

TOURISM DEVELOPMENT IN MONGOLIA

Tashkent, Uzbekistan, October 23-24, 2018



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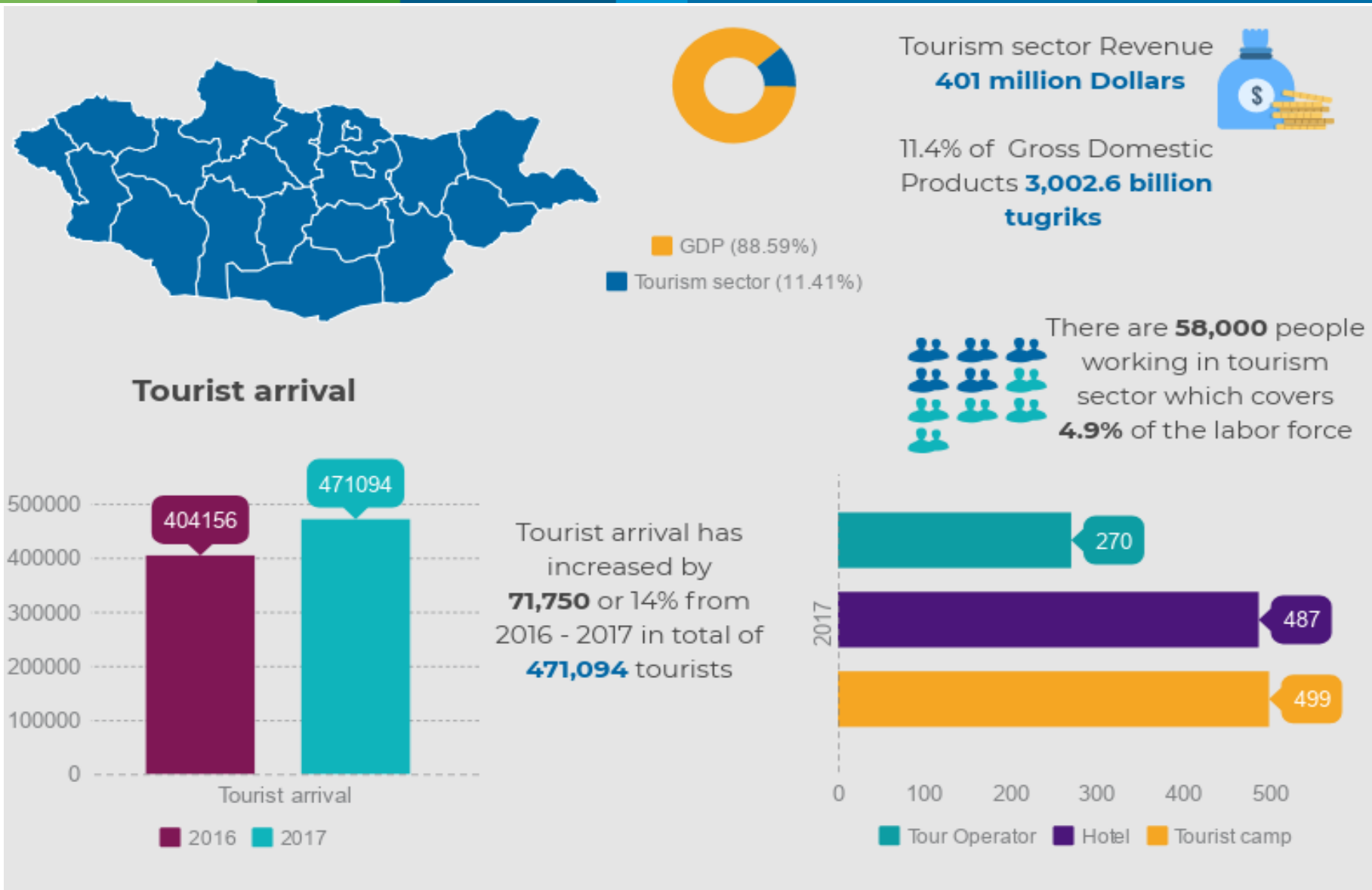


