Optimizing the Benefits of Regional Tourism Cooperation

- good practice & lessons from the Greater Mekong Subregion

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## Overview

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Regional Tourism Cooperation in SE Asia

Source: ASEAN Tourism Strategic Plan 2011-2015
GMS Tourism Assets
GMS Tourism Trends

Source: Mekong Tourism Coordinating Office; GMS NTOs
## GMS Tourism Trends

<table>
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<th>Revenue by subsector*</th>
<th>2004</th>
<th>2010</th>
<th>2015</th>
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<td>Accommodation and Food</td>
<td>5.27</td>
<td>10.51</td>
<td>18.67</td>
</tr>
<tr>
<td>Transportation</td>
<td>1.94</td>
<td>3.87</td>
<td>6.87</td>
</tr>
<tr>
<td>Shopping</td>
<td>4.07</td>
<td>8.11</td>
<td>14.40</td>
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<tr>
<td>Tours</td>
<td>1.19</td>
<td>2.37</td>
<td>4.21</td>
</tr>
<tr>
<td>Other Services</td>
<td>2.33</td>
<td>4.64</td>
<td>8.25</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$14.80</td>
<td>$29.50</td>
<td>$52.40</td>
</tr>
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</table>

*US$ billion

Source: GMS Tourism Sector Strategy estimates
GMS Tourism Trends

international arrivals 2010
GMS Tourism Trends

Thailand’s share of GMS international arrivals

Source: Mekong Tourism Coordinating Office; GMS NTOs
Rise of IntraASEAN Travel

International arrivals by source market - based on 2008 NTO estimates
Air links and low cost carriers

- Bangkok
- Bali
- Penang
- Langkawi
- Siem Reap

from RM 0.99

HURRY! Book your year-end holidays now.
More Change Coming…Ready?

[Images of different technologies, including a Walkman, iPod, and a futuristic phone]
The GMS Tourism Sector Strategy

“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, and sustainable development, while minimizing adverse impacts”
“The benefits of our collective efforts are greater than what can be achieved through independent actions”
Rationale of Subregional Tourism Cooperation

- Greater benefits through cooperation than through independent actions

- Economies of scale for joint marketing and promotion – complementary to individual countries efforts
  - longer stay
  - higher spend
  - repeat visitation

- More effective and efficient infrastructure investments

- Facilitate knowledge sharing, technology transfer and institutional strengthening

- Improved coordination in responding to adverse events

- Harmonization of travel formalities and common service standards to help increase international arrivals, length of stay and spend
Rationale of Subregional Tourism Cooperation

GMS Economic Cooperation Program

Vision

Prosperous, Integrated and Harmonious Subregion

Prosperous – accelerated and sustained inclusive economic growth, poverty reduction, sustainable management and protection of heritage resources

Integrated – infrastructure improved, immigration procedures streamlined, subregional tour circuits developed, competency and environmental standards adopted, joint marketing implemented, partnerships promoted

Harmonious – tourism is the business of peace, friendship and cross-cultural understanding

GMS Tourism Sector Strategy
The GMS Tourism Sector Strategy

- 7 Thematic Programs
- 29 Priority Projects
- 13 Priority Zones

www.exploremekong.org
Thematic Programs

1. **Marketing and product development**
   Promote the development of multi-country, high quality sub-regional culture, nature and adventure products

2. **Human resource development**
   Upgrade the skills and capacity of tourism managers, trainers, and tourism education and training institutions

3. **Heritage conservation and social impact management**
   Promote higher standards of natural and cultural heritage management and foster a more coordinated approach to managing the social impacts of tourism

4. **Pro-poor tourism development**
   Promote patterns of tourism development that increase economic opportunities for the poor, women and ethnic groups
Thematic Programs

5. Private sector participation
   Encourage private sector participation and public-private partnerships in subregional tourism planning, investment and marketing

6. Facilitating the movement of tourists
   Address impediments to travel to and within the GMS, with special attention to visa and border/immigration issues

7. Tourism-related infrastructure development
   Jointly plan and develop tourism infrastructure in the subregion with a view to ensure wider distribution of tourism benefits and support pro-poor tourism development in priority zones
GMS Tourism Sector Strategy: Implementation

GMS Ministers and Senior Officials
Leadership and Policy Guidance

Advisory Board
(ADB, ESCAP, PATA, UNESCO, SNV, WTO)

Private Sector
tour operators, airlines, ground transport, marketing boards, etc

GMS Tourism Working Group
6 GMS NTOs
formulate and direct strategy implementation, report to GMS leaders, MTCO board

Mekong Tourism Coordinating Office
market and monitor the subregion and coordinate development partners. TWG secretariat

NTO & Priority Projects
each NTO leads select subregional priority projects with participation of the development partners

Mekong Tourism Forum
annual public-private GMS forum and promotional event
GMS Tourism Sector Strategy Midterm Review

- Key accomplishments and good practice

- GMS Tourism Working Group and Mekong Tourism Coordinating Office – knowledge sharing and coordination among countries
- Explore Mekong Campaign and Mekong Tourism Forum
- Tourism HRD strategies and rollout of ASEAN standards
- UNESCO GMS Heritage Guide Training Program
- Prevention of child sex tourism campaigns
- Legal and policy reform to promote pro-poor tourism
- Improving investment climate
- Streamlined intraregional travel, especially for ASEAN citizens
- Completion of primary GMS international road network
GMS Tourism Sector Strategy Midterm Review

