18.2.4 Approaches for Rural/ Heritage Area

(1) Development Concept

The Rural Zone of Siem Reap extends in the north within the protected area of Angkor (Zone 1 and 2), and in the outskirts of the urban areas mostly in the south and in the west. The areas in the west of Siem Reap is generally conceived as potent for agricultural production due to the availability of water from West Baray, although the potential is tapped to a limited scale at present.

The rural areas around Siem Reap have an important role of sustaining Angkor ruins in a number of aspects.

- Siem Reap and Angkor is sustained naturally by the watershed of the Siem Reap River, which provides the water resources, vegetation and natural eco-system.
- The rural areas provide workers for tourism and related industries, such as hotel and services, handicrafts production, transport and construction. Without the supply of workforce from the rural areas, the tourism in Siem Reap shall be difficult to sustain. Also, it is in the rural areas that provide the workforce for the preservation and rehabilitation of the ruins including some of the skilled workers for stone carving.
- The rural areas in Siem Reap maintain future possibility of local supply of foodstuff for visitors at hotels and guest houses including vegetables and poultry. This will be an important aspect for the pro-poor tourism for Siem Reap.

Thus the rural areas in Siem Reap will co-exist with the Angkor tourism and Siem Reap as its main gate by maintaining the functions mentioned above for sustainable development of the region as a whole.
It is thus contemplated that the basic direction of development for the rural areas of Siem Reap to be the following;

Rural/Heritage Area: The Rural Communities in Harmony with Heritages, Supporting the Tourism and Preservation

(2) Development Approaches

Two approaches to realize the concept in the Rural/Heritage Area are raised as follows.

Agricultural Development in the Western Suburbs

The areas west of the urban area of Siem Reap is said to have high potential for agricultural development. Water for technical irrigation is available from the West Baray almost perennially. As Siem Reap is an international tourism city, there is substantial demand for agricultural products for foodstuff. There needs to be planning to establish agricultural development, primarily focusing on the cash crops such as vegetables and fruits.

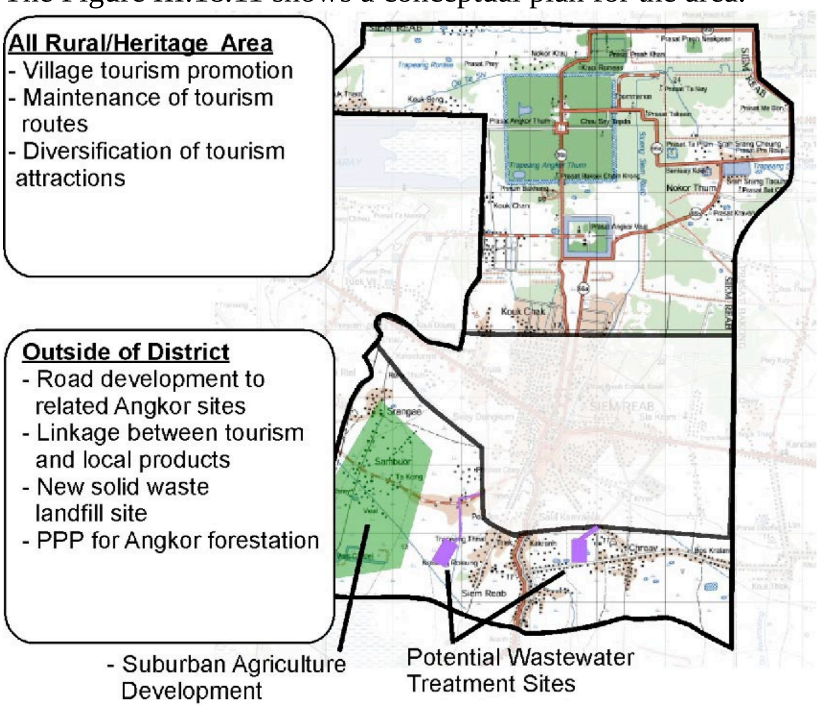
Promotion of Village and Eco Tourism

As the areas within the protected area is under strict control of building and land use changes, and generally the people living there have little means for livelihood than participating in tourism sector by selling souvenir or doing guides, or temporarily work for construction sites in the city. In order to enhance and establish the areas within the protection zone as a sustainable base for the Angkor monuments preservation and sustainable tourism, there need to be more involvement of the residents in the preservation zone in the activities related to the tourism.

Efforts need to be made to the promotion of village tourism and eco tourism in these villages. The village tourism encompasses on the village activities such as producing local products with tourism interest, such as pottery, weaving, stone and metal carving etc. The eco tourism will focus on the natural trail in the woods and along the natural river courses.

(3) Conceptual Plan

The Figure III.18.11 shows a conceptual plan for the area.



Source: JICA Study Team.

Figure III.18.11 Conceptual Plan for Rural/Heritage Area

18.2.5 Approaches for Tonle Sap Lake Area

(1) Development Concept

Gifted with various riverine resources, Tonle Sap, or often called the Great Lake, is the largest fresh water lake in Southeast Asia,. The low lying area around the lake is seasonally submerged by the lake's water surface that rises during the rainy season. While Tonle Sap functions as a gigantic regulation pond for the Mekong, it is historically an indispensable part of the Khmer Kingdom for transport and battle site, and is laden with rich natural environment with biodiversity. It would be no wonder if Tonle Sap was put on the UNESCO's World Heritage as a natural heritage.

The direction of planning is thus set as in the following;

Tonle Sap: The Eco-Tourism Area with Protection and Sustainable Use of Diverse Natural Environment

(2) Development Approach

The approach to realize the concept associated with the urban development in the Tonle Sap Lake Area is in the followings;

<u>Development of Tonle Sap for Sustainable Tourism</u>

Tonle Sap was often depicted in bas-reliefs of Angkor ruins, and has been so-call the mother of the Khmer Civilization. The lake thus possesses ample potential for widening the tourism resource of Angkor Wat as a site for boat trips.

As there is an on-going ADB project for Tonle Sap Sustainable Development project which caused substantial social controversy as to the development of the estuary area, SRAT study shall refrain from focusing on this issue any further. It remains to be pointed out that there is a clear need for a comprehensive study to clarify the natural resources of Tonle Sap and formulation of preservation plan together with a sustainable utilization plan for Tonle Sap Lake.

(3) Conceptual Plan

The Figure III.18.12 shows a conceptual plan for the area.

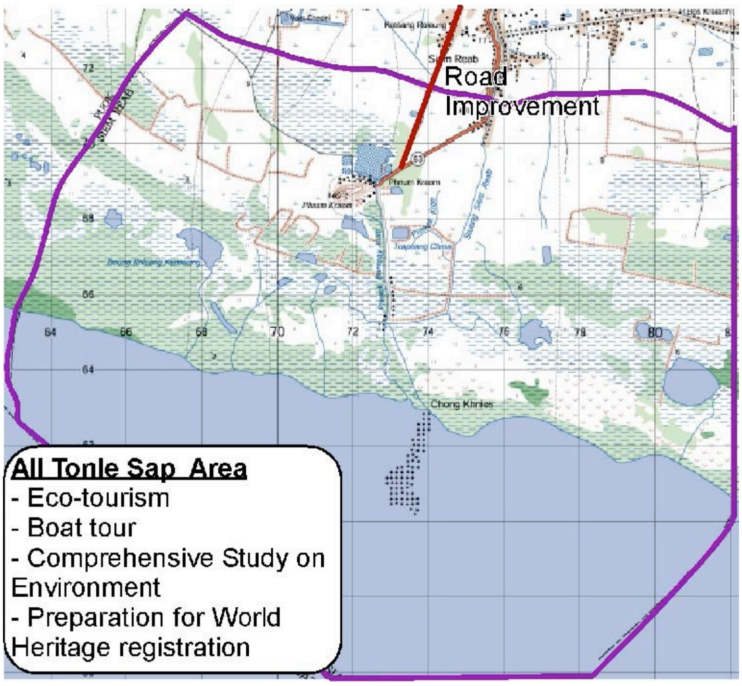


Figure III.18.12 Conceptual Plan for Tonle Sap Lake Area

18.2.6 Area-wise Development Approaches and Development Issues

The following Table III.18.3 summarizes the area-wise development approaches and issues described above.

Table III.18.3 Summary of the Urban Issues and Approaches

	Approaches	Issues
Urban/ Urbanizing Area	● Formation of a Compact City	● Preservation of French Colonial Architecture
	● Urban Redevelopment and Integration of Old Quarter Area	● Making an Attractive City for the Visitors
	● Necessity for Urban Roads and Infrastructure	● The City with River and Greenery
		● Improvement of High Density Residential Zones
		● Hotel Construction without Order
		● Insufficient Infrastructure Development
Rural Area	● Agricultural Development in the Western Suburbs	● Agricultural Development with the water from West Baray
Waterfront Area	● Development of Tonle Sap for Sustainable Tourism	● Promotion of Sustainable Tourism

Source: JICA Study Team

18.3 Population and Land Use Framework

18.3.1 Population Distribution

Provided the projected population in the years of 2012 and 2020 in Chapter 17 and the above area-wise development approaches, this section envisages a pattern of population distribution in a way to materialize the concept of "Compact City." A basic idea for the population distribution framework is to expand Siem Reap's urban area with reasonable population density. In addition, the urban area is encouraged to expand southeastwards. New residential areas are to be designed at a population density of 40-60 persons per hectare[2].

