



GREATER MEKONG SUBREGION TOURISM STRATEGY 2030



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In this publication, "\$" refers to United States dollars.

MTCO uses "China" to refer to the People's Republic of China, and "Ha Noi" instead of Hanoi.

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On the cover: Morning sunlight by Mekong River, Phu Huay Isan, Sangkhom District, Nong Khai, Thailand.

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Abbreviations

ADB	–	Asian Development Bank
ASEAN	–	Association of Southeast Asian Nations
COVID-19	–	coronavirus disease
GDP	–	gross domestic product
GMS	–	Greater Mekong Subregion
GSTC	–	Global Sustainable Tourism Council
Lao PDR	–	Lao People’s Democratic Republic
MSME	–	micro, small, and medium-sized enterprises
MTCO	–	Mekong Tourism Coordinating Office
MTF	–	Mekong Tourism Forum
NTO	–	national tourism organization
PRC	–	People’s Republic of China
TWG	–	tourism working group
UN	–	United Nations
UNESCO	–	United Nations Educational, Scientific and Cultural Organization
WTTC	–	World Travel & Tourism Council



Photo: Weizhou Island, Beihai, Guangxi Zhuang, People's Republic of China



1

Introduction

Tourism is an important economic and social activity that contributes to and benefits from the three GMS pillars: community, connectivity, and competitiveness

Photo: Flower field in Luoping, Yunnan, People's Republic of China

The six Greater Mekong Subregion (GMS) countries—Cambodia, the Lao People’s Democratic Republic (Lao PDR), Myanmar, the People’s Republic of China (PRC), Thailand, and Viet Nam—envisage developing a more integrated, prosperous, sustainable, and inclusive subregion, predicated on three pillars: community, connectivity, and competitiveness. This vision is articulated in the GMS Economic Cooperation Program Strategic Framework 2030.¹

Tourism is an important economic and social activity that contributes to and benefits from the three GMS pillars. In 2023, international visitor arrivals reached 52 million and in 2024 are expected to fully recover or surpass the 2019 pre-coronavirus disease (COVID-19) pandemic record of 87 million international arrivals. Remarkably, there were 9.5 million intra-GMS tourists in 2023. Given renewed strong demand for tourism in the GMS, the GMS visitor economy is expected to continue growing steadily and generate \$200 billion per year by 2030.²

However, despite successful efforts to revive demand post-pandemic, GMS tourism is confronting sustainability and inclusion challenges. These include tourism congestion in gateway destinations, infrastructure deficits, climate change, and environmental degradation. Other constraints such as digital skills gaps, inconsistent service quality, and fragmented tourism management and marketing must also be addressed to help the subregion stay competitive, harness inclusive business opportunities, and protect tourism assets.

The GMS Tourism Strategy 2030 is designed to address these challenges, in alignment with the overarching vision of the GMS Economic Cooperation Program Strategic Framework 2030. The strategy will guide GMS tourism to become more integrated, prosperous, sustainable, and inclusive.

Four strategic directions channel resources to build sustainable destinations, develop human capital, strengthen stakeholder engagement, and enhance destination marketing. Strategic programs will (i) develop climate-resilient infrastructure, particularly transport infrastructure in secondary destinations and border areas, invest in green urban infrastructure, promote universal accessibility, and implement regional tourism standards; (ii) strengthen public and private tourism workers’ management capabilities and digital skills, support tourism industry- and learner-relevant vocational training and education, and advocate for workforce diversification; (iii) deepen public–private stakeholder engagement, improve crisis communications, and promote visa openness and facilitation; and (iv) create more quality multicountry visitor experiences and enhance destination marketing. The well-established Mekong Tourism Forum (MTF) and other GMS knowledge platforms will continue to promote public–private tourism cooperation and sustainable tourism policy dialogue.

Since 2005, successful GMS tourism cooperation has been guided by three successive subregional tourism development and marketing strategies. These focused on enhancing human resources, infrastructure development, protecting distinct and similar cultural heritage, social impact management, promoting gender equality, subregional marketing, private sector development, and travel facilitation, among others. Recent efforts shifted to safely reopening borders and reviving post-pandemic tourism demand. During

¹ Asian Development Bank (ADB). 2021. [The Greater Mekong Subregion Economic Cooperation Program Strategic Framework 2030](#).

² World Travel & Tourism Council (WTTC). 2024. [Economic Impact Research](#).



Photo: Dong Chorus, Guangxi Zhuang, People's Republic of China

2025–2030, GMS countries will jointly pursue their ambition to promote resilient high-yield sustainable tourism and accelerate secondary destination development, building on the sturdy foundations laid by previous strategies. Collective actions will also align with sustainable tourism development pillars set by the Association of Southeast Asian Nations (ASEAN)—sustainable tourism growth; social inclusiveness; job creation and poverty reduction; environmental protection and climate change; diversity and heritage; mutual understanding and peace; and health, safety, and security.³

The GMS Tourism Working Group (TWG) and Mekong Tourism Coordinating Office (MTCO) led the formulation of this strategy.⁴ The process started with a review of previous GMS tourism strategies and each GMS country's national tourism plan to distill good practices and determine where strategic priorities overlap. A situational analysis of global and subregional trends, opportunities, and constraints that influence GMS tourism followed. Private sector associations, development partners, and the media were consulted along with subject matter experts and the GMS Secretariat. The analysis and stakeholder consultations informed the selection of four strategic directions, 19 strategic programs, and the TWG decision to carry over ongoing projects from the GMS Tourism Sector Strategy 2016–2025.

Implementation arrangements build on the existing GMS tourism cooperation framework, where the GMS tourism ministers provide policy guidance and GMS national tourism organization (NTO) officials direct the implementation of strategic programs, projects, and joint activities through the GMS TWG and MTCO. MTCO will coordinate and monitor strategic program implementation and help mobilize public and private resources for joint projects and activities. The GMS TWG will review strategy implementation semiannually, and report progress during GMS Senior Officials Meetings and the GMS Summit. Implementation results and recommendations will be disseminated during the annual MTF.

³ ASEAN Secretariat. 2024. *Action Roadmap for Sustainable Tourism Development in ASEAN*.

⁴ GMS Tourism Working Group members comprise mid- and senior-level officials from the GMS National Tourism Organizations (Ministry of Tourism, Cambodia; Ministry of Culture and Tourism, PRC; Ministry of Information, Culture and Tourism, Lao PDR; Ministry of Hotels and Tourism, Myanmar; Ministry of Tourism and Sports, Thailand; and Ministry of Culture, Sports and Tourism, Viet Nam National Authority of Tourism, Viet Nam). MTCO was formally established as the GMS Tourism Working Group Secretariat under the 2005 Siem Reap Declaration on Mekong Tourism.

The estimated cost to implement the 47 priority projects and initiatives included in this strategy is \$1.28 billion. Financing and other resources will mainly be sourced from government (national, subnational, and municipal), the private sector, and development partners. MTCO will continue to assist governments and the private sector to market and promote GMS tourism products and services directly through the www.mekongtourism.org website and industry partnerships.



Photo: Koh Rong, Preah Sihanouk Province, Cambodia



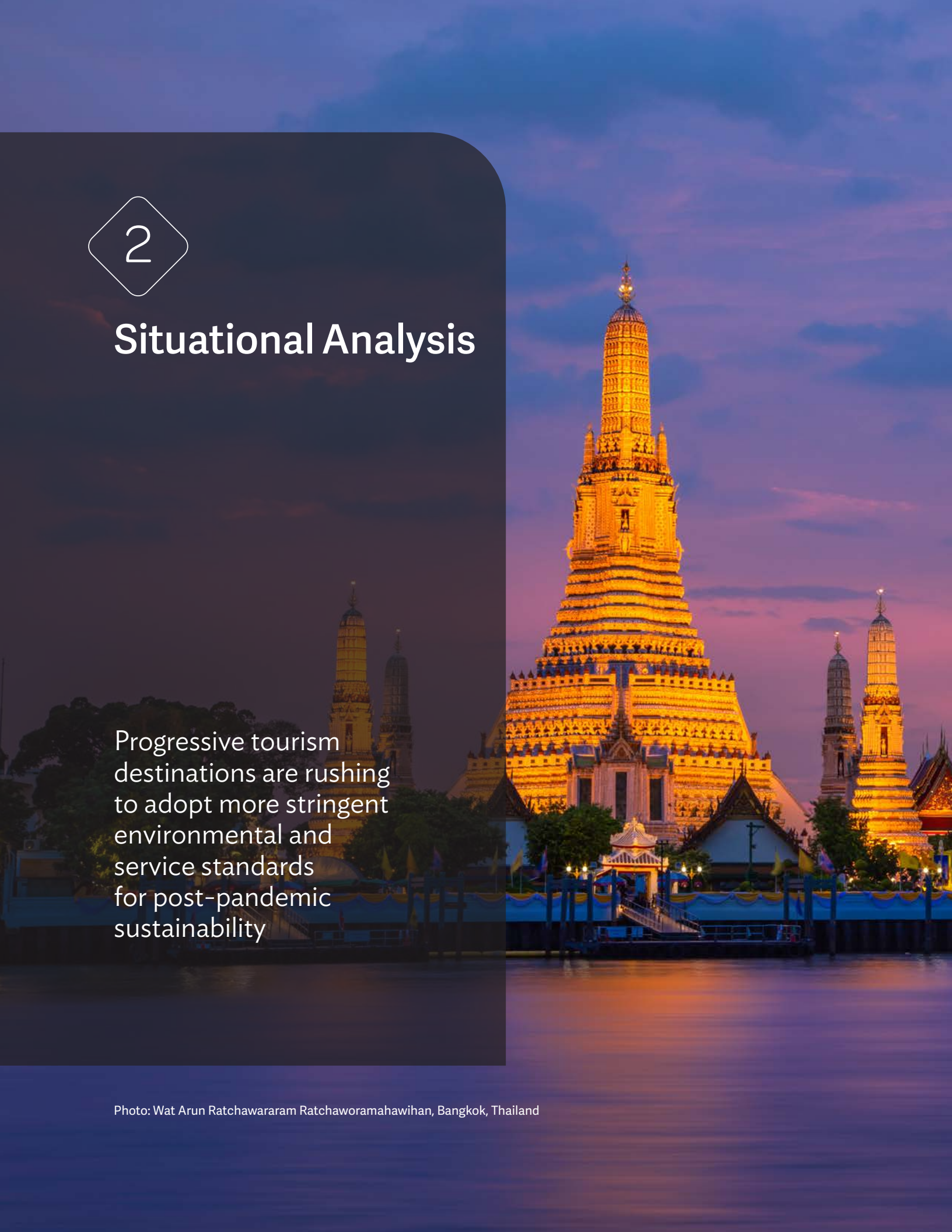
Since 2005, the successful GMS tourism cooperation has been guided by three successive subregional tourism development and marketing strategies

2

Situational Analysis

Progressive tourism destinations are rushing to adopt more stringent environmental and service standards for post-pandemic sustainability

Photo: Wat Arun Ratchawararam Ratchaworamahawihan, Bangkok, Thailand



GLOBAL TOURISM TRENDS AND INFLUENCES

International visitor arrivals reached a record high of 1.5 billion worldwide in 2019, before the disastrous COVID-19 pandemic. In 2020, global arrivals fell to 407 million then rose slightly to 458 million in 2021. This contraction left more than 140 million tourism workers (43%) unemployed and caused export revenues from tourism to fall by 60% compared to the record high (\$1.7 trillion) set in 2019. Following the removal of most travel restrictions, there was a sharp rebound to 1.4 billion global arrivals in 2023 and continued upward momentum during the first 9 months of 2024. A full recovery to 2019 levels or higher is expected in 2024.⁵

While the 2020–2022 pause in global tourism demand caused economic hardship, it also sparked greater interest in sustainability initiatives after destinations saw negative tourism impacts dissipate with fewer visitors. The COVID-19 pandemic emphasized the need for better destination management and economic diversification to enhance resilience and mitigate the negative environmental and social impacts of high-intensity, low-yield tourism.⁶ Consumer behavior also shifted toward localization and closer-to-home travel. Concurrently, the use of digital technologies skyrocketed, creating vast economic opportunities for tourism-related micro, small, and medium-sized enterprises (MSMEs). Overshadowing these trends is growing recognition among visitors and hosts that climate change mitigation and adaptation efforts must be redoubled or tourism may be forced to permanently close in some places. Progressive tourism destinations are rushing to adopt more stringent environmental and service standards in response to post-pandemic sustainability concerns.

SUSTAINABLE TOURISM

United Nations (UN) Tourism defines sustainable tourism as tourism that takes full account of its current and future economic, social, and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities.⁷

From a demand perspective, 83% of travelers seek sustainable tourism options and 49% believe there are not enough sustainable travel options available.⁸ Destination management organizations and online travel agents recognize this trend and are increasingly promoting sustainable practices.

Sustainability initiatives include one of the world's largest online travel agents showing third-party sustainability certifications across more than 30 categories, low-emissions destinations, and circular economy systems to reduce, recycle, and eliminate waste.⁹ For example, Costa Rica—a leading sustainable tourism destination—generates 98% of its electricity from renewable sources and aims to become carbon

⁵ UN Tourism. 2023. *World Tourism Barometer*. 22 (2). May.

⁶ World Bank Group. 2024. *Tourism Watch Quarterly Report Q1 2024*.

⁷ UN Environment Program and UN World Tourism Organization.

⁸ Among 29,000 travelers surveyed in 30 countries. See *2021 Sustainable Travel Report*.

⁹ CE360 Alliance. 2022. *Circular Economy in Travel and Tourism*.

neutral by 2050. In 2019, 170 countries pledged to significantly reduce the use of plastics by 2030 and make necessary plastics reusable, recyclable, or compostable. Canada went a step further in 2023 by banning the manufacture, import, and sale of many single-use plastic products. Meanwhile, destinations in the Republic of Korea are recycling up to 95% of food waste.¹⁰

Since 2015, 191 United Nations (UN) Member States have committed to the 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals. While tourism has the potential to contribute, directly or indirectly to all 17 goals, it is specifically mentioned in Goals 8, 12, and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources (Figure 1).¹¹ In 2023, the UN reaffirmed its commitment to promote tourism as a means of fostering post-pandemic inclusive growth, advocating for strategic policies supporting education, job creation, and gender equality.¹²

Figure 1: Tourism and the Sustainable Development Goals



Source. UN Tourism.

¹⁰ World Economic Forum. 2019. [Canada Bans Single Use Plastic](#); World Economic Forum. 2019. [South Korea Once Recycled 2% of its Food Waste. Now it Recycles 95%](#).

¹¹ UN Tourism. 2024. [Tourism4SDGs](#).

¹² WTO. 2023. [Tourism: A Driver for Shared Prosperity – Key insights](#). UNWTO.



Photo: Kulen, Cambodia

OVERTOURISM AND CLIMATE CHANGE

As tourist numbers rise globally, overtourism is a renewed concern. While destinations welcome the jobs and income tourism brings, many cities and fragile heritage sites are overly congested and unable to cope with additional demand for solid waste collection and treatment, water supply and wastewater treatment, and other public services. Management responses include limiting visitor numbers, requiring advance reservation and timed entry to popular attractions, and imposing higher fees and taxes to soften demand.¹³

Climate change is an existential threat to the earth's tourism destinations and is causing more frequent severe weather events and disasters that disrupt travel patterns. There is already decreasing demand for hotter destinations and more interest in cooler regions—a trend that is expected to accelerate.¹⁴ Destinations that fail to address climate and disaster vulnerability can also expect significantly lower earnings per visitor and negative perceptions about safety.¹⁵

ENVIRONMENT AND SOCIAL CONCERNS

In 2019, greenhouse gas emissions from travel and tourism activities reached 8.1% of total global greenhouse gas emission, mainly due to continued reliance on fossil fuels for transport.¹⁶ Travel and tourism accounts for 10.6% of global energy consumption, and about 1% of freshwater consumption. Tourists typically generate double the amount of solid waste per day than residents, resulting in more than 35 million tons of solid waste annually.¹⁷ These “invisible burdens” of tourism stretch infrastructure capacity, affect residents’

¹³ National Geographic. 2023. *What's the Problem with Overtourism*.