1. Background of Mongolian Tourism industry
2. Managing tourism's impacts on culture, heritage and the environment
3. Inter-country tourism products
4. Potentials of future cooperation

1. Background of Mongolian Tourism industry



Current Development of Tourism sector

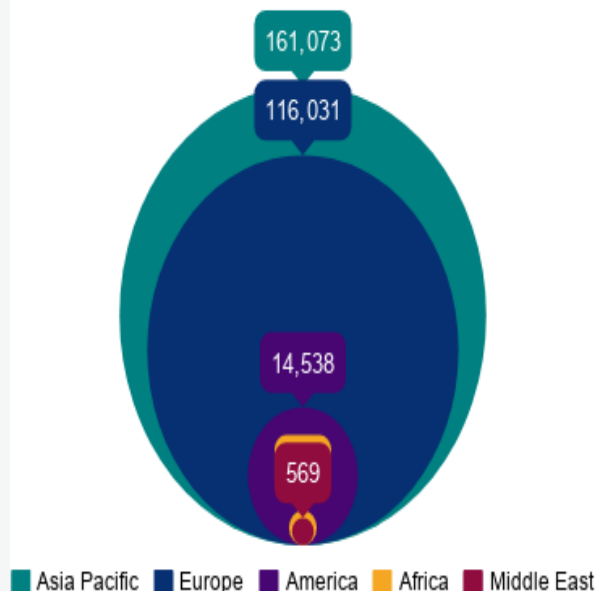


International Tourist arrivals by July 2018

COMPARED WITH JULY 2017



Tourist arrivals by the most visited countries



		2017	2018	
1	China	78,955	85,855	8.0%
2	Russia	56,204	71,274	21.1%
3	Korea	42,373	47,152	10.1%
4	Japan	12,523	10,576	-18.4%
5	USA	10,668	11,183	4.6%
6	Kazakhstan	9,452	11,287	16.3%
7	Germany	6,321	6,366	0.7%
8	France	5,842	5,787	-1.0%
9	Great Britain	3,447	3,290	-4.8%
10	Australia	4,372	4,487	2.6%
11	Canada	2,048	2,204	7.1%
12	Netherlands	1,830	2,211	17.2%
13	Turkey	1,223	1,751	30.2%
14	India	1,027	1,977	48.1%
15	Singapore	1,354	1,552	12.8%

Total stats by July, 2018 since January, 2018:



293,131 Tourists

+30,085 tourists

+10.26 %



Revenue:
303,195,356
USD

+81,399,579
USD

+26.8 %

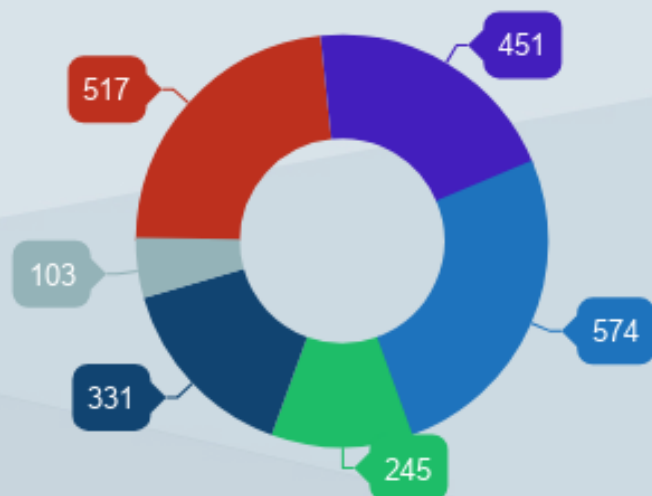
Number of Mongolians traveling abroad in July, 2018



201,750 citizens

Source: General Authority for Border Protection

Total number of accommodations in Mongolia



■ Hotel (23.28%) ■ Motel (20.31%) ■ Resort (25.84%)
■ Tourist camp (11.03%) ■ Ger camp (14.90%) ■ Spa resort (4.64%)