- Lessons and ongoing challenges
  - Mekong Tourism Coordinating Office – lack of legal status and limited resources
  - Different levels of development among and between the GMS countries causing some difficulties sequencing/synchronizing subregional initiatives
  - Need for improved social/economic impact monitoring – “if you can’t measure it, you can’t manage it”
  - Need for improved coordination with key sectors that are affected by and/or affect tourism - transport corridors, economic corridors, tourism corridors
  - Difficulties putting pro-poor tourism policies into action due to limited capacity of public sector officials and slow adoption by private sector
GMS Tourism Sector Strategy Midterm Review

- Lessons and ongoing challenges
  - Support for private-sector led Tourism Marketing and Promotion Boards and industry associations is variable – but is it necessary given the high growth rates?? More tourists or more spend??
  - Cumbersome immigration procedures at land borders impeding development of subregional tour circuits - should we still be trying to promote a common GMS or ASEAN visa for long haul markets??
  - “Last mile” access infrastructure to enable development of secondary destinations lacking – what are the criteria we should be applying to select sites ??
The Tea Caravan Trail

1. Fort Carnot
   Visit colonial France’s westernmost Indochinese garrison, and admire the best-preserved Hmong gate tower. Watch Hmong women make strong bamboo paper by grinding bamboo stems into a paste, spreading it on a mat, then sun-drying it.

2. Nam Chang
   Watch Hmong women make strong bamboo paper by grinding bamboo stems into a paste, spreading it on a mat, and sun-drying it.

3. Don Chai
   Stop at the visitor center of the Bokeo Arts and Crafts Center and purchase the range of goods produced for sale by the ethically-diverse Bokeo Handicraft Collective.

4. Nam Phae
   Enjoy a panoramic view of the Ceng, forested southwestern mountain range, all the way to the Golden Triangle from the Tea Caravan Trail's highest point.

5. Bor Kung
   Take a walk through this 18-hectare forest to a Shrimp Stream (Bo Kung) and its fish, crabs and prawns, and nearby stone pools for a cool dip.

6. Vat Mahaphot
   Explore the female's site of an ancient city dating to the 1200s on a forested mountain top, and see earth ovens once used to make bronze drums.

7. Nam Eng Cave
   Journey through the area of northern Laos' longest mapped caves, and marvel at the 'inner chambers' hollowed out by underground water pools with cave pools.

8. Nam Ha NPA
   Start your ecotourism activities in the Nam Ha National Protected Area at the visitor center in the Nam Ha Village.

9. Vieng Neua
   Visit this ethnic Lao-Tai village and experience a local ceremony, dance and music performances, muds and cooking classes in its traditional community center.

10. Nam Dee Fall
    Take a short trail to this rocky furnace, enjoy a picnic lunch by a spring overlooking two pools of its base, and jump in for a refreshing swim.
River life adventures in Northeast Cambodia
Alignment with ASEAN Tourism Strategic Plan

Vision:
By 2015, ASEAN will provide an increasing number of visitors to the region with authentic and diverse products, enhanced connectivity, a safe and secure environment, increased quality of services, while at the same time ensuring an increased quality of life and opportunities for residents through responsible and sustainable tourism development by working effectively with a wide range of stakeholders.

Responsible and Sustainable Tourism Development
All strategic directions and actions in the ATSP are guided by responsible and sustainable tourism principles recognizing the significant role that tourism plays in poverty reduction, climate change, gender and minority issues, capacity building, cultural preservation and natural conservation.

1. Develop Experiential Regional Products & Creative Marketing & Investment Strategies
   1.1 Develop and implement a tourism marketing strategy for the ASEAN region
   1.2 Develop Experiential and creative regional/sub regional circuits & packages together with investment strategies
   1.3 Enhance the external relation polices and procedures of ASEAN tourism

2. Strategically Increase the Quality of Services and Human Resources in the Region
   2.1 Develop a set of ASEAN tourism standards with a certification process
   2.2 Implement the MRA on ASEAN Tourism Professionals and its requirements
   2.3 Provide opportunities for increase knowledge and skill development

3. Enhance and Accelerate Travel Facilitation and ASEAN Connectivity
   3.1 Advocate for a single visa for the ASEAN region
   3.2 Work with other ASEAN bodies to expand connectivity through air, water, rail and ground transportation

Source: ASEAN Tourism Strategic Plan 2011-2015
Discussion

How are other subregions (BIMP-EAGA, SASEC, IMT-GT, CAREC, etc.) addressing the challenges of subregional tourism development?

**Challenges**
- Subregional marketing and promotion
- Development of subregional tour products / circuits
- Heritage protection and management
- Infrastructure investments to distribute tourism flows, investment and benefits more widely
- Prevent and mitigate negative social impacts
- Promotion of private sector participation and partnerships with local communities
- Streamline travel formalities
- Strengthen tourism-related human resources
- Strengthen mechanisms and institutions for subregional tourism cooperation

**Solutions**
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Thank you

Questions / comments:

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