¹⁴ Forward Keys. 2023. *Global Travel Trends 2023*.

¹⁵ S. Cevik, M. Ghazanchyan. *Perfect Storm: Climate Change and Tourism*. *IMF Working Paper No. 2020/243*.

¹⁶ WTTC. 2023. *The Environmental Impact of Global Tourism*.

¹⁷ E. Juvan, B. Grün, and S. Dolnicar. 2023. *Waste Production Patterns in Hotels and Restaurants: An Intra-Sectoral Segmentation Approach*. *Annals of Tourism Research Empirical Insights*. 4 (1) May.

quality of life, and increase public service costs to local economies.¹⁸ As demand for environmentally sustainable tourism increases, consumers will expect more mandatory emissions reporting and sustainability standards, energy-efficient accommodations and tour services, and renewable energy to power tourism transport. Promoting investment in water saving technology for tourist accommodations, water and energy-efficient food production, and proper waste management are other measures that help reduce tourism's environmental footprint and address sustainability concerns.¹⁹

Although tourism directly employs about 19 million young people globally (about 4.5% of total youth employment) and 48 million women (3.7% of total female employment), youth and women are often seasonal workers and lack the qualifications to advance to management roles.²⁰ Better access to formal education and vocational training is needed to improve core analytical and management skills, critical thinking, service and foreign language skills, and information and communication technology aptitude.²¹ Older people (800 million in 2023) and people with disabilities (16% of the global population) also need training and support to enable them to enter and diversify the tourism workforce.²² Making tourism facilities universally accessible is another way to boost social inclusion.

INTERNATIONAL TOURISM STANDARDS

International tourism sustainability standards help ensure consistent and high-quality experiences for visitors and residents while protecting tourism assets. Standards attainment is a good investment because consumers are willing to spend an average of 9.7% more on sustainable goods and services.²³ Recognizing the benefits, more businesses and destinations are implementing standards developed by government, industry, and nongovernment organizations, including the Global Sustainable Tourism Council (GSTC) travel and tourism standards.²⁴ ASEAN has established regional standards for tourism professionals, green hotels, spa services, clean tourist cities, community-based tourism, homestay, public toilets, ecotourism; and meetings, incentives, conference, and event venues. Supplementing these are ASEAN's common hygiene and safety guidelines for tourism workers and communities.²⁵

¹⁸ Travel Foundation. 2019. [Destinations at Risk: The Invisible Burden of Tourism](#).

¹⁹ ADB. 2021. [Sustainable Tourism After COVID-19](#).

²⁰ WTTC. 2023. [The Social Impact of Global Tourism](#).

²¹ UN Tourism. 2022. [G20 Bali Guidelines for Strengthening Communities and MSMEs as Tourism Transformation Agents](#).

²² Our World in Data. 2024. [Age Structure](#); World Health Organization. 2023. [Disability](#).

²³ PwC. 2024. [Voice of the Consumer Survey](#).

²⁴ See [GSTC Members](#) | GSTC (gstccouncil.org).

²⁵ ASEAN. 2018. [ASEAN Tourism Standards](#); ASEAN. 2022. [ASEAN Hygiene and Safety Guidelines for Professionals and Communities in the Tourism Industry](#).

DIGITAL TECHNOLOGY AND THE SHARING ECONOMY

Digital technologies transform the way destinations gather data, access markets, offer products and services, and facilitate travel. Online travel agents, mobile applications, social media, and digital payment systems are ubiquitous, and their global reach offers tremendous business opportunities for tourism MSMEs. Digital platforms offering alternative accommodations or mobility services are another way small-scale entrepreneurs can connect to the tourism economy.²⁶ In 2023, online sales comprised 63% of travel and tourism transactions and were increasing by 8% per year. The global online travel market is expected to be worth nearly \$1 trillion per year in 2030.²⁷ Apart from their commercial benefits, digital tools can be used to help destination management authorities better regulate visitor flows, monitor environmental conditions, and efficiently collect tourism taxes and fees.

DESTINATION STEWARDSHIP

Tourism cuts across multiple sectors and government agencies therefore multi-sector public-private engagement is vital to successfully align sensible tourism growth aspirations with sustainability objectives. Destinations taking collaborative governance and stewardship approaches are succeeding in developing sustainable and resilient tourism economies that meet the economic, environmental, and social needs of a place. An example of how visitors can be engaged as destination stewards is The Tiaki Promise: *“while traveling in New Zealand, I will care for land sea and nature, treading lightly and leaving no trace; travel safely, showing care and consideration for all; and respect culture, traveling with an open heart and mind.”*

Collaboration between government, tourism businesses, and communities is also essential for effective disaster planning and response, including crisis communications.

VISA OPENNESS AND FACILITATION

Visa openness indicates the extent to which countries facilitate travel by easing restrictions to obtain a visa. Visa facilitation is the process of simplifying visa requirements and procedures for travelers. Introducing visa-free travel options boosts international visitor arrivals by 16% on average, while facilitative new visa types generate an 8% average increase in arrivals.²⁸ Visa openness and facilitation influence the mobility rankings shown in Table 1 and together with source market population, propensity to travel, and spending power are key destination marketing considerations. Globally, 77% of the world’s population was required to apply for a traditional tourism visa before departure in 2008. This figure fell to 47% in 2023.²⁹

²⁶ ADB. 2023. [Alternative Accommodations in Southeast Asia](#); ADB. 2024. [Smart Tourism Ecosystem Development Readiness in Southeast Asia](#).

²⁷ SkyQuest. 2023. [Online Travel Booking Services Market Insights](#).

²⁸ World Travel & Tourism Council. 2019. [Visa Facilitation: Enabling Travel & Job Creation Through Secure & Seamless Cross-border Travel](#).

²⁹ UN Tourism. 2023. [Tourism Visa Openness Report](#).

Table 1: Top 25 Countries Least Affected by Visa Restrictions

Mobility Ranking	Country	Population Estimate (million)	Outbound Tourists 2019 (million)	Outbound Annual Spend 2019 (\$ billion)
1	Singapore	6	10.71	27.05
2	Germany	84	99.53	93.24
3	Italy	61	34.70	30.34
3	Spain	47	19.85	27.78
5	Denmark	6	9.09	10.00
5	Sweden	11	18.00	14.37
5	France	68	30.41	50.54
8	The Netherlands	18	22.05	20.47
9	Austria	9	11.90	11.60
9	Belgium	12	17.32	18.69
9	Portugal	10	3.10	5.74
12	Finland	6	9.41	5.68
12	Luxembourg	1	2.55	3.61
14	United States	342	99.74	131.99
14	Switzerland	9	13.44	18.85
16	Japan	123	20.08	21.26
17	Canada	39	26.61	35.35
18	United Kingdom	68	93.09	85.95
18	Greece	10	7.85	3.07
20	Poland	39	13.50	9.27
21	Norway	6	8.89	16.11
22	Malaysia	35	14.20	12.35
23	Czech Republic	11	7.35	5.89
24	Ireland	5	9.35	8.26
25	Republic of Korea	52	28.71	32.74

Source: UN Tourism, 2023. *Tourism Visa Openness Report*.

TRAVELER TYPES AND MARKETING CHANNELS

Traveler types are diversifying and destinations that can connect with emerging “traveler tribes” and provide the niche experiences they seek will benefit (Figure 2). Remote work and work-leisure travel is popular among millennials (born 1981–1996) and Generation Z (born 1997–2012). Although the growing number of older travelers may be less inclined to work remotely during their vacation, they often travel off-peak, helping moderate seasonality. Many countries are now offering special visa programs and remote work packages that include coworking spaces, accommodations, and curated activities.³⁰ There is also more demand for amenities, services, and experiences tailored for older people and people with disabilities.

³⁰ Airbnb, 2022. *Airbnb Guide to Live and Work Anywhere: How Communities Can Benefit from Remote Workers*.



Photo: Konglor Cave, Khammouane Province, Lao People's Democratic Republic



Photo: Koh Ker Temple, Preah Vihear Province, Cambodia

Destination narratives are increasingly influenced by visitors and hosts sharing opinions with global audiences electronically before, during, and after travel. This makes direct and indirect digital marketing channels like social media, websites, email, search, and pay-per-click tremendously important. Understanding how travelers plan and book, the electronic tools they use, and the content shaping travel decisions is crucial in the “awareness to conversion” process. To supplement digital channels, destinations still use specialized campaigns and events, traditional print media, and tour agents to reach niche markets. Another enduring practice is cooperative marketing campaigns that enable multiple stakeholders to pool resources and achieve economies of scale.³¹

Figure 2: Traveler Types and Niche Experiences



Source: Amadeus. 2023. [Traveler Tribes 2033 Report](#).

³¹ Sojern and Digital Tourism Think Tank. 2024. [State of Destination Marketing 2024](#).



Photo: Kyaiktiyo Pagoda, Mon State, Myanmar

GREATER MEKONG SUBREGION TOURISM

ECONOMIC AND SOCIAL CONTEXT

The GMS is connected by the Mekong River and covers 2.6 million square kilometers, with a combined population of about 346 million people. Urbanization ranges from 20% in Cambodia to 40% in Thailand and estimates place more than 40% of the GMS population in cities by 2030. Ongoing economic stimulus measures, intra-GMS trade worth about \$640 billion (2020), and foreign direct investment above \$25 billion per year are helping drive positive growth of gross domestic product (GDP) across the subregion. In 2023, most GMS economies were growing faster than the 3.2% global average.³² Tourism services comprise up to 14% of total exports. While GDP growth and targeted social policies are contributing to steady poverty reduction, Gini coefficients indicate that in-country income equality remains a challenge (Table 2).

³² International Monetary Fund. [Real GDP growth](#).

Table 2: Economic and Social Indicators

Area	Population 2023 (million)	Nominal GDP 2023 (\$ billion)	Annual GDP Growth 2023 (%)	Per Capita Gross National Income 2022 (\$)	Poverty Rate 2022 (%)	Tourism as Percentage of Total Exports 2023 (%)	Gini Coefficient ^c
Cambodia	17.09	31.9	5.0	1,690	17.8	14.5	28.0
PRC	1,409.67 ^a	17,889.0 ^b	5.2	12,850	...	1.7	46.7
Lao PDR	7.55	14.5	3.7	2,310	18.3	5.0	36.4
Myanmar	54.58	59.7	0.8	1,270	24.8	7.0	30.7
Thailand	70.06	514.8	1.9	7,230	5.4	12.0	43.3
Viet Nam	100.31	429.6	5.0	4,010	4.2	2.4	43.1

... = data not available, PRC = People's Republic of China, GDP = gross domestic product, Lao PDR = Lao People's Democratic Republic.

^a Population of Guangxi Zhuang, PRC (~47 million) and Yunnan, PRC (~50 million).

^b Includes 2023 values for Guangxi Zhuang, PRC (\$380.3 billion) and Yunnan, PRC (\$422.2 billion).

^c Data range from 2017–2022.

Source: ADB 2024 Basic Statistics; WTTC Annual Highlights; World Bank [Gini Index](#).

KEY TOURISM INDICATORS

Tourism is a major source of income and employment in GMS countries. In 2023, international and domestic visitors generated in total \$875 billion, supporting 94 million jobs. This includes countrywide PRC data, where the large domestic tourism market accounted for 93% (\$713.7 billion) of total spending (\$771 billion). The share of female workers is above 40% in all GMS countries. Tourism's contribution to GDP ranged from 3.0% to 16.3% in 2023 (Table 3). There is a wide disparity in average spending per international visitor, influenced by length of stay, exchange rates, source market spending power, and the quality and availability of tourism services, among others.

Table 3: Key Tourism Indicators, 2019 and 2023

Item	Cambodia	PRC	Lao PDR	Myanmar	Thailand	Viet Nam
International Visitor Arrivals (million)						
2019	6.61	145.32	4.79	4.36	39.92	18.01
2023	5.45	35.53	3.42	1.28	28.15	12.6
International Visitor Expenditure (\$ billion)						
2019	5.8	136.4	0.8	3.1	60.7	11.6
2023	3.4	57.3	0.43	0.95	34.1	8.5
Domestic Visitor Spending (\$ billion)						
2019	1.7	862.0	0.41	1.3	33.0	15.3
2023	1.7	713.7	0.48	3.96	33.2	17.6



Regional tourism priorities include economic growth, job creation, regional cooperation, heritage protection, and improving tourism service quality

Item	Cambodia	PRC	Lao PDR	Myanmar	Thailand	Viet Nam
Average Expenditure per International Visitor (\$)						
2019	877	938	167	729	1,520	644
2023	623	1,613	125	1,067	1,211	675
Total GDP Contribution (%)						
2019	25.8	11.6	9.9	6.5	14.6	8.1
2023	16.3	7.3	6.5	3.0	10.4	6.8
Tourism Jobs (million)						
2019	2.33	82.23	0.35	1.3	6.66	5.8
2023	2.28	77.47	0.32	0.41	7.61	5.62
Tourism's Share of Total Jobs (%)						
2019	27.0	10.8	18.9	7.5	17.7	11.5
2023	23.7	10.3	16.5	2.8	19.1	5.6
Female Employment (%)						
2021	48	47	52	41	52	43
Youth (15–24 years) Employment (%)						
2021	20	10	21	17	11	9

GDP = gross domestic product, Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China.

Note: The following estimates are assumed for (i) international spending: Guangxi Zhuang, PRC \$3.0 billion, Yunnan, PRC \$6.0 billion; and (ii) overall jobs: Guangxi Zhuang, PRC: 1.5 million, Yunnan, PRC: 2.0 million.

Sources: GMS national tourism organizations and World Travel & Tourism Council (2024 Annual Research/Environmental and Social Footprint Reports).

Table 4 summarizes GMS international visitor arrivals during 2016–2023. International arrivals reached nearly 52 million in 2023, more than double the number in 2022 but still 40.0% fewer than the all-time high set in 2019. Cambodia saw the fastest post-pandemic recovery, reaching 82.5% of 2019 levels in 2023. Thailand recorded the highest number of international visitors and share of GMS international arrivals (53.8%) in 2023, followed by Viet Nam (24.1%), and Cambodia (10.4%). GMS arrivals for the first 8 months of 2024 reached 86% of the 52 million recorded in 2023.



Photo: Golden Bridge, Ba Na Hills, Da Nang, Viet Nam

Table 4: Greater Mekong Subregion International Visitor Arrivals, 2016–2023

Area	2016	2017	2018	2019	2020	2021	2022	2023	Change 19/23 (%)	Share (%)	2024 (Jan–Aug)
Cambodia	5,011,712	5,602,157	6,201,077	6,610,592	1,306,143	196,495	2,276,626	5,453,231	-17.51	10.42	4,291,058
Lao PDR	4,239,047	3,868,838	4,186,432	4,791,065	886,447	...	1,294,365	3,417,629	-28.67	6.53	2,652,967
Myanmar	2,907,207	3,443,133	3,551,428	4,364,101	903,343	130,947	233,487	1,284,731	-70.56	2.45	760,000
Thailand	32,529,588	35,591,978	38,178,194	39,916,251	6,725,193	510,767	11,065,226	28,150,016	-29.48	53.77	23,567,850
Viet Nam	10,012,735	12,922,151	15,497,791	18,008,591	3,686,779	...	3,661,222	12,602,434	-30.02	24.07	11,430,512
Guangxi Zhuang, PRC	4,825,160	5,124,400	5,623,253	6,239,568	246,815	61,909	30,622	222,600	-96.43	0.43	692,551
Yunnan, PRC	4,506,937	5,075,186	7,060,755	7,390,209	576,000	90,000	89,000	1,218,000	-83.52	2.33	1,817,700
Total	64,032,386	71,627,843	80,298,930	87,320,377	14,330,720	990,118	18,650,548	52,348,641	-40.05	100	45,212,638

-- = negative, ... = data not available, PRC = People’s Republic of China, Lao PDR = Lao People’s Democratic Republic.
 Source: GMS national tourism organizations.

