbers rounded. Myanmar data for 2014.
Source: National Tourism Organizations.

SCARCITY OF AGGREGATED MARKET RESEARCH

All GMS NTOs collect tourism statistics and publish annual tourism statistics reports by country. With a small investment, this exercise could provide more powerful insights into travel patterns and better market intelligence if visitor surveys were standardized and the results of an aggregated, GMS-wide analysis were published annually. More can be done to use customer reviews and social media as a source of market intelligence to improve destination marketing campaigns and guide decisions on which travel trade shows to attend. Knowledge sharing through an online Mekong Tourism Library could support this process.

INSUFFICIENT PUBLIC-PRIVATE PARTNERSHIPS

Despite the recent establishment of multi-stakeholder tourism marketing and promotion boards in some GMS countries, public–private collaboration for joint marketing remains weak. Greater effort is needed to bring public and private actors together to increase the effectiveness and efficiency of destination marketing and improve competitiveness. Strengthening partnerships is also essential for maximizing economies of scale, creating demand in secondary destinations, delivering on the brand promise, and stimulating innovation.

LOW 'MEKONG' BRAND AWARENESS IN MEDIUM- AND LONG-HAUL MARKETS

Currently, GMS tourism has two distinct brands (Table 12). The Mekong Tourism brand and logo were established in the early 2000's as an institutional brand for GMS tourism cooperation and is used ad-hoc to promote the region. However, it arguably does neither well.[18] The consumer-oriented Explore Mekong brand and logo were subsequently developed in 2008 but have had little exposure in consumer markets due to weak implementation. This practice of dual branding causes confusion. There is an urgent need to review the GMS single destination branding effort and agree on how to make it more relevant with consumers. Products, choices, value propositions, unique selling points and experiences should be clearly defined and reflected in the revised brand strategy.

[18] Semone. P. and Metin, K. 2011. 'Towards a Mekong Tourism Brand'. *Asia Pacific Journal of Tourism Research*.

Table 12: Mekong Brand History and Objectives

Mekong Tourism	The Mekong Tourism brand concept and logo were created in the early 2000's when the Agency for Mekong Tourism Activities (AMTA) was orchestrating GMS tourism marketing. AMTA was discontinued in 2005 when the responsibility for GMS tourism marketing was taken on by MTCO. In 2008 the GMS TWG evaluated the Mekong Tourism brand and agreed the concept and logo were overly focused on promoting the MTCO as an institution rather than the Mekong as a subregional tourism destination. The underlying meaning of the brand is arguably too abstract and does not convey key destination features of the subregion.
EXPLORE MEKONG SIX COUNTRIES...ONE RIVER	The Explore Mekong logo and "Six Countries – One River" slogan was developed in 2008 through a collaborative branding exercise directed by the GMS TWG. The key destination features considered were nature, community and culture. The objective of the brand is to increase awareness of the GMS by creating a strong and distinct brand image and clear positioning in target markets, facilitate awareness of the subregion, and complement existing national tourism marketing and promotion campaigns with a unified subregional program. Due to limited resources and weak implementation, the Explore Mekong brand has not been effectively introduced to consumer markets.

Source: Mekong Tourism Coordinating Office.

GREATER MEKONG SUBREGION KEY SOURCE MARKETS

The profiles of key source markets that show an affinity for culture- and nature-based tourism, multicountry tours, and good prospects for travel in GMS secondary destinations are provided below and summarized in Table 13. Source markets featured (listed alphabetically) are among the top generating markets in the GMS.

AUSTRALIA

Overseas travel is an integral part of the Australian lifestyle. The nation of 23.7 million people generated 10.7 million international departures for the 12 months ending September 2014.[19] According to the UNWTO *World Tourism Barometer*, Australians spent $28.5 billion during their travels abroad in 2013, placing them 8th in the world by total spend.[20] In that same year, Asian destinations received around 6.7 million Australian arrivals, with Southeast Asia capturing close to 64%, followed by Northeast Asia (28%). Interest in Southeast Asia is rising, with a compound annual growth rate (CAGR) of 8.7% during 2008–2013, compared to 3.3% growth for Northeast Asia. GMS destinations welcomed close to 1.52 million Australian arrivals, with Thailand (61%) and Viet Nam (21%) receiving the bulk. Growth into GMS destinations is about the same as Southeast Asia. According to Euromonitor International, annual outbound travel growth will likely drop to an average of 4% through

8th
biggest spenders in the world

[19] Australian Bureau of Statistics. 2014. *Overseas Arrivals and Departures.*

[20] United Nations World Tourism Organization. October 2014. *World Tourism Barometer.* Madrid.

2018 due to a weakening Australian dollar and softening economy. Australians traveling internationally tend to place more effort in planning and are comfortable purchasing travel-related products and services online.[21] Main considerations include value for money, unique experiences, and spending within budget. Australians' peak leisure travel period is December and January.

FRANCE

Approximately 75% of the French population travels at least once a year, mostly on domestic trips. Annual international outbound departures have been relatively consistent over recent years at around 25–26 million.[22] Arrivals into Asia have been steadily growing, with a CAGR of 6.5% between 2008 and 2013. Growth has been higher for Southeast Asia, which surpassed West Asia (Israel and Turkey) to become the leading Asian subregional destination in 2013. Arrivals into GMS countries exceeded 1 million for the first time in 2010 and progressively grew to 1.18 million in 2013.

Trips to Asia and the Pacific tend to be longer at around 16 nights compared to an overall average of nine nights. French outbound travelers are inclined to organize their own trips, arrange and book holidays online, and thoroughly research holiday destinations on the Internet.[23] However, recommendations by friends and family remain a significant factor in their final decision.

Main motivations for selecting a destination are driven by a combination of culture, relaxation and experiential discovery, with a strong emphasis on local cuisine. French international travelers also value well-kept surroundings, landscape conservation, and engaging in cultural activities and sports in natural settings. There is a recent trend towards mixing themes, such as combining a beach holiday with trekking.

GERMANY

The German market generates close to 90 million outbound trips annually, of which more than one quarter last four nights or more. In 2013, German outbound travelers spent $91 billion, the third highest in the world behind PRC and the USA.[24] German arrivals into Asia reached just over 8.4 million in 2013, with the largest share (47%) visiting West Asia (Turkey and Israel). Southeast Asia stood second at around 1.5 million arrivals, with a CAGR of 6.1% between 2008 and 2013. GMS destinations welcomed around 1.08 million arrivals with Thailand capturing over two-thirds of that volume.

Germans tend to organize their travel itineraries two to six months in advance. They prefer package holidays, especially those that include accommodation.

[21] Singapore Tourism Board. 2014. *STB Market Insights–Australia.* Singapore.
[22] OECD. 2012. *OECD Tourism Trends and Policies.* OECD Publishing.
[23] http://www.euromonitor.com/tourism-flows-outbound-in-france/report.
[24] United Nations World Tourism Organization. October 2014. *World Tourism Barometer.* Madrid.

This trend may partially be driven by the EU Travel Package Directive and the so-called "Frankfurt Table", which allows Germans to pursue legal redress if the product promised is not delivered.

Germans place great emphasis on the advice and recommendations of relatives and friends when selecting a travel destination, although they have increased their Internet use in recent years. Relaxation, sun and beach, good weather and opportunities to enjoy nature drive their destination preferences. They also tend to be price sensitive, mainly seeking a good ratio between quality and cost. In recent years specialized travel has become more noticeable, especially in wellness and spa activities. There is a growing demand for cruises as well.

INDIA

India generated 16.6 million outbound travelers in 2013 and forecasts suggest this number will exceed 50 million by 2020. Southeast Asia captured close to 3 million arrivals in 2013, of which Thailand welcomed more than 1 million (33%) followed by Singapore (31.6%) and Malaysia (22%). According to Euromonitor International, a depreciating rupee in 2013 shifted demand towards less expensive international destinations including Southeast Asia, with Thailand, Malaysia, and Viet Nam among the most visited.[25]

seeking **good value for money**

According to the Singapore Tourism Board, Indian travelers' top travel considerations are budget, available vacation days, value for money, visiting friends and relatives, and traveling with companions. Indians' travel concerns are language, exchange rates, the visa process, and a preference for familiar food.

The profile of Indian travelers varies. In Thailand, they tend to stay for seven days, with one-third on a package tour. Average spending in Thailand is almost 20% higher than the overall average of $150 per person-day. The Internet, mainly through mobile users, is a key mechanism for accessing the Indian traveler, reinforced by value, word of mouth, familiarity with food and language, and range of attractions and activities.

JAPAN

Japanese outbound travel tends to be cyclical. Currently the trend is downward, with a 5.5% contraction in 2013 to just under 17.5 million departures. The Republic of Korea, PRC, the USA and Canada are the most visited destinations, along with the Pacific islands of Hawaii, Guam and the Northern Marianas. Northeast Asia is the most popular subregion within Asia Pacific, accounting for about 40% of Japanese arrivals to the region, however its relative share has declined over the past five years from almost 50% in 2009 to 46% in 2012 and 40% in 2013. This is largely due to a significant increase in

[25] http://www.euromonitor.com/tourism-flows-outbound-in-india/report.

visiting
natural & scenic
attractions

Japanese arrivals to Southeast Asia, jumping from around 3.2 million in 2009 to more than 4.7 million in 2013.

Thailand received 60% of Japanese arrivals into the GMS in 2013, followed by Viet Nam (24%) and Cambodia (8%). Shopping remains the top activity, though visiting natural and scenic attractions is a close second, followed by visits to historic and cultural attractions.[26] Preferred activities broadly vary when assessed by gender, age and marital status. Overall, leisure travel dominates (>70%) followed by business trips (12%) and visiting friends and relatives (7%). Travelers tend to be male (55%) and mostly middle-aged, though the percentage of women travelers, especially middle-aged women, is increasing.

MALAYSIA

Malaysians took more than 9.5 million trips to Asian destinations in 2013, not counting significant overland arrivals into Singapore. Outbound travel climbed 3%, marginally slower than 2012 growth, with spending of around $12.2 billion.[27] Euromonitor International predicts departures will grow at an annual rate of around 4% to 2018. In 2013 Malaysia maintained its ranking of 24 on the UNWTO international tourism expenditure list.

sightseeing,
local food
& culture

The Singapore Tourism Board reports most international vacations last one week and long-haul trips stretch to two weeks.[28] Southeast Asia captured around 63% of Malaysian arrivals into Asia in 2013, followed by Northeast Asia with over 29%. Southeast Asia boasted a CAGR of 9.5% during 2008–2013 compared to Northeast Asia at 4.9%.

GMS destinations collectively welcomed more than 3.9 million Malaysians in 2013, with a CAGR of about 11% during 2008–2013. Myanmar, Viet Nam and Guangxi Zhuang, PRC recorded the highest CAGR at 36.9%, 14.2%, and 12.3%, respectively. Thailand received over 77% of arrivals to the GMS in 2013, followed by Viet Nam with close to 9%.

Malaysians are heavy media consumers and several channels influence their travel decisions. Mobile devices and the Internet are popular, with some 80% of the estimated 19.2 million online users engaging in social networking. Malaysians normally combine sightseeing with tasting local food and experiencing culture. Women often place shopping on their agendas, while families focus on activities such as theme parks or zoos. Malaysians seek good value for money and many require halal food and Muslim prayer facilities.

[26] Japan Tourist Board. 2013. *All About Japanese Overseas Travelers*. Tokyo.
[27] United Nations World Tourism Organization. October 2014. *World Tourism Barometer.* Madrid.
[28] Singapore Tourism Board. 2014. *Market Insights Malaysia*. Singapore.

PEOPLE'S REPUBLIC OF CHINA

According to the UNWTO, 98 million outbound Chinese travelers spent $129 billion in 2013, excluding transportation costs. Southeast Asia received 15% of Chinese arrivals into Asia and the Pacific in 2013. Thailand received 4.7 million or 64% of all Chinese arrivals into the GMS, with an impressive 42% CAGR for 2008–2013. Chinese travelers use the Internet as their main source of information and are active social networkers.[29] Friends and travelogues are also important sources of travel information.

shopping
58% of
travel budget

The diverse Chinese market shows high demand for virtually every tourism product, although shopping is the top expenditure item, accounting for nearly 58% of the travel budget compared to lodging at 18%.[30] Classic sightseeing is the main activity but more travelers are seeking in-depth travel experiences, such as exploring the historical, cultural and architectural features of destinations. They prefer middle- to upper-end accommodation. Key concerns include language barriers, personal and property safety, and cultural differences.