In addition, the following factors are included;

- The population density in the urban area of Siem Reap is set to be about 50 persons/ha throughout the existing and new urban areas.
- In 2012, the area within the planned semicircular road is to be urbanized, while in 2020 some spillover is to take place in the area east of the ring road.
- In some of the existing high density residential areas northeast of the city, the future population density has been set to be lower than at present on the assumption that the urban renewal would be in progress.
- Overall, the population distribution has been adjusted so as to minimize discrepancy from a guideline under consideration by APSARA.

The population distribution by village for the years 2004, 2012 and 2020 for the Siem Reap District is shown in Table III.18.4 and 5. Based on the numbers, the Figure III.18.12~14 show the population density in 2004, 2012 and 2020, respectively. This population distribution is used as a common basis for physical layout of infrastructures such as electricity, water supply and drainage.

2 Please refer to Part III Chapter 1 for detail.

Table III.18.4 Population Framework for Siem Reap District (1/2)

Commune	Village Name	Area (ha)	Population (person)			Density (person/ha)		
			2004	2012	2020	2004	2012	2020
Sla Kram	Sla Kram	13.6	1,870	1,520	1,421	137.2	111.5	104.2
	Boeng Doun Pa	90.6	2,801	2,991	3,631	30.9	33.0	40.1
	Chong Kausu	427.5	8,196	9,714	11,805	19.2	22.7	27.6
	Dak Pou (urban)	119.4	2,611	3,115	3,814	21.9	26.1	31.9
	Dak Pou (rural)	57.4	198	214	232	3.4	3.7	4.0
	Banteay Chas	29.7	5,573	5,071	4,481	187.7	170.8	150.9
	Treang	489.2	3,122	3,122	3,122	6.4	6.4	6.4
	Mondol Bei	73.0	4,912	5,010	5,110	67.3	68.6	70.0
	Total	1300.5	29,283	30,757	33,616	22.5	23.7	25.8
	Total Urban	326.4	17,767	17,707	18,457	54.4	54.2	56.5
Svay Dangkum	Phnhea Chey (urban)	26.8	143	203	753	5.3	7.6	28.1
	Phnhea Chey (rural)	110.4	569	616	667	5.2	5.6	6.0
	Kantrak	160.7	1,373	1,450	1,520	8.5	9.0	9.5
	Kouk Krasang	2442.1	789	907	1,200	0.3	0.4	0.5
	Svay Prey	90.0	871	880	890	9.7	9.8	9.9
	Pou Bos	156.2	771	887	1,153	4.9	5.7	7.4
	Thmei (urban)	75.1	598	2,044	3,466	8.0	27.2	46.2
	Thmei (rural)	60.8	157	170	184	2.6	2.8	3.0
	Svay Dangkum (urban)	86.0	1,347	2,850	4,307	15.7	33.1	50.1
	Svay Dangkum (rural)	137.2	335	363	393	2.4	2.6	2.9
	Sala Kansaeng	164.2	5,751	6,400	7,811	35.0	39.0	47.6
	Kruos (urban)	63.7	2,455	2,760	3,060	38.5	43.3	48.0
	Kruos (rural)	90.7	661	715	775	7.3	7.9	8.5
	Vihear Chen	65.9	4,884	5,560	7,228	74.1	84.4	109.7
	Stueng Thmei (urban)	86.1	3,191	3,858	5,081	37.1	44.8	59.0
	Stueng Thmei (rural)	46.7	85	92	100	1.8	2.0	2.1
	Mondol Muoy	18.1	2,871	2,681	2,500	158.8	148.3	138.3
	Mondol Pir	35.8	336	500	750	9.4	14.0	21.0
	Ta Phul	114.6	2,895	3,471	4,911	25.3	30.3	42.9
	Total	4031.0	30,082	36,407	46,749	7.5	9.3	11.8
	Total Urban	736.3	24,471	30,327	39,867	33.2	41.2	54.1
Kouk Chak	Trapeang Seh (urban)	128.9	4,576	4,536	4,494	35.5	35.2	34.9
	Trapeang Seh (rural)	112.7	475	515	557	4.2	4.6	4.9
	Veal (urban)	33.7	497	497	497	14.7	14.7	14.7
	Veal (rural)	831.4	1,900	1,900	1,900	2.3	2.3	2.3
	Teaksen Tboung (urban)	63.1	1,571	1,921	2,671	24.9	30.4	42.3
	Teaksen Tboung (rural)	79.3	571	618	670	7.2	7.8	8.4
	Kouk Chan	445.5	1,056	1,056	1,056	2.4	2.4	2.4
	Khvien	142.3	1,287	1,287	1,287	9.0	9.0	9.0
	Kouk Beng	696.7	1,117	1,117	1,117	1.6	1.6	1.6
	Kouk Tnaot	698.2	2,327	2,327	2,327	3.3	3.3	3.3
	Nokor Krau	579.6	2,738	2,738	2,738	4.7	4.7	4.7
	Total	3811.3	18,115	18,512	19,314	4.8	4.9	5.1
	Total Urban	225.7	6,644	6,954	7,662	29.4	30.8	33.9
Sala Kamraeuk	Voat Bour	253.0	4,918	10,847	15,891	19.4	42.9	62.8
	Voat Svay - West	67.1	1,861	2,558	3,582	27.7	38.1	53.4
	Voat Svay - East	81.7	2,267	3,117	4,363	27.7	38.2	53.4
	Voat Damnak - West	37.0	2,195	2,220	2,230	59.3	60.0	60.3
	Voat Damnak - East	75.2	1,378	3,637	4,535	18.3	48.4	60.3
	Sala Kamraeuk	61.2	1,319	2,160	3,141	21.5	35.3	51.3
	Chonlong	58.0	803	1,700	2,338	13.8	29.3	40.3
	Ta Vien	117.5	1,895	3,700	5,041	16.1	31.5	42.9
	Trapeang Traeng	90.0	593	2,160	3,024	6.6	24.0	33.6
	Total	840.6	17,229	32,099	44,145	20.5	37.1	51.5
	Total Urban	840.6	17,229	32,099	44,145	20.5	38.2	52.5

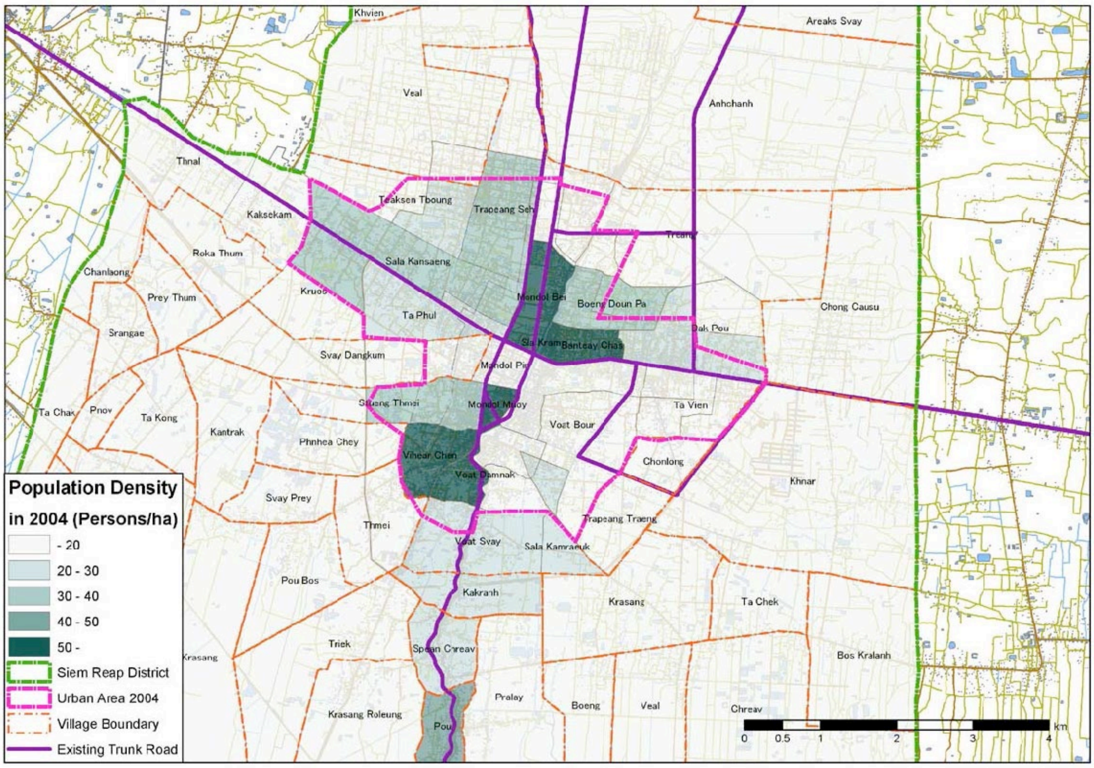
Source: JICA Study Team.
Notes: Shadowed figures indicate the future urban area, No area data are available for Chng Knies Commune