Number of
accommodation in
Ulaanbaatar City

842



Number of
accommodation in
21 provinces

1,214



Total number of Bed/ night

Resorts **34,553**

Tourist camps **10,919**

Ger camps **3,894**

Motels **32,34**

Hotels **13,976**

Spa Resort **6,072**

In Total



72,648

INTERNATIONAL AIR ACCESS



MINISTRY OF
ENVIRONMENT AND
TOURISM



Tourism resources of Mongolia, by regions

● Western Zone

● Mountainous Zone

● Central Zone

● Eastern Zone



2. Managing tourism's impacts on culture and heritage

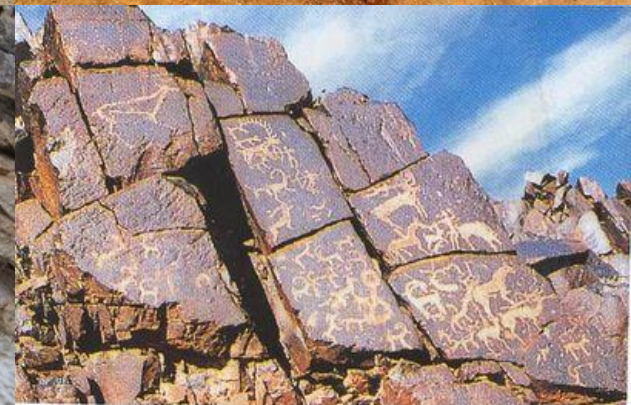
- To promote and develop traditional intangible cultural heritages, organize more than 25 cultural events and festivals including Naadam, Thousand camel, Yak, Horse racing and winter horse, eagle hunting, throat singing and felt making etc.
- Those events becoming more popular and attract special interest and photo tourists/growing number of tourists local people try to continue their tradition



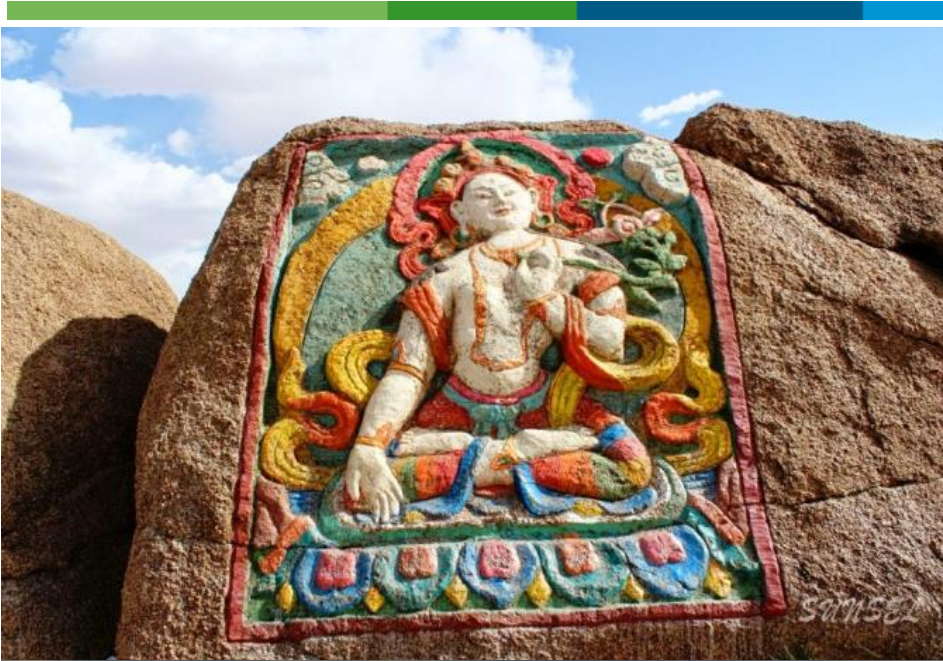
Positive effect
on both side

2. Managing tourism's impacts on culture and heritage

- In order to protect the historical and other heritage sites organize tourist flows by limiting the open areas and locate information boards
- Increase the knowledge of tourists by ethic codes and internal travel rules