REPUBLIC OF KOREA

Koreans took about 14.85 million outbound trips in 2013: 57% for leisure, 25% for business, 12% for education and training, and 5% for visiting friends and relatives. Expenditure per trip averages $1,202 excluding transportation.

The top 10 destinations for Korean tourists are all in Asia, except for the United States of America. Thailand is the leading GMS destination and in 2013 it captured 44% of all Korean arrivals to the subregion. Cambodia and Viet Nam are the next most-visited GMS destinations, followed by Yunnan, PRC and Guangxi Zhuang, PRC. Myanmar and Lao PDR have both recently seen very strong growth from a small base, with CAGRs of about 35% during 2009–2013.

culture & nature-based
activities

When traveling abroad, Koreans seek diverse culture and nature-based activities and new experiences. The segment of the traveling population under 30 years of age is mainly interested in historic sites and urban tourism, though for some global destinations young Koreans travel to study. Those in the 50-plus age bracket tend to travel for culture and lifestyle. Overall, Koreans seek outdoor adventure and wellness activities so they can relax in a safe, clean environment. However, repeat visitation for leisure is not common.[31]

[29] Nasolomampionona, R.F. 2014. 'Profile of Chinese Outbound Tourists: Characteristics and Expenditures'. *American Journal of Tourism Management.*

[30] World Tourism Cities Federation & Ipsos. 2014. *Market Research Report on Chinese Outbound Tourist (City) Consumption.*

[31] Korea Tourism Organization. 2014.

seeking
beach & sun

RUSSIA

Russian outbound travel grew 15% in 2013 to reach 51 million departures, with the Ukraine, Finland and Kazakhstan the most visited destinations. Destinations such as Greece saw the highest inbound growth (65%), followed by India (64%), Thailand (39%) and the United Arab Emirates (34%).[32] Spending on outbound travel was also strong at $53.5 billion, climbing from 5th to 4th on the UNWTO international tourism expenditure rankings.

According to Euromonitor International, the number of outbound trips by Russians is expected to increase at a CAGR of 5% through 2018. The slowdown is mainly due to a faltering economy and development of more domestic destinations. Inbound trips to Asia have grown from 6.5 million in 2008 to almost 10.2 million in 2013, representing a CAGR of 9.2% over that period. Southeast Asia did much better with a CAGR of 33% during the same period. Interestingly, Northeast Asia is experiencing a downturn, with Russian arrivals falling from 3.5 million in 2008 to 2.8 million in 2013.

Russian outbound travelers prefer the beach and sunny destinations with warm weather, and are also interested in cultural, historical and religious sights.

seeking
nature

SINGAPORE

Air and sea departures from Singapore reached 8.65 million in 2013 with 80% traveling by air.[33] Singaporeans spent $24.6 billion on international travel in 2013, ranking 11th on the UNWTO international tourism expenditure list. Southeast Asian destinations received 85% of Singaporean outbound tourists into Asia during 2013 and this share has held steady since 2009. Singaporeans generated close to 1.5 million arrivals to GMS destinations in 2013 and were growing at an average annual rate of 11% in Thailand, 18% in Guangxi Zhuang, PRC, and 35% in Myanmar between 2008 and 2013.

According to Euromonitor International, outbound travel from Singapore is expected to continue growing over the next few years, driven by the availability of low-cost air fares.[34] Another major factor is discounting strategies by travel retailers for group travel. These include one-for-one travel packages and tiered pricing for second, third, or more travelers. Singaporeans tend to seek nature, coastal environments, and beach holidays.

[32] Euromonitor International. 2014. *Tourism Flows Outbound in Russia.* London.
[33] Department of Statistics Singapore. 2015. *Monthly Digest of Statistics.* Singapore.
[34] Euromonitor International. 2014. *Tourism Flows Outbound in Singapore.* London.

THAILAND

Outbound departures from Thailand reached 6 million in 2013. Across the GMS, Thailand generated close to 3.1 million arrivals in 2013 with Lao PDR capturing the most (67%), followed by Yunnan Province, PRC and Viet Nam with close to 9% each. The CAGR for Thai tourists into GMS destinations was 16.2% during the period 2008–2013. A significant portion of travel between Thailand and some neighboring GMS countries is border traffic, such as the case with Lao PDR, where in 2013 around 1.1 million border passes (about half of all Thai arrivals) were issued to inbound Thai day-trippers as distinct from overnight visitors. Thai outbound tourists spent $6.7 billion in 2013 and were ranked 33rd on UNWTO's international tourism expenditure list. Thais travel both long- and short-haul, with the former preferred for more extended holidays, but neighboring destinations have strong appeal for short-duration holidays. There are two traditional peaks: in April during Thai New Year and between October and December.

significant
day-trippers
to GMS countries

UNITED KINGDOM

Residents of the United Kingdom took 58.5 million outbound trips in 2013 with around 85% either traveling on a holiday (64%) or visiting friends and relatives (21%).[35] The United Kingdom was the fifth largest outbound tourist market in 2013 and spent in excess of $50 billion.[36] European destinations were the most visited (78%) and generated some 367 million nights with a total spend of around $32.5 billion. North America saw around 3.4 million arrivals, for about 51 million nights and expenditures of almost $6 billion.

Arrivals into Asia reached 7.7 million in 2013 with a CAGR of 3.5% during 2008–2013. West Asia captured 35% of arrivals into Asia in 2013, followed by Southeast Asia with just over 30%, then Northeast Asia (20%) and South Asia (14%). The GMS received 1.52 million tourists from the United Kingdom in 2013 with Thailand taking the largest share (over 900,000), followed by Yunnan Province, PRC (191,000), Viet Nam (185,000) and Cambodia (124,000). Other GMS destinations received fewer than 100,000 each. Travelers from the United Kingdom tend to make travel arrangements independently and few choose package tours. They use online channels for research and booking, though travel agencies still play an important role for some travel reservations. Recommendations from family and friends as well as personal experiences still strongly influence travel decisions but the Internet and particularly social networks are gaining greater importance.

5th largest
outbound tourist market

Most sought are beach experiences, nature, urban and cultural tourism. Accommodation quality and pricing strongly influence the selection of holiday destinations.

[35] United Kingdom. 2015. House of Commons Standard Note SN/EP/6022.
[36] United Nations World Tourism Organization. October 2014. *World Tourism Barometer.* Madrid.

seeking
food & new experiences

UNITED STATES OF AMERICA

The American market generated 130 million outbound trips in 2013 though most outbound travelers visited neighboring Mexico and Canada. Residents departing by air to international destinations reached 61.9 million in 2013, increasing from 59.2 million in 2011, but behind the 64 million reported in 2007.[37] Still, the current upward momentum appears to be holding, with year-on-year growth running at 10% for the first 10 months of 2014. Growth to Asia is expanding by 6.3%.

American visitors to Asia stay an average of 26 nights, are mainly males aged around 40 years (61%), and have previously traveled abroad (94.3%). During 2003–2013, departures to Asia had a CAGR of 4.3%, while Europe was relatively static (0.4%) and growth in travel to the non-Americas was only 1.4%. Within Asia, West Asia was the most dynamic with a 15.7% CAGR during 2003–2013. Northeast Asia captured the bulk of the 11 million American arrivals into Asia in 2013 (49%), followed by Southeast Asia (28%), West Asia (13%) and South Asia (10%).

The top three motivators for travel into Asia are visiting friends and relatives (57%), vacation/holiday (43%) and business (21%). Americans enjoy food, culture, health and wellness, shopping, and unique experiences.

VIET NAM

main expenditure:
shopping

Actual volumes of international arrivals from Viet Nam may differ from reported statistics, as some countries still classify Viet Nam as "other Asia" or "other countries" in tourism statistics reports. Nevertheless, arrivals from Viet Nam into Asia number at least 5 million per year and are mostly centered on destinations within Southeast Asia. That subregion collectively received about 64% of Vietnamese arrivals into Asia in 2013 with Northeast Asia accounting for an also-significant 35% share.

Growth into the GMS averaged close to 24% per annum (CAGR) during 2008–2013, with Lao PDR, Cambodia and Thailand being the most popular destinations. Viet Nam is the largest source market for Cambodia, generating over 850,000 visitors annually. Lao PDR receives over 900,000 Vietnamese visitors each year, though less than 5% arrive by air, while Thailand receives around 800,000 Vietnamese visitors annually that collectively spend more than $590 million.

The main sources of expenditure are shopping (31%), accommodation (27%), and food and beverage (17%).[38] The main reasons for travel are holiday, shopping, medical treatment, and education.

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[37] U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office.

[38] Thailand Ministry of Tourism and Sports. 2012. *Annual Statistical Report.* Bangkok.

Table 13: Characteristics of Key Source Markets in the Greater Mekong Subregion

	POPULATION (MILLIONS)	OUTBOUND TOURISTS (MILLIONS)	INTERNATIONAL TOURISM EXPENDITURE ($ BILLION)	GDP PER CAPITA ($)	AVERAGE ANNUAL LEAVE (DAYS)	MAIN INTERESTS
Australia	23.9	11	29	67,458	20	Visiting friends and relatives, unique experiences
France	65.0	26	43	42,503	30	Culture, local cuisine, experiential discovery
Germany	82.6	90	91	46,269	30	Sun, beach, nature, wellness and spa
India	1,252.0	17	12	1,499	20	Visiting friends and relatives, varied activities, shopping
Japan	126.8	17.5	22	38,634	13	Shopping, nature, sightseeing, local food
Korea	49.8	15	18	25,977	10	Culture, nature, wellness, soft adventure, new experiences
Malaysia	30.7	10	12	10,538	14	Sightseeing, shopping , local food, culture, family vacations
PRC	1,401.6	129	129	6,807	5	Shopping, sightseeing, experiential travel
Russia	142.1	51	54	14,612	28	Sun, warm destinations, cultural and historical sights
Singapore	5.6	9	25	55,182	14	Nature, coastal environment and beach holidays
Thailand	67.4	7	7	5,779	5	Sightseeing, shopping, food, culture, nature, gaming
UK	63.8	59	53	41,787	25	Rest and relaxation, nature, culture, food
USA	325.1	130	105	53,042	12	Visiting friends and relatives, shopping, sightseeing, food
Viet Nam	93.4	5	2	1,911	10	Leisure, shopping, medical care, education

Korea = Republic of Korea, PRC = People's Republic of China, UK = United Kingdom, USA = United States of America.

Notes: Many countries offer increased paid leave days after specified periods of employment. Figures cited here align with the minimum days offered. Figures are rounded.

Sources: Asian Development Bank estimates, National Tourism Organizations, United Nations World Tourism Organization.

CONSUMER MOTIVATIONS TO TRAVEL

According to a global survey of 39,721 travel consumers in 2014, the main factors that motivate people to travel are the appeal of unique and interesting experiences while on vacation, and opportunities to broaden knowledge and enrich understanding of the world (Table 14). About 36% of tourists vacation as a couple, followed by family travel (34%) and travel with friends (15%). Not surprisingly retirees aged 55 years and older tend to vacation for longer periods while the Millennials (aged 18–34 years) take shorter breaks. City and cultural excursions are the most popular type of trips (35%) followed by sun, beach, and sea vacations (28%), activity and adventure (15%), and back-to-nature (36%).[39] The rich diversity and authenticity of the Mekong tourism product is consistent with travelers' high demand for unique and interesting experiences. However, the lack of consumer awareness about the subregion in key markets reinforces the need for better joint marketing and promotion.

Table 14: Motivations to Travel

Travel Attributes	Global Benchmark	Australia	Germany	Japan	Thailand	UK	USA
	(%)						
Unique and interesting experiences	55	64	63	48	36	52	66
Broaden knowledge and enrich understanding of the world	44	49	43	43	32	41	45
Help enjoy life to the fullest	45	45	38	57	51	45	45
Let go and feel completely carefree	33	19	27	31	40	28	25
Immerse in local life and culture	36	48	50	31	35	37	41
Help meet new people and create memories	21	23	30	15	29	23	18
Enjoy special moments together with loved ones	42	38	42	35	41	49	47
Strengthen relationships with those close to me	19	14	16	16	25	19	22
Sense of exhilaration	18	10	10	40	30	8	12
Challenge to try something new	16	14	12	20	20	10	13
Restore sense of harmony and balance	17	12	13	15	7	20	14
Feel looked after and taken care of	6	9	10	3	7	12	7
Provide enviable experiences	14	16	14	6	18	15	12
Feel special and spoiled	10	14	7	6	12	14	11
Time out to think and regain control of life	12	9	8	20	12	13	8
Feel organized and avoid surprises	10	11	9	7	3	9	11

UK = United Kingdom, USA = United States of America.
Source: Trip Advisor. http://www.tripadvisor.com/TripBarometer.

