



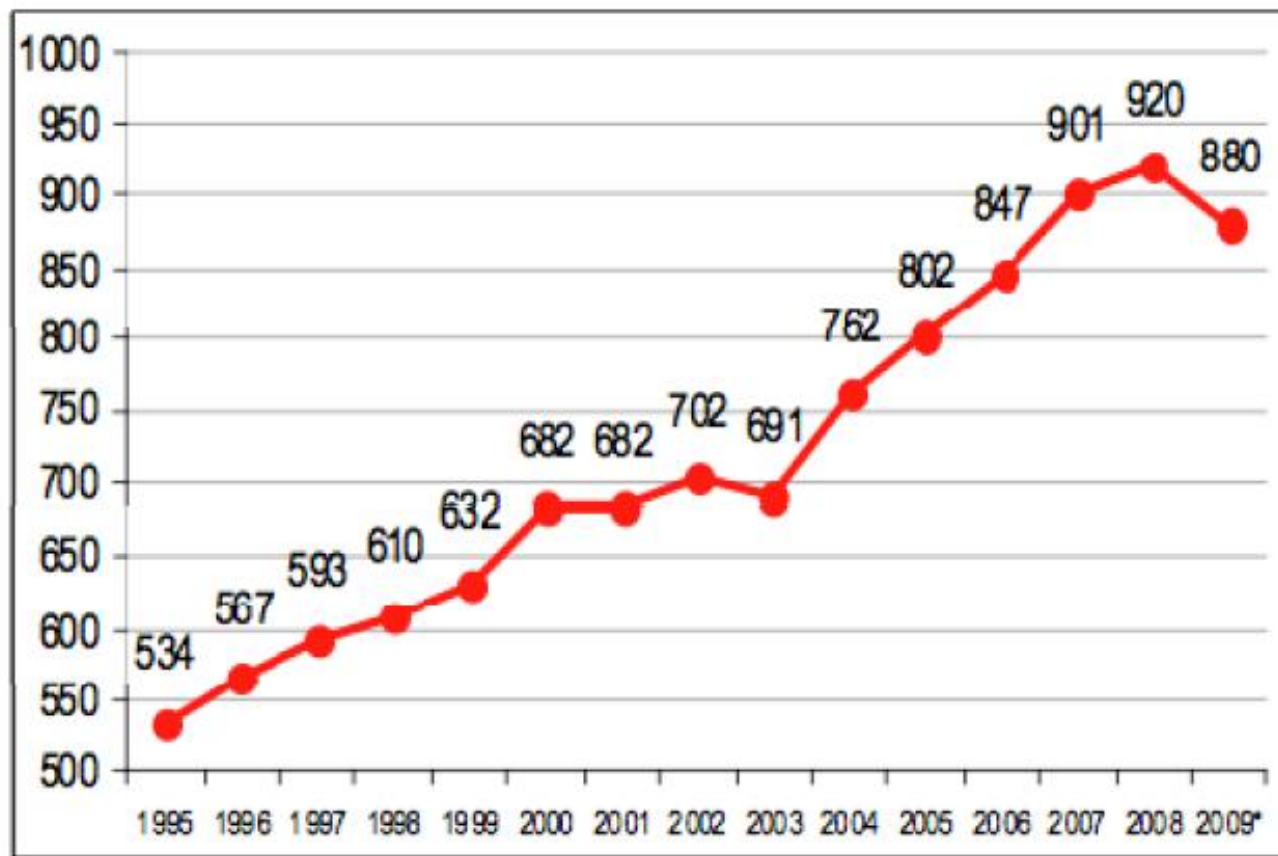
Tourism Update

Tith Chantha
Ministry of Tourism

1. World-wide situation (a)

World: Inbound Tourism
International Tourist Arrivals

(million)



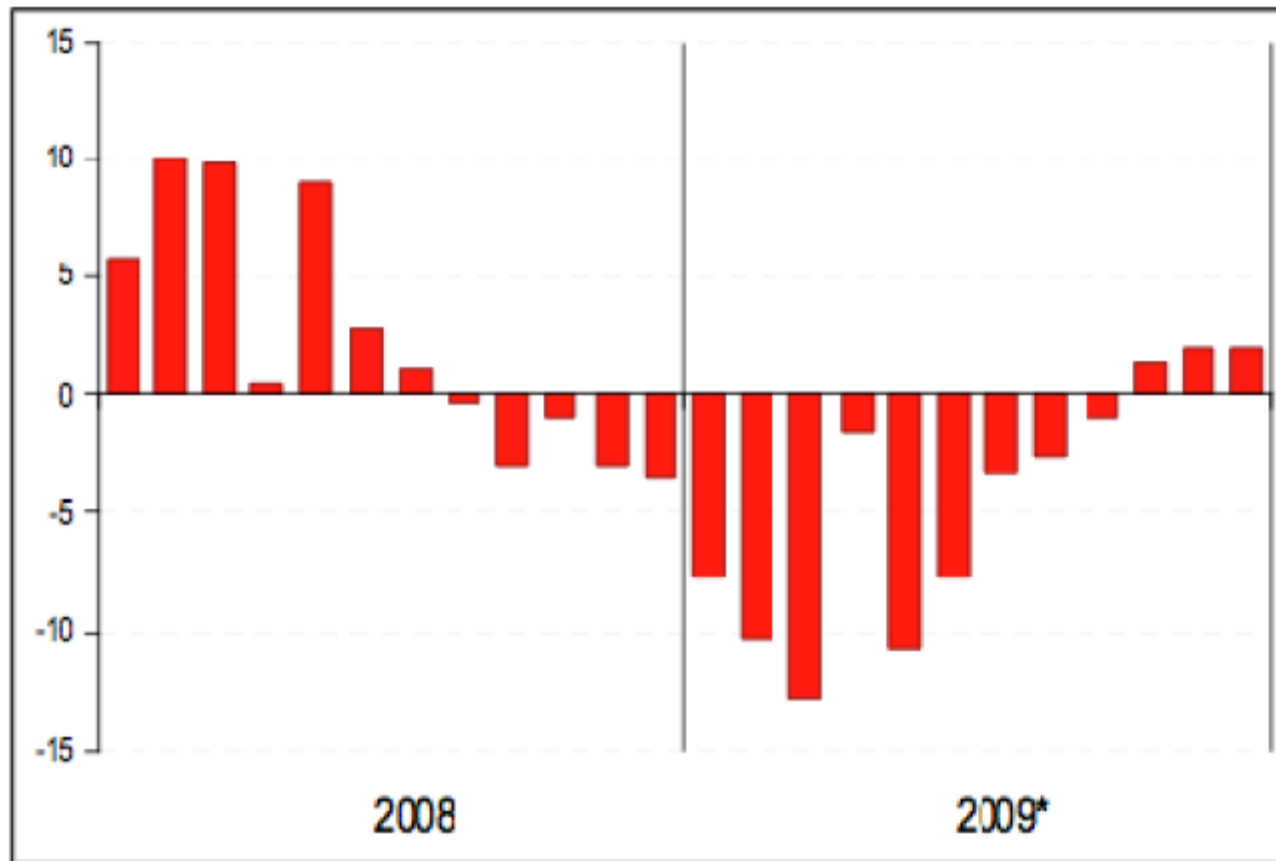
Source: World Tourism Organization (UNWTO) ©