Top GMS source markets in 2023 were the GMS countries themselves, with 9.5 million intra-GMS visitors comprising 18.2% of total international arrivals to GMS jurisdictions. There were 6.7 million arrivals from the PRC—50% visited Thailand and 25% visited Viet Nam. Other top markets include the Republic of Korea (10.8%), Malaysia (10.0%), the United States (3.7%) and Japan (2.9%). Of the 5.6 million arrivals from the Republic of Korea, 64% visited Viet Nam and 30% visited Thailand. The typical length of stay for Northeast Asian markets is 3–4 days. While the United States represents a smaller percentage of arrivals, Americans tend to stay longer, much like European visitors, and are more likely to visit more than one GMS country. With 22.8 million international visitors in 2023, Bangkok is one of the most visited cities in the world and the major gateway to the GMS. Other major international gateways are Ho Chi Minh City (6.0 million international visitors), Phnom Penh (1.3 million international visitors), and Vientiane (1.0 million international visitors). The GMS Tourism Sector Strategy 2016–2025 estimated about 30% of arrivals from long-haul markets visit more than one GMS country.

TOURISM PRIORITIES AND TARGETS

All GMS jurisdictions and ASEAN have strategic tourism plans. Regional tourism priorities and targets are summarized in Table 5. Goals and objectives emphasize economic growth, job creation, regional and international standards compliance, improving tourism management and marketing, regional cooperation, heritage protection, enhancing tourism service quality, and bolstering tourism competitiveness and sustainability.

Table 5: Regional Tourism Priorities and Targets to 2030

Area	Key Priorities and Targets
Cambodia	<ul style="list-style-type: none"> Enhance tourism product development and quality to serve 11 million visitors annually by 2030. BUILD (Brand management, Unique selling points marketing, Inbound design quality travel, Leverage tourism endowment and diversification, and Develop competitive tourism sites) the enabling environment and institutional structures for Cambodia to become a competitive, sustainable, and inclusive destination. Create and communicate Brand Cambodia as a leading global destination, promoting Cambodia tourism to targeted markets using unique selling point marketing. Leverage endowments to develop, diversify, and improve the quantity and quality of tourism products to meet international standards and increase visitor satisfaction. Develop tourism human resources to become skillful and qualified to ASEAN and international standards. Infuse digital transformation into every aspect of BUILD to enable competitive, sustainable, and inclusive tourism.
Guangxi Zhuang, PRC	<ul style="list-style-type: none"> Construct world-class tourism attractions by focusing on three “destinations,” two “belts,” and one “center” and six brands to receive 800 million annual visitors and earn CNY1.1 trillion by 2030. Improve tourism services quality by cultivating world-class tourist attractions, resorts, and enterprises. Modernize tourism governance by improving the internationalization of tourism. Promote integration and development of culture and tourism.
Yunnan, PRC	<ul style="list-style-type: none"> Establish the province as a world-class tourist destination by developing 10 new scenic spots, 10 new tourist resorts, and upgrading 450 existing scenic spots by 2030. Develop tourism belts, thematic tourism routes, and demonstration sites to build rural tourism. Build and promote three cross-border tourism corridors and three routes between Yunnan and the Lao PDR, Myanmar, and Viet Nam. Innovate tourism products, ranging from health and wellness tourism, industrial tourism, sports tourism, adventure tourism, educational tourism, and night economy tourism.
Lao PDR	<ul style="list-style-type: none"> Improve destination branding, unique selling propositions and digital capacity to attract 6.2 million international visitors by 2030. At least 10 cities achieve the ASEAN-National Clean Tourist Cities Standard and 15 community-based tourism sites achieve ASEAN-Community-Based Tourism Standard. Develop at least seven tourism-related policies/legislation. Strengthen service and management capacity of at least 6,000 public and private tourism stakeholders.

Area	Key Priorities and Targets
Myanmar	<ul style="list-style-type: none"> • Increase international visitor arrivals to 5 million and domestic visitors to 25 million by 2030. • Safeguard tourism resources and prevent negative impacts on society and the natural environment. • Support micro, small, and medium-sized enterprises through digitalization, expanding e-payment systems, tourism investments, training, and grants. • Establish and enforce quality service standards across the tourism industry. • Promote and expand niche tourism and enhance visitor experiences. • Establish and promote cross-border tourism corridors, including self-drive tourism initiatives among Mekong countries and designate sister cities to foster regional collaboration and tourism development.
Thailand	<ul style="list-style-type: none"> • Maintain Thailand's reputation as a great country to visit and live in and ensure that tourism remains an important economic sector in driving sustainable growth. • Tourism supports the development of infrastructure, experiences, and systems that enhance the quality of life for people in communities and localities. • The tourism industry is a catalyst for celebration, encouraging people to travel and experience the culture and nature of Thailand. • Tourism makes visitors value and respect culture and participate in caring for the environment and conserving natural diversity. • Tourism is systematically managed, environmentally friendly, and benefiting provinces and local communities.
Viet Nam	<ul style="list-style-type: none"> • Develop sustainable and inclusive tourism to attract 35 million international visitors, 160 million domestic tourists, generate 10.5 million total jobs and 3.5 million direct jobs, and comprise 13%–14% of GDP by 2030. • Obtain top 30 ranking in the World Economic Forum Travel & Tourism Development Index. • Maximize tourism's contribution to the Sustainable Development Goals. • Effectively manage and use natural resources, protect the environment and biodiversity, and adapt to climate change. • Promote cultural tourism, heritage values, and national cultural identity.
ASEAN	<ul style="list-style-type: none"> • ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, committed to responsible, sustainable, inclusive, and balanced tourism development to contribute significantly to the socioeconomic well-being of ASEAN people. • Enhance the competitiveness of ASEAN as a single tourism destination through resource efficiency, environmental sustainability, culture and heritage protection. • Ensure that ASEAN tourism is resilient, sustainable, and inclusive, on which the ASEAN tourism initiatives are anchored.

ASEAN = Association of Southeast Asian Nations, PRC = People's Republic of China, GDP = gross domestic product, GMS = Greater Mekong Subregion, Lao PDR = Lao People's Democratic Republic.

Sources: GMS national tourism organizations and [ASEAN Tourism Strategic Plan 2016-2025](#).



Photo: The Grand Palace, Bangkok, Thailand



Photo: Thingyan Festival at Inle, Myanmar

STRENGTHS, OPPORTUNITIES, CONSTRAINTS, AND THREATS

The World Economic Forum Travel & Tourism Development Index benchmarks and measures the set of factors and policies that enable the sustainable and resilient development of travel and tourism, which in turn contribute to the development of a country.³³ It provides a comprehensive, high-level framework to assess travel and tourism strengths, opportunities, constraints, and threats across 119 economies. The PRC is the only GMS economy to achieve a top 10 ranking and in 2024, all GMS economies saw rankings remain equal or decline compared to 2021 (Table 6). This was mainly due to lower subcategory performance for infrastructure, services, and sustainability. Travel and tourism policy-enabling conditions also declined after being negatively affected by pandemic-induced travel and tourism de-prioritization and temporary visa and travel restrictions. Additional areas for improvement include social inclusion and human resources, information and communication technology readiness, and health and hygiene. In contrast, nearly every GMS country has high scores for travel and tourism demand drivers, e.g., the natural and cultural resources that make the subregion a desirable place to visit.³⁴ Other GMS strengths reflected in the index include safety and security and price competitiveness.

Table 6: Travel & Tourism Development Index Overall Rankings 2021 and 2024

Area	2021	2024
Cambodia	85	86
Peoples Republic of China	7	8
Lao Peoples Democratic Republic	91	91
Thailand	35	47
Viet Nam	56	59

Note: Lower scores indicate better performance. Data not available for Myanmar.

Source: World Economic Forum.

STRENGTHS AND OPPORTUNITIES

Mekong River. Flowing about 4,350 kilometers, the Mekong River connects all GMS countries. It is a shared tourism resource and thematic anchor for destination branding, promoting river cruises, excursions, and developing water recreation activities. The diverse cultural and religious heritage along the Mekong also presents an opportunity to tap the global faith-based tourism market valued at \$15 billion in 2023.

³³ World Economic Forum. 2024. [Travel & Tourism Development Index](#).

³⁴ Travel & Tourism Development Index subcategories include (i) enabling environment (business, safety and security, health and hygiene, human resource and the labor market); (ii) travel and tourism policy enabling conditions (travel prioritization, international open, price competitiveness); (iii) infrastructure (air, ground, port, and tourist service infrastructure); (iv) travel and tourism demand drivers (natural, cultural, and non-leisure resources); and (v) travel and tourism sustainability (environmental, socioeconomic resilience and conditions, travel and tourism demand pressure and impact).

Natural and cultural resources. The GMS has 32 UNESCO World Heritage Sites and 30 ASEAN-recognized Heritage Parks. There are more than 20,000 species of plants, 1,300 bird species, and more than 500 mammal species. GMS transboundary landscapes hold some of Southeast Asia’s largest contiguous forest habitats with many rare and endemic species, including tigers, elephants, gibbons, pheasants, and the Irrawaddy dolphin.³⁵ GMS nature is a unique selling proposition, supporting activities like trekking, wellness activities, soft nature-based adventure tourism and excursions, and bird watching, among others.

Air, rail, and road connectivity. In 2023, both GMS international inbound flight and seat capacity reached approximately 68% of 2019 levels, with Thailand holding 54% of international inbound flights and seats, followed by Viet Nam with 32% (Table 7). The ASEAN multilateral “open skies” air services agreements are benefiting GMS tourism by creating a single aviation market policy that supersedes fragmented and more restrictive air services agreements among member states. The policy calls for all ASEAN carriers to be granted unlimited third, fourth, and fifth freedom rights for passenger air services and air freight services among designated points in ASEAN.³⁶

Table 7: International Inbound Flight and Seat Capacity

Area	Inbound Flights					Change 2015–2023 (%)
	2015	2017	2019	2021	2023	
Cambodia	25,673	32,310	43,895	2,178	22,182	–14.6
Lao PDR	8,786	10,770	12,500	486	7,514	–14.5
Myanmar	15,739	21,109	23,565	3,822	10,851	–31.1
Thailand	184,683	211,845	249,628	17,728	166,324	–9.9
Viet Nam	61,886	89,920	117,498	9,879	98,218	58.7
Total	296,284	365,571	446,498	31,554	303,372	2.4
	Inbound Seats					Change 2015–2023 (%)
	2015	2017	2019	2021	2023	
Cambodia	3,958,962	5,356,810	7,383,344	420,738	3,625,986	–8.4
Lao PDR	1,055,185	1,534,473	1,866,319	84,502	1,172,623	11.1
Myanmar	2,583,677	3,579,119	3,836,162	204,243	1,514,183	–41.4
Thailand	41,256,292	47,886,375	56,239,753	4,997,007	37,479,633	–9.2
Viet Nam	12,260,458	18,056,030	24,448,494	2,469,688	21,222,843	73.1
Total	61,108,953	76,389,428	93,800,448	8,176,178	64,957,318	6.3

– = negative, Lao PDR = Lao People’s Democratic Republic.

Source: OAG Schedules Analyzer.

³⁵ World Wildlife Fund. *Greater Mekong*.

³⁶ ASEAN Secretariat. 2011. *Master Plan on ASEAN Connectivity*.

Intraregional travel by rail is a growing opportunity following completion of the Lao–China railway connecting Kunming to Vientiane Capital. It is envisaged this line will become a “golden tourism corridor” linking secondary cities and UNESCO World Heritage sites. The Fangchenggang–Dongxing Railway, which began operating in late 2023, links south PRC’s Guangxi Zhuang Autonomous Region with the PRC–Viet Nam border. Thailand is constructing high-speed rail lines that will connect to the Lao–China railway, opening access to the PRC’s 45,000-kilometer rail network and broader pan-Asian high-speed rail system. Viet Nam and Myanmar have expansive rail networks primarily used for domestic travel. Cambodia’s national rail line transports passengers and freight between Phnom Penh and coastal Preah Sihanouk province and there are plans to augment this line with three high-speed lines connecting Phnom Penh to international ports of entry in Preah Sihanouk, Poipet bordering Thailand, and Bavet bordering Viet Nam. To improve efficiencies, GMS countries are aligning rail transport rules and regulations and simplifying entry and exit formalities with a view to providing convenient cross-border rail travel experiences.

Self-driving. There are approximately 40 million registered passenger vehicles in the GMS, the majority in Thailand (48%); Yunnan, PRC (22%); and Guangxi Zhuang, PRC (21%).³⁷ The GMS Cross-Border Transport Agreement is a legal instrument allowing passenger vehicles to cross GMS borders. Most self-driving tourism is between Thailand–Lao PDR, Thailand–Cambodia, and the PRC–Lao PDR through ports of entry equipped with facilities and systems to process foreign-registered vehicles. ASEAN also promotes self-drive tourism and has jointly produced a guidebook presenting visa requirements, vehicle permit processes, border formalities, and recommended routes.³⁸ While demand for self-driving is rising, few car rental companies currently allow driving outside of national borders due to insurance, permit, and security concerns.



Photo: Tree Building Ritual, Quang Nam, Viet Nam

³⁷ ASEANstats. 2022. [Number of Registered Passenger Cars](#); CEIC Data. 2022. [China Number of Motor Vehicles](#).

³⁸ Government of Thailand, Department of Tourism, Ministry of Tourism and Sports. 2022. [Self-Drive Tourism in ASEAN Countries](#).



The Mekong Tourism Coordinating Office is uniquely positioned to implement joint marketing campaigns under the Mekong Tourism brand

Quality and diverse accommodations. Major international hotel brands operate in GMS destinations, augmented by increasingly sophisticated national brands and smaller boutique and specialized owner-operated properties. There are an estimated 104,895 hotels across the GMS with millions of rooms that fit all price points, ranging from basic family-run guesthouses to luxury boutique resorts. Mid-range and deluxe accommodations are highly price-competitive and renowned for attentive service. In 2023, the occupancy rate in Southeast Asia was 62.8% and revenue per available room was \$71.65, up 44% compared to 2022. Occupancy rates in Bangkok, Ha Noi, and Ho Chi Minh City ranged from 65% to 70% in 2023 and revenue per available room ranged from \$72 to \$81.³⁹ Alternative accommodations (e.g., short-term rentals offered through online travel agents) also play an important role in the GMS visitor economy, providing opportunities for small entrepreneurs to diversify and enrich tourism experiences. Most alternative accommodation listings are apartments and condominiums, followed by houses and villas, guesthouses, and serviced apartments. Table 8 provides a summary of alternative accommodation online listings and performance across the GMS in 2022 and 2023. The number of listings, occupancy levels, and year on year revenue is increasing in all countries except Myanmar and the PRC.