[39] Ipsos and Trip Advisor. 2014. Trip Barometer 2014. *Psychology of Travel Global Report.*

SUMMARY OF PRODUCTS AND TARGET MARKETS

Based on the situational analysis and consumer motivations to travel, Table 15 matches products and experiences with GMS priority source markets.

Table 15: Products and Priority Markets

	AUSTRALIA	FRANCE	GERMANY	INDIA	JAPAN	KOREA	MALAYSIA	PRC	RUSSIA	SINGAPORE	THAILAND	UK	USA	VIET NAM
Built heritage	Moderate	Strong	Strong	Strong	Moderate	Strong	Strong	Strong	Moderate	Moderate	Strong	Strong	Moderate	Moderate
Ethnic and religious heritage	Moderate	Strong	Strong	Strong	Moderate	Strong	Strong	Strong	Moderate	Moderate	Strong	Strong	Moderate	Moderate
Cuisine	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Strong	Moderate	Moderate	Strong	Strong	Strong	Strong
Soft nature-based activities	Strong	Strong	Strong		Strong	Strong	Strong	Moderate	Moderate	Strong	Strong	Strong	Moderate	Moderate
Pilgrimage and religious festivals		Moderate		Strong			Strong				Strong			Moderate
MICE		Moderate		Moderate	Moderate			Moderate			Strong		Moderate	Strong
Cruise (river and sea)	Moderate		Strong			Moderate				Strong		Moderate	Moderate	
Ecotourism in protected areas	Strong	Strong	Strong		Strong	Strong	Strong	Moderate	Moderate	Strong	Strong	Strong	Moderate	Moderate
Sporting events	Strong	Strong		Moderate						Moderate	Moderate			Moderate
Adventure tourism	Strong	Strong	Moderate		Moderate	Moderate		Moderate		Moderate	Moderate	Moderate	Moderate	
Wellness	Moderate	Strong	Strong	Strong	Strong	Moderate	Moderate	Moderate	Strong	Strong	Moderate	Moderate	Strong	Moderate
Shopping	Strong	Moderate	Moderate	Strong	Strong	Strong	Strong	Strong	Strong	Moderate	Moderate	Moderate	Strong	Moderate

PRC = People's Republic of China; Korea = Republic of Korea, UK = United Kingdom, USA = United States of America, MICE = meetings, incentives, conferences, exhibitions.

Note: ■ indicates strong preference and ■ indicates moderate preference.

OTHER SUBREGIONAL TOURISM COOPERATION INITIATIVES IN ASIA AND THE PACIFIC

GMS countries benefit from being part of both the GMS and ASEAN tourism cooperation initiatives. There are a number of other groupings throughout Asia and the Pacific with objectives similar to those of the GMS and ASEAN. These subregional groupings engage in joint tourism marketing activities, capacity building, knowledge sharing, and strategy development.

BRUNEI, INDONESIA, MALAYSIA, PHILIPPINES EAST ASEAN GROWTH AREA

Subnational areas of this grouping include (i) the provinces of Kalimantan, Sulawesi, Muluku and Papua in Indonesia; (ii) the states of Sarawak and Sabah and the federal territory of Labuan in Malaysia; and (iii) the provinces of Mindanao and Palawan in the Philippines. Brunei Darussalam is a full state member. The member countries use the term BIMP–EAGA to refer to the subregional cooperation initiative and the geographic subregion.

BIMP–EAGA's tourism assets include rich marine and terrestrial biodiversity together with vibrant cultural resources. Beginning in 2008 the subregion adopted ecotourism as a key development activity to help narrow the development gap across and within member countries. The current focus is on marketing the subregion as a single ecotourism destination, promoting ecotourism product development, improving connectivity, and facilitating cross-border tourism flows. The "Equator Asia – Heart of Biodiversity" consumer tourism brand, logo, and website were launched in 2012.

GREATER TUMEN INITIATIVE

The Greater Tumen Initiative was established in 1995 to strengthen economic and technical cooperation, and attain greater growth and sustainable development in Northeast Asia. Members include the provinces of Jilin, Heilongjiang, Liaoning, and Inner Mongolia of PRC; Eastern Mongolia; the Republic of Korea's northeast seaports; and Russia's Primorsky Territory. The Greater Tumen Initiative Tourism Board brings together public and private stakeholders to help define and prioritize initiatives for regional tourism development.

The group emphasizes multi-destination tourism with a focus on easing cross-frontier travel, identifying multi-destination tourism routes and promoting them through familiarization trips, and publishing common tourism guides.

PAN PEARL RIVER DELTA REGIONAL TOURISM COOPERATION

This grouping was established in the early 2000s and includes Guangdong province, PRC, Hong Kong, China and Macao, China. The Framework Agreement on Pan–Pearl River Delta Regional Cooperation in Tourism was endorsed by the subregion's senior tourism officials in 2014 to (i) promote cooperation on tourism product development, (ii) enhance tourism promotion, (iii) optimize the mutual information–notification system, (iv) build accessible tourism districts, (v) advance regional cooperation and regulation, (vi) strictly enforce the Tourism Law, (vii) jointly facilitate training opportunities and improve mechanisms for cooperation, and (viii) build the Pan–Pearl River Delta brand as a regional travel destination.

SOUTH ASIA SUBREGIONAL ECONOMIC COOPERATION

Formed in 2001, the South Asia Subregional Economic Cooperation grouping comprises Bangladesh, Bhutan, India, the Maldives, Nepal, and Sri Lanka. Strategic directions of the subregional tourism development plan aim to build on and add value to its members' national agendas, with focus on (i) developing tourism that is sustainable and contributes to poverty reduction, (ii) product-focused branding, (iii) joint marketing and measures to ensure product quality, (iv) repositioning the subregion as a tourist friendly destination, (v) facilitating the development of a more competitive tourism industry, and (vi) improving tourism links with neighboring countries.

SOUTH PACIFIC TOURISM ORGANIZATION

Established in 1983, the South Pacific Tourism Organization includes 17 Pacific island governments, the PRC, and about 200 private sector members. The organization's mission is to market and develop South Pacific tourism by (i) improving air and sea access, (ii) enhancing the South Pacific brand, and (iii) developing capacity among stakeholders for sustainable tourism.

Its website is a good-practice example of a public-private partnership that links in-depth destination information and news with tourism-related businesses listings and booking capabilities.[40] The South Pacific Tourism Organization holds annual tourism trade shows and is implementing a cruise strategy with a strong focus on multicountry itineraries.[41] It also developed the South Pacific Specialist Program, a good-practice example of an accreditation scheme for travel agents that specialize in promoting the region.

40 www.spto.org.
41 South Pacific Tourism Organization. 2007. *South Pacific Cruise Development Strategy.* Suva.

SUMMARY OF STRENGTHS, OPPORTUNITIES, CONSTRAINTS AND RISKS

Based on the situational analysis, Table 16 summarizes the strengths, opportunities, constraints, and risks for jointly marketing the GMS as a single tourism destination.

Apart from possessing diverse and unique attractions and a reputation for good value and safety, the GMS is conveniently accessed from many fast-growing source markets. At the same time, constraints and risks such as limited awareness of the Mekong region, the lack of multicountry product packaging and promotion, and degradation of core attractions from overcrowding threatens long-term sustainability and erodes tourism competitiveness.

By building on the strengths and opportunities for joint marketing, and addressing constraints and risks to more inclusive growth, the GMS TWG and its partners can substantially improve tourism competitiveness in the subregion. The marketing strategy provides a framework for rationalizing and packaging multicountry tour products, joint promotional activities, branding, partnership arrangements and coordination. The vision and outcome, guiding principles, strategic objectives and activities are set out in the following section.

Table 16: Strengths, Opportunities, Constraints and Risks

STRENGTHS		CONSTRAINTS	
Product	**Market**	**Product**	**Market**
• Vibrant cultures and traditions • Diverse ethnic groups and festivals • Rich history and heritage • Scenic landscapes and natural attractions • Friendly people • Safe destinations • Iconic UNESCO World Heritage Sites • Good value for money • Variety of accommodation options • Vibrant gateway cities • Unexplored secondary destinations • GMS TWG strongly committed to subregional tourism cooperation	• Steady growth in global market share of international tourists • Proximity to thriving Northeast and Southeast Asian markets • Short flight times to Asian megacities • Expansion of low-cost air carrier networks • Strong national air carriers • Numerous well-established regional tour operators • Committed destination marketing organizations	• Overlapping product offerings between countries • Variable quality standards • Undertrained human resources, particularly in secondary destinations • Inconvenient visa processes and policies • Weak business enabling environment • Cumbersome regulatory environment • Underdeveloped public ground transport systems • Limited product development in secondary destinations • Low awareness of tourism investment opportunities	• Limited awareness of the Mekong region • Lack of a coherent Mekong tourism brand and communication strategy • Confusing web presence • Limited targeting of segmented markets • Lack of integrity in conveying product information • Limited coordination among public and private sector actors • Inadequate dissemination of information about secondary destinations • Lack of a digital marketing strategy
OPPORTUNITIES		**RISKS**	
Product	**Market**	**Product**	**Market**
• Range of yet-to-be discovered attractions, itineraries and resources that could significantly expand the regional product offering • Improved connectivity between gateway cities and secondary destinations • Willingness among development partners to help develop secondary destinations • Improving education and training programs • Energetic youth interested in tourism careers	• Refresh the Mekong tourism brand, e.g. Experience Mekong • Integrate regional digital marketing strategy • Increase popularity of the Mekong region • Unite and coordinate public and private sector stakeholders • Link to new markets with improved air, land and sea access • Expand multicountry offerings of international tour operators • Attract more scheduled air services to secondary destinations	• Lack of coordination between stakeholders • Degradation and overcrowding of core attractions • Low service quality • Failure to deliver brand promises	• Global competition for tourism market share • Natural- and human-induced disasters • Political instability • Economic downturns

GMS = Greater Mekong Subregion, MTCO = Mekong Tourism Coordinating Office, TWG = Tourism Working Group, UNESCO = United Nations Educational, Scientific and Cultural Organization.

EXPERIENCE MEKONG: THE ACTION PLAN

VISION

The GMS Strategic Framework 2012–2022 provides the overarching GMS vision of an integrated, prosperous, and equitable subregion. The strategic direction for subregional tourism cooperation is to develop and promote the Mekong as a single tourism destination. In this context, the vision for joint tourism marketing in the GMS is:

> *The tourism industry in the Greater Mekong Subregion is integrated, prosperous, and equitable with effective partnerships and knowledge sharing.*

To measure progress toward achievement of this vision, the GMS TWG will monitor (i) the percentage of international tourists taking multicountry holidays in the GMS, (ii) travel and tourism's direct contribution to gross domestic product in each GMS country, and (iii) the distribution of international tourism receipts among the GMS countries.

EXPECTED OUTCOME

The expected outcome of the marketing strategy is increased competitiveness of the GMS tourism industry. Achievement of the outcome will be assessed by (i) increases in the total number of international tourist arrivals in the GMS, and (ii) improved position of GMS countries in the World Economic Forum Travel & Tourism Competitiveness Index.

GUIDING PRINCIPLES

Ten principles guide implementation of the marketing strategy.

- Focus on promoting destinations along the Mekong River
- Encourage cooperation and collaboration between all stakeholders
- Promote a business-enabling environment conducive to joint marketing
- Demonstrate benefits for more than one GMS country
- Promote secondary destinations to distribute the benefits of tourism
- Continuous development of product and service quality
- Timely aggregation of data and dissemination of knowledge products
- Develop and broadly disseminate relevant consumer content
- Consistent messaging to reinforce the Mekong brand
- Strengthen MTCO and GMS NTO capacity to undertake joint marketing

STRATEGIC OBJECTIVES

The strategic objectives of the marketing strategy are to:

i. Jointly package and promote thematic multicountry tour products and thematic events in secondary destinations.

ii. Refine the Mekong Tourism brand and position the GMS as a must-visit destination in Asia.

iii. Strengthen institutional arrangements for joint tourism marketing and promotion among public and private stakeholders.

VISION

The tourism industry in the Greater Mekong Subregion is integrated, prosperous and equitable with effective partnerships and knowledge sharing.

EXPECTED OUTCOME

Increased competitiveness of the Greater Mekong Subregion tourism industry.