1. World-wide situation (b)

International Tourist Arrivals, monthly evolution

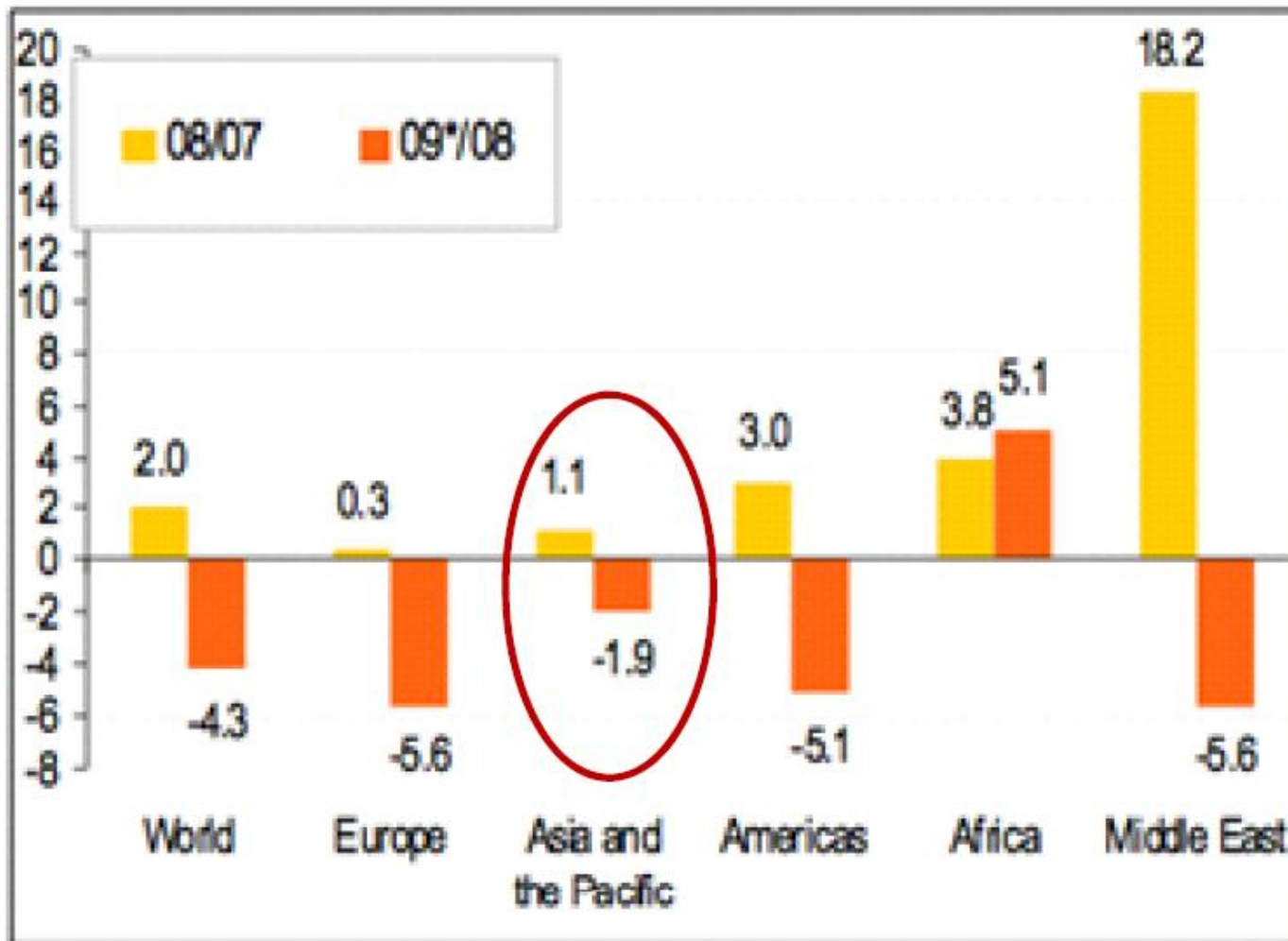
World

(% change)



