Strategic Planning
Policymaking and
Lawmaking of
Cambodia

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Strategic Plan 2011-2020

- Introduction: Tourism Situation
- Vision
- Strategic Directions
- Challenges
- Measures and Plans
- Monitoring
- Conclusion
Tourism as a System

- Tourism is “Cultural and Natural tourism”
- Tourism has been decided as «Green Gold»
- One of top ten priority sectors for socio-economic development.
- Tourism is one of major generators of revenue contributing more than 12% of GDP, job creations.
- Sustainable tourism contributes to poverty alleviation and Climate change mitigation.
- Tourism promotes peace and cooperation
Arrivals 1993-2010

2010: 2.5 M

2011 (Jan-Sep): 2 M (up 15%), Year 2011: 2.9 M (e)
Arrivals in 2010

2010 Arrivals 2,508 M (up 16%)

Air 1,304,300 52.00%
     PNH int’l airport 591,628 23.59%
     REP int’l airport 712,672 28.41%

Land 1,016,584 40.53%

Water ways 78,015 3.11%

Same-day visitor 109,390 4.36%

Mode of arrivals 2010
Source Markets of Arrival in 2010

- Europe, 19.51%
- Americas, 7.94%
- Africa, 0.18%
- Middle East, 0.31%
- ASEAN, 38.38%
- Asia and the Pacific, 72.06%
**Tourism Revenue**

Cambodia: **Tourism Receipts** (Million USD)

- 1995: 100
- 1996: 118
- 1997: 103
- 1998: 166
- 1999: 190
- 2000: 228
- 2001: 304
- 2002: 379
- 2003: 347
- 2004: 578
- 2005: 832
- 2006: 1,049
- 2007: 1,400
- 2008: 1,595
- 2009: 1,561
- 2010: 1,786

Cambodia: **Inbound Tourism** (Million)

- Jan-Sep 2011: 2.1 M, ↑15.6%
- 1993: 0.12
- 1997: 0.22
- 2003: 2.13
- 2008: 2.13
- 2010: 2.51

Source: Statistics & Tourism Information Dept., MOT
• Cambodia: world-class destination
• Welcome all tourists
• Quality Tourism and Sustainable Tourism Development
• Cultural Tourism is priority
Vision 2020

2011: 2.9 M
2015: 4.5 M
2020: 7 M
JOB

- **Direct**: 800,000
- **Indirect & Induce**: 1,000,000
Strategic Directions

Product Development

Legal system and management mechanism

Marketing and Promotion

Safety system Impact Management

Facilitation of Travel and Transportation

Capacity Development
Product Development

All Products

- Existing Products
- New Products
- Zoning Development
Existing Tourism Zoning

- Siem Reap
- Angkor
- Phnom Penh & Surrounding
- Costal Area
- Northeast
New Tourism Zoning
Angkor links to 5 directions
Phnom Penh
Coastal Area

Tatai Resort

Waterfall In Kampot
Coastal Area

Mangrove in Koh Kong

Dekoul Island

Coral Reef in Koh Rong

Seahorse in Koh Rong
Cambodian Bay is the full member of “The Most Beautiful Bay in the World Club”

Cambodia will celebrate its first Sea Festival in the coastal zone. (December 2011)
Linking Angkor + Coastal Area
Northeast
Northeast Cambodia is home to many species of animals. Wildlife Sanctuary.
Marketing Strategy

Marketing Mix (4 Ps)

- **Product**
- **Promotion**
- **Price**
- **Place (Market)**
Marketing Strategy

Markets

- Existing and New Markets
- Asia and Pacific, EU, Arab, Americas
- ASEAN, China, Korea, Japan, India, Russia
China Outbound
100 M (2020)

Japan Outbound
30 M (2020)

ASEAN
50 M (2020)

EU (2020)

GMS
45 M (2020)

Asia (2020)

Korea Outbound
(2020)

Japan Outbound
30 M (2020)