Table 8: Alternative Accommodation Listings 2022 and 2023

Area	Total Listings		Booked Listings		Occupancy (%)		Average Length of Stay (Days)		Average Daily Rate (\$)		Estimated Revenue (\$ million)	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Cambodia	5,800	6,859	3,039	4,000	32.0	35.0	2.9	3.1	63.0	62.0	5.9	9.2
Lao PDR	700	878	402	612	30.9	41.4	2.8	2.9	54.5	51.8	0.5	1.6
Myanmar	680	557	295	202	16.8	20.3	1.9	1.8	79.6	105.8	0.4	0.2
Guangxi Zhuang, PRC	13,752	...	11,455	...	43.9	...	3.5	...	62.5	...	29.9	...
Yunnan, PRC	27,603	...	23,643	...	47.8	...	3.6	...	83.0	...	89.0	...
Thailand	93,505	108,550	65,476	83,577	44.0	52.0	3.1	3.4	137.0	145.0	440.7	742.9
Viet Nam	74,069	95,958	44,294	59,150	35.6	38.8	2.4	2.6	66.0	75.0	105.0	205.7
Total	216,109	212,802	148,604	147,541	...	...	...	...	...	...	671.24	959.53

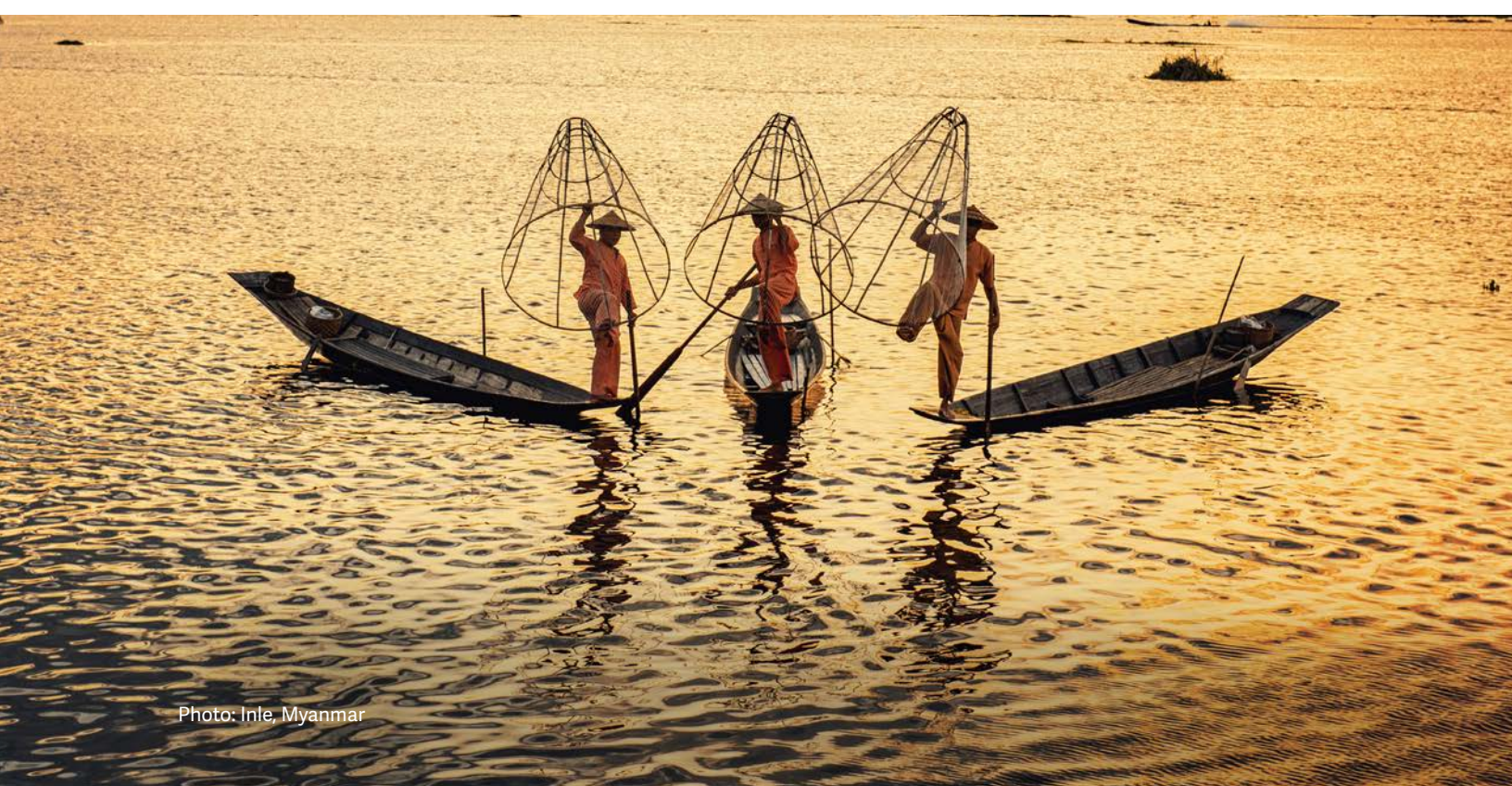
... = data not available, Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China.

Source: AirDNA, accessed March 2024.

³⁹ STR. 2024. Asia Pacific Hotel Review.

Mekong Tourism Coordinating Office. The Bangkok-based MTCO is owned and supervised by the GMS countries. It is uniquely positioned to assist the GMS TWG to coordinate public and private tourism stakeholders, mobilize resources for regional tourism planning and capacity development, monitor development partner activities, generate and disseminate knowledge, and implement joint marketing campaigns under the Mekong Tourism brand. As the convener of TWG meetings and the annual MTF, the MTCO fosters broad stakeholder engagement in GMS tourism development. As of 2024, the MTCO is the only self-financed sector working group in the GMS Economic Cooperation Program, reflecting strong member-country ownership of the subregional tourism cooperation agenda. The GMS countries intend to elevate MTCO's status to an intergovernmental organization and rename it the Greater Mekong Subregion Tourism Office.

Development partner engagement. There is a long history of development partner engagement with the GMS countries, including assistance to formulate sustainable tourism policies and strategies, improve the business-enabling environment, strengthen tourism value chains and market linkages, develop human resources, and finance transport and urban infrastructure. Overarching themes of gender equality, protecting cultural and natural assets, private sector development, and more recently, climate action, are well-integrated into GMS tourism development cooperation through engagement at the subnational, national, subregional, and ASEAN-levels. Development partners with active tourism assistance programs include Agence Française de Développement, Asian Development Bank (ADB), ASEAN-China Centre, ASEAN-Korea Centre, ASEAN-Japan Centre, the European Union, Japan International Cooperation Agency, Luxembourg Development Cooperation, the Swiss Agency for Development Cooperation, several UN agencies, and the World Bank, among others. To complement its role in identifying, protecting, and preserving World Heritage sites, UNESCO has developed a sustainable tourism toolkit and sustainable travel pledge that is being implemented in the GMS. The Pacific Asia Travel Association is another long-standing supporter of GMS tourism and launched the MTF together with MTCO's predecessor, the Agency for Coordinating Mekong Tourism Activities, in 1996. More recently, the





GMS offers many countries tourist visa exemption, visa-on-arrival, and electronic visas

Pacific Asia Travel Association has organized destination resilience planning and digital upskilling training for GMS tourism officials and tourism enterprises along with plastic and food waste reduction awareness programs. There are also GMS country-to-country assistance programs and exchanges supporting tourism higher education and vocational training, tourism management capacity building for government officials, and public tourism infrastructure development.

Safety, security, and price competitiveness. The Travel & Tourism Development Index ranks the GMS highly in safety and security as well as price competitiveness. In terms of tourist safety and security, the GMS demonstrates both a high level of duty of care and low crime rates due to strong community ties, emphasis on social order, and cultural values prioritizing respect. GMS countries also offer good value for money in tourism products and services. To maintain price competitiveness and address inflationary pressures, GMS destinations have an opportunity to increase the use of local goods and services, diversify tourism demand to less expensive secondary destinations and promote off-peak travel, and facilitate the use of more affordable lower-emissions transport modes such as trains.

CONSTRAINTS AND THREATS

Secondary destination infrastructure and services. Despite having good gateway airports and air connectivity across the subregion, most of the GMS countries rank low in the Travel & Tourism Development Index for infrastructure and services. This is mainly due to shortages of last-mile transport infrastructure, modern solid waste and wastewater management systems, urban green space for tourism and recreation, and quality tourism-services infrastructure in secondary destinations. Consequently, smaller cities and rural communities receive less tourism investment and fewer visitors despite having strong tourism development potential.



Photo: Quang Ngai drinking culture, Viet Nam

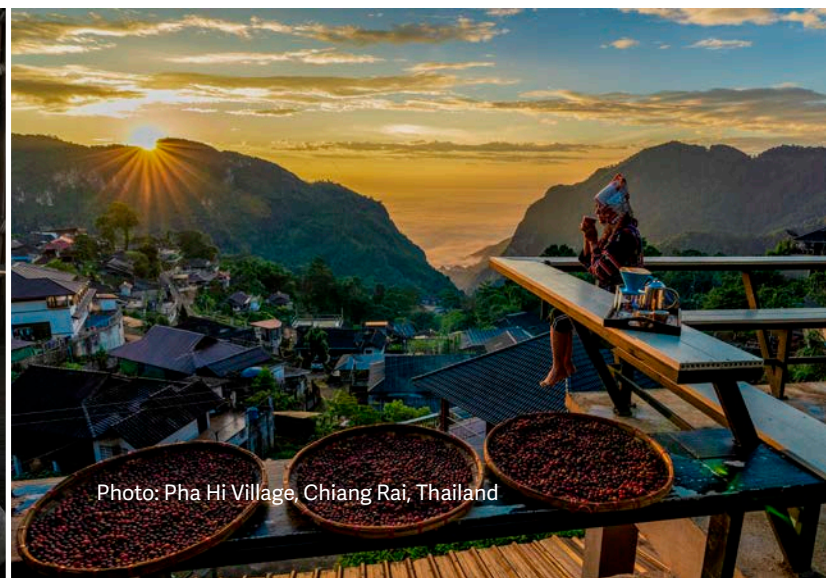


Photo: Pha Hi Village, Chiang Rai, Thailand



Photo: Patuxai, Vientiane Capital, Lao People's Democratic Republic

Climate change and disasters. Like most destinations across Asia and the Pacific, the GMS is vulnerable to climate change and disasters. Key climate and disaster risks include more intense and frequent extreme weather events like tropical storms and flooding, higher temperatures and precipitation intensity, and sea-level rise. Coastal and marine tourism are particularly at risk from storm-generated winds, waves, and storm surges that can disrupt transport services, utilities, and tourism activities. Rising sea levels threaten to inundate infrastructure and could permanently submerge beaches and other seaside attractions. Cutting greenhouse gas emissions, enhancing early warning systems, and investing in resilient infrastructure along with promoting sustainable land use and increasing community awareness are needed to reduce climate and disaster risk in tourist destinations.

Tourism standards implementation. GMS countries have well-defined national tourism standards for accommodations, food and beverage services, and tourism transport services, along with health and safety protocols developed during the COVID-19 pandemic. Most have adopted the ASEAN Common Tourism Standards and common tourism vocational standards set by the ASEAN Mutual Recognition Arrangements for Tourism Professionals. Despite efforts to promote these standards, implementation by destinations and tourism enterprises is limited. Moreover, few destinations have obtained sustainability certifications.

Human capital. Quickly evolving market dynamics and technology risk leaving large numbers of GMS tourism businesses and other stakeholders behind in terms of relevant skills and qualifications. GMS gender assessments show women account for most tourism workers but that they are overrepresented in informal and precarious jobs and underrepresented in management positions due to lower educational attainment and stereotypes that discourage women from advancing to leadership roles. The threat of human trafficking and sexual exploitation linked to tourism is a concern. Hospitality and tourism training providers must adapt curricula to recognize prior learning and build knowledge and skills relevant for changing consumer preferences and business needs, including the diverse needs of predominately women-led MSMEs.⁴⁰ Digital tourism skills in high demand include digital communications, digital marketing, revenue management and payments, online tour agent management, and cybersecurity. Many GMS institutions of higher learning need

⁴⁰ Organisation for Economic Co-operation and Development. 2022. [Tourism Trends and Policies](#).

to update tertiary curricula and make it more gender-responsive, with a view to strengthen problem-solving and analytical skills, critical thinking, creativity, management skills, and emotional intelligence to better prepare tourism decision makers and promote women’s leadership.

Stakeholder engagement and coordination. The GMS mean score for prioritization of travel and tourism falls in the lower half of the Travel & Tourism Development Index, reflecting the temporary de-prioritization of tourism during the COVID-19 pandemic. As the tourism recovery gains momentum, greater efforts are needed to convene public and private tourism stakeholders and work together to better manage visitor flows, promote lesser-known destinations, and ensure tourism activities benefit communities while respecting culture and the environment.

Cross-border travel facilitation. The GMS offers many countries tourist visa exemption, visa-on-arrival, and electronic visas. Visa openness and visa requirement rankings for 2023 (Table 9) reflect the GMS countries’ cautious approach to lifting COVID-19 pandemic-related travel restrictions. Following the removal of these restrictions in 2023 together with implementation of the ASEAN Framework Agreement on Visa Exemption, more bilateral visa exemptions, and wider eligibility for electronic visas, the GMS is on track to regain its place among the world’s most open destinations. Persistent constraints to cross-border and multicountry travel includes inadequate immigration and customs facilities at secondary destination ports of entry, few countries offering multiple entry tourists visas, and low market awareness of the requirements and procedures to obtain long-stay visas.

Table 9: Visa Openness Scores

Area	UN Tourism Visa Openness Score	TTDI Visa Requirements Global Rank	
	2023	2021	2024
Cambodia	72.30	7	10
People’s Republic of China	0.64	116	119
Lao PDR	62.42	19	27
Myanmar	44.81	...	...
Thailand	58.66	21	31
Viet Nam	42.46	49	53

... = not available; Lao PDR = Lao People’s Democratic Republic; TTDI = Travel & Tourism Development Index, UN = United Nations.

Note: The UN Tourism Visa Openness Score ranges from 0 to 100. Higher scores indicate better performance.

Source: World Economic Forum. 2022. *Interactive Data and Economy Profiles: Travel & Tourism Development Index 2021 Edition*.

Evidence-based joint marketing. Successful GMS tourism marketing campaigns have been organized in the past, including Mekong Moments, Mekong Hidden Gems, and Mekong Easy Getaways. However, lack of access to consumer data, which is controlled by third parties who usually share data only on a commercial basis, limits the ability to make informed marketing decisions. This situation is exacerbated by a lack of NTO staff skilled at data collection and analysis. Furthermore, a lack of public–private marketing alliances coupled with resource constraints at MTCO limit the ability to organize large subregional marketing programs. Expanding partnerships with online travel agents and other organizations that collect and curate traveler data would enable MTCO to elevate its capacity to identify market opportunities and create compelling targeted cooperative marketing campaigns.



Photo: Sunset view at U Bein Bridge, Myanmar



Photo: Wind-Raid Bridges of the Dong Ethnic Group, Guangxi Zhuang, Peoples Republic of China

ACTIONABLE INSIGHTS

As recognized by the Travel & Tourism Development Index, GMS tourism strengths include outstanding natural and cultural resources and diverse, quality, and price-competitive tourism accommodations and services. These advantages are backed by the subregion’s reputation for warmly welcoming guests, safety, and entrepreneurialism. Other strengths are the GMS countries’ strong commitment to subregional tourism development cooperation, joint marketing, and ambition to elevate the MTCO to an intergovernmental organization. Opportunities to build on are good gateway connectivity, rising personal vehicle ownership and interest in self-driving tourism, the expanding transnational rail network, and the high affinity for travel and tourism in the GMS among increasingly affluent Asian markets.