PILLAR 1

Jointly package and promote thematic multicountry tour products and thematic events in secondary destinations

Activity Group 1.1
Identify priority secondary destinations

Activity Group 1.2
Produce promotional content and promote multicountry tour programs

Activity Group 1.3
Conduct training to expand e-marketing and online promotion

Activity Group 1.4
Disseminate online information to industry and consumers

Activity Group 1.5
Organize thematic events in secondary destinations

PILLAR 2

Refine the Mekong Tourism brand and position the GMS as a must-visit destination in Asia

Activity Group 2.1
Evolve the Mekong Tourism brand and logo

Activity Group 2.2
Produce content to express the Mekong Tourism brand

Activity Group 2.3
Build industry awareness of the Mekong Tourism brand

Activity Group 2.4
Promote the Mekong Tourism brand in consumer markets

PILLAR 3

Strengthen institutional arrangements for joint tourism marketing and promotion among public and private stakeholders

Activity Group 3.1
Launch new content-rich website that is mobile optimized

Activity Group 3.2
Engage multiple social media and sharing economy platforms to disseminate content

Activity Group 3.3
Organize the annual Mekong Tourism Forum

Activity Group 3.4
Expand Mekong Tourism Advisory Group engagement

Activity Group 3.5
Collect, aggregate, and report regional tourism statistics

KEY ACTIVITIES AND PRIORITY ACTIONS

STRATEGIC PILLAR 1 – JOINTLY PACKAGE AND PROMOTE THEMATIC MULTICOUNTRY TOUR PRODUCTS AND THEMATIC EVENTS IN SECONDARY DESTINATIONS

Strategic pillar 1 supports joint promotion of thematic multicountry tour products and thematic events in secondary destinations to expand the breadth of product offerings, particularly along the Mekong River, and help distribute tourism benefits more widely.

Activity Group 1.1: Identify priority secondary destinations

Each GMS member country has identified priority secondary destinations that are closely linked to the marketing strategy's focus on the Mekong River and promoting multicountry travel. Selection of the destinations proposed in Table 17 considered the following criteria: (i) availability of scheduled air services and accommodations, (ii) good existing cross-border ground transport infrastructure, (iii) availability of tourist visa-on-arrival, (iv) private sector interest in promoting the destinations, (v) good quality and quantity of cultural and natural assets, and (vi) sufficient demand in priority markets for products offered.

Table 17: Focal Destinations for Joint Marketing

COUNTRY	DESTINATIONS	RELATED MULTICOUNTRY TOUR PROGRAM
Cambodia	Koh Kong, Sihanoukville, Kep, Takeo and Kampot	Southern Coastal Corridor
PRC	Detian Jinghong and Pu-er	Largest Waterfall in Asia Mekong Tea Caravan Trail
Myanmar	Kengtung and Thachilek Yangon, Bago, Kyaikhtiyo, Mawlamyine and Hpa-An	Mekong Tea Caravan Trail The Middle Path
Lao PDR	Sayabouli, Luang Prabang and Oudomxay	Northern Heritage Trail
Thailand	Buriram and Ubon Ratchatani Chanthaburi and Trat Nan and Lampang	Mekong Discovery Trail Southern Coastal Corridor Northern Heritage Trail
Viet Nam	Tieng Giang and An Giang Da Nang, Hoi An, Hue and Lao Bao Ha Tinh	Cruising the Mekong Delta East-West Economic Corridor Route 8

Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China.

Activity Group 1.2: Produce promotional content and promote multicountry tour programs.

Activity group 1.2 will focus on packaging multicountry tour programs shown in Table 17 and producing content to promote them. An outline description of the multicountry tour programs and others with good development potential is in Appendix 4. As a first step GMS NTOs will undertake an audit of tourism assets together with MTCO, the private sector, and other partners.

Activity Group 1.3: Conduct training to expand e-marketing and online promotion.

Tourism information and tourist markets are dynamic therefore full-time qualified curators of content are needed to effectively market and promote GMS destinations. The key skill sets for these curators include a good understanding of how to use information technology to gather, consolidate, and disseminate information, as well as fluency in foreign languages. Activity group 1.3 will strengthen capacity and human resources in NTOs and provincial tourism offices to effectively engage in destination marketing and promotion using the digital marketplace in partnership with the private sector.

Activity Group 1.4: Disseminate online information to industry and consumers.

Promotional content must be widely disseminated online in a professional, accurate and efficient way. Activity group 1.4 will enhance the use of existing communication channels to reach industry stakeholders and consumers. These include the MTCO website and newsletter, social media platforms such as TripAdvisor, Instagram, Facebook, and travel bloggers. Additionally, Adword campaigns will be supported in partnership with select tour operators and destination management companies.

Activity Group 1.5: Organize thematic events in secondary destinations.

Under activity group 1.5, each GMS country will scale up and promote the thematic events listed in Appendix 5, many of which are held in secondary destinations prioritized in the marketing strategy. The focus will be on promoting food, sports, cultural industries, and other products and experiences with strong market demand. An underlying objective of the events should be to raise awareness of the unique attributes of the destinations and strengthen market linkages between local producers of agricultural products, crafts, and other products that appeal to international and domestic tourists. A series of multicountry sporting events will also be organized/expanded, such as the existing Mekong Triathlon and cross-border marathons, and potentially a Tour d’ Mekong cycling race. Selection of events will consider readiness of the destination, seasonality, and optimal sequencing in a GMS events calendar.

STRATEGIC PILLAR 2 – REFINE THE MEKONG TOURISM BRAND AND POSITION THE GMS AS A MUST-VISIT DESTINATION IN ASIA

Strategic pillar 2 supports refinements to the Mekong Tourism brand and positioning the GMS as a must-visit tourist destination in Asia. Brand adjustments will more accurately reflect and communicate the key characteristics of GMS tourism, which include nature, community, and culture, anchored by a single logo and tagline.

Activity Group 2.1: Evolve the Mekong Tourism brand and logo.

This activity group will engage branding experts to review the appropriateness, effectiveness and viability of the existing Mekong Tourism brands. Adjustments and updates will be made and a brand dissemination strategy established. According to TripAdvisor research the word "experience" strongly resonates with the aspirations of many source markets and will be considered as part of the brand review. In this regard, MTCO has proactively registered the domain names ExperienceMekong.com and ExperienceMekong.org. The existing Six Countries – One River slogan is considered relevant as it is consistent with the overall intention to anchor promotion of the six GMS countries on the Mekong River.

Activity Group 2.2: Produce content to express the Mekong Tourism brand.

Activity group 2.2 will gather photographs, videos, and written content to express the updated Mekong Tourism brand message. Content will be made freely available to industry stakeholders and the public through the MTCO website and uploaded to social media photo banks such as Facebook and Instagram. News items to build awareness of the Mekong Tourism brand will be prepared monthly and disseminated directly to journalists and consumers through the MTCO website. Travel writers will be retained by MTCO to prepare stories based on the directions of the marketing strategy and guidance from the TWG and MTCO.

Activity Group 2.3: Build industry awareness of the Mekong Tourism brand.

Activity group 2.3 focuses on building industry awareness of the Mekong Tourism brand. MTCO, GMS NTOs, and industry associations will be encouraged to prominently display the Mekong Tourism logo and slogan on electronic media, printed promotional materials, and during trade shows. MTCO will prepare and make freely available standard presentations that effectively communicate the Mekong Tourism brand and information about the GMS tourism cooperation framework. MTCO will develop and maintain media and industry databases and systematically disseminate press releases and other relevant information to key contacts. Introduction of the Mekong Innovative Tourism Awards alongside the annual MTF will be explored to showcase good practices. MTCO and NTOs will partner with industry stakeholders to regularly organize familiarization tours for the media, guidebook writers, and tour operators, targeting priority secondary destinations and thematic events. The private sector will be requested to contribute in-kind hotel rooms, transportation, meals and other services in support of these activities.

Activity Group 2.4: Promote the Mekong Tourism brand in consumer markets.

MTCO and the GMS NTOs will collaborate with relevant media, airlines, tour operators, and other industry stakeholders to promote the Mekong Tourism brand in the priority consumer markets presented in the situational analysis. Partners will be asked to use Mekong Tourism brand elements to complement their own marketing activities and include the Mekong Tourism logo and tagline in printed/electronic collateral and other marketing materials. Opportunities for production of video segments for travel shows, publication of stories in international in-flight magazines, and other targeted awareness building activities will be explored and implemented. Existing relationships between NTOs and leading global media will be leveraged for brand exposure in priority markets.

STRATEGIC PILLAR 3 – STRENGTHEN INSTITUTIONAL ARRANGEMENTS FOR JOINT TOURISM MARKETING AND PROMOTION AMONG PUBLIC AND PRIVATE STAKEHOLDERS

Strategic pillar 3 supports actions to strengthen the institutional arrangements for joint tourism marketing and promotion in the GMS among public and private stakeholders, including the media and GMS development partners. Activities focus on increasing the relevance and effectiveness of joint marketing by MTCO, GMS NTOs and their affiliates, and private firms. The marketing strategy underscores the need to strengthen partnerships and cooperative arrangements to improve tourism competitiveness, increase visitor arrivals and receipts, add jobs and income, and boost economic growth in secondary destinations along the Mekong River.

Activity Group 3.1: Launch new content-rich website that is mobile optimized.

MTCO will strengthen its web presence to communicate and disseminate information about tourism products and services in secondary destinations along the Mekong River. The new consumer marketing web presence will align with the updated Mekong Tourism brand (e.g. Experience Mekong) and facilitate dissemination of destination information and third party product distribution. The content-rich website will be search engine optimized and enabled for use on smartphones, tablets, laptops and desktops.

Activity Group 3.2: Engage multiple social media and sharing economy platforms to disseminate content.

Successful destination marketing in the digital age requires engagement with both social media (e.g. Facebook, Instagram, and Twitter) and the sharing economy (e.g. AirBnB and Uber) platforms to ensure timely and relevant content dissemination to consumers. Activity group 3.2 focuses on linking such platforms to the MTCO website and training people to ensure consistent curation of social media content. MTCO will carefully monitor its ownership of web domains and social media accounts related to the Mekong Tourism brand.

Activity Group 3.3: Organize the annual Mekong Tourism Forum.

The MTF has been organized since the mid-1990s as a flagship annual gathering for tourism industry stakeholders to discuss the development and promotion of travel to, from and within the GMS. MTCO and GMS NTOs will continue to support organization of the MTF under a different theme each year, rotating among the six GMS countries and typically held in a secondary destination. The program will be expanded to include sessions on hotel investment, aviation, travel facilitation and visas, digital marketing, and official development assistance, with a view to growing MTF into the must-attend subregional event for industry, government, the media and academia. GMS TWG meetings will continue to be held in parallel with the annual MTF. Members of other subregional tourism cooperation initiatives in Asia and the Pacific will be invited to participate in the MTF to encourage inter-regional marketing and knowledge sharing. The MTF and thematic events included in the marketing strategy will be organized following international good practice for sustainability (Appendix 6).

Activity Group 3.4: Expand Mekong Tourism Advisory Group engagement.

The marketing strategy requires the private sector to be fully engaged at all stages of its implementation. To facilitate this, MTCO will approach private enterprises such as tour operators, travel agents, airlines, hotels, restaurants, shopping outlets and other tourism service providers with an interest in sustainable tourism to participate in an informal, private sector led Mekong Tourism Advisory Group (MeTAG). MTCO will organize regular meetings between the MeTAG and government to discuss issues that impede business development in secondary destinations and seek solutions to overcome them. MeTAG members will be encouraged to provide in-kind and cash support for various activities in the marketing strategy.

Activity Group 3.5: Collect, aggregate, and report regional tourism statistics.

All GMS NTOs collect tourism statistics and produce country-specific tourism statistics reports. To provide more powerful market intelligence NTOs will adopt a standardized visitor survey and provide annual data sets to MTCO for aggregation, analysis, and preparation of a GMS-wide annual tourism statistics report to better inform marketing planners and decision makers. The report will be made freely available through the MTCO website.

TOURIST ARRIVALS AND SPENDING FORECASTS

Given the focus on promoting multicountry visits and multiple visits to secondary destinations, forecasts suggest that successful implementation of the marketing strategy will generate an incremental annual increase of 1.49 million tourists and additional annual tourism receipts equivalent to $1.53 billion by 2020. Highly successful implementation of the marketing strategy would boost arrivals by up to 4.4 million and generate about $4.62 billion in additional receipts (Table 18). These assumptions are in line with international good practice, such as the Brand USA program, which through strong public-private partnerships generated more than 1.1 million incremental annual visitors in 2013 that spent $3.4 billion while traveling in the USA.[42]

[42] U.S.Travel Association. 2014. *Brand USA Working for all of US.* Washington, D.C.