Provide sustainability for the historical sites



Managing tourism's impacts on environment

- There are 33 special protected areas, only tourism activities are allowed with special rules and regulations for the tourism activities
- Promote green technologies and sustainable use of natural resources
- Eco labelling



3. Inter-country tourism products

1. Tea road and GTI region tourism products are both inter country tourism products
2. Self driving, auto rally, marathon and other cultural tourism products are becoming more popular
3. Every 9.26-28 Khovd province organizes “Tea road cultural heritage festival”, includes camel caravan, traditional cultural events



GTI Multi-Destination Tourism Project Regional Economic Cooperation Executive Summary

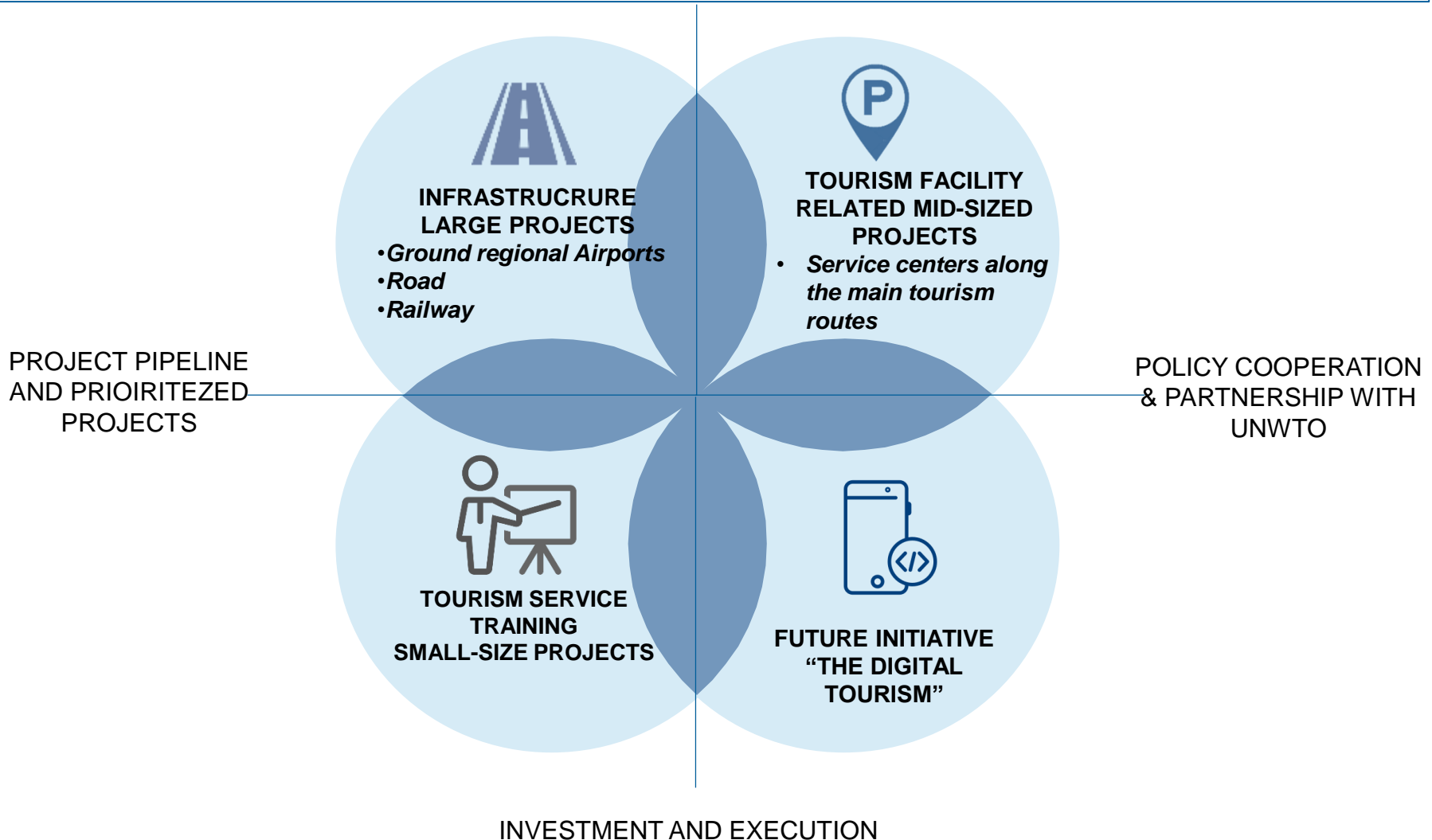


Inter-country tourism products



4. Potentials of future cooperation

The following project in order to prioritize key strategic developments focused on the sustainable development of access to Mongolia so that it supports and facilitates growth of the tourism sector.