Constraints and threats that the GMS must collectively address are underdeveloped secondary destination infrastructure, climate change and disasters, slow tourism standards implementation, shortages of qualified workers, inconsistent stakeholder engagement and coordination, and the lack of evidence-based joint marketing. Table 10 summarizes GMS tourism strengths, opportunities, constraints, and threats.

Table 10: Strengths, Opportunities, Constraints, and Threats

Strengths	Constraints
<ul style="list-style-type: none"> • Abundant natural resources, scenic landscapes, and diverse ecosystems • Price competitiveness and value for money • Safety and security • Good air and ground connectivity • Friendly people, diverse cultures, heritage, ethnic groups, festivals, and culinary traditions • Rich variety of traditional and alternative accommodations • Increasingly simplified visa regimes and streamlined cross-border processes • GMS countries’ commitment to subregional tourism cooperation • Engaged and supportive development partners 	<ul style="list-style-type: none"> • Underdeveloped infrastructure and public services in secondary destinations, including lack of universal access and cross-border travel facilitation • Shortage of qualified human resources possessing the right attitude, knowledge, and skills lowers service quality • Lack of relevant digital skills among tourism workers and small businesses • Slow adoption of tourism standards • Inconsistent public–private coordination to manage tourism destinations • Limited collection of regional market intelligence and consumer data to inform evidence-based marketing • Lack of MTCO resources, limiting its ability to implement joint marketing programs

Opportunities	Threats
<ul style="list-style-type: none">• Strong recovery of domestic and intraregional tourism demand• Diversifying traveler types seeking niche culture, nature, and urban tourism experiences• Proximity to major Asian markets• Rising private vehicle ownership and cross-border self-driving options• Expanding GMS rail network• More older travelers and people with disabilities seeking travel experiences• Expansion of the mandate of the MTCO as an intergovernmental organization serving GMS tourism development• Development partner interest in supporting sustainable tourism development• Visa programs tailored to longer stay business-leisure travelers and digital nomads	<ul style="list-style-type: none">• Overtourism and congestion• Environmental degradation• Climate change• Communicable disease outbreaks• Economic downturns• Regional and global geopolitical instability and conflict

GMS = Greater Mekong Subregion, MTCO = Mekong Tourism Coordinating Office.
Source: Mekong Tourism Coordinating Office.



Photo: Ngapali Beach, Myanmar

3

Greater Mekong Subregion Tourism Strategy 2030

The vision for GMS tourism is aligned with the GMS Strategic Framework 2030 vision to develop an integrated, prosperous, sustainable, and inclusive subregion

Photo: Hue Ancient Capital, Thua Thien Hue, Viet Nam

VISION

The GMS Tourism Strategy 2030 provides an overarching framework to guide cooperation among GMS national tourism organizations and other tourism industry stakeholders. The collective vision for GMS tourism is aligned with the GMS Strategic Framework 2030 vision to develop an integrated, prosperous, sustainable, and inclusive subregion.

EXPECTED OUTCOME

The expected outcome of the strategy is: by 2030, the GMS will be a premier global tourist destination recognized for seamless high-quality sustainable travel experiences that foster inclusive economic opportunities and responsible destination stewardship.

GUIDING PRINCIPLES

The following 10 principles will guide GMS tourism cooperation and strategy implementation, in alignment with the GMS Economic Cooperation Program Strategy 2030, other GMS strategies, and the post-2025 ASEAN Tourism Strategic Plan.

- Ensure that tourism initiatives generate benefits for multiple GMS countries.
- Expand seamless travel experiences in the GMS.
- Promote the development of secondary destinations, particularly along the Mekong River, to distribute tourism benefits more widely and reduce risks of overtourism.
- Support the tourism development goals and priorities of individual GMS countries, ensuring alignment and coherence.
- Improve the livelihoods of local communities through tourism development.
- Prioritize quality tourism experiences over volume, focusing on high-yield, responsible tourism.
- Mainstream actions to enhance tourism resilience and promote climate-friendly practices.
- Enhance environmental sustainability and ensure that tourism does not damage natural and cultural heritage.
- Contribute to the advancement of Sustainable Development Goals.
- Encourage universal accessibility, gender equality, and inclusion of youth, older people, and other vulnerable groups.

STRATEGIC DIRECTIONS

The four strategic directions are (i) build sustainable destinations, (ii) develop human capital, (iii) strengthen stakeholder engagement, and (iv) enhance destination marketing (Figure 3).

CROSSCUTTING ISSUES

Digital transformation. Tourism policies, programs, and projects will use digital technologies to create more personalized, interactive and immersive experiences for tourists. Online booking systems, digital marketing, and data analytics will help tourism businesses to reach a larger audience and make data-driven decisions to improve their offerings and services. Digitalization will further empower GMS tourism businesses to streamline operations, reduce costs, innovate, and access education and training. Smart technologies for resource management, energy efficiency, and waste reduction will support sustainable practices in destinations, minimizing tourism’s environmental footprint while preserving natural and cultural assets. Digital platforms will also be used to strengthen communication and collaboration among governments and private sector stakeholders, enabling better coordination for destination management, crisis response, and resource mobilization to address negative externalities.

Environmental sustainability. A whole-of-industry approach to climate change mitigation will be promoted to reduce or prevent greenhouse gas emissions and other damaging environmental externalities. Achieving this will involve promoting energy-efficient practices, conserving water, implementing comprehensive waste management programs, sourcing local and organic products, supporting biodiversity conservation, and promoting sustainable transportation options. Adoption of appropriate safeguard measures and sustainability practices to protect the region’s natural tourism assets will be considered when developing and implementing regional tourism programs and projects. Education and awareness initiatives for both guests and staff, along with community engagement, obtaining eco-certifications, monitoring progress, and adhering to international sustainability standards will help ensure continuous improvement. Sustainable development practices, such as using eco-friendly designs and conducting environmental impact assessments, will further support these efforts to reduce tourism’s environmental footprint.

Inclusion and empowerment. GMS tourism programs and initiatives will be designed based on gender and social analysis, to ensure that everyone, regardless of their gender, background or abilities, can benefit from tourism. Providing access to training, entrepreneurship mentoring, networking, and funding, particularly for ethnic groups, youth and women, will empower them to enter and benefit from the tourism economy. Initiatives to help safeguard the unique GMS heritage will engage local communities in tourism management and decision-making processes.

Private sector development. GMS governments will strengthen tourism investment policies, laws, and regulations to improve the business enabling environment. Public sector investment in transportation, digitalization, utilities, and high-quality tourism facilities will stimulate growth in secondary destinations. Improved infrastructure and business environments will catalyze private sector tourism investment in lagging areas. Specialized digital skills training and sustainability standards will support the private sector to cultivate new opportunities, while addressing growing demand for sustainable tourism. Partnerships between government, communities, and the private sector will be fostered to develop and promote multicountry tourism experiences and clusters.



The four strategic directions are: build sustainable destinations, develop human capital, strengthen stakeholder engagement, and enhance destination marketing

Figure 3: GMS Strategic Tourism Directions

Strategic Direction 1	Strategic Direction 2	Strategic Direction 3	Strategic Direction 4
Build Sustainable Destinations	Develop Human Capital	Strengthen Stakeholder Engagement	Enhance Destination Marketing
Program 1.1 Integrated and sustainable tourism planning strengthened	Program 2.1 Public tourism managers' capabilities strengthened	Program 3.1 Public multisector coordination strengthened	Program 4.1 Multicountry experiences, tourism clusters, and thematic routes jointly developed and promoted
Program 1.2 MSME participation in tourism value chains increased	Program 2.2 Service quality improved	Program 3.2 Public-private collaboration strengthened	Program 4.2 GMS single-destination sustainable tourism promotion campaign implemented
Program 1.3 Common tourism standards implemented	Program 2.3 Digital skills strengthened	Program 3.3 Mekong Tourism Coordination Office strengthened	Program 4.3 GMS tourism statistics collection, analysis and dissemination improved
Program 1.4 Climate- and disaster-resilient infrastructure developed	Program 2.4 Sustainable tourism awareness and practice increased	Program 3.4 Crisis communications strengthened	Program 4.4 Mekong Tourism Forum organized annually
Program 1.5 Accessible tourism services expanded	Program 2.5 Tourism workforce diversified	Program 3.5 Visa openness and facilitation improved	

GMS = Greater Mekong Subregion, MSME = micro, small, and medium-sized enterprises.

Source: GMS Tourism Working Group.

STRATEGIC PROGRAMS

Strategic Direction 1: Build Sustainable Destinations

Program 1.1: Integrated and sustainable tourism planning strengthened

The program will strengthen sustainable tourism planning in towns and cities, and rural and cross-border areas, particularly secondary destinations along the GMS economic corridors and the Mekong River corridor. GMS NTOs together with subnational tourism agencies and tourism industry associations will convene diverse public, private, and civil society stakeholders to formulate plans with goals that balance the needs of residents, visitors, and the environment while minimizing negative impacts. Sustainable tourism planning will adopt approaches prioritized in the GMS Economic Cooperation Program Strategic Framework 2030 (i.e., harnessing the digital revolution, enhanced spatial approaches to development, deepening dialogue on policies and regulations, knowledge solutions and capacity building, and embracing private sector solutions), including NTO support for public–private partnership project feasibility studies. Tools developed by UNESCO will be used to conduct tourism development impact assessments at heritage sites. Good practices in water and energy conservation, waste management, climate action, community participation, universal accessibility, and overtourism mitigation will be incorporated into sustainable tourism plans.

Program 1.2: MSME participation in tourism value chains increased

GMS NTOs will collaborate with industry associations, chambers of commerce, and producer groups to organize events that increase small businesses' awareness about tourism value chain income generating and employment opportunities. Skills and marketing training, including how to use electronic commerce and online travel agent platforms, expand access to affordable finance and business advisory services, and support for local festivals and cultural events involving MSMEs will complement awareness-raising.



Photo: Tad Fane, Champasak Province, Lao People's Democratic Republic



Photo: Yuanyang terraced paddy field, Yunnan, People's Republic of China

Program 1.3: Common tourism standards implemented

This program will strengthen and accelerate implementation of the well-established ASEAN Common Tourism Standards, ASEAN MRA-TP, and the PRC's National Tourist Attraction Rating System. Destinations will also be encouraged to include Global Sustainable Tourism Council standards in tourism development plans. GMS NTOs and certification entities will continuously build the capacity of trainers, assessors, and businesses to enable standards adoption. Regulatory and non-regulatory incentives will be implemented to drive compliance including recognition of certified businesses or destinations on official websites along with other marketing assistance. The program will provide businesses with advice on the adoption of environmentally friendly technologies to retrofit aging accommodation facilities with green technologies and other solutions to lower greenhouse gas emissions.

Program 1.4: Climate- and disaster-resilient infrastructure developed

Climate and disaster risk assessments will inform tourism infrastructure planning and construction, including climate proofing existing facilities with a mix of engineering and nature-based solutions. GMS NTOs will engage in upstream planning and downstream infrastructure development to ensure tourism considerations are integrated into transport, urban, coastal protection, and other public tourism-services infrastructure. MTCO will help foster multisector engagement by featuring climate action at the annual MTF, and by sharing climate adaptation and mitigation knowledge resources with GMS tourism stakeholders through the MTCO electronic library. NTOs and agencies responsible for climate change and disaster management will organize training for destination managers to improve risk assessment and hazard mapping, land use planning, climate-resilient design and construction, and disaster preparedness and response. MTCO will collaborate with the Pacific Asia Travel Association to scale up tourism destination resilience training for GMS NTOs and businesses.⁴¹

Program 1.5: Accessible tourism services expanded

Universal access considerations will be integrated into tourism planning, education, and training courses, facilities development, retrofits, transport services, and visitor experiences. GMS NTOs will engage tourism stakeholders to conduct accessibility audits, identify barriers for people with disabilities, and inform the inclusion of accessibility standards into common tourism standards. Staff in tourism-related businesses will be made aware of accessibility practices and customer service for individuals with disabilities through seminars and training. Businesses and attractions will use multiple formats to make information accessible to people with disabilities, including braille and accessible digital formats. Customized training programs for tour guides and other service providers will be informed by national legal frameworks for people with disabilities and the ISO Standard 21902.⁴² NTOs and MTCO will share information about universally accessible products and services on their official websites.

⁴¹ [Tourism Destination Resilience Course](#).

⁴² World Tourism Organization; Fundación ONCE and Normalización Española. 2024. How to apply ISO Standard 21902: Accessible tourism for all – Recommendations for tour operators, travel agencies, and travel agents.

Strategic Direction 2: Develop Human Capital

Program 2.1: Public tourism managers' capabilities strengthened

GMS NTOs in collaboration with MTCO, ADB's B-I-G Program,⁴³ the ASEAN Centres (Republic of Korea, Japan, and China), UN Tourism, the Pacific Asia Travel Association and other knowledge institutions will continue to organize executive learning programs for GMS public tourism officials. These demand-driven adult learning programs will be designed to empower public tourism officials with the knowledge and skills needed to improve destination management. Specialized topics include sustainable tourism policy formulation, heritage management, smart tourism ecosystem development, alternative accommodations management, environmental and social impact monitoring, and crisis communications, among others.

Program 2.2: Service quality improved

Improving service quality in tourism is crucial for attracting high-yield visitors, enhancing customer satisfaction, and building loyalty. GMS education and training institutions and NTOs in partnership with tourism associations, chambers of commerce, and businesses will nurture service quality improvements by upskilling tourism workers and promoting technologies that improve visitor experiences. This includes quality hospitality skills training (front office, housekeeping, food production, and food and beverage services) and travel services skills (e.g., travel agency and tour operations) based on ASEAN and internationally recognized standards. Digital upskilling will focus on increasing efficiency and customer satisfaction with electronic booking systems, customer relationship management systems, and automation of routine tasks (e.g., check-in, feedback, notifications).

Program 2.3: Digital skills strengthened

GMS NTOs, MTCO, and ADB will work with regional knowledge partners (e.g., universities, think tanks, industry associations, private sector entities) to develop and implement digital skills training targeting public officials and tourism MSMEs. Online learning programs like the Innovation and Digital Transformation Course offered by UN Tourism will also be promoted.⁴⁴ The program will enable GMS NTOs and businesses to improve how they gather data, access markets, offer products and services, and facilitate travel using digital tools. MSMEs will be trained in areas such as social media management, sharing economy engagement, online customer engagement, and digital payments. GMS NTOs' training will focus on using digital resources to strengthen strategic planning, better manage visitor flows, efficiently collect tourism taxes and fees, and environmental and social impact monitoring.

⁴³ Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area (BIMP-EAGA), the Indonesia-Malaysia-Thailand Growth Triangle (IMT-GT), and GMS.

⁴⁴ UN Tourism. 2024. [UNWTO Tourism Academy](#).



Photo: Hot air balloons, Bagan, Myanmar

Program 2.4: Sustainable tourism awareness and practice increased

This program will raise awareness about responsible and sustainable travel among visitors, residents, and businesses. Visitors will be informed how to travel responsibly with do's and don'ts guidelines. Tourism communities will organize public awareness campaigns themed "Greening Mekong Tourism" and be encouraged to adopt sustainability guidelines. High school students will learn about sustainable tourism careers while tourism diploma and degree programs will incorporate lessons on the Sustainable Development Goals and how to prevent negative tourism impacts. Tourism businesses will be encouraged to transition to renewable energy sources and eco-friendly operating practices through standards adoption.