Table III.18.5 Population Framework for Siem Reap District (2/2)

Commune	Village Name	Area (ha)	Population (person)			Density (person/ha)		
			2004	2012	2020	2004	2012	2020
Nokor Thum	Rohal	1878.4	1,346	1,346	1,346	0.7	0.7	0.7
	Srah Srang Cheung	788.5	928	928	928	1.2	1.2	1.2
	Srah Srang Tboung	731.4	556	556	556	0.8	0.8	0.8
	Kravan	691.7	892	892	892	1.3	1.3	1.3
	Areaks Svay	233.8	493	493	493	2.1	2.1	2.1
	Anhchanh	1164.5	861	861	861	0.7	0.7	0.7
	Total	5488.2	5,076	5,076	5,076	0.9	0.9	0.9
Chreav	Chreav	1015.1	860	929	1,003	0.8	0.9	1.0
	Khnar	666.1	2,686	7,320	13,550	4.0	11.0	20.3
	Bos Kralanh	277.7	1,263	1,364	1,910	4.5	4.9	6.9
	Ta Chek	113.4	631	681	736	5.6	6.0	6.5
	Veal	4063.6	1,298	1,402	1,514	0.3	0.3	0.4
	Krasang	285.0	1,065	1,385	3,250	3.7	4.9	11.4
	Boeng	159.3	568	613	663	3.6	3.8	4.2
	Total	6580.2	8,371	13,694	22,626	1.3	2.1	3.4
Chong Khnies	Phum Muoy	0	999	1,079	1,187	N.A.	N.A.	N.A.
	Phum Pir	0	619	669	735	N.A.	N.A.	N.A.
	Phum Bei	0	723	781	859	N.A.	N.A.	N.A.
	Phum Buon	0	754	814	896	N.A.	N.A.	N.A.
	Phum Pram	0	517	558	614	N.A.	N.A.	N.A.
	Phum Prammuoy	0	731	789	868	N.A.	N.A.	N.A.
	Phum Prampir	0	2,053	2,217	2,439	N.A.	N.A.	N.A.
	Total	0	6,396	6,907	7,598	N.A.	N.A.	N.A.
Sambuor	Pnov	46.8	682	716	920	14.6	15.3	19.7
	Sambuor	146.9	765	803	1,059	5.2	5.5	7.2
	Veal	422.1	579	608	800	1.4	1.4	1.9
	Chrey	1950.3	633	665	875	0.3	0.3	0.4
	Ta Kong	131.0	605	635	856	4.6	4.8	6.5
	Total	2697.0	3,264	3,427	4,510	1.2	1.3	1.7
Siem Reab	Pou	64.5	2,739	3,013	3,200	42.4	46.7	49.6
	Phnum Kraom	3810.7	2,581	2,839	3,123	0.7	0.7	0.8
	Pralay	471.2	760	836	920	1.6	1.8	2.0
	Kakranh	93.2	2,409	2,650	2,915	25.8	28.4	31.3
	Krasang Roleung	500.2	776	854	939	1.6	1.7	1.9
	Spean Chreav	85.1	2,367	2,604	2,864	27.8	30.6	33.7
	aranh	211.4	3,301	3,631	3,994	15.6	17.2	18.9
	Triek	278.9	1,195	1,315	1,446	4.3	4.7	5.2
	Total	5515.3	16,128	17,742	19,401	2.9	3.2	3.5
Srangae	Kaksekam	110.7	1,179	1,179	1,179	10.6	10.6	10.6
	Thnal	150.3	1,293	1,422	1,872	8.6	9.5	12.5
	Roka Thum	141.7	516	675	1,274	3.6	4.8	9.0
	Prey Thum	96.5	624	686	903	6.5	7.1	9.4
	Srangae	89.0	840	860	880	9.4	9.7	9.9
	Chanlaong	84.6	712	740	840	8.4	8.7	9.9
	Ta Chak	3065.4	458	504	663	0.1	0.2	0.2
	Total	3738.3	5,622	6,066	7,611	1.5	1.6	2.0
	Total Urban	261.1	2,472	2,601	3,051	9.5	10.0	11.7
	Grand Total	34,003	139,566	170,687	210,646	4.1	5.0	6.2
	Grand Total Urban	2,390.2	68,583	89,688	113,182	28.7	37.5	47.4

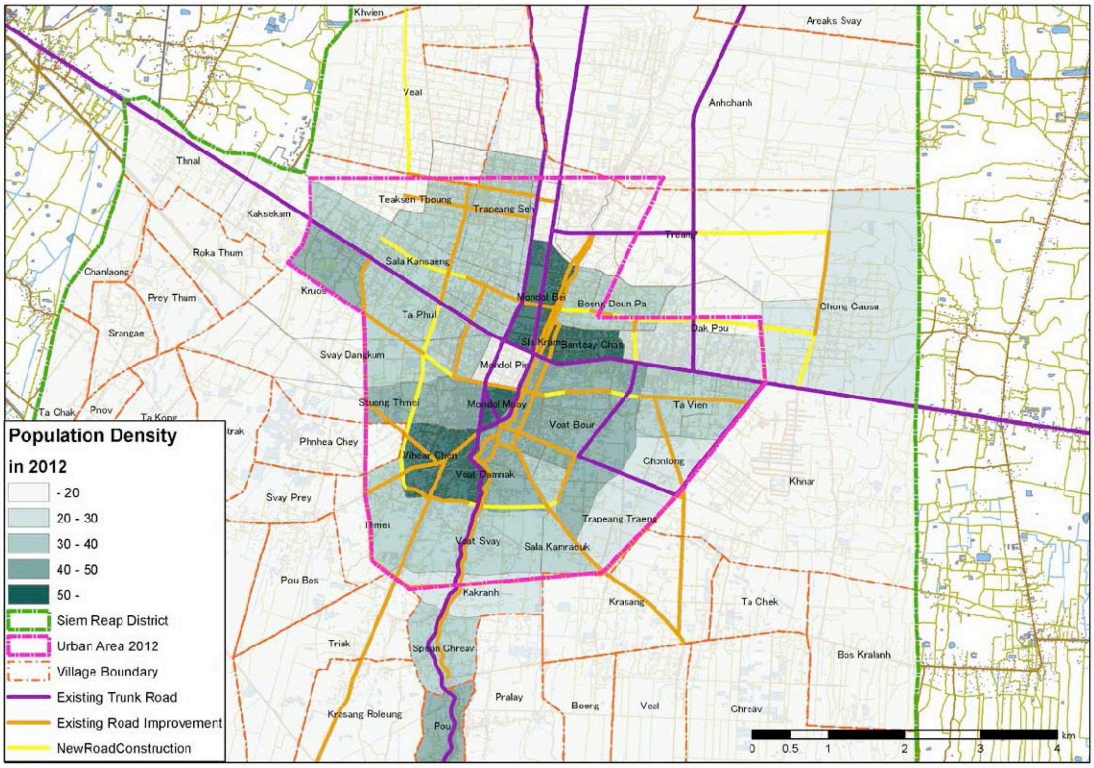
Source: JICA Study Team.

Notes: Shadowed figures indicate the future urban area, No area data are available for Chpng Knies Commune