Source: World Tourism Organization (UNWTO) ©

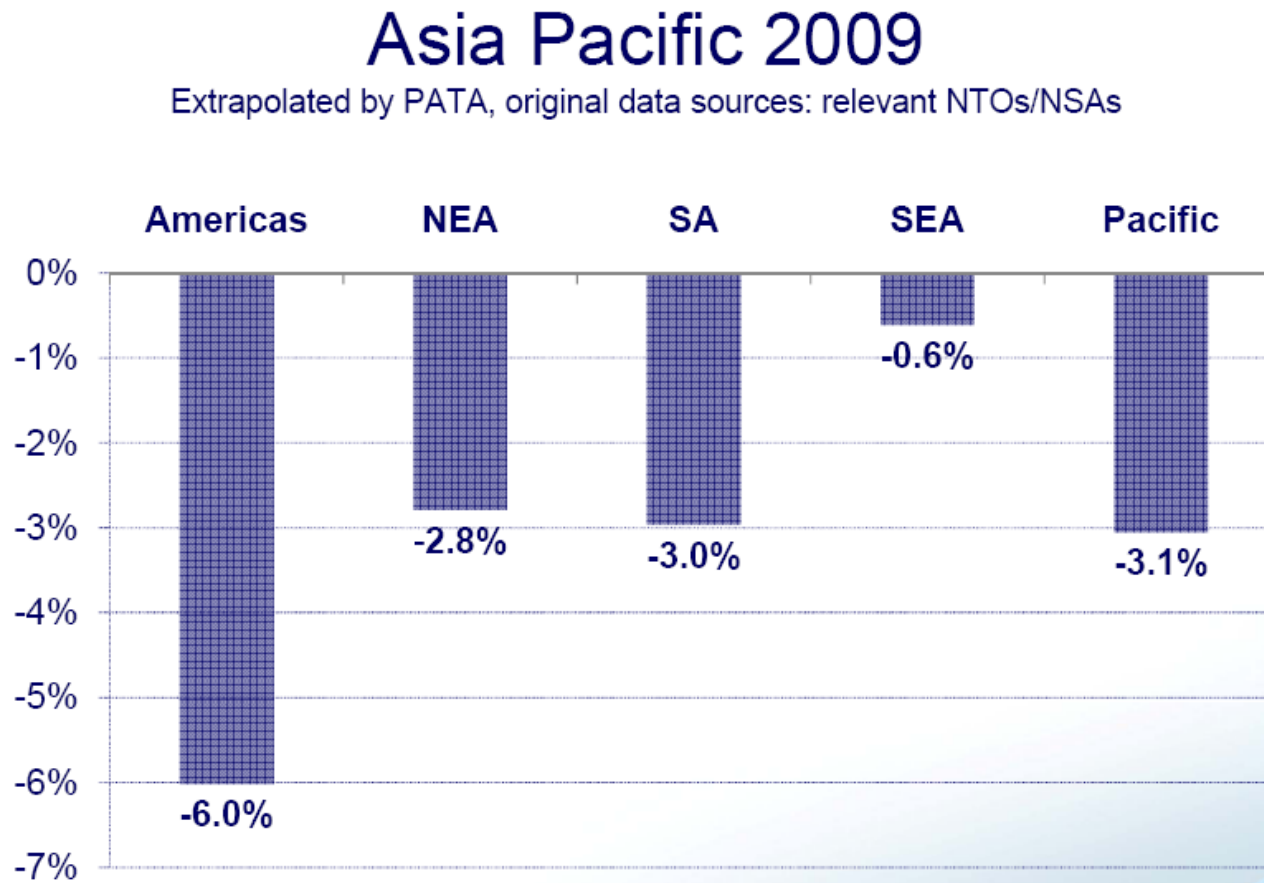
1. World-wide situation (c)