Program 2.5: Tourism workforce diversified

Diversifying the tourism workforce is essential for fostering innovation, enhancing customer experiences, and connecting with the diverse clientele that GMS tourism serves. GMS NTOs and training institutions will support tourism workforce diversification by offering scholarships for underrepresented and vulnerable groups, promoting inclusive recruitment strategies and outreach to underrepresented groups, and raising awareness about tourism employment and benefits. Training and employer outreach will incorporate tourism mentorship and networking programs, including on social media. Employers with programs and incentives that boost diversity will be featured in the MTCO newsletter and Mekong Voices series.

Strategic Direction 3: Strengthen Stakeholder Engagement

Program 3.1: Public multisector coordination strengthened

Strengthening public multisector coordination is essential for effective governance and addressing complex tourism management challenges. GMS NTOs will convene national, provincial, and municipal agencies using in-person and digital communications channels to enhance cross-sector coordination on tourism-related policy and regulatory issues. GMS national secretariats will encourage cross-sector coordination and multisector participation in subregional sector working group meetings (e.g., environment, health, tourism, transport, urban development) to enable wider consideration of tourism perspectives and the development of joint action plans. Cross-attendance by tourism officials and other GMS working group members in subregional knowledge sharing events will be encouraged to facilitate information sharing, networking, and relationship building among decision makers.

Program 3.2: Public–private collaboration strengthened

This program will deepen private sector involvement in delivering quality tourism, transport, and urban services; standards implementation; business incubation and technology start-up challenges; and destination marketing. The program will increase private sector participation in policy formulation, capacity building, and project design and implementation to leverage expertise, resources, and innovation. MTCO will invite the private sector to GMS TWG meetings and the MTF with a view to enhancing public–private collaboration in areas of mutual interest. By capitalizing on respective strengths and core competencies of government and industry, public–private partnerships will increase efficiencies, spread financial risks, and foster innovative solutions. Cooperative marketing partnerships will pool resources to achieve economies of scale in promoting the Mekong Tourism brand, multicountry experiences, and awareness campaigns.

Program 3.3: Mekong Tourism Coordinating Office strengthened

MTCO has been integral to GMS tourism cooperation and an effective convener of government, the private sector, development partners, and civil society organizations in support of sustainable tourism development. Its core functions as GMS TWG Secretariat and MTCO Board Secretariat, organizing the MTF, and representing GMS tourism at travel trade events and conferences will be strengthened following its ascension to an intergovernmental organization. This will enable MTCO to mobilize more funding and personnel to help the TWG implement the strategy and deepen collaboration with development partners and the private sector.

Program 3.4: Crisis communications strengthened

This program will focus on strengthening tourism crisis communications capacity in GMS tourism destinations. Using tools such as the ASEAN Tourism Crisis Communications Manual and UN Tourism’s Toolbox for Crisis Communications, GMS NTOs will work with tourism stakeholders to develop

comprehensive crisis communications plans.⁴⁵ As part of the planning process, GMS countries will organize crisis communications training for national and subnational entities to enable them to better use digital and traditional communication channels.

Program 3.5: Visa openness and facilitation improved

GMS countries will continue to facilitate convenient tourist entry procedures by expanding visa-on-arrival eligibility, reducing border processing times, and using information technology to increase electronic visa availability and duration validity. Visa exemptions for cruise passengers on shore excursions and air-transit passengers will be expanded. GMS national tourism organizations will collaborate with concerned ministries to provide accurate, up-to-date visa and tourism information on official websites in multiple languages. Border infrastructure will be modernized to reduce clearance times and facilitate multicountry travel. Joint border area development plans, training, capacity building, and information and communications technology upgrades will improve border management and enable single-window passenger and vehicle clearance, as outlined in GMS cross-border transport agreements. Border security will be enhanced with training and equipment for improved screening and risk assessment. To cater to remote workers and older persons, destinations will offer retirement visas, digital nomad visas, and other long-stay visa programs.

Strategic Direction 4: Enhance Destination Marketing

Program 4.1: Multicountry experiences, tourism clusters, and thematic routes jointly developed and promoted

GMS NTOs, MTCO, and tourism businesses will jointly develop and market the routes and clusters shown in Figure 4 using national tourism websites, social media, influencers, and travel trade events. Taskforces/working groups may be formed among countries to develop and promote the routes effectively. Leveraging shared resources, the MTCO will broadly promote attractions and experiences in the routes and clusters on its website along with implementing campaigns targeting sustainability-conscious travelers.

Program 4.2: GMS-single destination sustainable tourism promotion campaign implemented

The UN proclaimed 2027 the International Year of Sustainable and Resilient Tourism, encouraging member states to accelerate global sustainable development. To demonstrate Mekong Tourism's commitment to sustainable tourism, a subregional sustainable tourism campaign will be organized in 2027. MTCO and GMS NTOs will leverage technology and social media to spread awareness about sustainability efforts, eco-friendly practices, and local cultural offerings. The MTCO will encourage the 2027 MTF host destination to prominently feature the campaign. Initiatives to engage industry in sustainability such as the Sustainable Travel Pledge by UNESCO, which was launched in Thailand in 2021, will be incorporated into the campaign.

⁴⁵ ASEAN Secretariat. 2024. ASEAN Tourism Crisis Communications Manual; UN Tourism. 2012. Toolbox for Crisis Communications in Tourism.

Figure 4: GMS Multicountry Experiences and Clusters















NO.	ROUTE NAME	MAIN EXPERIENCE	AREAS INCLUDED (ANCHOR NODES IN BOLD)	BORDER AREAS
1	Southern Coastal Corridor	Beach and islands, leisure, seafood, history, culture, community-based tourism 	Thailand = Chanthaburi, Trat, and Kanchanaburi Cambodia = Koh Kong, Sihanoukville, Kampot, Kep, and Takeo Viet Nam = Kien Giang (Ha Tien, Phu Quoc Island, and Phu Tu) Myanmar = Dawei	Prek Chak-Ha Tien Hat Lek-Cham Yearn Htikhi-Ban Phu Nam Ron
2	Largest Waterfall in Asia	Nature, ethnic groups, culture 	Detian-Ban Gioc Cross-Border Waterfall People's Republic of China = Nanning and Detian Viet Nam = Ha Noi through Cao Bang in Viet Nam	Detian-Ban Gioc
3	Mekong Tea Caravan Trail East	River cruising, food, nature, ethnic groups, culture, ecotourism 	People's Republic of China = Kunming, Dali, Pu'er, Ganglaba and Jinghong/Xishuangbanna Lao People's Democratic Republic = Luang Namtha, Huay Xai/Bokeo, and Luang Prabang Thailand = Chiang Kong and Chiang Rai/Golden Triangle	Mohan-Boten Chiang Khong – Huay Xai
4	Mekong Tea Caravan Trail West	Ethnic groups, culture, ecotourism 	Thailand = Chiang Rai, Mae Sai, and Golden Triangle Myanmar = Tachileik and Kengtung People's Republic of China = Jinghong	Mohan-Boten Tachileik-Mae Sai
5	Northern Heritage Trail	Culture, nature, history, community-based tourism 	Thailand = Lampang and Nan. Lao People's Democratic Republic = Sayabouly, Luang Prabang, Viengxay, and Meuang Xai/Oudomxay Viet Nam = Dien Bien	Pan Hok-Tay Trang Phu Du-Pak Lay
6	Mekong Discovery Trail	Mekong excursions, nature, history, culture, coffee, ecotourism 	Thailand = Buriram, and Ubon Rachathani (Kong Jiem) Lao People's Democratic Republic = Champasak (Pakse, Champasak and 4,000 Islands) Cambodia = Steung Treng, Kratie, Ratanakiri Viet Nam = Pleiku and Quy Nhon	Chong Mek-Vang Tao Trapeang Kreal-Nong Nok Kien
7	Cruising the Mekong Delta	Mekong excursions, nature, culture, food 	Viet Nam = Tien Giang (My Tho) and An Giang (Chau Doc) Cambodia = Siem Reap, Kratie, and Phnom Penh. Focus on day excursions and multi-day international cruises	Phnom Den-Tinh Bien
8	The Middle Path	Culture, history, pilgrimage 	Myanmar = Yangon, Bago, Khyatiktho (Golden Rock Pagoda), Hpa-An, and Myawaddy Thailand = Mae Sot, Tak and Sukhothai	Myawaddy-Mae Sot
9	Mekong River Cruising in the Golden Triangle	Mekong excursions, nature, culture, soft adventure 	Thailand = Chiang Rai and Chiang Kong Lao People's Democratic Republic = Bokeo (Houay Xai), Pakbeng, and Luang Prabang. Focus on multi-day international cruises, day- excursions, and sports events	Chiang Khong-Houay Xai
10	Route 8	Nature, soft adventure, culture, history, pilgrimage, beach 	Thailand = Nakorn Phanom Lao People's Democratic Republic = Thakhek (The Loop, including all caves and attractions) and Lax Xao Viet Nam = Cau Treo Border, and Ha Tinh (Chua Huong Pagoda and Thien Cam beaches)	Nam Phao-Cau Treo Nakhon Panom-Thakhek
11	East-West Corridor	Beach, culture, history 	Viet Nam = Da Nang, Hoi An, Hue, and Lao Bao Lao People's Democratic Republic = Phin and Savannakhet Thailand = Mukdahan	Dansavanh-Lao Bao Mukdahan-Kaysone Phomvihane
12	Colors of Mekong Cultural Route	Featuring one iconic cultural/heritage site in each of the jurisdictions using multimodal transportation (train-flight-road) 	Cambodia = Siem Reap People's Republic of China = Lijiang, Guilin Lao People's Democratic Republic = Luang Prabang Myanmar = Bagan, Three Pyu Ancient Cities (Halin, Beikthano, and Sri Ksetra) Thailand = Sukhothai Viet Nam = Hoi An	Multimodal, multicountry
13	Mekong to Sea	Culture, community-based tourism, agrotourism, nature-based tourism 	Thailand = Bueng Khan Lao People's Democratic Republic = Bolikhamxay (Paksan, Lak Sao) Viet Nam = Cua Lo, Vinh	Bueng Khan-Paksan Friendship Bridge (5th Mekong Bridge) Nam Kan – Nam Can
14	Indochina Explorer Route	Arts and culture, nature, gastronomy, self-drive tourism 	Thailand = Sa Kaeo Cambodia = Phnom Penh-Battambang-Poi Pet Viet Nam = Ho Chi Minh City	Aranyaprathet-Poi Pet Bavet-Moc Bai



Photo: Kampot International Tourism Port, Cambodia



Photo: Blue Moon Valley, Lijiang, Yunnan, People's Republic of China



Photo: Kuang Si Waterfall, Lao PDR



Photo: Aerial view of Cockburn Island, Myanmar

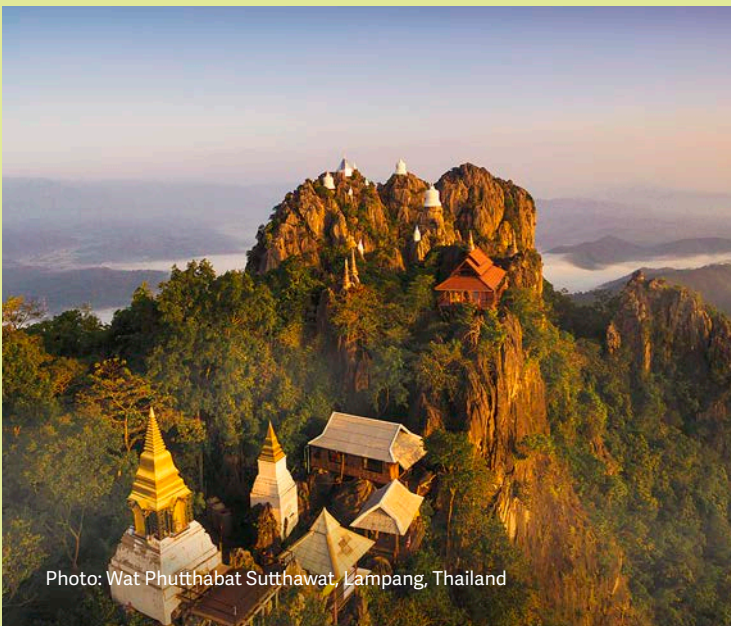


Photo: Wat Phutthabat Sutthawat, Lampang, Thailand



Photo: 117-Yen Bai-Sun streaks on terraced fields, Viet Nam

Program 4.3: GMS tourism statistics collection, analysis, and dissemination improved

The program will build GMS NTO capacity to use digital tools, including artificial intelligence for efficient data collection, analysis, and reporting. Timely and accurate information will help shape policies, improve tourism planning, and enable MTCO and GMS NTOs to design more effective joint marketing activities. Continuous refinement of methodologies and adaptation to changing trends will ensure that GMS tourism statistics remain relevant and support evidence-based decision-making. MTCO and the GMS NTOs will also select and monitor common sustainable tourism indicators from internationally recognized sources and use the information to produce an annual sustainable tourism scorecard. The scorecard will supplement indicators currently reported on the MTCO website.⁴⁶

Program 4.4: Mekong Tourism Forum organized annually

The MTF will continue to be organized annually on a rotational basis in a secondary GMS destination, featuring the principles and crosscutting themes in this strategy. The MTF serves as an important platform for government, industry, and civil society stakeholders to exchange knowledge, share good practices, and network. MTCO will promote the MTF regionally and globally, while GMS NTOs will encourage participation of national, subnational, and municipal agencies to support multisector public sector networking and exposure to good practices. Local tourism products and services exhibitions featuring tourism-related MSMEs will be organized alongside the MTF. The MTF will follow international guidelines for green events.

IMPLEMENTATION FRAMEWORK

The arrangements for implementing and monitoring strategic programs align with the existing GMS Economic Cooperation Program institutional framework (Figure 5). ADB will continue to serve as the impartial coordinating GMS Secretariat.

The GMS Summit of Leaders, held triennially in a GMS country following an alphabetical rotation, is the highest forum in the GMS Economic Cooperation Program. The summit provides strategic directions, endorses GMS strategic frameworks and investment plans, and approves other GMS policies and strategies. Additionally, GMS ministers hold an annual conference to coordinate government policies, engage with development partners and the private sector, and endorse sector strategies and studies.

GMS tourism ministers appoint national tourism officials to represent their countries at GMS TWG meetings and other regional forums. They periodically meet to set the GMS tourism vision, provide policy guidance, endorse tourism strategies, approve subregional programs, promote cross-sector cooperation, allocate resources, and review implementation progress.

GMS senior officials, acting as national coordinators and heads of their country's GMS secretariat, frequently meet to develop strategies and policies for GMS ministers to adopt, review sector plans, and coordinate the GMS Economic Cooperation Program. Meanwhile, the GMS TWG, comprising officials from each GMS NTO, advises the MTCO board and will provide leadership and technical guidance for planning, implementing, monitoring, and evaluating this strategy.

⁴⁶ For example, the Japan International Cooperation Agency, and UN Tourism. 2023. *Achieving the Sustainable Development Goals through Tourism*; WTTC. 2023. *Travel & Tourism's Global Footprint*.

The GMS TWG meets at least twice a year to set implementation priorities for joint GMS tourism initiatives, coordinate closely with other regional and subregional working groups, maintain relations with development partners, and report progress of GMS tourism activities.

Figure 5: GMS Tourism Cooperation Organizational Structure



GMS = Greater Mekong Subregion, Lao PDR = Lao Peoples Democratic Republic, PRC = People’s Republic of China.

Source: Mekong Tourism Coordinating Office.