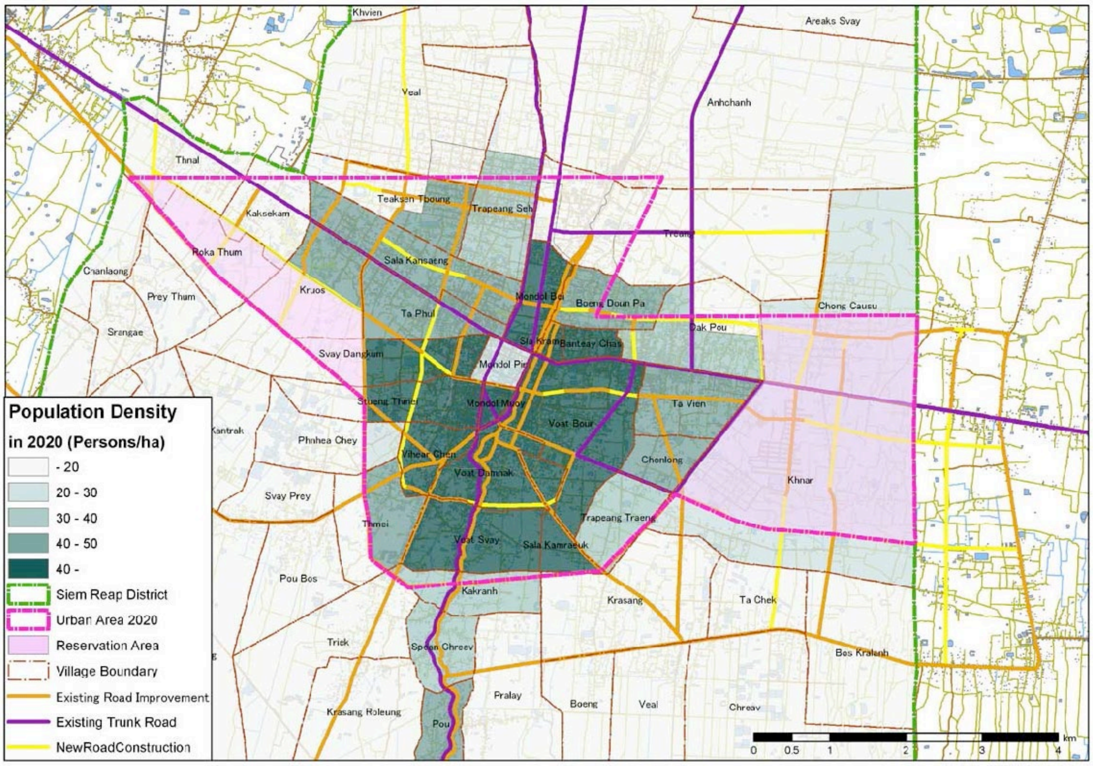
Source: JICA Study Team

Figure III.18.13 Current Population Density (2004)



Source: JICA Study Team

Figure III.18.14 Population Density (2012)



Source: JICA Study Team

Figure III.18.15 Population Density (2020)

18.3.2 Land Use Framework

Control of land use is an important tool to realize the above framework. This study proposes the land use framework and related urban projects as indispensable policy tools to materialize the framework and the concept of "Compact City."

Setting a land use framework is more difficult task than other frameworks, because most of the current urban areas are mixed use. The land use plan in SRAT Study shall have the target year of 2020.

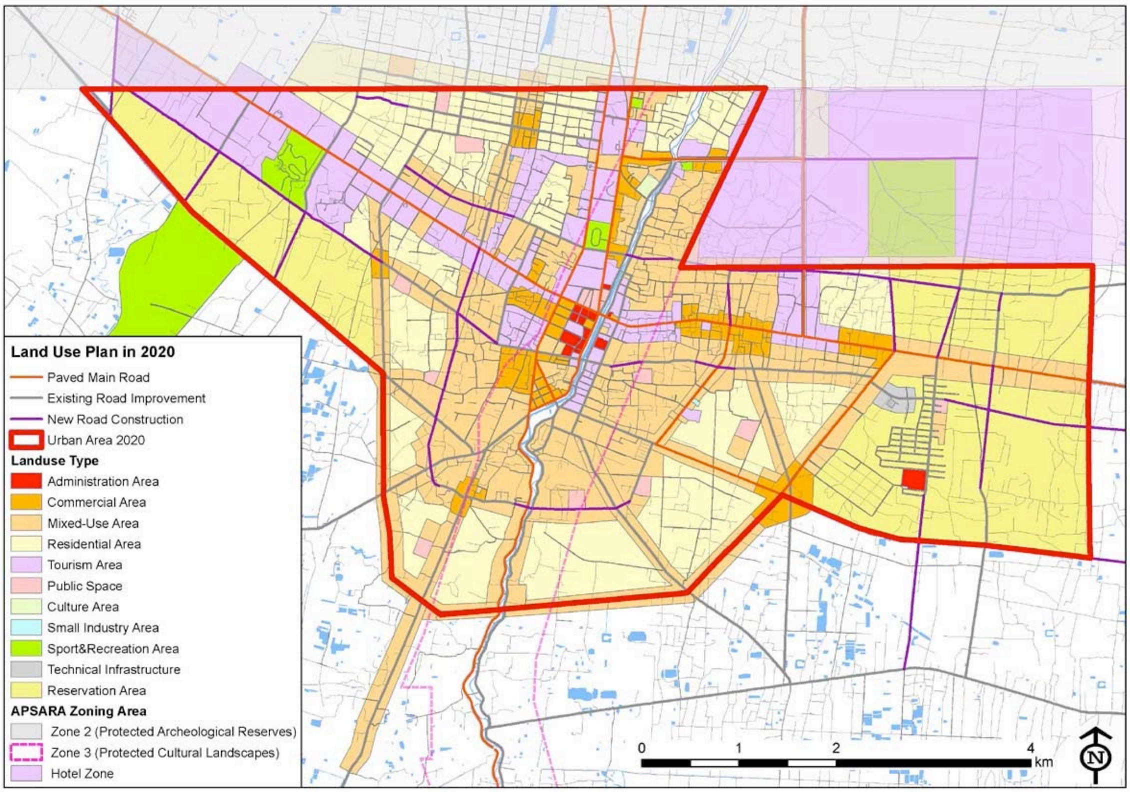
In order to control the urban expansion and development to match the land use plan, the control of new buildings will be devised based on the coverage ratio, floor to area ratio and/ or height of the buildings. The control will be applied to new buildings within the "urbanization area" set for 2020.

For the purpose of achieving a compact city in Siem Reap, the areas inside of the proposed ring road, south of the NR6, shall be considered as a priority area for urbanization, and the infrastructure development shall be promoted with priority within this area, while the areas outside of this priority area shall be considered for private sector urban development that is permitted with a sizable area and well planned urban environmental condition.

Although Cambodia has no official urban land use classification, this Study adopts a land use classification system in cooperation with Asia Urbs Project and Siem Reap

District (See Part III Chapter 1 for detail).

Consequently, a draft land use plan shown in Figure III.18.16 has been derived from the basic idea for the population distribution framework as well as from present patterns of land use. The land use plan is prepared to be as a guideline. It will not be strongly regulative until an appropriate control measure for land use is established in the country.



Source: JICA Study Team.

Figure III.18.16 Draft Land Use Plan

Chapter 19 Tourism Framework

19.1 Tourism Demand Projection

19.1.1 Trend of Tourist Growth in the Past

Foreign and domestic tourist to Siem Reap from 1998 to 2004 are given in Table 4.26. It shows that the number of foreign tourist from 1999 to 2000 increased rapidly at a rate being 130% per annum. In 2004, the number of foreign tourist reached 560,897 with a 40.2% of growth per annum. Foreign tourist arrivals from 1998 to 2004 are not considered to be a normal growth trend. It is unexpected how much foreign and domestic tourist will increase for next five years. Siem Reap entered into the development period of tourist destination and is still in the half of development period. Under this circumstance, the foreign tourist will continue to increase at an annual growth rate of between 15-20% for the next five years.

Table 19.1 Trend of Foreign and Domestic Tourist to Siem Reap : 1998 to 2004

Year	Foreign	Growth Rate	Domestic	Growth Rate	Total	Growth Rate
1998	34,541	-	N/A	-	-	-
1999	83,641	142.1%	N/A	-	-	-
2000	194,641	132.7%	N/A	-	-	-
2001	264,057	35.7%	N/A	-	-	-
2002	453,148	71.6%	93,942	-	547,090	-
2003	400,100	-11.7%	132,643	29.2%	532,743	-2.7%
2004	560,897	40.2%	297,348	55.4%	858,245	37.9%

Source: Tourism Statistical Year Book 2004, Ministry of Tourism

18.1.2 Alternative Scenarios

For the tourist demand projection for 2012 (Mid-term) and 2020 (Long-term), two scenarios (cases) are considered as follows:

- Trend Projection: Growth Trend Case (without Master Plan)

This case is to continue attracting foreign and domestic tourists and tourism private investment (hotel) to Siem Reap, while it gives negative impact to Angkor Wat Complex and requires increase demand of infrastructure to support tourism industry.

- Projection with Policy Intervention: Angkor Wat Conservation Case (with Master Plan)

This case is to control unplanned development of hotel, minimize impact to Angkor Wat Complex for sustainable tourism development. Also, the number of foreign tourist in 2020 does not exceed a carrying capacity of the existing Siem Reap Airport.

19.1.3 Methodology of Tourist Demand Projection

The methodology of tourist demand projection for each case is shown in Table 19.2 and Table 19.3.

Table 19.2 Projection under Trend Growth Scenario

Tourist	Base year	Growth Rate	Average length of stay	Average daily tourist by month
Foreign	2004	20% (2005-2006)[1] 15% (2007-2010)[1] 10% (2011-2015)[2] 8% (2016-2020)[2]	2.8-3.5 days	Actual monthly tourist distribution ratio in 2004 -Highest: (Dec., 13.2%) -Lowest: (May, 4.9%)
Domestic	2004	10% (2005-2010)[1] 8% (2011-2015)[3] 5% (2016-2020)[3]	1.5 days	Actual monthly tourist distribution ration in 2004 -Highest: (Apr., 30.7%) -Lowest: (Jul, 3.1%)

Remark:

1: Growth rates from 2005 to 2010 follow the tourist projection prepared by Siem Reap-Angkor Area Conservation and Development, UNESCO-APSARA-FAD, 2002.