Mongolian Tourism & Travel Competitiveness index* took the 102th position globally...

...Greatest gap in **INFRASTRUCTURE DEVELOPMENT** and **HUMAN RESOURCE**...

Level of competitiveness, Colors are determined by the relative position of each score, each pillar

Best - 7 Worst - 1

Selected Countries	T&T policy and enabling conditions				Infrastructure			Global Rank
	Safety and security	Human resource & Labour Market	Price Competitiveness	Prioritization of T&T	Air Transport Infrastructure	Ground and port infrastructure	Tourist Service Infrastructure	
Kazakhstan	5.5	4.8	5.9	4.3	2.6	2.8	3.1	81
Tajikistan	5.7	4.9	4.7	4.0	2.2	2.6	2.1	107
Ukraine	3.5	4.9	5.2	4.3	2.4	3.0	4.0	88
Mongolia	5.7	4.5	5.7	4.0	2.2	2.1	2.7	102
Armenia	5.9	4.8	4.8	4.6	2.2	2.9	3.9	84
Azerbaijan	5.8	5.0	5.4	4.8	2.4	3.7	3.3	71
Georgia	6.0	4.8	4.9	4.9	2.2	3.3	4.0	70
Russia Federation	4.3	4.8	5.8	4.2	4.5	3.0	4.5	43
China, PRC	5.0	5.2	5.3	4.8	4.3	4.0	3.2	15
Singapore	6.5	5.6	4.7	6	5.3	6.3	5.4	13
Malaysia	5.8	5.2	6.1	4.7	4.5	4.4	4.7	26
Thailand	4.0	4.9	5.6	5.0	4.6	3.1	5.8	34
Indonesia	5.1	4.6	6	5.6	3.8	3.2	3.1	42
Sri Lanka	5.5	4.5	5.6	5.2	2.6	3.9	3.2	64
Vietnam	5.6	4.9	5.3	4.0	2.8	3.1	2.6	67
Philippines	3.6	4.8	5.5	4.8	2.7	2.5	3.4	79
India	4.1	4.4	5.8	3.9	3.9	4.5	2.7	40
Pakistan	3.1	3.1	5.4	3.4	3.1	3.0	2.3	124

Low Level compared with the average for other selected countries

Source: World Economic Forum, The Travel & Tourism Competitiveness Report 2017, UNWTO