Photo: So Sa Ngo, Chiang Rai, Thailand

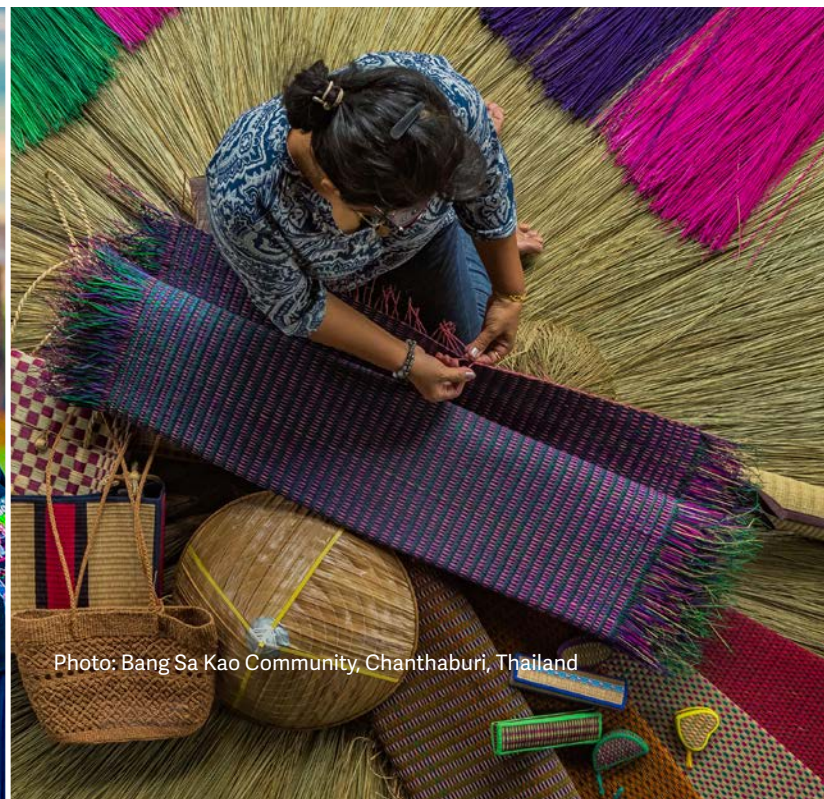


Photo: Bang Sa Kao Community, Chanthaburi, Thailand



Photo: Ha Giang, Viet Nam

The MTCO promotes cooperation among governments, industry, development partners, and civil society for tourism marketing, product development, capacity building, knowledge sharing, investment, and travel facilitation. It plans and implements programs to enhance tourism's role in inclusive economic growth and environmental sustainability, represents GMS countries at tourism events, mobilizes resources for GMS Tourism Strategy implementation, undertakes secretariat functions for the GMS TWG, organizes the annual MTF, and maintains the institutional website www.mekongtourism.org. Communicating on behalf of the TWG, the MTCO will raise awareness of the GMS Tourism Strategy 2030 through press releases, awareness-raising activities, and subregional and national events.

Development partners, including financial institutions, aid agencies, civil society organizations, industry associations, academic institutions, and the media, will engage with the GMS Economic Cooperation Program to provide knowledge and finance for strategic programs, support private sector development, offer policy advice, and disseminate accurate information about GMS tourism.

The private sector collaborates with the GMS TWG, MTCO, and NTOs to develop multicountry tourism routes and experiences, organize promotional events, support marketing campaigns, create sustainable tourism knowledge products, and identify business constraints for discussion at GMS sector group and higher-level forums.

Program and project implementation agencies, including NTOs and agencies responsible for education, transport, heritage management, safety, and urban management, along with state-owned enterprises, private entities, and civil society organizations, work to jointly identify, design, implement, monitor, and evaluate programs and projects. They report progress and issues to sector working groups and produce and disseminate tourism knowledge products and services.

COSTS AND FINANCING

Indicative cost estimates to implement the strategic programs and projects in Appendix 1 total \$1,278.49 million (Table 11). Financing will be sourced from government, the private sector, and development partners. Innovative financing mechanisms such as public-private partnerships will be explored where appropriate.

Table 11: Indicative Cost Estimates

Strategic Direction	Cost Estimates (\$ Million)
Build Sustainable Destinations	1,196.02
Develop Human Capital	70.01
Strengthen Stakeholder Engagement	3.68
Enhance Destination Marketing	8.78
TOTAL	1,278.49


Source: GMS Tourism Working Group.

MONITORING AND REPORTING

MTCO will raise awareness of the strategy through media releases, networking events, and partnerships with the academic community. It will track and communicate progress of strategy implementation to the TWG regularly. The GMS NTOs, through the TWG, will set up results monitoring systems and ensure that the planned activities are being implemented and managed effectively and efficiently. MTCO will coordinate annual TWG workplans, track performance indicators, and prepare semiannual reports based on the results framework in Appendix 2. These reports will be reviewed by the TWG during its semiannual meetings and the TWG will subsequently report progress during annual GMS Senior Officials Meetings, the MTF, and triennial GMS Summit. A midterm review of the strategy will evaluate (i) relevance of strategic directions and implementation arrangements; (ii) progress made mobilizing resources to implement priority programs and projects; (iii) effectiveness of the GMS TWG, MTCO, and other stakeholders in implementing strategic programs and projects; and (iv) provide recommendations to address constraints to implementation and any new strategic priorities.



Photo: Guangxi Sanyuesan Festival, Guangxi Zhuang, People's Republic of China



Appendix 1

Photo: Phu Huoa Xang, Xaysomboun Province, Lao People's Democratic Republic.

Appendix 1 Priority Investment Programs and Projects

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
Strategic Direction 1: Build Sustainable Destinations						
1	Tourism Infrastructure for Inclusive and Resilient Growth Project	The project will support inclusive and resilient development in areas of Siem Reap and Battambang provinces that are increasingly affected by climate change and disasters. Integrated multisector solutions will (i) improve the quality, coverage, and affordability of urban infrastructure, sanitation, and other public services and facilities; (ii) connect rural areas that have good tourism and agricultural development potential to urban growth centers; (iii) strengthen the institutions and capacity needed to foster climate, disaster, and gender-responsive urban development and tourism; and (iv) promote economic diversification and private sector investment.	Cambodia	80.0	Mekong - Lancang Cooperation Special Fund 2025	Development partner- 70.0 Government of Cambodia- 2.0
2	Tourism Infrastructure support to the Supreme Tourism Area	The supreme tourism area aims to promote tourism and investment in the specific area	Cambodia	200.0	2025–2030	Grant Cofinancing (To be confirmed)-8.0 ADB
3	Tourism Infrastructure support the Mekong Discovery Trail tourism development	The Mekong Discovery Trail is an important multicountry tourism destination for Cambodia, Lao PDR, and Viet Nam	Cambodia, Lao PDR, Viet Nam	25.0	2025–2030	ADB
4	Implementation of the Green Destination for Sustainable Tourism	The project aims to apply the GSTC-recognized Green Destination Standard, supporting its implementation and assessment in Cambodia to promote sustainable and inclusive tourism development.	Cambodia	3.0	2025-2030	TA, ADB

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
5	Community-Based Tourism for Resilience and Inclusion	Construction of tourism infrastructure in coastal communities (Kampot, Kep, Sihanoukville, Koh Kong), Tonle Sap Lake and surrounding areas (Siem Reap, Battambang, Pursat, Kampong Chhnang, Kampong Thom) and along the Mekong River (Stung Treng, Kratie, Tboung Khmum, Kampong Cham, Kandal, Prey Veng and Phnom Penh) including: tourist ports, connecting roads to tourist information centers, public restrooms, supporting infrastructure and tourism facilities in tourist communities. Components include (i) strengthening community entrepreneurship, (ii) tourism promotion and marketing, (iii) strengthening quality management of tourism services in communities, and (iv) training and supporting micro and small businesses in the tourism sector.	Cambodia	16.6	2025–2030	ADB
6	Empowering Tourism Destination: Strengthening Tourism Value Chain and Local Economic Development	<p>Assessment of Current Capacities: Evaluate the existing capabilities of value chain actors in tourism and agriculture within Cambodia, including suppliers, farmers, and processors.</p> <p>Identification of Challenges and Needs: Pinpoint specific obstacles and requirements faced by stakeholders to understand what hinders their development and market competitiveness.</p> <p>Market Positioning Strategies: Develop recommendations to enhance stakeholders' presence in domestic and international markets, aiming to boost their export potential.</p> <p>Proposal of Interventions: Suggest actionable short- and medium-term measures to address key challenges, promoting sustainable growth and improved livelihoods.</p> <p>Promotion of Sustainable Practices: Encourage eco-friendly approaches and community engagement to ensure long-term benefits for the local economy and environment.</p> <p>By focusing on these components, the project aims to empower local actors, strengthen the value chain, and foster economic development in the 4 tourism zones within Cambodia.</p>	Cambodia	3.0	2025–2028	TA, ADB

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
7	Guangxi Li River Comprehensive Ecological Management and Demonstration Project	The project will support Guilin, in Guangxi Zhuang Autonomous Region, in its efforts to improve environmental and economic conditions by (i) strengthening institutional capacity to preserve the environment and promote inclusive growth, (ii) reducing pollution and improving the environment of the Li River and its tributaries, and (iii) preserving cultural heritage and creating more livable places.	People's Republic of China (PRC)	357.60	2022–2027	Asian Development Bank (ADB): 140 Government of the PRC: 217.6
8	Integration Project of Valley Legacy Hani Migration Literature Brigade	The project represents a comprehensive program of cultural protection and tourism. It includes the planning and construction of a garden, a children's natural activity center, a tourist service center, a festival distribution square, a song and dance cultural theater, a local specialty market, a hiking trail, a woodland campground, a dry hot valley research station, an agricultural research station, a historical exhibition hall, and a catering and accommodation area.	PRC	0.39	2025	Government of the PRC Public–Private Partnership (cost estimate for feasibility study)
9	GMS Smart and Sustainable Tourism Infrastructure for Inclusive Growth Project	The project will improve roads, enhance transport systems, develop and market cross-border tourism products, and strengthen destination management capacity along tourism corridors in Champasak and Khammouane Provinces linking the Lao People's Democratic Republic (Lao PDR) with Cambodia, Thailand, and Viet Nam. Public–private collaboration will be used for destination management, improvement of transport systems, product development, and marketing. The project will have three outputs: (i) access infrastructure and environmental services improved; (ii) smart tourism destination management practices implemented; and (iii) institutional arrangements and capacity for smart tourism destination management and infrastructure operation and maintenance strengthened.	Lao PDR	41.20	2024–2029	ADB: 40 Government of the Lao PDR: 1.2
10	GMS Cross-Border Tourism Corridor Development Project	The project will increase cross-border tourism between Cambodia, the Lao PDR, Thailand, and Viet Nam, boosting revenue and employment. The project will have three outputs: (i) infrastructure to facilitate movement along cross-border tourism corridors improved; (ii) transport systems, tourism products and marketing along tourism corridors enhanced; and (iii) institutional arrangements and capacity for destination management and infrastructure operation and maintenance strengthened. Target areas in Lao PDR include the provinces of Champasak and Khammouane.	Lao PDR	20.60	2024–2029	Development partner– 20.0 Government of the Lao PDR-0.6

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
11	Last-Mile Connections in Tourism Destinations along Lao PDR-PRC Railway	The project will improve first- and last-mile access infrastructure and develop smart local transport systems between the Lao PDR and the PRC that link to the high-speed railway stations, the Vientiane-Vang Vieng Expressway entrances and exits, and tourism destinations along the Luang Namtha-Vientiane section of the Greater Mekong Subregion (GMS) North-South Economic Corridor. These improvements will enhance ease of use, reduce travel time and costs, and improve the experience of travelers using the new transport options. Public-private collaboration will be promoted to develop and operate the smart local transport systems.	Lao PDR	30.90	2024-2029	Development partner-30.0 Government of the Lao PDR -0.9
12	Regional Destination Development and Management Network Project	The project will improve last-mile access, develop and market tourism products, and strengthen cross-border destination management frameworks in the central Lao PDR provinces of Khammouane and Savannakhet and the southern Lao PDR provinces of Champasak, Sekong, Salavan and Attapeu, linking the Lao PDR with Cambodia, Thailand and Viet Nam. As a result, these destinations, located along segments of the GMS north-south, east-west and southern economic corridors, will become better known, more accessible and connected, and better managed. They will offer quality visitor experiences, boosting revenue and employment. Public-private collaboration will be key for destination management and for making improvements to transport systems, product development, heritage activities, and marketing.	Lao PDR	30.90	2024-2029	Development partner-30.0 Government of the Lao PDR -0.9
13	Lao Urban Environment Improvement Project	The project will support sustainable, inclusive, and resilient urban development in Luang Prabang, Lao PDR, a city in the GMS north-south economic corridor. Multisector project investments will (i) improve the quality and coverage of urban infrastructure and services; (ii) strengthen institutions and capacity to foster climate and disaster resilient development pathways; (iii) promote inclusive and gender-responsive urban planning; and (iv) enhance women's leadership, economic empowerment, and participation in tourism and urban management.	Lao PDR	45.00	2024	ADB

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
14	Improve Tourism Infrastructure in Cau Treo International Border Gate Economic Zone Project	The project will promote connectivity and increase trade and tourism between Viet Nam and the Lao PDR, as part of the East–West Economic Corridor. The project will promote cooperation between two important commercial and tourist centers of the region and develop regional infrastructure. Beneficiaries will include people and businesses operating in the fields of trade, tourism and investment in the East–West Economic Corridor.	Viet Nam	60.00	2024	Development partner - 35.00 Government of Viet Nam - 10.00 Public–Private Partnership – 15.00
15	Lao Cai Sustainable Urban and Infrastructure Development Project	The project will upgrade public infrastructure and support community-led enterprise development to reinvigorate sustainable and inclusive tourism growth in Lao Cai province. The project is estimated to benefit 114,000 people in Lao Cai province—of whom 64% are ethnic minorities and 50% are women.	Viet Nam	111.20	2024-2028	ADB - 75.00 Government of Viet Nam - 33.20 Japan Fund for Prosperous and Resilient Asia and the Pacific 3.00
16	Hoa Binh Tourism Infrastructure Development Project	The project will upgrade climate-resilient transport infrastructure and develop digitally enabled tourism services to attract quality tourism investment.	Viet Nam	126.10	2025-2028	ADB - 74.50 Government of Viet Nam - 51.60
17	Improve Tourism Infrastructure, Protect Forests, Border Security and Community-based Tourism Development Project in the East–West Economic Corridor	The project will provide infrastructure and material to promote connectivity, enhance trade and tourism, and develop the East–West Economic Corridor.	Viet Nam	40.00	2024	Development partner -25.00 Government of Viet Nam - 5.00 Public–Private Partnership - 10.00

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
18	Livelihood Improvement by Introducing Agritourism in Ethnic Minority Villages in Midlands and Mountainous Areas	In small farming villages inhabited by many ethnic minorities in the northwestern mid-mountainous region, income from agricultural products is low and the village economy is stagnant. This has led to a widening economic gap between urban and rural areas as well as urban migration of young people. Since it is essential to revitalize the economy to stabilize this area, agritourism will add value to agricultural products and diversify rural activities, aiming to revitalize the village economy.	Viet Nam	0.35	2021–2024	Japan
19	Grassroots Economic Development and Poverty Reduction in Nawatwithi Communities	The project's objective is to empower local communities and alleviate poverty through sustainable economic development initiatives, with a specific focus on promoting community-based tourism in "One Town One Product" (OTOP) Nawatwithi communities.	Thailand	0.18	2025	Government of Thailand
20	Southeast Asia Sustainable Tourism Facility	The technical assistance will provide project preparation support, capacity building, and knowledge services to a series of multisector projects that support sustainable and inclusive tourism. It will support efforts to revive tourism, develop green and resilient urban and transport infrastructure in secondary cities, attract private investment, accelerate inclusive digital transformations, and mobilize domestic resources for tourism management.	Regional: Cambodia, Lao PDR, Thailand, Viet Nam	4.0	2024–2025	ADB- 2.8 Cofinancing -1.2
Strategic Direction 2: Develop Human Capital						
21	Establishment of Tourism Vocational School and Center for Excellence	The project aims to construct and operate a tourism vocational school with a center of excellence/assessment center in Siem Reap.	Cambodia	14.10	2024–2025	Development partner - 11.6 Government of Cambodia- 2.5
22	Establishment of Tourism Vocational School	The project aims to construct and operate tourism vocational schools in Phnom Penh and Preah Sihanouk province to improve service quality.	Cambodia	12.00	2013-2025	Agence Française de Développement
23	Enhance Tourism Workforces capability and Skills Recognition for Lifelong Learning	The project aims to enhance the tourism services quality and productivity of the workforce by upskilling and recognition of prior learning (RPL) against National Qualification Framework	Cambodia	1.5	2026-2030	TA, ADB