Source: World Tourism Organization (UNWTO) ©

2. Regional Tourism situation (a)

- ◆ Asia Pacific: tourism decreases by 3.9%

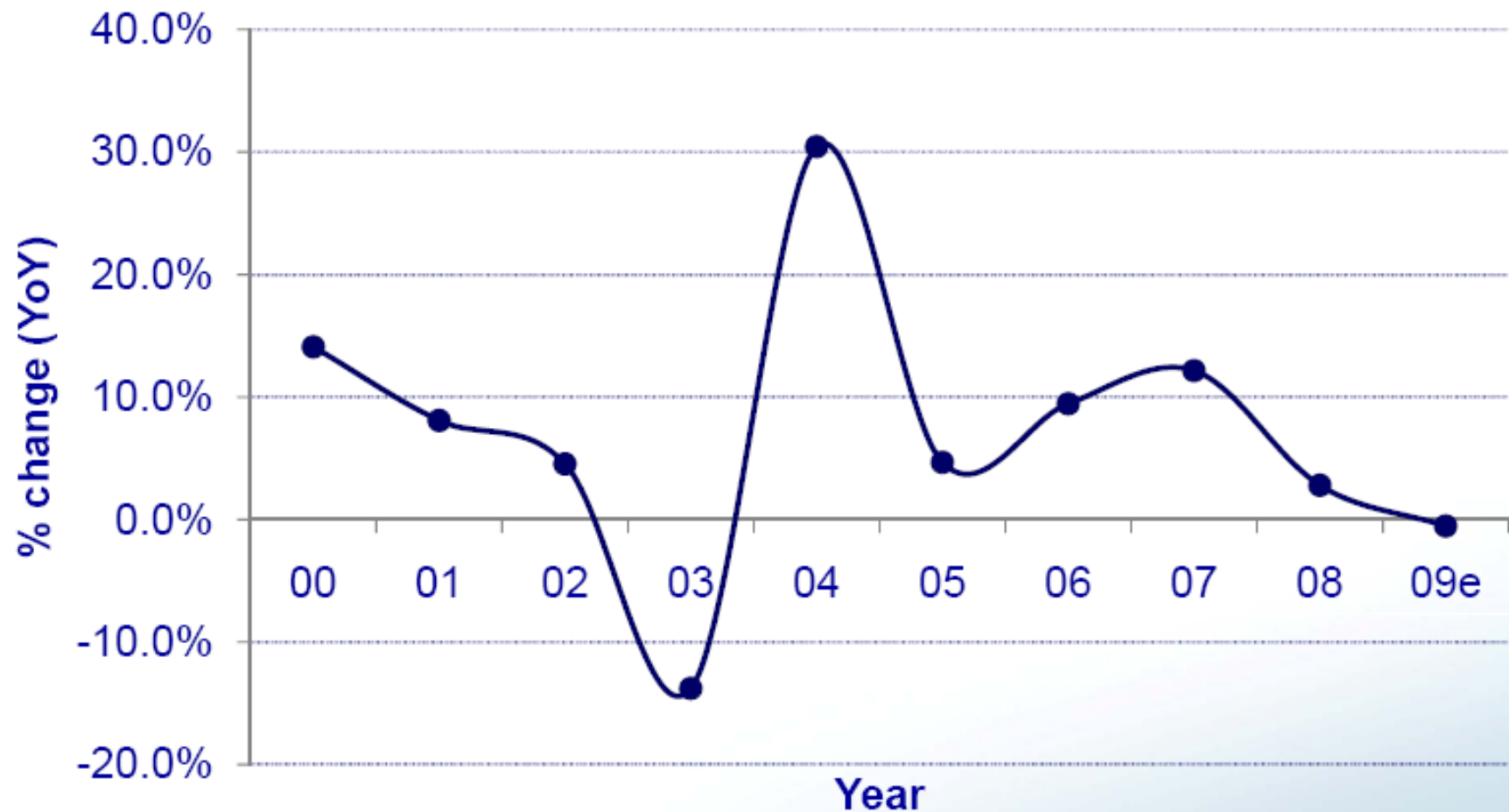


2. Regional Tourism situation (b)

- ◆ ASEAN (10 countries): increase 0.19%
- ◆ Tourist from Asian countries increase, make up 45% of total
- ◆ Tourist from Europe make up 10% of total
- ◆ 15million tourists from Japan, Chinese and Korea visit Southeast Asia

% Change in Arrivals to ASEAN

YoY, source: relevant NTOs/NSAs, compiled by PATA



Southeast Asia Countries Tourism

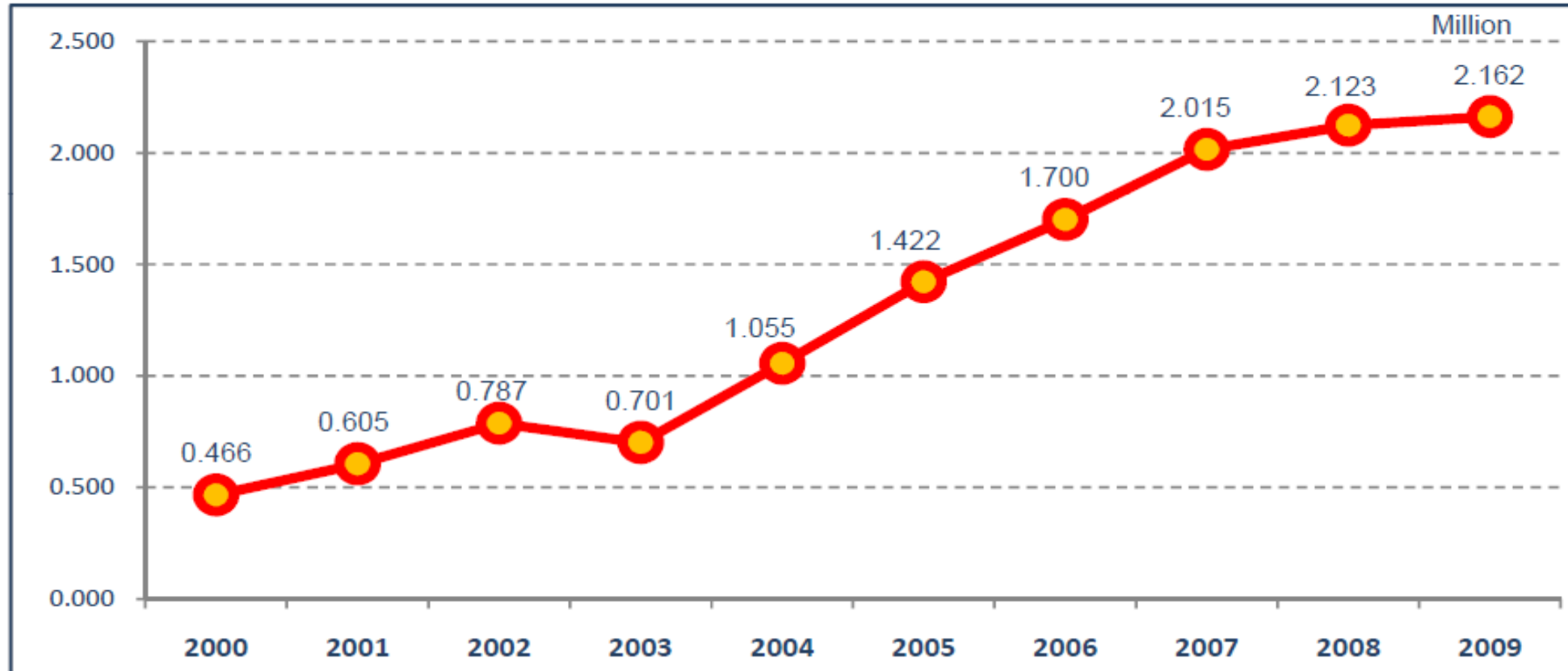
- ◆ 5 countries receive increasing numbers:
Cambodia 2%, Malaysia 7.2%, Myanmar 4.3%, Laos 2.9% and Indonesia 0.4%
- ◆ 5 countries facing with decreasing numbers:
Thailand -3.5%, Vietnam -11.3%; Brunei -34%; Philippines -1.4% and Singapore -5.6%
- ◆ Those countries have connecting with overland routes got increasing in numbers of tourists but those countries depend on only by air got decreasing numbers of tourists.