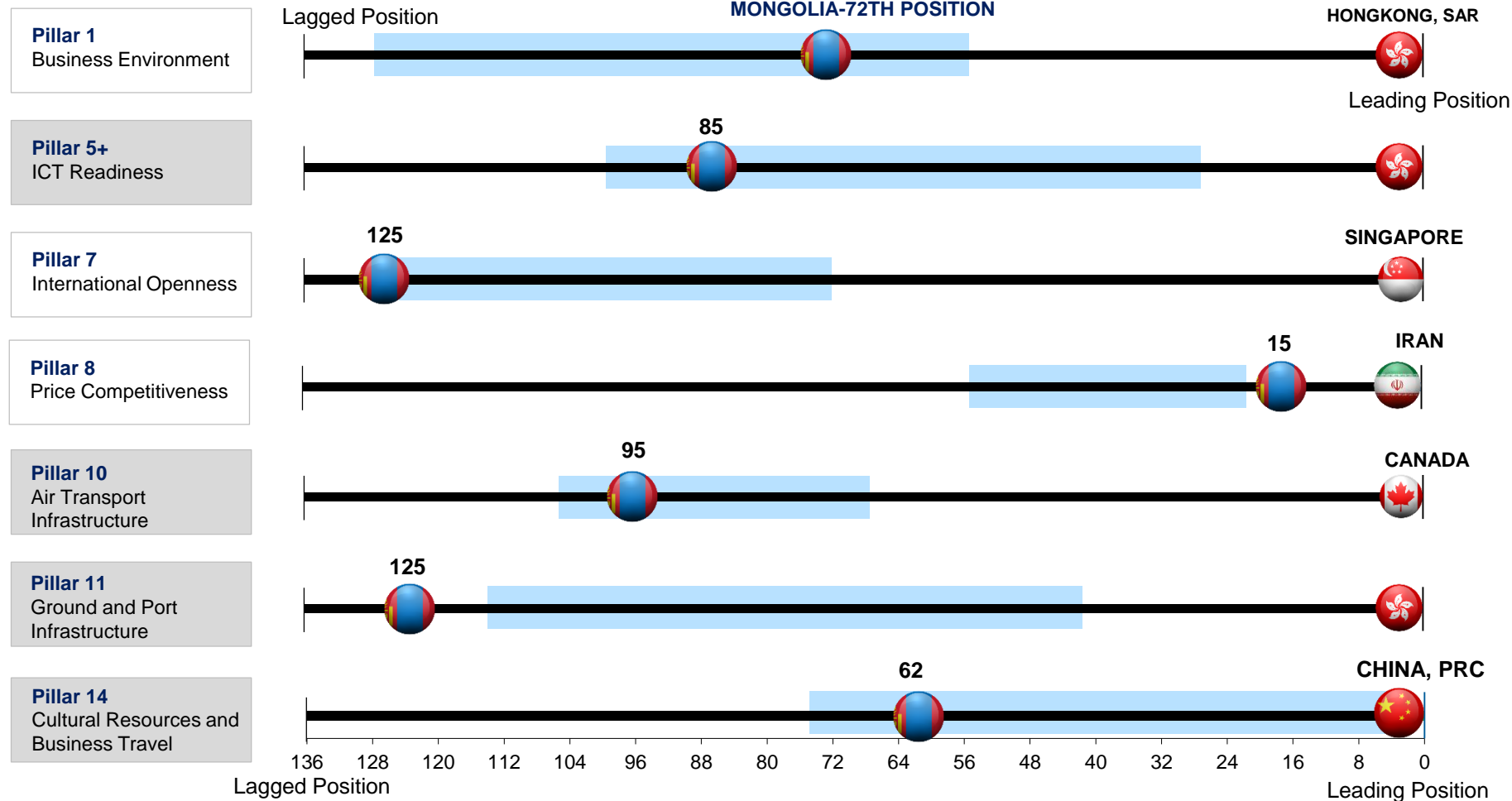
*T&T Competitiveness Index is defined by World Economic Forum. It is Understanding country competitiveness in tourism is a major consideration for policy makers and a major challenge for professionals in providing evidence to inform decision making.

We need to be prioritize and invest to Tourism infrastructure projects

...tourism Infrastructure is the backbone that enhances our competitive advantage...

Min – Max*

Tourism sector investments are functional and create the greatest impact in terms of economic growth, social uplift and sustainability. Thus, investments clearly depend on a project prioritization policy and international cooperation



+ Grey colored Pillar need to be Infrastructure development

*Min-Max means historical range of Selected countries indicators

Source: World Economic Forum, The Travel & Tourism Competitiveness Report 2017, UNWTO, Advisory Team analysis



Planned Railway (Phase 1) - 1920km
Planned Railway (Phase 2) - 2420km

Legend:

- Existing Railway 0-15 Mtpa
- Existing Railway 16-30 Mtpa
- Planned Railway (phase 1)
- Planned Railway (phase 2)
- Border Crossing
- Primary Station
- Secondary Station
- Cargo Source

[illegible]