Table 18: Tourist Arrivals and Spending Forecasts, 2020

COUNTRY	NATIONAL TOURISM ORGANIZATION PROJECTIONS WITHOUT THE MARKETING STRATEGY		SUCCESSFUL IMPLEMENTATION OF THE MARKETING STRATEGY		HIGHLY SUCCESSFUL IMPLEMENTATION OF THE MARKETING STRATEGY	
	IVA	Receipts ($ billion)	IVA	Receipts ($ billion)	IVA	Receipts ($ billion)
Cambodia	7,000,000	5.00	7,140,000	5.085	7,560,000	5.340
Lao PDR	4,700,000	0.643	4,900,000	0.675	5,100,000	0.705
Myanmar	7,500,000	10.10	7,650,000	10.17	8,100,000	10.28
Thailand	37,000,000	55.00	37,750,000	56.00	39,000,000	57.50
Viet Nam	10,500,000	19.00	10,750,000	19.35	11,340,000	20.55
Total	**66,700,000**	**89.743**	**68,190,000**	**91.280**	**71,100,000**	**94.375**

IVA = international visitor arrivals, NTO = national tourism organization.
Source: Mekong Tourism Coordination Office estimates.

IMPLEMENTATION ARRANGEMENTS

Successful implementation of the marketing strategy requires effective and efficient cooperation among regional, national and provincial public and private stakeholders. The roles of key stakeholders involved in its implementation are outlined below.

GMS NATIONAL TOURISM ORGANIZATIONS

GMS national tourism organizations will play an integral role in facilitating implementation of the marketing strategy at the national, provincial and municipal levels. GMS NTOs will:

- communicate the desired outcomes of the marketing strategy to government departments and industry associations
- facilitate collaboration between public and private stakeholders
- mobilize financial and human resources to implement the marketing strategy
- participate in GMS TWG meetings to direct and monitor implementation of the marketing strategy
- provide MTCO with governance and oversight
- provide MTCO with information for the www.mekongtourism.org website and online library

For each thematic multicountry tour program listed in Table 19 a GMS NTO has been proposed to serve as the lead marketing coordinator. Specifically, the lead NTO will:

- scout and survey multicountry tour routes
- organize meetings with other GMS countries and private sector tour operators to prepare detailed plans for packaging and promoting the program
- ensure consistent and continuous sharing of destination information with MTCO and tour operators for inclusion in promotional media and communications
- facilitate promotion through its regular marketing channels
- produce editorial content for reproduction and dissemination by MTCO
- identify, prepare and organize events along thematic multicountry routes

Table 19: Priority Thematic Multicountry Tour Programs

MULTICOUNTRY TOUR PROGRAM	LEAD COUNTRY	PARTICIPATING COUNTRIES
Southern Coastal Corridor	Cambodia	Myanmar, Thailand, Cambodia and Viet Nam
Largest Waterfall in Asia	PRC (Guangxi Zhuang)	PRC and Viet Nam
Mekong Tea Caravan Trail	PRC (Yunnan)	Myanmar, PRC, Lao PDR and Thailand
The Middle Path	Myanmar	Myanmar and Thailand
Northern Heritage Trail	Lao PDR	Thailand, Lao PDR and Viet Nam
Mekong Discovery Trail	Thailand	Thailand, Lao PDR and Cambodia
Cruising the Mekong Delta	Viet Nam	Viet Nam and Cambodia
East-West Economic Corridor	Viet Nam	Viet Nam, Lao PDR and Thailand
Route 8	Lao PDR	Thailand, Lao PDR and Viet Nam
Mekong River Cruising in the Golden Triangle	Thailand	Thailand and Lao PDR

Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China.

MEKONG TOURISM COORDINATING OFFICE

Mekong Tourism Coordinating Office is the focal subregional entity tasked with coordinating implementation of the marketing strategy. MTCO will:

- develop and maintain content-rich and industry-focused websites
- build industry and consumer awareness of the Mekong Tourism brand
- coordinate with GMS NTOs to organize semi-annual GMS TWG meetings and the annual MTF

- integrate joint marketing activities into the GMS TWG detailed annual work plan based on agreements reached at GMS TWG semi-annual meetings
- assist GMS NTOs to organize thematic events and familiarization tours in secondary destinations
- maintain a media database and distribute regular press releases
- assist GMS NTOs to raise funds from the private sector and development partners
- produce and disseminate tourism knowledge products, including an annual GMS tourism statistics report

INDUSTRY ASSOCIATIONS

Industry associations can be effective partners in helping promulgate the Mekong Tourism brand and promoting subregional activities and achievements to a large audience. These associations successfully bring together diverse stakeholders with common interests and provide an important platform for networking and advocacy. Industry associations will:

- publicize GMS tourism news through media channels and private sector networks
- provide free or discounted booth space at trade events
- participate in regional workshops and events such as the MTF
- support the MTCO in the attainment, analysis, and distribution of statistics and intelligence
- encourage the study and dissemination of good practice in regional tourism cooperation
- provide MTCO with information for the www.mekongtourism.org website and online library

DESTINATION MANAGEMENT ORGANIZATIONS AND COMPANIES

Destination management organizations and companies possess extensive local knowledge and expertise in the design and implementation of events, activities, tours, and logistics in tourism destinations. Many also have good links with distribution channels in key source markets, therefore they will be invited to:

- contribute cash and in-kind resources to support familiarization tours
- develop and distribute packaged multicountry tours
- build awareness about the GMS among leading outbound tour operators in key source markets
- provide logistics support to organize and implement thematic events

- participate in MeTAG meetings
- provide MTCO with information for the www.mekongtourism.org website and online library

MEKONG TOURISM ADVISORY GROUP

Mekong Tourism Advisory Group is a group of tourism industry leaders representing airlines, hotels, restaurants, other services, and attractions that share the common interest of growing tourism demand and yield in the GMS. The collective knowledge and networks of the group will help strengthen public-private partnerships, generate sponsorship, and ensure industry relevance. Members of this group will:

- partner with MTCO and NTOs to support thematic events and multicountry product development
- contribute resources to increase awareness of the Mekong subregion in priority markets
- introduce new sponsorship approaches and opportunities
- strengthen public-private partnership approaches
- support familiarization trips by contributing products and services
- provide advice and logistics support to the MTCO
- provide MTCO with information for the www.mekongtourism.org website and online library

THE MEDIA

The media in its role as a neutral party in conveying information and analysis about tourism products and services will:

- participate in the annual MTF
- help disseminate Mekong Tourism brand messages
- stimulate demand through editorial content
- build awareness among industry partners of the marketing strategy and good practice
- provide MTCO with information for the www.mekongtourism.org website and online library

DEVELOPMENT PARTNERS

Development partners, including academic institutions, will provide technical and financial assistance to support multicountry product development, capacity building, research, and knowledge sharing on good practices. Development partners will:

- participate in GMS TWG meetings and the annual MTF

- provide policy advice, technical assistance, and financial support for select marketing and promotion activities
- harmonize their assistance and align it with national/subregional priorities
- provide MTCO with information for the www.mekongtourism.org website and online library

MONITORING AND REPORTING

The GMS TWG will be responsible for monitoring implementation of the marketing strategy and ensuring that planned activities are being managed effectively and efficiently. MTCO will track day-to-day performance and prepare semi-annual reports on progress made toward performance targets agreed by the GMS TWG. The semi-annual reports will be reviewed and endorsed by the GMS TWG during its semi-annual meetings. The GMS TWG will subsequently report annual progress during the Mekong Tourism Forum and periodic meetings of the GMS Tourism Ministers. The marketing strategy will be treated as a living document with adjustments to annual activity plans made based on need and endorsement of the GMS TWG.

COSTS AND FINANCING

The indicative cost estimate to implement the strategy is $7,679,000 (Table 20). Financing will be sourced from government, the private sector, and GMS development partners. Innovative financing mechanisms such as public-private partnerships and crowd-funding will be explored when appropriate.

Table 20: Indicative Cost Estimates

STRATEGIC PILLAR	ESTIMATED COST ($)
Jointly package and promote thematic multicountry tour products and thematic events in secondary destinations	6,042,500
Refine the Mekong Tourism brand and position the GMS as a must-visit destination in Asia	815,500
Strengthen institutional arrangements for joint tourism marketing and promotion among public and private stakeholders	821,000
Total	**7,679,000**

APPENDICES

APPENDIX 1 – IMPLEMENTATION PLAN 2015–2020

Strategic Pillar 1: Jointly package and promote thematic multicountry tour products and thematic events in secondary destinations

	ACTIVITY	YEAR						ENTITIES INVOLVED	COST ESTIMATE ($)	PERFORMANCE TARGET
		2015	2016	2017	2018	2019	2020			
Activity Group 1.1 Identify priority secondary destinations	1.1.1 Agree on secondary destinations that meet prescribed criteria to be included in first-phase marketing/promotion campaign	x						**NTOs** MTCO PTDs	5,000	18 secondary destinations identified
	1.1.2 Collect baseline data on tourism performance in selected 18 secondary destinations	x						**NTOs** **PTDs** MTCO	5,000	Baseline data collected
	1.1.3 Engage public and private sector tourism stakeholders to build awareness and ownership of the marketing strategy	x						**MTCO** ADB TWG NTOs MeTAG	50,000	Four stakeholder workshops held
Activity Group 1.2 Produce promotional content and promote multicountry tour programs	1.2.1 Develop a tourism asset auditing mechanism to ensure continuity and consistency	x						**MTCO**	2,500	Audit instrument prepared
	1.2.2 Conduct an audit of tourism assets in selected secondary destinations using audit instrument defined in Activity 1.2.1	x						**NTOs** **PTDs** MTCO	20,000	Audits completed
	1.2.3 Partner with leading tour operators and private sector entities that have developed multicountry tour packages in selected secondary destinations	x						**MTCO** NTOs PTDs MeTAG	10,000	At least 10 partnerships established
	1.2.4 Collect existing content (packages, text, photography, video, etc.) from partners	x	x					**MTCO** NTOs PTDs	15,000	Content collected for each select secondary destination
	1.2.5 Upload content to relevant MTCO websites, knowledge sharing platforms and social media outlets	x	x					**MTCO**	7,500	Content uploaded
	1.2.6 Review and update content to ensure accuracy, validity and relevance		x	x	x	x	x	**MTCO**	25,000	MTCO websites always up to date

Activity Group 1.3 Conduct training to expand e-marketing and online promotion	1.3.1 Identify personnel in each priority destination to function as lead content coordinators	x	x	x	x	x	x	NTOs PTDs	5,000	Content coordinators identified in each destination
	1.3.2 Conduct digital marketing and promotion training for identified personnel		x					**MTCO** NTOs PTDs	15,000	Training organized and conducted
	1.3.3 Organize contact/meetings between digital content coordinators at least quarterly	x	x	x	x	x	x	**MTCO** NTOs PTDs	15,000	Regular Skype (or similar) meetings held
	1.3.4 Collaborate with private sector experts and develop partnerships to enhance content creation and dissemination		x	x	x	x	x	**MTCO** NTOs PTDs	12,500	At least 10 partnerships formed
Activity Group 1.4 Disseminate online information to industry and consumers	1.4.1 Host all content on MTCO's enhanced website www.mekongtourism.org	x	x	x	x	x	x	**MTCO** NTOs PTDs	10,000	Content on MCTO website
	1.4.2 Partner with social media providers to produce Mekong-specific regional tourism marketing and promotion campaign		x	x				**MTCO**	75,000	At least four social media channels developed
	1.4.3 Partner with private sector to organize Adword campaigns		x	x	x	x	x	**MTCO**	30,000	Adword campaigns launched in 2016
Activity Group 1.5 Organize thematic events in secondary destinations	1.5.1 Select 12 thematic events to be held in focal secondary destinations	x						**NTOs** **PTDs** MTCO	15,000	12 thematic events identified
	1.5.2 Organize 12 annual thematic events linked to food, sports or cultural industries in the focal secondary destinations.	x	x	x	x	x	x	**NTOs** **PTDs** MTCO	3,630,000	60 thematic events held
	1.5.3 Identify additional multicountry sports events that cross GMS borders, e.g. cycling, marathons, triathlons, boating on the Mekong	x	x					**NTOs** MTCO PTDs	15,000	Sport events identified
	1.5.4 Promote and seek sponsorship and celebrity endorsements for the multicountry sports events		x	x	x	x	x	**MTCO** NTOs PTDs	60,000	Sponsorships and partnerships established
	1.5.5 Implement at least one multicountry sports event per year under the Mekong Tourism brand	x	x	x	x	x	x	**NTOs** MTCO PTDs	2,020,000	Six events held

ADB = Asian Development Bank, GMS = Greater Mekong Subregion, MeTAG, Mekong Tourism Advisory Group, MTCO = Mekong Tourism Coordinating Office, NTOs = National Tourism Organizations, PTDs = Provincial Tourism Departments.