2: Growth rate was adjusted to meet common growth rate from 8% to 15% in Asian tourism area.

3: Growth rate after 2010 follows 4.2% of National GDP (The Phnom Penh–Sihanukville Growth Corridor Study, JICA, 2002) + income growth elasticity.

Source: JICA Study Team

Table 19.3 Projection under Moderate Growth Scenario

Tourist	Base year	Growth Rate	Average length of stay	Average daily tourist by month4
Foreign	2004	20% (2005-2006)[1] 15% (2007-2010)[1] 8% (2011-2012)[2] 4-2% (2013-2020)[2]	2.8-3.5 days	Actual monthly tourist distribution ratio in 2004 (2005-2007) -Highest: (Dec., 13.2%) -Lowest: (May, 4.9%)
Domestic	2004	10% (2005-2010) 4.2% (2011-2020)[3]	1.5 days	Actual monthly tourist distribution ration in 2004 -Highest: (Apr., 30.7%) -Lowest: (Jul, 3.1%)

Remark:

1: Growth rates follow the tourist projection prepared by Siem Reap-Angkor Area Conservation and Development, UNESCO-APSARA-FAD, 2002

2: Growth rate after 2010 was adjusted to meet capacity of the Siem Reap Airport and inland transportation flows.

3: Growth rate after 2010 follows 4.2% of National GDP (The Phnom Penh–Sihanukville Growth Corridor Study, JICA, 2002)

4: Distribution ratio for 2008-12, 2013-2016 and 2017-2020 in the average daily tourist by month were adjusted to reduce gap between tourist peak month and off peak month.

Source: JICA Study Team

18.1.4 Projected Number of Tourists and Length of Stay in Siem Reap

Tourist population projections under Trend Growth Scenario and Moderate Growth Scenario are tabulated in Table 19.4 and Table 19.5.

Table 19.4 Tourist Population Projection (2005-2020, Trend Growth Scenario)

Year	Foreign (person/year)	Growth Rate	Average Length of Stay (day)	Total Stay (person x day /year)	Domestic (person/year)	Growth Rate	Average Length of Stay (day)	Total Stay (person x day /year)	Overall (foreign + domestic)	Growth Rate	Average Length of Stay (day)	Total Stay (person x day /year)
2004	560,897	40.2%	2.8	1,570,512	297,348	55.4%	1.5	446,022	858,245	37.9%	2.3	2,016,534
2005	673,076	20%	2.8	1,884,614	327,083	10.0%	1.5	490,624	1,000,159	14.2%	2.4	2,375,238
2006	807,692	20%	3.0	2,423,075	359,791	10.0%	1.5	539,687	1,167,483	14.3%	2.5	2,962,762
2007	928,845	15%	3.0	2,819,709	395,770	10.0%	1.5	593,655	1,324,616	11.9%	2.6	3,413,365
2008	1,068,172	15%	3.1	3,280,815	435,347	10.0%	1.5	653,021	1,503,519	11.9%	2.6	3,933,836
2009	1,228,398	15%	3.1	3,816,808	478,882	10.0%	1.5	718,323	1,707,280	11.9%	2.7	4,535,131
2010	1,412,658	15%	3.1	4,439,782	526,770	10.0%	1.5	790,155	1,939,428	12.0%	2.7	5,229,937
2011	1,553,924	10%	3.2	4,939,257	568,912	8.0%	1.5	853,368	2,122,835	8.6%	2.7	5,792,625
2012	1,709,316	10%	3.2	5,494,230	614,425	8.0%	1.5	921,637	2,323,741	8.6%	2.8	6,415,867
2013	1,880,248	10%	3.3	6,110,804	663,579	8.0%	1.5	995,368	2,543,826	8.7%	2.8	7,106,172
2014	2,068,272	10%	3.3	6,795,752	716,665	8.0%	1.5	1,074,997	2,784,937	8.7%	2.8	7,870,749
2015	2,275,100	10%	3.3	7,556,581	773,998	8.0%	1.5	1,160,997	3,049,098	8.7%	2.9	8,717,578
2016	2,457,107	8%	3.4	8,248,861	812,698	5.0%	1.5	1,219,047	3,269,806	6.7%	2.9	9,467,908
2017	2,653,676	8%	3.4	9,003,544	853,333	5.0%	1.5	1,279,999	3,507,009	1.2%	2.9	10,283,543
2018	2,865,970	8%	3.4	9,826,183	896,000	5.0%	1.5	1,343,999	3,761,970	6.7%	2.9	11,170,183
2019	3,095,248	8%	3.5	10,722,823	940,800	5.0%	1.5	1,411,199	4,036,047	6.8%	3.0	12,134,022
2020	3,342,868	8%	3.5	11,700,037	987,840	5.0%	1.5	1,481,759	4,330,707	6.8%	3.0	13,181,796

Source: JICA Study Team

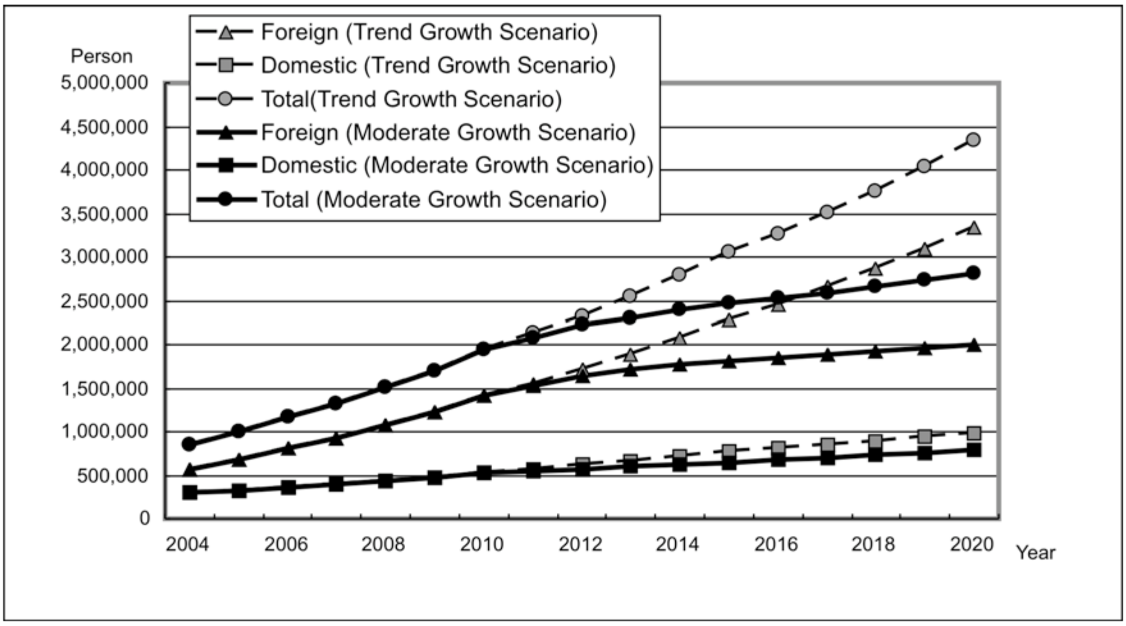
Table 19.5 Tourist Population Projection (2005-2020, Moderate Growth Scenario)

Year	Foreign (person/year)	Growth Rate	Average Length of Stay (day)	Total Stay (person x day /year)	Domestic (person/year)	Growth Rate	Average Length of Stay (day)	Total Stay (person x day /year)	Overall (foreign + domestic)	Growth Rate	Average Length of Stay (day)	Total Stay (person x day /year)
2004	560,897	40.2%	2.8	1,570,512	297,348	55.4%	1.5	446,022	858,245	37.9%	2.3	2,016,534
2005	673,076	20%	2.8	1,884,614	327,083	10.0%	1.5	490,624	1,000,159	14.2%	2.4	2,375,238
2006	807,692	20%	3.0	2,423,075	359,791	10.0%	1.5	539,687	1,167,483	14.3%	2.5	2,962,762
2007	928,845	15%	3.0	2,819,709	395,770	10.0%	1.5	593,655	1,324,616	11.9%	2.6	3,413,365
2008	1,068,172	15%	3.1	3,280,815	435,347	10.0%	1.5	653,021	1,503,519	11.9%	2.6	3,933,822
2009	1,228,398	15%	3.1	3,816,808	478,882	10.0%	1.5	718,323	1,707,280	11.9%	2.7	4,535,115
2010	1,412,658	15%	3.1	4,439,782	526,770	10.0%	1.5	790,155	1,939,428	12.0%	2.7	5,229,918
2011	1,525,670	8%	3.2	4,849,452	548,894	4.2%	1.5	823,342	2,074,565	6.5%	2.7	5,672,774
2012	1,647,724	8%	3.2	5,296,256	571,948	4.2%	1.5	857,922	2,219,672	6.5%	2.8	6,154,156
2013	1,713,633	4%	3.3	5,569,307	595,970	4.2%	1.5	893,955	2,309,603	3.9%	2.8	6,463,260
2014	1,782,178	4%	3.3	5,855,729	621,001	4.2%	1.5	931,501	2,403,179	3.9%	2.8	6,787,227
2015	1,817,822	2%	3.3	6,037,766	647,083	4.2%	1.5	970,624	2,464,905	2.5%	2.8	7,008,387
2016	1,854,178	2%	3.4	6,224,742	674,260	4.2%	1.5	1,011,390	2,528,438	2.5%	2.9	7,236,129
2017	1,891,262	2%	3.4	6,416,781	702,579	4.2%	1.5	1,053,869	2,593,841	2.5%	2.9	7,470,670
2018	1,929,087	2%	3.4	6,614,013	732,087	4.2%	1.5	1,098,131	2,661,174	2.5%	2.9	7,712,165
2019	1,967,669	2%	3.5	6,816,567	762,835	4.2%	1.5	1,144,252	2,730,504	2.5%	2.9	7,960,841
2020	2,007,022	2%	3.5	7,024,578	794,874	4.2%	1.5	1,192,311	2,801,896	2.5%	2.9	8,216,911