3. Situation of Cambodian Tourism

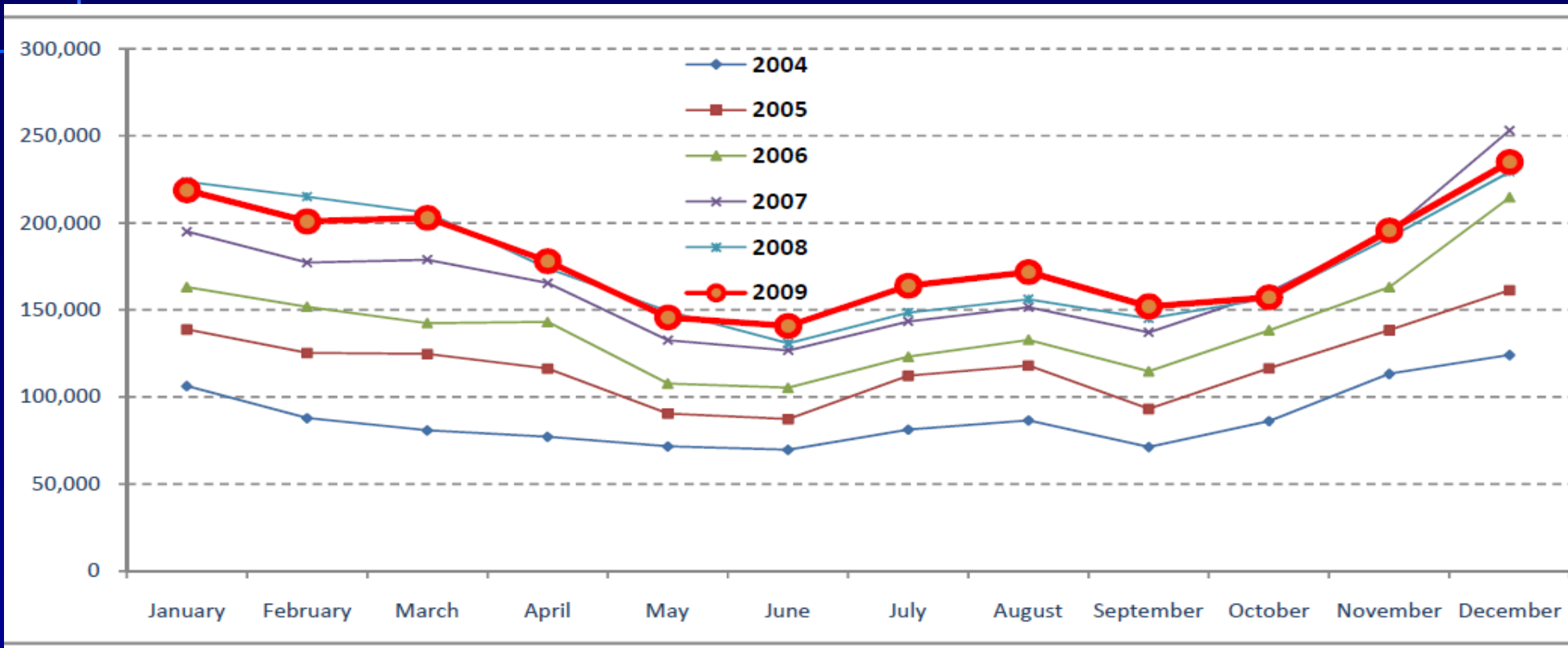
- ◆ Cambodia suffered from world economic crisis, politic crisis from neighboring country and A/H1N1
- ◆ Cambodia set up 7 strategies
- ◆ Promotional strategy (Kingdom of Wonder) and City competition of clean city, clean resorts and good services.
- ◆ Try to flight with world economic crisis