Notes: The lead entity is highlighted in bold text.

Strategic Pillar 2: Refine the Mekong Tourism brand and position the GMS as a must-visit destination in Asia

	ACTIVITY	YEAR						ENTITIES INVOLVED	COST ESTIMATE ($)	PERFORMANCE TARGET
		2015	2016	2017	2018	2019	2020			
Activity Group 2.1 Evolve the Mekong Tourism brand and logo	2.1.1 Engage a professional communications firm to assist the TWG to refine the Mekong Tourism brand	x	x					**MTCO** TWG	20,000	Refined brand agreed in 2016
	2.1.2 Identify overarching themes that are linked with consumer sentiment and key Mekong features (e.g. Experience Mekong)	x	x					**MTCO** NTOs TWG MeTAG	5,000	Themes and features identified in 2015/16
	2.1.3 Conduct stakeholder consultations on the brand evolution	x	x					**MTCO** NTOs PTDs TWG MeTAG	5,000	Focus group meetings held in 2015/16
	2.1.4 Define a logo and slogan that embraces the core messages of the Mekong Tourism brand	x	x					**MTCO** NTOs PTDs TWG MeTAG	10,000	New logo and slogan launched in 2016
Activity Group 2.2 Produce content to express the Mekong Tourism brand	2.2.1 Host a publically accessible photo/video bank of images that communicate the Mekong Tourism brand	x	x	x	x	x	x	**MTCO**	5,000	Online library with initial content established in 2015 and updated thereafter
	2.2.2 Compile news stories, other media, and promotional materials for uploading to social media and dissemination on MTCO website		x	x	x	x	x	**MTCO**	12,500	Newsletter disseminated monthly
	2.2.3 Engage travel writers to prepare stories on Mekong Tourism		x	x	x	x	x	**MTCO**	20,000	Four stories published annually

Activity Group 2.3 Build industry awareness of the Mekong Tourism brand	2.3.1 Prepare Mekong Tourism brand user guidelines for use by industry stakeholders		x	x				**MTCO**	5,000	Mekong Tourism logo appears in collateral of at least 30 firms
	2.3.2 Prepare a standard Mekong Tourism brand presentation for dissemination to industry stakeholders		x	x				**MTCO**	5,000	Presentation prepared and disseminated to 100 firms
	2.3.3 Establish and maintain data base of media contacts and guidebook writers	x	x	x	x	x	x	**MTCO**	5,000	Database created and updated with at least 100 contacts
	2.3.4 Distribute regular and topical press releases and distribute to media contact database		x	x	x	x	x	**MTCO**	30,000	Four topical news releases distributed annually to at least 100 media contacts
	2.3.5 Collaborate with private sector to raise contributions for in-kind hotel rooms, transportation, meals and other services		x	x	x	x	x	**MTCO** NTOs PTDs TWG MeTAG	300,000	Products and services donated to support 10 familiarization tours
	2.3.6 Organize familiarization tours for key media and industry stakeholders, particularly tour operators and guidebook / travel writers		x	x	x	x	x	**MTCO** NTOs PTDs TWG MeTAG	24,000	Two familiarization tours organized annually
	2.3.7 Launch the annual Mekong Innovative Tourism Awards and continue annually	x	x	x	x	x	x	**MTCO**	9,000	Awards launched at MTF 2015
Activity Group 2.4 Promote the Mekong Tourism brand in consumer markets	2.4.1 Identify up to six priority markets in which to promote the Mekong Tourism brand in partnership with the private sector	x						**MTCO** NTOs PTDs TWG MeTAG	10.000	Six markets identified and agreed upon in 2015
	2.4.2 Disseminate information about activities and events being held under the Mekong Tourism brand using NTO websites and news releases	x	x	x	x	x	x	**MTCO** NTOs PTDs TWG MeTAG	15,000	Information distributed starting in 2015
	2.4.3 Participate in regional and international trade shows to promote the Mekong Tourism brand to target markets		x	x	x	x	x	**MTCO** NTOs PTDs TWG	75,000	Mekong Tourism brand appears at three major shows annually
	2.4.4 Engage airlines to support communication of the Mekong Tourism brand in in-flight publications and commercial websites		x	x	x	x	x	**MTCO** NTOs PTDs TWG MeTAG	10,000	Mekong Tourism brand appears in at least two publications annually
	2.4.5 Seek partnership/sponsorship with CNN, BBC and other leading global media to help promulgate the Mekong Tourism brand		x	x	x	x	x	**MTCO** NTOs PTDs TWG	250,000	Mekong Tourism appears in at least one television program annually

BBC = British Broadcasting Company, CNN = Cable News Network, GMS = Greater Mekong Subregion, MeTAG = Mekong Tourism Advisory Group, MTCO = Mekong Tourism Coordinating Office, NTOs = National Tourism Organizations, PTDs = Provincial Tourism Departments.

Notes: The lead entity is highlighted in bold text.

Strategic Pillar 3: Strengthen institutional arrangements for joint tourism marketing and promotion among public and private stakeholders

	ACTIVITY	YEAR						ENTITIES INVOLVED	COST ESTIMATE ($)	PERFORMANCE TARGET
		2015	2016	2017	2018	2019	2020			
Activity Group 3.1 Launch new content-rich website that is mobile optimized	3.1.1 Prepare a web strategy for the mekongtourism.org website, considering institutional and consumer audiences	x						**MTCO**	5,000	Web strategy prepared
	3.1.2 Design and launch the upgraded website www.mekongtourism.org	x	x					**MTCO** NTOs PTDs TWG MeTAG	10,000	Website launched
	3.1.3 Regularly maintain and curate website content	x	x	x	x	x	x	**MTCO**	12,000	Website up to date and relevant
Activity Group 3.2 Engage multiple social media and sharing economy platforms to disseminate content	3.2.1 Link www.mekongtourism.org to major social media and sharing economy platforms to ensure flow of new and robust content (1.4.2)		x					**MTCO**	5,000	Website and social media channels linked
	3.2.2 Identify and train personnel to support the Mekong Tourism digital presence		x					**MTCO**	12,000	Qualified person identified and trained
	3.2.3 Ensure regular curation of content, including responding to comments and queries		x	x	x	x	x	**MTCO**	52,000	Regular flow of relevant content
	3.2.4 Carefully manage and maintain ownership of domain names and social media accounts by MTCO	x	x	x	x	x	x	**MTCO**	3,000	Registration and evidence of ownership
Activity Group 3.3 Organize the annual Mekong Tourism Forum	3.3.1 Organize the annual MTF	x	x	x	x	x	x	**MTCO** TWG	540,000	MTF organized annually
	3.3.2 Establish a MTF content committee to ensure that the annual program is relevant to industry needs	x	x	x	x	x	x	**MTCO** NTOs PTDs TWG MeTAG	12,000	Committee formed in 2015 and meeting at least quarterly
	3.3.3 Create more investment promotion activities		x	x	x	x	x	**MTCO** NTOs PTDs TWG MeTAG	12,000	New concepts included in MTF program
	3.3.4 Engage new stakeholders to participate in the MTF (aviation, development partners, and marketers)		x	x	x	x	x	**MTCO** NTOs PTDs TWG MeTAG	6,000	At least 20 new partners and stakeholders engaged
	3.3.5 Implement green event guidelines at Mekong Tourism Forum and thematic events	x	x	x	x	x	x	**MTCO**	6,000	Guidelines implemented at 65 events

Activity Group 3.4 Expand Mekong Tourism Advisory Group engagement	3.4.1 Prepare terms of reference for the MeTAG	x						**MTCO** TWG	2,000	Terms of reference completed in 2015
	3.4.2 Identify and invite key private sector stakeholders from industry sectors (e.g. aviation, banks, tour operators, accommodations, etc.) to join MeTAG	x	x					**MTCO** TWG	4,000	Membership in MeTAG expanded in 2015/16
	3.4.3 Hold quarterly issues-based MeTAG meetings	x	x	x	x	x	x	**MTCO**	36,000	Four meetings held annually
	3.4.4 Promote in-kind and cash contributions from MeTAG members to support activities in the marketing strategy	x	x	x	x	x	x	**MTCO**	5,000	Air tickets, hotel rooms and other services contributed
Activity Group 3.5 Collect, aggregate, and report regional tourism statistics	3.5.1 Hold regional workshops to determine data needs and harmonize methodology for collection and reporting tourism statistics by GMS countries	x	x					**NTOs** MTCO	50,000	Workshops held in 2015/16
	3.5.2 GMS NTOs submit electronic data sets annually to MTCO for meta-analysis	x	x	x	x	x	x	**NTOs** MTCO	6,000	Data submitted annually starting in 2015
	3.5.3 MTCO publishes annual GMS Tourism Statistics Report		x	x	x	x	x	**MTCO**	25,000	Annual report published
	3.5.4 MTCO continues to publish semi-annual GMS Tourism Performance Scorecard	x	x	x	x	x	x	**MCTO**	10,000	Scorecard published on MTCO website
	3.5.5 MTCO produces press releases announcing annual and semi-annual tourism statistics reports/scorecards	x	x	x	x	x	x	**MTCO**	10,000	Six press releases issued

GMS = Greater Mekong Subregion, MeTAG = Mekong Tourism Advisory Group, MTCO = Mekong Tourism Coordinating Office, MTF = Mekong Tourism Forum, NTOs = National Tourism Organizations, PTDs = Provincial Tourism Departments.

Notes: The lead entity is highlighted in bold text.

APPENDIX 2 – DESIGN AND MONITORING FRAMEWORK

DESIGN SUMMARY	PERFORMANCE TARGETS AND/OR INDICATORS	DATA SOURCES AND/OR REPORTING MECHANISMS
VISION The tourism industry in the GMS is integrated, prosperous, and equitable with effective partnerships and knowledge sharing	**By 2022** • Percentage international tourists taking multicountry holidays in the GMS maintained (2013 baseline: 30%) • Travel and tourism's direct contribution to gross domestic product in each GMS country maintained (2013 baseline: 1.6% to 10.4%) • At least 30% of international tourism receipts in the GMS are generated by the CLMV countries (2013 baseline: 25%)	• GMS NTO annual tourism statistics reports • World Travel and Tourism Council economic research reports
OUTCOME Increased competitiveness of the GMS tourism industry	**By 2020** • Total number of international tourist arrivals in the GMS increases to 68.2 million (2013 baseline: 51.7 million) • Position of GMS countries in the World Economic Forum Travel & Tourism Competitiveness Index increases: CLMV countries each increase by at least 10 positions (2015 baseline: 75–134); PRC & Thailand each increase by at least 2 positions (2015 baseline: 17 and 35)	• GMS NTOs annual tourism statistics reports • World Economic Forum Travel & Tourism Competitiveness Report
STRATEGIC PILLARS Jointly package and promote thematic multicountry tour products and thematic events in secondary destinations	**By 2020** • At least 10 multicountry tour packages promoted on MTCO website • At least 60 thematic events jointly promoted and held in secondary destinations • Mekong digital marketing campaign reaches 600,000 industry stakeholders and consumers	• GMS TWG meeting reports • Google Analytics • Social media reports
Refine the Mekong Tourism brand and position the GMS as a must-visit destination in Asia	• Mekong Tourism brand and user guidelines endorsed by the GMS TWG • Mekong Tourism brand ranked in top quartile against its comparators • At least 24 articles featuring Mekong Tourism brand published in top-tier international media	• GMS TWG meeting reports • Digital Tourism Brand Index • Media tracking reports
Strengthen institutional arrangements for joint tourism marketing and promotion among public and private stakeholders	• MTCO legally established and its operations plan is endorsed by GMS TWG • Regular private sector participation in GMS TWG meetings and joint marketing activities • www.mekongtourism.org global website ranking improves from 4.25 million to 100,000 or better • At least 180 industry-relevant knowledge products and services disseminated on www.mekongtourism.org library	• GMS TWG meeting reports • Alexa rankings • Google Analytics • Social media reports

CLMV = Cambodia, the Lao PDR, Myanmar, and Viet Nam; GMS = Greater Mekong Subregion, NTO = national tourism organization, PRC = People's Republic of China, TWG = Tourism Working Group.