Source: JICA Study Team

18.1.5 Comparison of Two Cases of Projection of Number of Tourists

The projected tourist population from 2005 to 2020 for Trend Projection and Projection with Policy Intervention is shown in Figure 19.1. The projected number of tourist population for domestic and foreign tourists from 2005 to 2010 is similar growth trend for Trend Projection and Projection with Policy Intervention. After 2010, the foreign tourist population under Trend Growth Scenario continues to increase with growth rates of 8-10% and reaches 3,342,868 in 2020, while the foreign tourist population under Moderate Growth Scenario increases with low annual growth rates of 4-2% and reaches 2,007,022 in 2020. The total tourist population in 2020 under these two scenarios are 4,330,707 and 2,801,896, respectively.



Source: The JICA Study Team

Figure 19.1 Projected Tourist Population in Siem Reap : 2006 to 2020 (Trend Growth Scenario and Moderate Growth Scenario)

19.2 Projection of Number of Hotel and Guesthouse

18.2.1 Methodology of Demand Projection of Hotels and Guesthouses

The demand of room for hotel and guesthouse at peak month in Siem Reap up to 2020 are calculated based on the projected tourist population projection. The methodology of calculation by case is as follows.

<u>Projection under Trend Growth Scenario</u>

Foreign tourist:

- (a) Total tourist stay (person x day/year): (Number of tourist/year) x (Average length of stay: 2.8-3.5)
- (b) Monthly tourist population distribution ratio (actual figure in 2004): 13.2% (Peak month, Dec.)
- (c) Average monthly population (person/day): (a) x (b)
- (d) Hotel share: 70% - 80% (2005-2020)
- (e) Guesthouse share: 30%-20% (2005-2020)
- (f) Number of guest/room: 1.8 persons (Hotel) and 2.2 persons (Guesthouse)
- (g) Required room for hotel at peak month: (c) x (d) x (f)

Domestic tourist:

- (a) Total tourist stay (person x day/year): (Number of tourist/year) x (Average length of stay: 1.5)
- (b) Monthly tourist population distribution ratio (actual figure in 2004): 30.7% (Peak month, April)
- (c) Average monthly population (person/day): (a) x (b)

- (d) Hotel share: 10% - 20% (2005-2020)
- (e) Guesthouse share: 70% (2005-2020)
- (f) Other room share: 10-20% (2005-2020)
- (g) Number of guest/room: 3.0 persons (Hotel) and 5.0 persons (Guesthouse)
- (h) Required room for hotel at peak month: (c) x (d) x (g)

Total required room demand (Hotel and Guesthouse) for Trend Projection is the total of room at peak month for foreign and domestic tourist. For the calculation of the total room, it is necessary to compare the total of required room at peak month for domestic and foreign.

<u>Projection under Moderate Growth Scenario</u>
The methodology is the same as the above.

19.2.2 Demand for Rooms of Hotel and Guesthouse

The required rooms for hotel and guesthouse for Trend Growth Scenario and Moderate Growth Scenario are tabulated in Tables 19.6, 19.7 and 19.8. In 2007, the number of existing rooms (including planned as of 2007) is already far beyond the present level of demand. Under the Moderate Growth Scenario, those existing rooms can meet the demand until 2011. Additional hotel rooms will be necessary only after 2012 under the Trend Growth Scenario and after 2014 under the Moderate Growth Scenario.

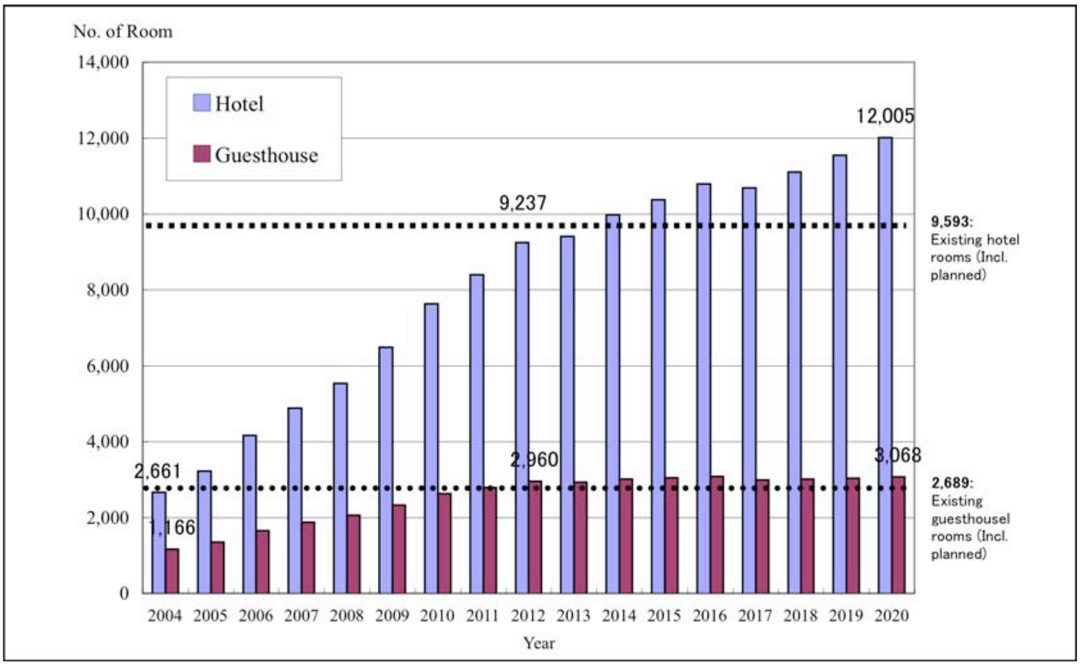
Under the Trend Growth Scenario, without any additional hotel and guesthouse development after 2007, the number of room for hotel and guesthouse will be shortage in 2012 and 2010, respectively. Under the Moderate Growth Scenario, an additional hotel room is necessary by 2014. By 2020, it will require to supply 22,544 hotel rooms for Trend Growth Scenario and 12,055 hotel rooms for Moderate Growth Scenario.

Table 19.6 Required Number of Rooms of Hotel and Guesthouse in Siem Reap : 2005-2020

(Unit: Room)

Year	Trend Projection		Projection with Policy Intervention	
	Hotel	Guesthouse	Hotel	Guesthouse
2004	2,661	1,166	2,661	1,166
2005	3,219	1,351	3,219	1,351
2006	4,166	1,655	4,166	1,655
2007	4,890	1,873	4,890	1,873
2008	5,737	2,118	5,538	2,056
2009	6,730	2,394	6,496	2,324
2010	7,893	**2,705**	7,618	2,625
2011	8,856	2,935	8,390	**2,788**
2012	**9,935**	3,183	9,237	2,960
2013	11,143	3,449	9,399	2,938
2014	12,495	3,736	**9,969**	3,018
2015	14,007	4,043	10,372	3,050
2016	15,412	4,286	10,789	3,081
2017	16,954	4,540	10,680	2,987
2018	18,647	4,806	11,106	3,015
2019	20,505	5,083	11,548	3,042
2020	22,544	5,372	12,005	3,068

Source: The JICA Study Team



Source: The JICA Study Team

Figure 19.2 Room Demand for Hotel and Guesthouse under Moderate Growth Scenario : 2005-2020

Table 18.7 Demend Projection of Hotel and Guesthouse Room (Trend Projection)