Cambodia: Inbound Tourism 2009

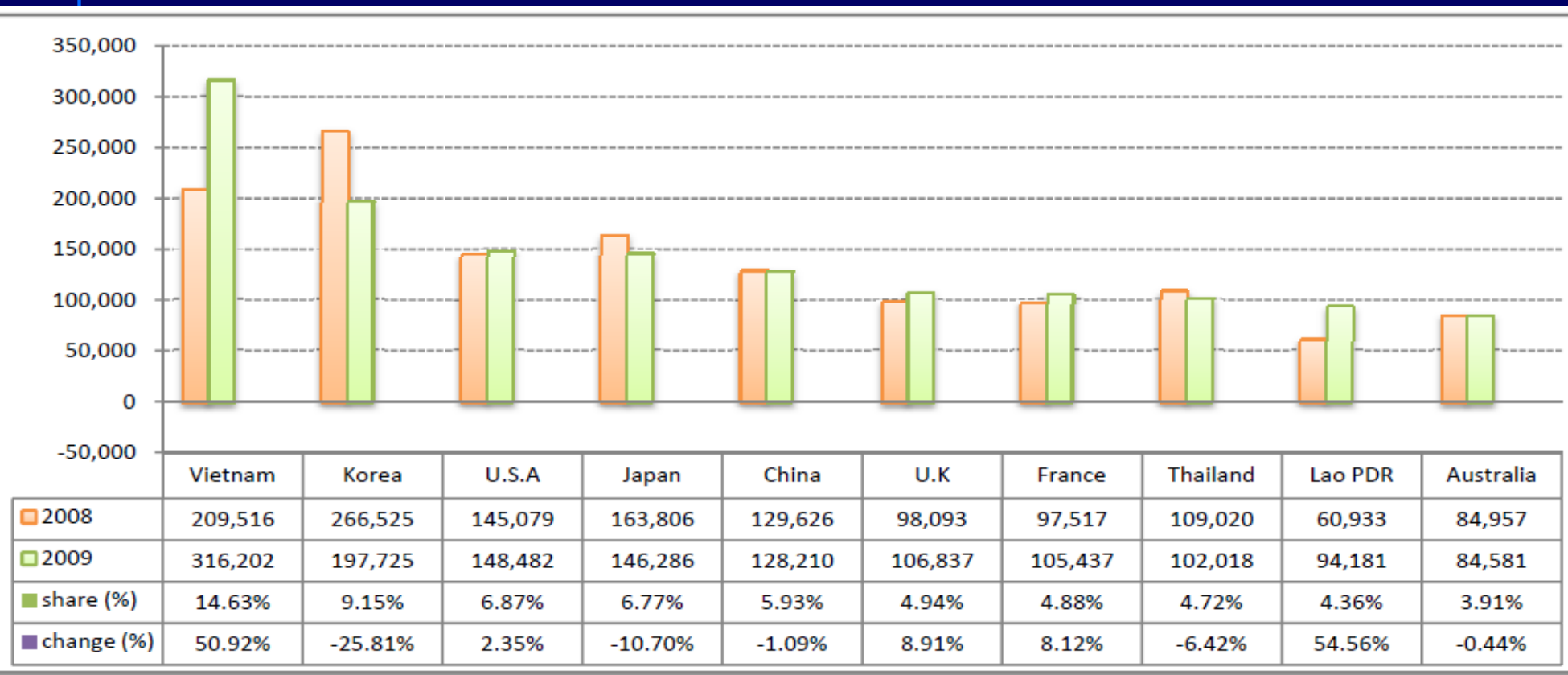
Cambodia: Inbound Tourism
International Visitor Arrivals