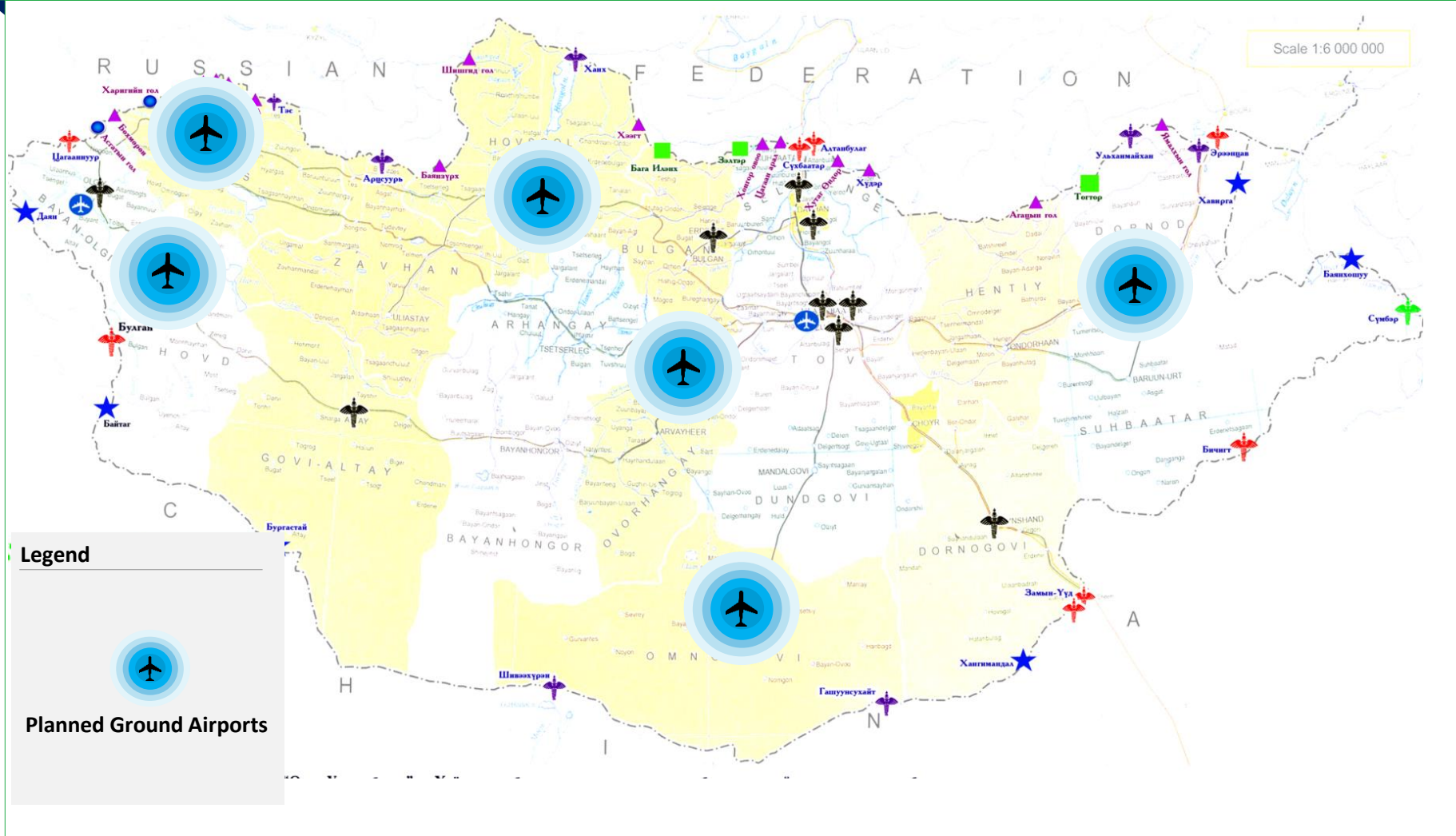
Map of the Ulaanbaatar region showing main tourism routes and service centers. The map includes labels for various districts and towns such as Altanbulag, Ikh Uul, Erdene, Darhan, Ulaanbaatar, and others. A red star marks the central area of Ulaanbaatar.