Year	Foreign								Domestic										Total (Hotel)	Total (Guesthouse)
	Required Hotel Room (peak month)				Required Guesthouse Room (peak month)				Required Hotel Room (peak month)				Required Guesthouse Room (peak month)				Required Others Room (peak month)			
	Share	Person	person/ room	Room	Share	Person	Person/ room	Room	Share	Person	Person/ room	Room	Share	Person	Person/ room	Room	Share	Person	Room	Room
2004	70%	4,681	1.8	2,601	30%	2,006	2.2	912	10%	456	3	152	70%	3,195	5.0	639	20%	913	2,661	1,166
2005	71%	5,668	1.8	3,149	29%	2,357	2.2	1,071	11%	533	3	178	70%	3,515	5.0	703	19%	973	3,219	1,351
2006	71%	7,351	1.8	4,084	29%	2,966	2.2	1,348	11%	621	3	207	70%	3,866	5.0	773	19%	1,036	4,166	1,655
2007	72%	8,630	1.8	4,794	28%	3,377	2.2	1,535	12%	721	3	240	70%	4,253	5.0	851	18%	1,101	4,890	1,873
2008	73%	10,128	1.8	5,627	28%	3,842	2.2	1,746	13%	835	3	278	70%	4,678	5.0	936	18%	1,169	5,737	2,118
2009	73%	11,884	1.8	6,602	27%	4,368	2.2	1,985	13%	965	3	322	70%	5,146	5.0	1,029	17%	1,240	6,730	2,394
2010	74%	13,942	1.8	7,746	26%	4,963	2.2	2,256	14%	1,112	3	371	70%	5,660	5.0	1,132	16%	1,314	7,893	2,705
2011	74%	15,642	1.8	8,690	26%	5,389	2.2	2,450	14%	1,255	3	418	70%	6,113	5.0	1,223	16%	1,364	8,856	2,935
2012	75%	17,546	1.8	9,748	25%	5,849	2.2	2,658	15%	1,415	3	472	70%	6,602	5.0	1,320	15%	1,415	9,935	3,183
2013	76%	19,678	1.8	10,932	24%	6,342	2.2	2,883	16%	1,592	3	531	70%	7,130	5.0	1,426	14%	1,464	11,143	3,449
2014	76%	22,064	1.8	12,258	24%	6,872	2.2	3,124	16%	1,788	3	596	70%	7,701	5.0	1,540	14%	1,513	12,495	3,736
2015	77%	24,736	1.8	13,742	23%	7,441	2.2	3,382	17%	2,005	3	668	70%	8,317	5.0	1,663	13%	1,559	14,007	4,043
2016	78%	27,221	1.8	15,123	23%	7,903	2.2	3,592	18%	2,183	3	728	70%	8,732	5.0	1,746	13%	1,559	15,412	4,286
2017	78%	29,951	1.8	16,640	22%	8,386	2.2	3,812	18%	2,374	3	791	70%	9,169	5.0	1,834	12%	1,555	16,954	4,540
2018	79%	32,949	1.8	18,305	21%	8,891	2.2	4,041	19%	2,579	3	860	70%	9,628	5.0	1,926	11%	1,547	18,647	4,806
2019	79%	36,241	1.8	20,134	21%	9,417	2.2	4,280	19%	2,798	3	933	70%	10,109	5.0	2,022	11%	1,534	20,505	5,083
2020	80%	39,856	1.8	22,142	20%	9,964	2.2	4,529	20%	3,033	3	1,011	70%	10,614	5.0	2,123	10%	1,516	22,544	5,372

Souece: JICA Study Team

Table 18.8 Demend Projection of Hotel and Guesthouse Room (Projection with Policy Intervention)

Year	Foreign								Domestic										Total (Hotel)	Total (Guesthouse)
	Required Hotel Room (peak month)				Required Guesthouse Room (peak month)				Required Hotel Room (peak month)				Required Guesthouse Room (peak month)				Required Others Room (peak month)			
	Share	Person	person/ room	Room	Share	Person	Person/ room	Room	Share	Person	Person/ room	Room	Share	Person	Person/ room	Room	Share	Person	Room	Room
2004	70%	4,681	1.8	2,601	30%	2,006	2.2	912	10%	456	3	152	70%	3,195	5.0	639	20%	138	2,661	1,166
2005	71%	5,668	1.8	3,149	29%	2,357	2.2	1,071	11%	533	3	178	70%	3,515	5.0	703	19%	147	3,219	1,351
2006	71%	7,351	1.8	4,084	29%	2,966	2.2	1,348	11%	621	3	207	70%	3,866	5.0	773	19%	157	4,166	1,655
2007	72%	8,630	1.8	4,794	28%	3,377	2.2	1,535	12%	721	3	240	70%	4,253	5.0	851	18%	167	4,890	1,873
2008	73%	9,769	1.8	5,427	28%	3,705	2.2	1,684	13%	835	3	278	70%	4,678	5.0	936	18%	177	5,538	2,056
2009	73%	11,463	1.8	6,368	27%	4,213	2.2	1,915	13%	965	3	322	70%	5,146	5.0	1,029	17%	188	6,496	2,324
2010	74%	13,447	1.8	7,471	26%	4,786	2.2	2,176	14%	1,112	3	371	70%	5,660	5.0	1,132	16%	199	7,618	2,625
2011	74%	14,813	1.8	8,229	26%	5,104	2.2	2,320	14%	1,211	3	404	70%	5,898	5.0	1,180	16%	199	8,390	2,788
2012	75%	16,313	1.8	9,063	25%	5,438	2.2	2,472	15%	1,317	3	439	70%	6,146	5.0	1,229	15%	199	9,237	2,960
2013	76%	16,578	1.8	9,210	24%	5,343	2.2	2,429	16%	1,429	3	476	70%	6,404	5.0	1,281	14%	199	9,399	2,938
2014	76%	17,575	1.8	9,764	24%	5,474	2.2	2,488	16%	1,549	3	516	70%	6,673	5.0	1,335	14%	198	9,969	3,018
2015	77%	18,270	1.8	10,150	23%	5,496	2.2	2,498	17%	1,676	3	559	70%	6,953	5.0	1,391	13%	197	10,372	3,050
2016	78%	18,989	1.8	10,549	23%	5,513	2.2	2,506	18%	1,811	3	604	70%	7,245	5.0	1,449	13%	196	10,789	3,081
2017	78%	18,758	1.8	10,421	22%	5,252	2.2	2,387	18%	1,955	3	652	70%	7,549	5.0	1,510	12%	194	10,680	2,987
2018	79%	19,489	1.8	10,827	21%	5,259	2.2	2,390	19%	2,107	3	702	70%	7,866	5.0	1,573	11%	191	11,106	3,015
2019	79%	20,245	1.8	11,247	21%	5,261	2.2	2,391	19%	2,269	3	756	70%	8,197	5.0	1,639	11%	188	11,548	3,042
2020	80%	21,027	1.8	11,682	20%	5,257	2.2	2,389	20%	2,440	3	813	70%	8,541	5.0	1,708	10%	185	12,005	3,068

Based on the projected room demand for hotel and guesthouse in Siem Reap, the number of room for additional development and room occupancy rate by peak and off-peak were estimated as shown in Table 19.9. Up to 2008, 3,283 rooms will be increased by the existing 22 planned hotel development. An estimated target rooms for hotel in 2012 and 2020 are set 10,500 and 12,500. The room occupancy rates will increase from 88.0% to 96%. The future room demand for hotel and guesthouse were projected in the peak month of tourist visit in Siem Reap so that the room occupancy rates for hotel and guesthouse in the off-peak month becomes low with less than 50%.

Table 19.9 Target Room Number and Room Occupancy Rate of Hotel and Guesthouse in Siem Reap

Year	Hotel/ Guesthouse	Room Demand			Existing and Target room number	Room occupancy rate (%)		
		Peak Month	Off-Peak Month	Average		Peak Month	Off-Peak Month	Average
2004	Hotel	2,661	984	1,715	5,691	46.8	17.3	30.1
	Guesthouse	1,166	417	759	2,689	43.4	15.5	28.2
2006	Hotel	4,166	1,542	2,685	7,804	53.4	19.8	34.4
	Guesthouse	1,655	596	1,076	2,772	59.7	21.5	38.8
2012	Hotel	9,237	3,755	6,167	10,500	88.0	35.8	58.7
	Guesthouse	2,960	1,160	1,980	3,000	98.7	38.7	66.0
2020	Hotel	12,005	6,063	8,774	12,500	96.0	48.5	70.2
	Guesthouse	3,068	1,430	2,208	3,100	99.0	46.1	71.2

Source: JICA Study Team
Remark: Peak month: December, Off-peak month: May

An additional room supply and share of targeting room number by hotel grade in Siem Reap was estimated based on the room demand and targeting room number in Table 19.9. In 2012, 3-star hotel set as the largest share among classified hotels with 30% in total, while 1-star hotel is the smallest share with 10%. In 2020, 75% of hotels are from 3- to 5-star hotels. The proportion of estimated share of room number in Table 19.10 is targeting for mid-high tourism market.