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
24	Sustainable Urban and Transport Management in Luang Prabang	To ensure Luang Prabang remains a sustainable World Heritage City, the project supports the provincial government officials involved in the development and conservation of Luang Prabang to improve their capacity to formulate development plans and implement projects that will contribute to solving the city's issues such as on-street parking, inadequate and discontinuous sidewalks, absence of public transportation, traffic congestion during peak travel hours, high risk of traffic accidents, and high road density.	Lao PDR	2.20	2023-2026	Japan
25	Interpretation Training of Trainer to Improve Certified Guide Skills in Luang Prabang	This project aims to train interpretation trainers and establish a system for training high-quality certified guides in Luang Prabang Province and Luang Prabang City. It will help both tourists and residents, including guides, recognize the value of local resources and contribute to the promotion of local environmental conservation and the realization of sustainable tourism.	Lao PDR	0.44	2022-2025	Japan
26	Vocational Skills Development for Tourism and Hospitality Sector (LAO/336)	The program aims to foster and facilitate meaningful change in vocational skills development, thereby increasing the employability of graduates to take advantage of job/income generation opportunities, leaving no one behind in the Lao PDR's socioeconomic development. The focus is on two key economic sectors considered to have high and labor-intensive growth potential, and present opportunities for sustainable and technology-enhanced development and innovation, namely tourism and hospitality, and agriculture and forestry. The program expects to directly reach 20,000 women and men, particularly those from vulnerable and marginalized groups.	Lao PDR	27.00	2023-2027	Luxembourg, Switzerland, and European Union
27	Developing and Improving the Quality of Souvenirs from Local Resources in Phoukham and Muan Village, Pek District, Xiangkhouang Province	In the villages of Phoukham and Muan village, residents discover tourism resources from their traditional way of life and develop and improve the quality of products for tourists. Through this project, the villagers deepen their understanding on the usefulness of the design process and design thinking in improving the quality of tourism products and centralizing the production system.	Lao PDR	0.06	2022-2025	Japan
28	The Establishment of Bakery and Pastry Training Project	The project aims to strengthen human resource capacities of tourism stakeholders in particular women, youth, people with disabilities, and locals.	Myanmar	0.24	2022-2024	Mekong-Lancang Cooperation Special Fund

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
29	Enhancing the Tourism-Related MSMEs of GMS Countries Through Digitalization	The initiative will conduct awareness training/workshops for tourism-related MSMEs to enhance innovative and creative products and marketing by upgrading digital skills and facilitating regional networking.	Myanmar	1.00	2024-2026	GMS Regional Investment Framework (financing to be confirmed)
30	Publication of Tourism Promotional Materials	The project will carry out specific activities for promoting GMS existing and emerging destinations through publishing brochures, in-flight magazines, DVD songs, documentary VDOs, and organizing the GMS Food Festival in Myanmar.	Myanmar	0.30	2025-2027	GMS Regional Investment Framework (financing to be confirmed)
31	Workshop on Sustainable Development Goals for Tourism Professionals in the GMS	The workshop will enhance knowledge of the Sustainable Development Goals through practical application and raise awareness of low carbon tourism.	Thailand	0.04	2027	Government of Thailand
32	Strengthening Participation of Ethnic Minority Communities in Tourism Development in Binh Lieu District, Quang Ninh Province	The project will promote the participation of ethnic minority communities in this district in tourism development actions and contribute to improving the lives and livelihoods of residents.	Viet Nam	0.06	2023–2026	Japan
33	Sustainable Gastronomy Tourism	A Mekong-Lancang Cooperation project focused on sustainable gastronomy tourism among four GMS countries to promote and celebrate the rich culinary heritage of the region by emphasizing the use of local ingredients in cuisine. Through the project, local communities will be empowered to harness their traditional knowledge and resources to create unique gastronomic experiences for tourists while promoting sustainable practices.	Thailand, PRC, Lao PDR, Viet Nam	9.86	2025	Mekong-Lancang Cooperation Special Fund, Private sector Chiang Mai University
34	The Identity of Buddhist Cultural Heritage	This project aims to develop a database of Buddhist cultural heritage tourism assets, including architectural and artistic works in cities across the GMS. This information will be used for tourism development and training tourism personnel.	Thailand, PRC, Lao PDR, Myanmar	0.21	2025–2027	Government of Thailand
35	GMS Train the Trainers Program on Digital Skills for Digital Tourism	MTCO and regional knowledge partners (universities, think tanks, industry associations, private sector entities) will develop digital capacity building and training programs that can be replicated locally.	GMS-wide	1.0		ADB

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
Strategic Direction 3: Strengthen Stakeholder Engagement						
36	Intra-Governmental Cooperation for Sustainable Tourism Growth and Resilience	The program supports cross-border cooperation on disaster risk reduction and response, including crisis communications.	GMS-wide	1.0	2025–2030	To be confirmed
37	GMS Smart Hotel Data Exchange Network: Enhancing Regional Tourism through Digital Innovation and Collaboration along the High-Speed Rail Link	The GMS Smart Hotel Data Exchange Network is designed to enhance regional tourism through digital innovation and cross-border collaboration along the high-speed rail link connecting southern PRC (Yunnan Province), Lao PDR, and Thailand. The project aims to create a comprehensive, data-driven hotel ecosystem by developing new cloud-based property management systems and to function as a revenue management program.	Thailand, PRC (Yunnan Province), Lao PDR	2.68	2025	Development partner (to be confirmed) Private sector (Hotel owners)
Strategic Direction 4: Enhance Destination Marketing						
38	Enhance Destination Marketing for Siem Reap and surrounding area	Beyond Siem Reap Archeological Park, there are much tourism attractions. This project aim to enhance tourist perception beyond Angkor and to promote secondary destinations.	Cambodia	0.50	2026–2030	TA, ADB
39	Six Countries–One Destination Joint Tourism Promotion	Publish promotional brochures and in-flight magazine of “Six Countries - One Destination” in English, Producing DVD songs in six languages, shooting a documentary in each GMS country, organizing a GMS Food Festival and Forum in Myanmar, and linkage/exchange of contents for posting on promotional websites of GMS countries.	Myanmar	0.30	2025–2027	GMS Regional Investment Framework (financing to be confirmed)
40	Virtual Reality Web Portal for GMS Countries	The project aims to enhance GMS tourism through the development of a virtual reality web portal that will provide a comprehensive and engaging platform for tourists to explore the GMS virtually. Users will be able to access the portal through their web browsers and navigate through a variety of virtual reality experiences, including 360-degree videos, virtual tours, and interactive simulations. The portal will feature key tourist destinations, historical sites, traditional arts and crafts, local cuisines, and other attractions unique to each country.	Myanmar	0.57	2025–2027	GMS Regional Investment Framework (financing to be confirmed)

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
41	Promoting Gastronomy Tourism through the Rich Tapestry of Traditional Cuisines in the Republic of Korea and the Mekong Region	The project promotes cooperation between Mekong countries and the Republic of Korea in advancing gastronomy tourism and preserving traditional cuisine. Through joint workshops, cultural exchanges, and policy dialogue, stakeholders from both regions will share expertise and good practices, fostering mutual understanding and collaboration. By showcasing the diverse culinary traditions of each region, the project strengthens cultural ties and promotes regional identity.	Myanmar	1.00	2025–2027	GMS Regional Investment Framework (financing to be confirmed)
42	Development of a Cruise Tourism Route Within the GMS Subregion	This project will develop a multicountry GMS cruise tourism route. The route includes all GMS countries and aims to stimulate the economy, generate income along the cruise tourism route, and support the expansion of cruise tourism in the future.	Thailand	0.42	2027	Government of Thailand
43	Cultural Heritage Route Development in GMS	This project will design a route linking cultural heritage tourist attractions of the GMS. It aims to develop tourism products and enhance service quality along Thailand's tourism routes, connecting tourist destinations in GMS member countries within the Mekong River Basin; promote tourism in the GMS; stimulate the economy to create income in the connected tourism routes; and expand the overnight stays of tourists.	Thailand	0.29	2024	Government of Thailand
44	Srikotaboon Civilization and Sociocultural Studies for Creative Socioeconomic Development	The project will: (i) conduct research into the archaeological evidence for the Srikotaboon civilization; (ii) excavate archaeological sites using geographical information systems in the Lao PDR, Thailand, and the PRC; (iii) integrate the targeted archaeological sites into one of the UNESCO Creative Cities; (iv) improve the livelihoods of communities living near these sites through creative economy schemes; and (v) establish research networking connections to help promote mutual cooperation among GMS member countries.	Thailand, Lao PDR	1.70	2024–2026	Development partner (to be confirmed) Government of Thailand research and development agencies

PRIORITY INVESTMENTS

No.	Program/Project	Description	Countries	Cost Estimate (\$ million)	Timing	Financing (\$ million)
45	Chiang San-Suvan Khomkhum Cultural Corridor	The project aims to collect information and promote the history of Chiangsan in Thailand and Suvan Khomkum in the Lao PDR. These ancient cities are on opposite sides of the Mekong River. Project activities will include: (i) mapping the sites of the Chiangsan and Suvan Khomkhum; (ii) creating a database; (iii) promoting the study of art history; (iv) applying scientific equipment to analyze cultural artifacts, especially Buddha images from these ancient cities; (v) identifying the regional and international relationships of these ancient cities; (vi) initiating cross-border cultural, historical, and socioeconomic centers of knowledge; and (vii) using the information gathered by the study to analyze manufacturing technology for creating sculpture and ornaments.	Thailand, Lao PDR	0.50	2026	Government of Thailand
46	Mekong Tourism Coordinating Office (MTCO) Digital Marketing Activities	This includes maintaining the www.mekongtourism.org web portal, regular publication of the Mekong Tourism Newsletter, and other digital marketing activities.	GMS-wide	1.00	Ongoing	MTCO
47	GMS Sustainable Tourism Promotion Campaign 2027	To attract responsible travelers and preserve the region's beauty and heritage, the proposed campaign will focus on sustainable tourism practices and authentic local experiences through a regional marketing initiative. It will involve collaborative planning among stakeholders, selecting destinations that align with sustainable tourism principles, and crafting tailored marketing strategies to highlight unique attractions.	GMS-wide	2.50	2026-2027	MTCO Public-private partnership

Source: GMS Tourism Working Group.

Appendix 2

Photo: Sopheakmit Waterfall, Stung Treng Province, Cambodia

Appendix 2 Results Framework

Vision			
GMS tourism is integrated, prosperous, sustainable and inclusive in alignment with the GMS Economic Cooperation Program Strategic Framework 2030			
Outcome	Performance Target/Indicators	Source	Source
By 2030, the GMS will be a premier global tourist destination recognized for seamless high-quality sustainable travel experiences that foster inclusive economic opportunities and responsible destination stewardship	<ul style="list-style-type: none"> Overall TTDI mean score for GMS is <52 (2024 baseline: 58.6) GMS countries attract 128 million international visitors spending \$200 billion per year 	<ul style="list-style-type: none"> WEF TTDI GMS NTOs, WTTC, UN Tourism, PATA 	WEF TTDI
Strategic Directions	Outputs	Performance Target/Indicators	Sources
Build Sustainable Destinations	Integrated and sustainable tourism planning strengthened; MSME participation increased; common standards implemented; climate and disaster resilience strengthened; accessible tourism services expanded	<ul style="list-style-type: none"> Improvement in GMS mean ranking across TTDI sub-indices (2024 baseline values) <ul style="list-style-type: none"> ICT Readiness (64) Air Transport Infrastructure (54.4) Ground and Port Infrastructure (59.2) Tourist Service Infrastructure (83.4) Natural Resources (37.4) Cultural Resources (48.6) Environmental Sustainability (79.4) T&T Socioeconomic Impact (70.4) T&T Demand Sustainability (44.4) 	WEF TTDI

RESULTS FRAMEWORK

Strategic Directions	Outputs	Performance Target/Indicators	Sources
		<ul style="list-style-type: none"> GMS countries adopt at least five types of common tourism sustainability standards by 2030 Sustainability assessments are integrated into tourism development projects in GMS countries by 2030 GMS countries develop or adopt plans for disaster risk reduction and climate adaptation in tourism by 2030 GMS countries are committed to improving accessibility in tourism through policies and regulations 	<p>GMS NTOs and government agencies</p> <p>MTCO/NTO joint surveys</p>
Develop Human Capital	Strengthened capacity of public tourism managers; service quality improved; digital skills strengthened; increased awareness of sustainable tourism; tourism workforce diversified	<ul style="list-style-type: none"> Improvement in GMS mean ranking of 67.8 in TTDI sub-index on human resources (2024 baseline) All public tourism managers participate in at least one advanced capacity-building program focused on sustainable tourism or digital transformation by 2030. By 2030, digital skills training programs are available for tourism businesses in all GMS countries. Increase in average female (2021 baseline: 47%) and youth (2021 baseline: 14.6%) employment in tourism as a share of total 	<p>WEF TTDI</p> <p>MTCO and NTO tracking</p> <p>WTTC Annual Research and Social Footprint Reports</p>
Strengthen Stakeholder Engagement	Strengthening of public multisector coordination, public-private collaboration, MTCO, and crisis communications. Improvement of visa openness and facilitation	<ul style="list-style-type: none"> Respective improvement in GMS mean ranking of 69.2, 69.4, and 66.4 in TTDI sub-indices on business environment, prioritization and openness (2024 baseline) Improvement in GMS mean score of 46.9 in the UN Tourism Visa Openness Score MTCO status elevated to intergovernmental organization. 	<p>WEF TTDI</p> <p>UN Tourism</p>
Enhance Destination Marketing	Multicountry experiences jointly developed; sustainability campaign implemented; strengthened and harmonized tourism data collection and analysis; MTF held annually	<ul style="list-style-type: none"> Multicountry tourism routes are jointly promoted through regional campaigns Tourism businesses are encouraged to participate in and promote sustainability campaigns All NTOs actively collaborate on harmonized tourism data collection initiatives organized by MTCO Annual MTF attracts at least 100 attendees and fosters collaboration through sessions on regional tourism initiatives 	<p>MTCO and NTO tracking</p>

GMS = Greater Mekong Subregion, ICT = information and communications technology, MTF = Mekong Tourism Forum, NTO = national tourism organization, PATA = Pacific Asia Travel Association, TTDI = Travel & Tourism Development Index, WEF = World Economic Forum, WTTC = World Travel and Tourism Council, T&T = Travel and Tourism.
Source: GMS Tourism Working Group.



Photo: The 55th GMS Tourism Working Group Meeting held in June 2025, Lao PDR



Photo: Technical Tour of Mekong Tourism Forum 2025



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