Cambodia: Inbound Tourism 2009 by Months



Top Ten Arrivals to Cambodia in 2009



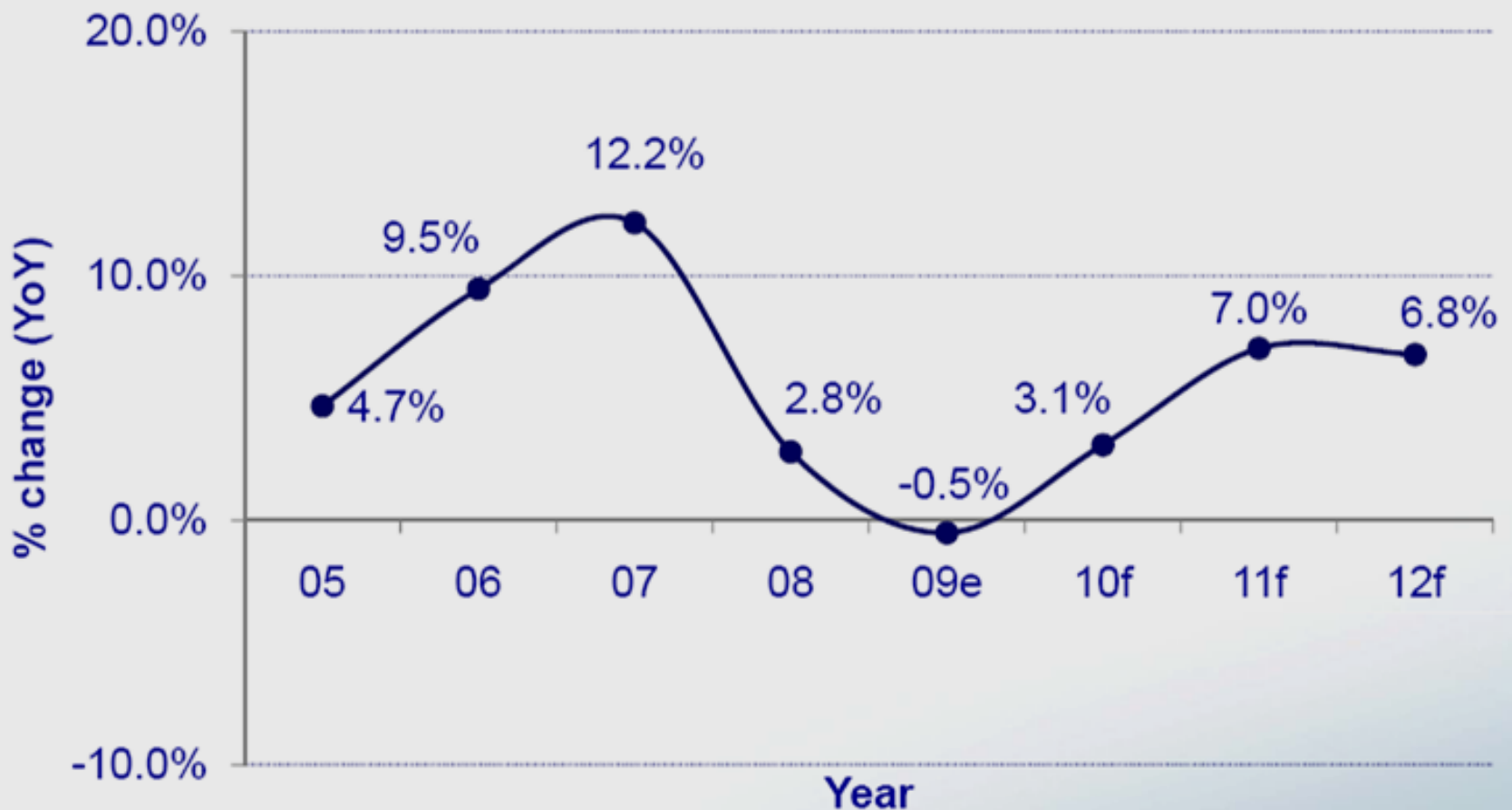
4. Trend of tourism 2010

- ◆ Tourism field is expected to recover at the time of world economic crisis recovery
- ◆ Number of tourists will be increased at the average of 5% in the period of 2010-2012
- ◆ Tourists in Asia Pacific will be increased as well
- ◆ Southeast Asian tourists will be increased about 3% in 2010, 7% in 2011 and 6.8% in 2012

% Change in Arrivals to ASEAN

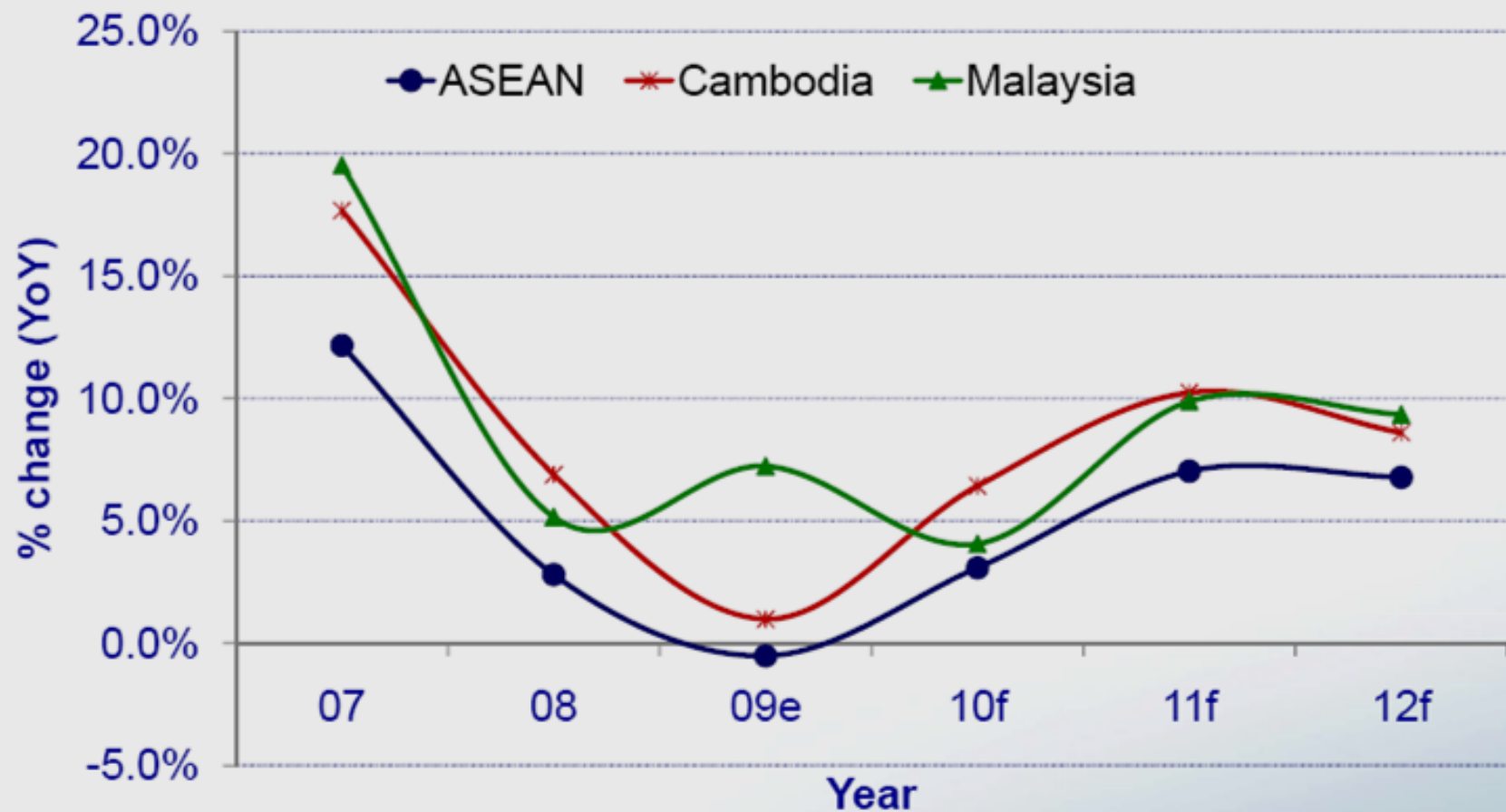
YoY, Actual and Forecast, source: relevant NTOs/NTAs, compiled by PATA