Americas (2020)

World
1.6 B (2020)
Marketing Strategy

Markets

- Youth visitors
- Second Home
- Retired Person
- Beach and Entertainment
- Cambodian living abroad
- Domestic Tourist
Connectivity, Facilitation of Travel

Linking

- Air
- Land
- Water way
Facilitation of Travel

- Open-sky policy:
- Visa on arrival / Embassy
- E-visa,
- K-visa (Overseas Cambodian)
- Visa Exemption for ASEAN member countries
Gateway to Cambodia

21 international Check Points:
- With Vietnam 10
- With Thailand 6
- With Lao 1
- Sea port 1
- Airport 3

Siem Reap Int’l Airport
Phnom Penh Int’l Airport
Trapaing Kreal (Steng Treng)
Trapaing Sre (Kratie)
Trapaing Phlong (Kampong Cham)
Bavet (Svay Rieng)
Prey Vor
Sihanouk Pro. Int’l Seaport
Prom (Pailin City)
Daung (Battambang)
Poi Pet (Banteay Meanchey)
O’Smach (Oddar Meanchhey)
Chorm (Anlong Veng-Oddar Meanchhey)
Chan Yean (Koh Kong)
Prek Chak (Kampot)
Kaam Samnor (Kandal)
Phnom Den (Takeo)
Sihanouk Pro. Int’l Seaport
Banteay Chak Krey (Prey Veng)
Phnom Penh
The Philippines
Singapore
Indonesia
Myanmar
Southern China
Manila
Bangkok
Kunming
Vietnam
Thailand
Laos
Kuala Lumpur
Malaysia
Jakarta
Singapore
Brunei
Begawan
Hanoi
Laos
o Vientiane
Cambodia
1h:30 in average
Safety, Impact Management

- **Safety System**
  - Police, Social order, food safety, insurance...

- **Impacts**
  - socio- Economic, Culture and Environment
  - Leakage Management
Regulatory and Legal Mechanism

- **Tourism Sector Policies** (national tourism policy, national ecotourism policy and strategic plan, tourism development strategic plan 2011 – 2020)
- **Regulations** (sub-decrees, ministerial regulations, directives, circular for instruction etc)
- **Law on Tourism** and en route of developing a new law on Governance of Ecotourism and CBET
Human Resource Development

- All levels of HRD
- Skills/capacity-building, tourism professional capacity development National Institute and University of Tourism and Hospitality, (in close cooperation with the Cheju Halla University developing a project proposal)
- All stakeholders
- Bank of Student
Challenges

• Cross-sectors’ and public’s comprehension limited
  cross-sectoral cooperation & collaboration limited

• Product, Marketing, connectivity, impacts, Mechanism

• Weakness and Threat

• Giving Solutions
Measures, Activities and Plans

- Based on strategic Directions
- Product, Marketing, connectivity, Safety, Mechanism
- Short term (2012-2014)
- Long term (2015-2020)
Measures, Activities and Plans

- Proposed infrastructure development
  Road, Port, Airport, Power, Water...

- Ex. New Airport in Phnom Penh, (10 M)

- Air field in some key area: Northeast, Battabang, Koh Kong, Preah Vihear...

- Sea port: Kep, Kamport
Measures, Activities and Plans

- **Tourism links with Garment industry**
- **Tourism links with Rice export**
  (Greed + White Gold)
Monitoring

- Committee for implementation
- Secretariat General at MOT
Conclusions

- Tourism “Green Gold” Green Economy
- Socio- Economic Development
- Job, Poverty Reduction
We need

Hotel Demand (Room)

2011: 25,000
2015: 45,000
2020: 75,000
We Need

1- Tourism related Infrastructures
2- Hotel, Resorts
3- Convention Center
4- Theme Park
5- Travel and Transport
6- HRD, Skill, School
7- Other Tourism related Sectors
We Need

4 Ms

- Man
- Money
- Material
- Management

All in the Strategy.....