

Ecotourism in Cambodia

An Overview

National Ecotourism Policy & Strategy

Initiated by Ministry of Tourism & SNV (Netherlands Development Organisation)

Objectives:

- diversify tourism product
- raise the profile of the country
- attract growth segments
- provide an incentive for sustainable use of natural resources
- alleviate poverty
- facilitate responsible tourism planning and management practices

Strategic Planning Process

- Regional field trips
- Stakeholder consultations
- Regional workshops
- Tour operator survey
- Tourist survey
- Inventory of assets



Draft National Ecotourism Policy & Strategy

International Ecotourism Markets

Predominant international markets

- North America, UK, Germany, France and Netherlands
- South Korea and Japan

Travel Characteristics

- FIT & Group Inclusive
- income between US\$25,000 - \$35,000
- University educated
- willing to pay between US\$25 - \$40 per night for an experience involving a protected area
- willing to pay an entry fee of under US\$3-5

International Ecotourism Markets

International visitors

- 22% already visited a protected area in Cambodia
- 42% expressed an interest if they had time
- 32% said they had an interest to visit

Highest visitation of a national park or protected area

- Tonle Sap (45%)
- North-east (19%)
- Coastal Zone (18%)

Opportunities

1. Diverse cultural and natural resources
2. Increased stakeholder & institutional support
3. Improve infrastructure – Brownfield & Greenfield
4. Market demand
5. Diversified products:
 1. 'blue' & 'green' ecotourism
 2. adventure tourism
 3. regional ecotourism



Strengths



1. Rich in biodiversity & cultural heritage
2. Geographical accessibility
3. Institutional and stakeholder support
4. Perception as a new ecotourism destination
5. Positive market trends

Ecotourism Development Priorities

National Policy on Ecotourism prioritises development into 4 regions:

1. North-east
2. Tonle Sap
3. South Coast
4. South-west



- Cities
- Main Rivers
- Proposed Protected Areas
- Protected Areas
- Water
- Biodiversity regions
- Kampong Cham
- Mekong
- North East
- Northern Plains
- Pailin
- South West
- Tonle Sap.



Source:
 Protected Area: Ministry of Environment (2001)
 Proposed Protected Areas: Ministry of Agriculture, Forestry and Fisheries (2000)
 Cities: UNEP (1999)
 Biodiversity regions: ICBM (2002)

Prepared: 17th June 04
 Updated: March 05



North East Region

Diversity of resources and landscapes:



Mekong & Sekong Rivers

Virachey National Park

Sre Pok Wilderness Area

Stung Treng Ramsar Site



North East Region

Unique species:

- Irrawaddy Dolphin
- Sarus Crane
- Mekong Giant Catfish



Local
indigenous
populations
endemic to
the area

Approx. 270,000 visitors
in 2007

- 85% domestic
- 15% international



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Tonle Sap Region

Prek Toal - a core zone of the Tonle Sap Biosphere Reserve



Prek Toal - Asia's premier habitat for large water birds

The flooded forests of
Kompong Pluk



Tonle Sap Region

- Floating villages capture local lifestyles
- Proximity to Siem Reap provides access to key markets





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South West Region

Cardamom Mountains key draw card to the area



One of the largest intact tropical forests in mainland Southeast Asia.

More than one million hectares of diverse habitat types.

- Central Cardamoms Protected Forest
- Mount Samkos Wildlife Sanctuary
- Botum Sakor National Park
- Mount Aural Wildlife Sanctuary



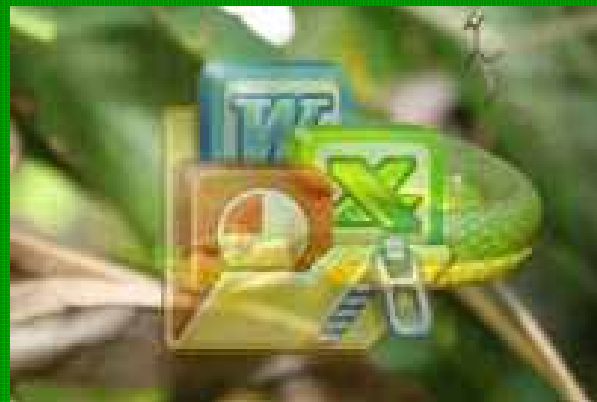
South West Region

Richness & diversity of flora and fauna

A wide range of globally threatened species in relatively high numbers



Tiger, Asian elephant, Pileated gibbon, Siamese crocodile, Elongated tortoise





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Southern Coastline

Kep to Koh Kong

435 km of diverse coastal habitats



Coastal zone provinces received 886,581 visitors in 2007

- 86% domestic
- 14% international



Variety of quality accommodation and tourist services

Southern Coastline

Opportunities to provide marine-based tourism products including 'blue' ecotourism



Off-shore islands, mangrove forests, sea grass beds, mountain ranges, beaches and coral reefs



The Investment Opportunity

Investment in tourism is needed to:

- diversify the current tourist product mix
- distribute more evenly the spread of tourism development in the country
- Support and improve on current infrastructure

The Investment Opportunity

- Critical is the need for investment to build and maintain the hard and soft infrastructure required to support tourism development.
- Brownfield & Greenfield Investments
 - Hard infrastructure opportunities in French colonial properties
 - Natural and rural sites in proximity to key attractions
- Hard Infrastructure
 - Transportation, telecommunications, electricity / alternative energies
- Soft Infrastructure
 - human resources
- Access to finance for tourism SMEs

The Investment Opportunity

- **Demand led**

- National Tourism Development Plan recognises the need to diversify products from Angkor Wat to other destinations
- Ability to attract and meet the needs of high yield markets
- Private sector seeking new attractions and experiences for their clients
- Tourists seeking additional activities and attractions

Investment Opportunities

- Higher end accommodation services
- Quality & diversity of food service providers
- Regional training & education facilities



- Energy efficiency technologies
- Transportation services
- Small scale SME investment