APPENDIX 3 – BASELINE INFORMATION

		INT'L TOURIST ARRIVALS	DOMESTIC VISITORS	SCHEDULED INBOUND SEATS	HOTEL/GUESTHOUSE ROOMS	INT'L BORDER
Cambodia 2013	Phnom Penh	1,972,879	2,204,573	2,200,113	14,115	Y
	Kampot	117,280	614,610	0	1,701	Y
	Kep	46,840	638,496	0	775	N
	Koh Kong	47,446	96,080	0	1,506	Y
	Kratie	22,776	46,546	0	687	Y
	Sihanoukville	303,325	731,604	17,420	4,703	Y
	Siem Reap	2,237,786	2,193,000	2,021,860	14,778	Y
	Stung Treng	12,240	120,313	0	463	Y
PRC 2013	Guangxi Zhuang	2,123,149	235,400,000	7,152,234*	50,729	Y
	Yunnan	5,310,000	130,800,000	26,319,070	58,220	Y
Lao PDR 2013	Huay Xai/Bokeo	207,786	24,237	0	853	Y
	Champassak	493,180	254,971	189,783	4,072	Y
	Khammouane	427,918	154,851	0	1,119	Y
	Luang Prabang	342,611	125,354	471,405	4,126	Y
	Luang Namtha	305,608	101,644	23,146	1,296	Y
	Oudomxay	172,731	303,980	22,294	1,396	Y
	Sayabouli	87,776	78,492	0	1,437	
	Savannakhet	1,167,154	459,673	88,182	1,662	Y
Myanmar 2013	Bago	...	...	0	396	N
	Kengtung	...	...	66,232	451	N
	Kyakthyo	≥70,000	>1,000,000	0	543	N
	Hpa-an	...	...	0	180	N
	Myawaddy	1,267,710	...	0	...	Y
	Thachilek	...	...	237,183	1,013	Y
	Yangon	817,699	...	3,317,084	10,175	Y
Thailand 2013	Buriram	28,346	1,158,413	6,208	2,784	N
	Chanthaburi	74,197	1,571,614	0	3,833	Y
	Chiang Rai	526,498	2,383,306	670,617	14,939	Y
	Lampang	74,411	687,412	55,720	2,132	N
	Mukdahan	139,835	1,288,825	0	2,040	Y
	Nan	16,723	609,967	63,375	2,329	Y
	Nakorn Phanom	72,484	801,441	130,624	1,999	Y
	Sukothai	309,172	807,413	51,247	2,327	N
	Tak	35,220	1,618,293	72,544	4,919	Y
	Trat	404,153	1,281,384	75,180	9,937	Y
	Ubon Rachatani	119,858	2,471,568	465,351	4,066	Y
Viet Nam 2013	An Giang	55,498	5,293,350	0	1,993	Y
	Cao Bang	24,170	435,430	0	1,288	N
	Da Nang	630,908	2,028,650	2,534,936	10,570	Y
	Dien Bien	65,000	295,000	46,735	1,300	Y
	Ha Tinh	61,352	3,630,460	0	3,000	Y
	Hanoi	2,100,000	12,826,000	8,425,048	18,630	Y
	Quang Nam	1,470,000	1,330,000	0	4,644	N
	Thua Tien Hue	867,904	1,676,786	277,302	6,755	Y
	Kien Giang	162,000	3,396,000	0	5,293	Y
	Tien Giang	542,692	626,590	0	2,891	N

... = data not available, PRC = People's Republic of China, Lao PDR = Lao People's Democratic Republic, N= no, Y= yes, INT'L=International.
Note: International borders include international airports, land borders and sea ports with tourist visa on arrival. Domestic visitors are domestic overnighters.

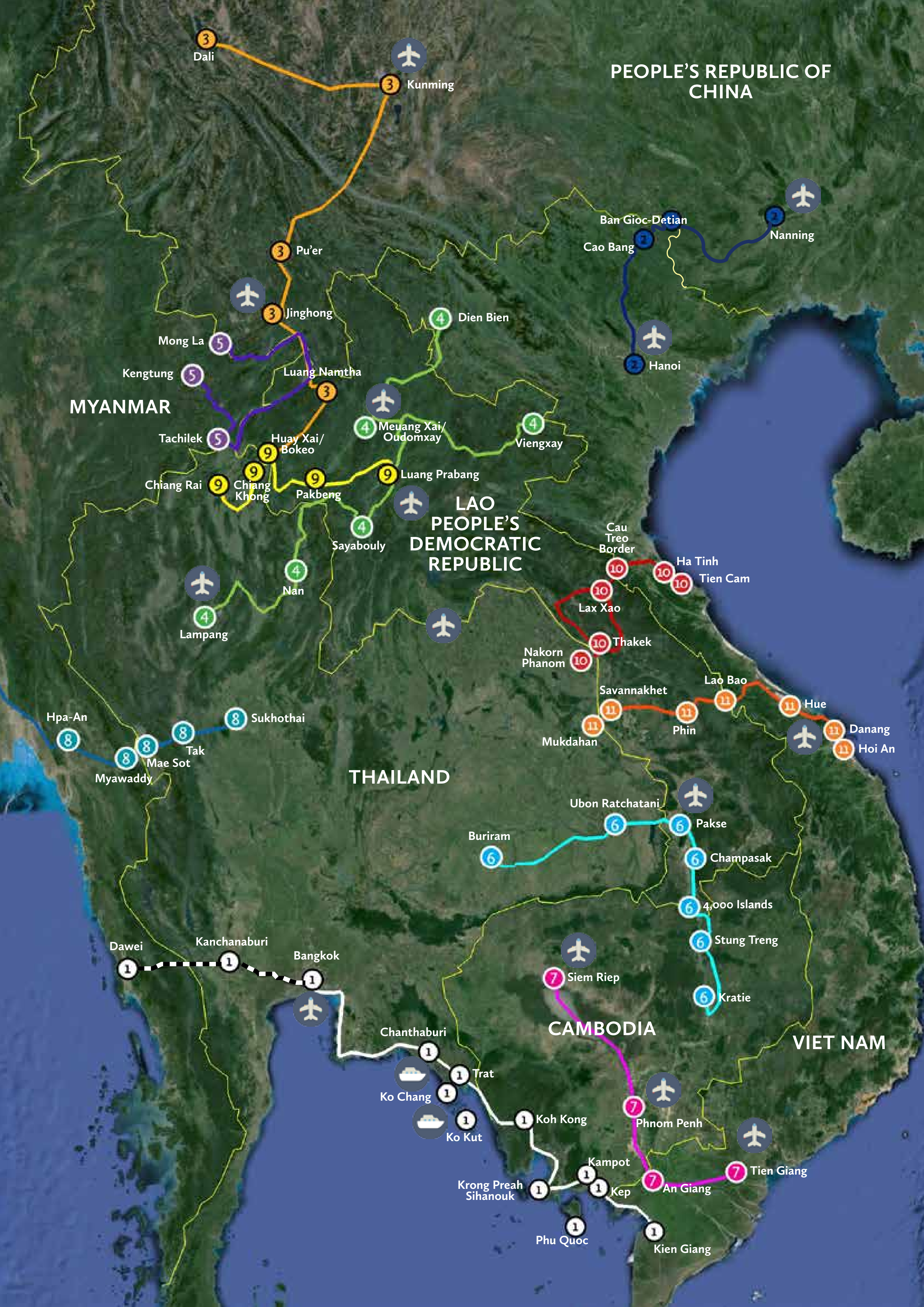
** For Nanning only.*

Sources: GMS National Tourism Organizations, Amadeus Schedule Analysis.

APPENDIX 4 – MULTICOUNTRY TOUR ROUTES

ROUTE	LEAD	MAIN EXPERIENCES	AREAS INCLUDED
1 Southern Coastal Corridor - - - - = proposed	Cambodia	Beach and islands, leisure, seafood, history, culture, community-based tourism	**Thailand** = Chanthaburi,Trat (Ko Chang, and Ko Kut) and Kanchanaburi (proposed). **Cambodia** = Koh Kong (Peam Krasop, Chiphat), Preah Sihanouke, Kampot, Kep (Kep Crab Market). **Viet Nam** = Kien Giang (Ha Tien, Phu Tu and Phu Quoc Island). **Myanmar** = Dawei (proposed)
2 Largest Waterfall in Asia	Guangxi Zhuang, PRC	Nature, ethnic groups, culture	Detian–Ban Gioc Cross-Border Waterfall. **PRC** = Nanning and Detian. **Viet Nam** = Ban Gioc, Cao Bang, and Hanoi.
3 Mekong Tea Caravan Trail East	Yunnan, PRC	River cruising, food, nature, ethnic groups, culture, ecotourism	**PRC** = Kunming, Dali, Pu'er, Ganglaba and Jinghong/ Xishuangbanna. **Lao PDR** = Luang Namtha and Huay Xai/Bokeo. **Thailand** = Chiang Kong and Chiang Rai/Golden Triangle.
4 Northern Heritage Trail	Lao PDR	Culture, nature, history, community-based tourism	**Thailand** = Lampang and Nan. **Lao PDR** = Sayabouly, Luang Prabang, Viengxay and Meuang Xai/Oudomxay. **Viet Nam** = Dien Bien.
5 Mekong Tea Caravan Trail West	Yunnan, PRC	Ethnic groups, culture, ecotourism	**Thailand** = Chiang Rai, Mae Sai and Golden Triangle. **Myanmar** = Thachilek and Kengtung. **PRC** = Mong La and Jinghong.
6 Mekong Discovery Trail	Thailand	Mekong excursions, nature, history, culture, coffee, ecotourism	**Thailand** = Buriram and Ubon Rachathani (Kong Jiem). **Lao PDR** = Champasak (Pakse, Champasak and 4,000 Islands). **Cambodia** = Stung Treng and Kratie.
7 Cruising the Mekong Delta	Viet Nam	Mekong excursions, nature, culture, food	**Viet Nam** = Tien Giang (My Tho) and An Giang (Chau Doc). **Cambodia** = Siem Reap and Phnom Penh. Focus on day-excursions and multi-day international cruises.
8 The Middle Path	Myanmar	Culture, history, pilgrimage	**Myanmar** = Yangon, Bago, Khyatiktho (Golden Rock Pagoda), Hpa-An and Myawaddy. **Thailand** = Mae Sot, Tak and Sukhothai.
9 Mekong River Cruising in the Golden Triangle	Thailand	Mekong excursions, nature, culture, soft adventure	**Thailand** = Chiang Rai and Chiang Kong. **Lao PDR** = Bokeo (Houay Xai), Pakbeng and Luang Prabang. Focus on multi-day international cruises, day-excursions and sports events.
10 Route 8	Lao PDR	Nature, soft adventure, culture, history, pilgrimage, beach	**Thailand** = Nakorn Phanom. **Lao PDR** = Thakhek (The Loop, including all caves and attractions) and Lax Xao. **Viet Nam** = Cau Treo Border and Ha Tinh (Chua Huong Pagoda and Tien Cam beaches).
11 East–West Corridor	Viet Nam	Beach, culture, history	**Viet Nam** = Da Nang, Hoi An, Hue and Lao Bao. **Lao PDR** = Phin and Savannakhet. **Thailand** = Mukdahan.