CAGR (2012/09) = 5.6%



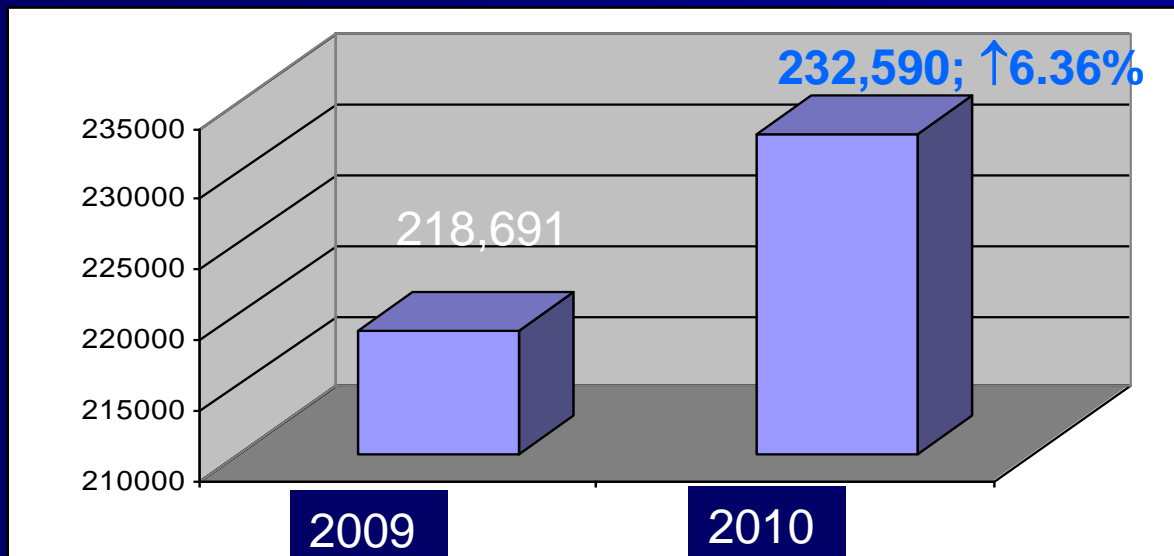
% Growth > ASEAN average

Source: PATA 'Asia Pacific Tourism Forecasts 2010-12' Turner & Witt (2010)

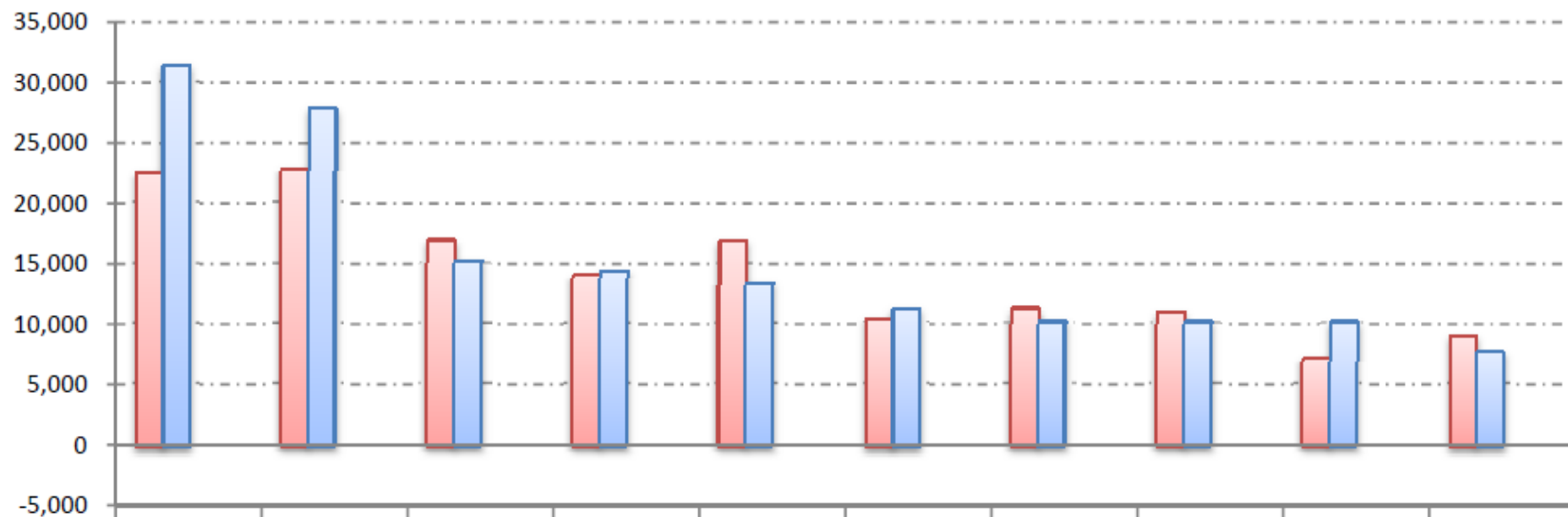


IV. Visitor arrivals to Cambodia in January 2010

Visitor arrivals			share (%)		change (%)
	2009	2010	2009	2010	2010*/09
Air	121,238	126,995	55.44	54.60	4.75
Phnom Penh Int'l Airport	50,749	54,584	23.21	23.47	7.56
Siem Reap Int'l Airport	70,489	72,411	32.23	31.13	2.73
Land and Water ways	85,843	89,545	39.25	38.50	4.31
Land	76,375	82,449	34.92	35.45	7.95
Boat	9,468	7,096	4.33	3.05	-25.05
Sub-Total	207,081	216,540	94.69	93.10	4.57
Same-day visitors	11,610	16,050	5.31	6.90	38.24
Total	218,691	232,590	100.00	100.00	6.36



III. Top ten markets arrivals to Cambodia in January 2010



	Korea	Vietnam	U.S.A	Japan	China	Australia	U.K	France	Taiwan, China	Thailand
2009	22,524	22,875	16,975	14,088	16,893	10,419	11,328	10,993	7,241	9,046
2010	31,369	27,895	15,285	14,453	13,472	11,253	10,278	10,227	10,215	7,741
share (%)	13.49%	11.99%	6.57%	6.21%	5.79%	4.84%	4.42%	4.40%	4.39%	3.33%
change (%)	39.27%	21.95%	-9.96%	2.59%	-20.25%	8.00%	-9.27%	-6.97%	41.07%	-14.43%