Table 19.10 Grade-mix of Hotel Rooms : An Estimate

	Required Room (Peak Month)	Existing & Target room no.	Addi. Room Supply	Share of Targeting room number (Supply)										
				5	%	4	%	3	%	2	%	1	%	%
2004	**2,661**	**5,691**		**851**	**15.0**	**786**	**13.8**	**2,147**	**37.7**	**1,189**	**20.9**	**718**	**12.6**	**100**
2005	3,219	6,910	1,219	1,321	19.1	831	12.0	2,575	37.3	1,385	20.0	798	11.5	100
2006	4,166	7,804	894	2,021	25.9	941	12.1	2,660	34.1	1,385	17.7	798	10.2	100
2007	4,890	8,698	894	2,189	25.2	1,304	15.0	2,810	32.3	1,563	18.0	833	9.6	100
2008	5,538	9,593	895	2,358	24.6	1,667	17.4	2,959	30.8	1,741	18.1	868	9.0	100
2009	6,496	9,800	207	2,352	24	1,813	18.5	2,979	30.4	1,764	18	892	9	100
2010	7,618	9,900	100	2,376	24.0	1,832	19	2,970	30.0	1,782	18	941	9.5	100
2011	8,390	10,300	400	2,390	23.2	1,988	19.3	3,090	30	1,803	17.5	1,030	10.0	100
2012	**9,237**	**10,500**	**200**	**2,415**	**23**	**2,100**	**20**	**3,150**	**30**	**1,785**	**17**	**1,050**	**10**	**100**
2013	9,399	10,750	250	2,408	22.4	2,258	21.0	3,225	30	1,785	16.6	1,075	10	100
2014	9,969	11,000	250	2,420	22.0	2,387	21.7	3,300	30	1,793	16.3	1,100	10	100
2015	10,372	11,250	250	2,430	21.6	2,520	22.4	3,375	30	1,800	16.0	1,125	10	100
2016	10,789	11,500	250	2,450	21.3	2,634	22.9	3,450	30	1,817	15.8	1,150	10	100
2017	10,680	11,750	250	2,468	21.0	2,761	23.5	3,525	30	1,821	15.5	1,175	10	100
2018	11,106	12,000	250	2,472	20.6	2,892	24.1	3,600	30	1,836	15.3	1,200	10	100
2019	11,548	12,250	250	2,487	20.3	3,014	24.6	3,675	30	1,850	15.1	1,225	10	100
2020	**12,005**	**12,500**	**250**	**2,500**	**20**	**3,125**	**25**	**3,750**	**30**	**1,875**	**15**	**1,250**	**10**	**100**

Source: JICA Study Team

19.3 Room Supply with Reference to Grade of Hotel and Type of Tourist

Tourist number, average length of stay and share by classified hotel in 2012 and 2020 for individual and group tourist were estimated based on the projected tourism framework as shown below.

The shares of individual and group tourists in 2012 and 2020 are not changed and are similar to 2004. The future hotel room supply in Siem Reap is planned targeting for quality tourism market, mid to up-tourism markets in accordance with the tourism development framework. Comparing with hotel rooms and shares in 2004, 2012 and 2020, hotels in Siem Reap dominated more than 3-star hotels with the total of 75%.

Table 19.11 Number of Tourists, Average Length of Stay and Number of Rooms by Grade of Hotel and Type of Tourist

Hotel class	Individual			Group			Hotel room (Existing)	Share
	No. of tourist	Share	Ave. length of stay	No. of tourist	Share	Ave. length of stay		
5	11,218	2%	3	28,045	5%	2.5	851	15%
4	22,436	4%	3.4	56,090	10%	2.1	786	14%
3	28,045	5%	3.3	112,179	20%	2.0	2,147	38%
2	67,308	12%	3.6	72,917	13%	2.0	1,189	21%
1	140,224	25%	3.6	16,830	3%	2.2	718	13%
Total	269,231	49%	3.6	286,060	51%	2.1	5,691	100%

Source: Tourism Statistical Year Book, 2004, Hotel date is from Hotel survey by JICA Study Team

Table 19.12 Composition of Hotel Rooms by Grade of Hotel and Type of Tourist in 2012

	Individual			Group			Hotel room (Target)	Share
Hotel class	No. of tourist	Share	Ave. length of stay	No. of tourist	Share	Ave. length of stay		
5	98,863	6.0%	3.3	148,295	9.0%	3.4	2,415	23%
4	107,102	6.5%	3.7	168,068	10.2%	2.9	2,100	20%
3	131,818	8.0%	3.7	336,136	20.4%	2.4	3,150	30%
2	164,772	10.0%	4.0	181,250	11.0%	2.4	1,785	17%
1	288,352	17.5%	4.0	23,068	1.4%	3.0	1,050	10%
Total	790,908	48.0%	3.8	856,816	52.0%	2.7	10,500	100%

Source: JICA Study Team

Table 19.13 Composition of Hotel Rooms Supply by Grade of Hotel and Type of Tourist in 2020

	Individual			Group			Hotel room (Target)	Share
Hotel class	No. of tourist	Share	Ave. length of stay	No. of tourist	Share	Ave. length of stay		
5	200,702	10.0%	3.6	56,090	10.0%	3.0	2,500	20%
4	250,878	12.5%	4.0	70,112	12.5%	3.0	3,125	25%
3	200,702	10.0%	4.0	114,423	20.4%	3.0	3,750	30%
2	140,492	7.0%	4.3	44,872	8.0%	3.2	1,875	15%
1	180,632	9.0%	4.3	3,366	0.6%	3.4	1,250	10%
Total	973,406	48.5%	4.0	288,862	51.5%	3.0	12,500	100%

Source: JICA Study Team

19.4 Target at Tourism Marketing

According to the statistic and the result of tourist survey, tourist arrivals to Siem Reap by air is dominated by foreign market, especially Asian and Oceania market by region, accounted for 60% of the total in 2004.

Major foreign tourist markets for Siem Reap are Japan, South Korean, China, Taiwan and Thailand for Asian market and U.S.A, France, United Kingdom and Germany. Among those markets, Japan and South Korea are the biggest market in Siem Reap, 26.4%, 20.1%, respectively, which totaled 46.5%.

The growing trend of Japan and South Korea markets expect to continue for another five years considering current market situation such as started operating direct flights from Inchoeon Airport, Korea by Asiana Airline in April 2005, planning to star operating direct from Seoul, Korea and Narita/Kansai, Japan by Royal Khmer Airlines in October 2005. It also expects that low cost airlines will start flying into Siem Reap with attracting more budget tourist to Siem Reap.

Based on the analysis of tourist expenditure and length of stay in Siem Reap by nationality, hotel, tourist pattern (group and individual), the main tourism market for

Siem Reap in the long term should aim at more upper tourism market. For this market, foreign individual and group tourist stays upper class hotel with higher expenditure and longer stay, which contribute to more local economy in terms of expenditure and creating more employment for the hotel industry.

Table 19.14 Target Tourism Market in Development Phase

	Present (2004)	Short-Mid terms (-2012)	Long term (-2020)
Foreign Market	No. of tourists: 561 (Thousand) - Dominated group packaged tourist staying 2-3 days (tour combined visiting Hanoi, Ho chi min and Bangkok) - Individual tourist such as backpackers	No. of projected tourists: 1,648 (Thousand) - Group/individual tourists staying more than 3 star hotels - Promoting foreign tourist during off peak season (Discount promotion rate for accommodation) - MICE tourism in ASEAN region	No. of projected tourists: 2,007 (Thousand) - Group/individual tourists staying more than 3 star hotels - Long stay tourist visiting many places and participating optional tours program - MICE tourism market
Asian & ASEAN	Major markets: (Share of tourist) Japan (26.4%) South Korea (20.1%) Taiwan (7.2%) Thailand (2.6%) China (1.7%)	- Japan for quality market (group tours staying more than 3 star hotels and longer stay) Thailand for cross border tourist by land - South Korea, Taiwan, China market for promoting in off season - Promoting MICE tourism	- Quality tourism market - Community based village and eco tourism market - MICE Tourism market - Promotion of Wedding package - Pilgrimage tourism market
European	Major markets: France (5.4%) United Kingdom (4.5%) Germany (3.2%) Group and individual tourists	- France, United Kingdom, Germany and other countries for long stay staying more than 3 star hotels - Promotion of more tourists during off season.	- Promote Scandinavian and other European for quality tourism market - Community based village and eco tourism market
America/Oceania	Major markets: USA (9.1%) Australia (2.9%)	- Promotion of more tourist during off season for American market	- Community based village and eco tourism market - Long stay and quality tourists
Domestic Market	297 (Thousand) Domestic tourist concentrated from November to January and Cambodian New Year holiday in April.	572 (Thousand) - Promote more local tourist during off peak season. - Weekend destination - Promoting targeted higher income people - Promotion of study tour for local students - Promoting MICE tourism	795 (Thousand) - Promoting mid and high income people - Promotion of study tour for local students - Promotion of package tour - Promoting MICE tourism

Source: JICA Study Team, Tourist statistic data in 2004 (Tourism Statistical Year Book, 2004, MOT)