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


PEOPLE'S REPUBLIC OF CHINA
MYANMAR
LAO PEOPLE'S DEMOCRATIC REPUBLIC
THAILAND
CAMBODIA
VIET NAM
Dali
Kunming
Pu'er
Jinghong
Mong La
Kengtung
Luang Namtha
Tachilek
Huay Xai/ Bokeo
Chiang Rai
Chiang Khong
Pakbeng
Luang Prabang
Meuang Xai/ Oudomxay
Dien Bien
Viengxay
Sayabouly
Nan
Lampang
Ban Gioc-Detian
Nanning
Cao Bang
Hanoi
Cau Treo Border
Ha Tinh
Tien Cam
Lax Xao
Thakek
Nakorn Phanom
Savannakhet
Mukdahan
Phin
Lao Bao
Hue
Danang
Hoi An
Hpa-An
Myawaddy
Mae Sot
Tak
Sukhothai
Ubon Ratchatani
Pakse
Buriram
Champasak
4,000 Islands
Stung Treng
Kratie
Siem Riep
Phnom Penh
An Giang
Tien Giang
Dawei
Kanchanaburi
Bangkok
Chanthaburi
Trat
Ko Chang
Ko Kut
Koh Kong
Krong Preah Sihanouk
Kampot
Kep
Phu Quoc
Kien Giang

APPENDIX 5 – THEMATIC EVENTS

	EVENT	MAIN ACTIVITIES	LOCATION	DATES
CAMBODIA	Sea Festival	Live concerts and entertainment, international food festival, presentation of projects, and beach and water activities	Kep, Kampot, Sihanoukville and Koh Kong (rotates)	Annually in December
	Mekong River Festival	Performances and exhibitions with the goal of protecting the remaining 100+ Irrawaddy dolphins	Kratie	Annually in March
LAO PDR	Luang Prabang Food and Craft Festival	Local food tastings, cooking demonstrations, top chef competition, craft market, design and production demonstrations and performing arts	Luang Prabang Town, Luang Prabang	Annually in December
	Lao Coffee Festival	Exhibitions, coffee tasting, production and roasting demonstrations, seminars and competition and awards	Pakse Town, Champasak	Biennially in October 2016, 2018 and 2020
	ASEAN Ecotourism Forum	Conference and trade show, with familiarization tours for media and tour operators	TBD	2016 - TBD
MYANMAR	Htamane Festival	Htamane-cooking and preparation competition	Shwedagon Pagoda, Yangon and across the country	Annually in February
	Nine Thousand Lighting of Candles Festival	Buddhist pilgrimage to the Kyaik-Htee-Yoe Pagoda	Kyiak Hto, Mon State	Annually in October and November
THAILAND	Thai-Myanmar Friendship Bicycle Rally	Social cycling event to promote sport tourism	Mae Sod District, Tak Province, Thailand to Myawaddy City, Myanmar	Annually in February
	Golden Triangle International Triathlon	Swim, cycle and run event through Thailand, Lao PDR and Myanmar on a 66.7km route	Chiang Rai	Annually in March
	Nakhon Phanom Illuminated Boat Procession	Traditional long boat races, wax castles, illuminated float procession, local cultural performances and traditional dancing	Nakhon Phanom	Annually in October on the night of Ok Phansa (end of Buddhist Lent)

VIET NAM	Da Nang International Fireworks Competition	Fireworks competition by five groups	Da Nang City	Biennially in late April 2015, 2017, 2019
	Hue Festival	Grand Opening Ceremony, Imperial Night, traditional fashion show, Oriental Night Show, street cultural performances, folk music performances	Hue City	Biennially from 29 April to 4 May 2016
	Nha Trang Sea Festival	Culture, sports and tourism activities including exhibition on sea culture heritage, coffee and wine festivals, folk games, art kite flying, beach volleyball and handball, golf tournament	Nha Trang City, Khanh Hoa Province	Biennially in July

Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China, TBD = to be determined.

Source: Mekong Tourism Coordinating Office and GMS National Tourism Organizations.

APPENDIX 6 – GUIDELINES FOR GREEN EVENTS

All events can be made more green and sustainable. Green events conserve and restore resources, add value to the local economy, and educate participants about the benefits of sustainability. Ten easy steps to make an event greener include:

1. Establish an environmental statement or policy for the meeting and obtain concurrence for it from the host organization's management. Share the policy with suppliers, delegates and speakers.
2. Use new media and electronic technology to reduce paper use. Create a conference web site, offer electronic registration and confirmation, and advertise using the web and email.
3. Reduce distances traveled by speakers and delegates. Choices are made according to proximity to the venue — for cost-saving, reducing travel time and carbon footprint. Direct routes for flights should be mandatory. Co-sharing for ground transportation is encouraged.
4. Hotel and meeting venues provide visible and accessible reduction, reuse and recycling services for paper, metal, plastic and glass.
5. Food and beverage service providers use bulk dispensers for sugar, salt, pepper, cream and other condiments.
6. Choose a hotel that offers a linen reuse program and bulk dispensers for shampoos and soaps.
7. Include vegetarian meals and have meals planned using local seasonal produce.
8. All printed materials are published on recycled paper, using vegetable-based inks, and on both sides of the page.
9. Coordinate with the meeting venue to ensure that energy efficient lighting and air conditioning, and water saving technology is used. Lights and air conditioning are turned off when rooms are not in use.
10. Widely publicize your efforts to make the event green and sustainable.

Source: Adapted from Green Meeting Industry Council 10 Tips for Making Your Event More Sustainable. www.gmicglobal.org.

Other resources: Thailand Convention & Exhibition Bureau. Green Meetings Guidelines.

GLOSSARY

Brand	The collection of perceptions that a person has of a product (or destination) based on the product's (or destination's) observable characteristics, which differentiate it from all other products (or destinations), thereby endowing it with a competitive advantage over other similar products (or destinations).
Community-based tourism	A form of tourism in which a significant number of local people have substantial control and involvement, with a high proportion of benefits remaining within the local economy. Members of the community, even those who are not directly involved, often gain some form of benefit (e.g. through community funds). Community-based tourism can create jobs both directly and indirectly as well as additional income for the local population, provide further training opportunities (e.g. language, service, restaurant and hotel business, and guiding) for community members. It strengthens the social and organizational structure within the community and can help strengthen cultural identity and preserve cultural heritage.
Cruise tourism	A long- or short-term holiday on a cruise ship. May include local excursions.
Culinary/food tourism	The pursuit of unique and memorable eating and drinking experiences, often tied to learning the cuisine of a destination; a subset of cultural tourism (cuisine as a manifestation of culture); not limited to gourmet food.
Cultural tourism	A country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those peoples, their art, architecture, religion(s), performing arts, visual arts, festivals, heritage sites, fashion, theaters and other elements that helped shape their way of life; includes tourism in urban areas, particularly historic or large cities and their cultural facilities (e.g. museums and theaters; also includes rural areas, showcasing the traditions of indigenous cultural communities (e.g. festivals, rituals) and their values and lifestyle.
Destination	A country, region or city specifically as a tourism destination: a place that people wish to visit.
Heritage tourism	A subset of cultural tourism oriented towards understanding and appreciating the heritage of a destination; focuses on visiting historical or industrial sites (e.g. old canals, railways, battlegrounds, etc.); also attributed to dramatized historical events; concerned with a culture's tangible elements and intangible dimensions.
Logo	A visual design mark, which is used consistently on all destination marketing communications as a symbol of the destination. Its value comes from its consistent application over time, which encourages recognition of it as emanating from, and representing, that particular destination.
Long-haul	Air travel with a one-way flight duration of more than six hours .
Market	A group of potential customers who have been identified as potentially interested in a particular product or destination. Market is used to refer to countries, although not exclusively; whereas market segment is used more frequently to define a group of potential customers who have been identified as potentially interested in a particular destination.

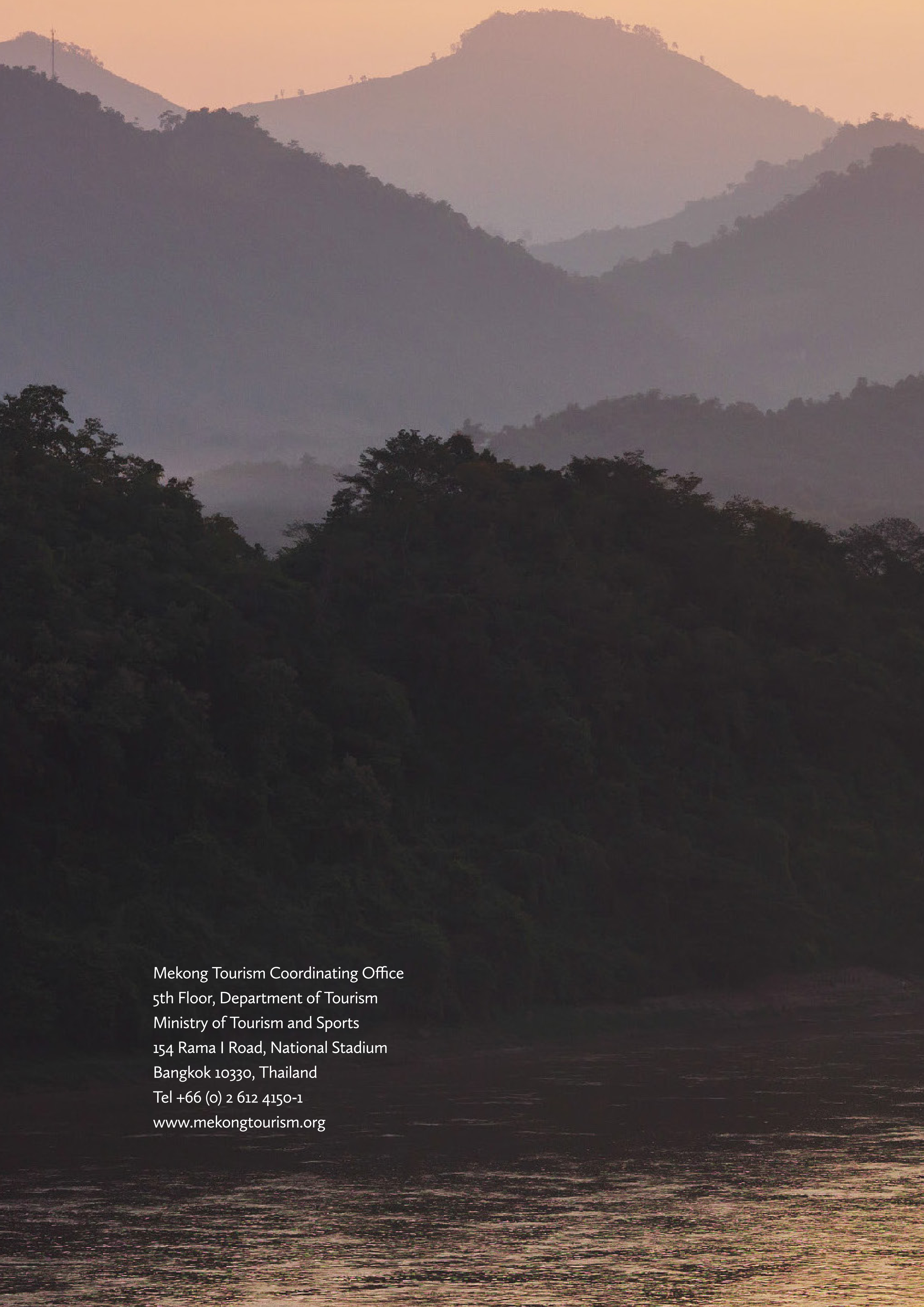
Marketing	Covers the entire process of developing a product and promoting it, to refining and redeveloping it; from initial consumer research through promotional campaigns to monitoring customer attitudes and sales. It is often misused to mean just promotion, which is just one element of the marketing process.
Medium-haul	Air travel with a one-way flight duration of three to six hours.
MICE tourism	Groups brought together for a particular purpose (e.g. meetings, incentives, conferences, and exhibitions); usually planned well in advance.
Nature tourism	Leisure travel undertaken largely or solely to enjoy natural attractions and engage in a variety of outdoor activities (e.g. bird watching, hiking, fishing, and beachcombing); a subset of nature-based tourism.
Pilgrimage	A journey to a shrine or other sacred place undertaken to gain divine aid, as an act of thanksgiving or penance, or to demonstrate devotion.
Promotion	The process of communicating a destination's (or place's) brand or competitive edge to potential visitors (or customers) through marketing communications. Promotion is just one element of marketing.
Short-haul	Air travel with a one-way flight duration of less than three hours .
Tourism value chain	The chain of activities or production units in different industries that provide goods and services demanded by visitors.
Visitor	A traveler taking a *trip* to a destination outside his/her *usual environment*, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. A *visitor* (*domestic, inbound* or *outbound*) is classified as a *tourist* (or overnight *visitor*), if his/her *trip* includes an overnight stay, or as a same-day *visitor* otherwise.

Source: Adapted from 'ASEAN Tourism Strategic Plan 2011–2015' Glossary of Different Forms of Tourism Activity, UNWTO definitions, and tourism strategies and master plans of the GMS National Tourism Organizations.

ABBREVIATIONS

ADB	Asian Development Bank
ASEAN	Association of Southeast Asian Nations
BIMP–EAGA	Brunei, Indonesia, Malaysia, Philippines East ASEAN Growth Area
CAGR	Compound Annual Growth Rate
GDP	Gross Domestic Product
GMS	Greater Mekong Subregion
Lao PDR	Lao People's Democratic Republic
MeTAG	Mekong Tourism Advisory Group
MICE	Meetings, Incentives, Conventions and Exhibitions
MTCO	Mekong Tourism Coordinating Office
MTF	Mekong Tourism Forum
NTO	National Tourism Organization
PATA	Pacific Asia Travel Association
PRC	People's Republic of China
PTO	Provincial Tourism Office
TAT	Tourism Authority of Thailand
TWG	Tourism Working Group
UNESCO	United Nations Educational, Scientific, and Cultural Organization
UNWTO	United Nations World Tourism Organization
WEF	World Economic Forum





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