	A	B	C
Existing Rest Area, Service Centers	-	19	25
Planned New Rest Area, Service Centers	1	13	25

1

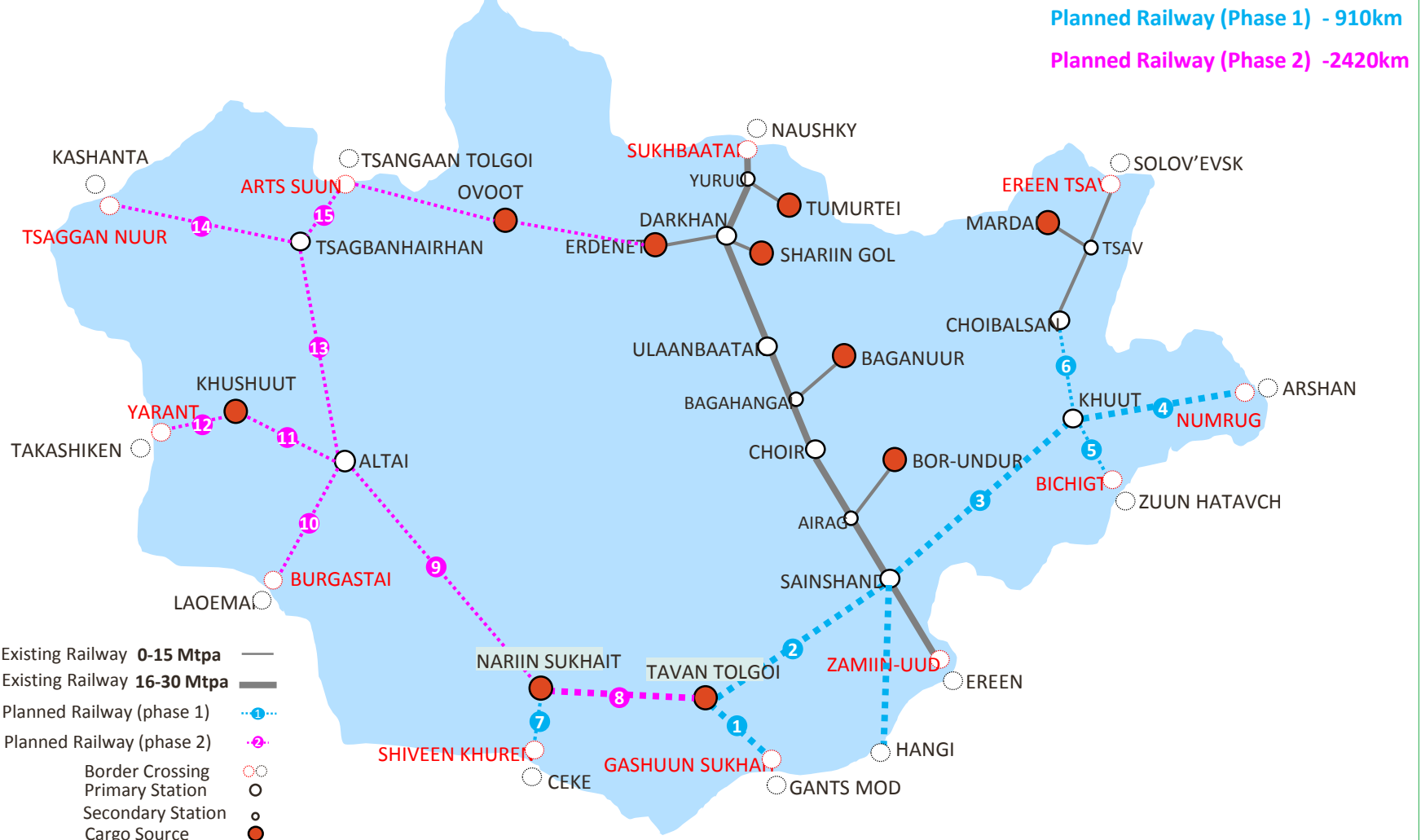
The government is now shifting its focus to developing and upgrading regional airports, with plans to 6 projects in the coming years.

GROUND 6 AIRPORT INFRASTRUCTURE PROJECTS



...the development of the Railway infrastructure is central to the economic and tourism development of Mongolia...

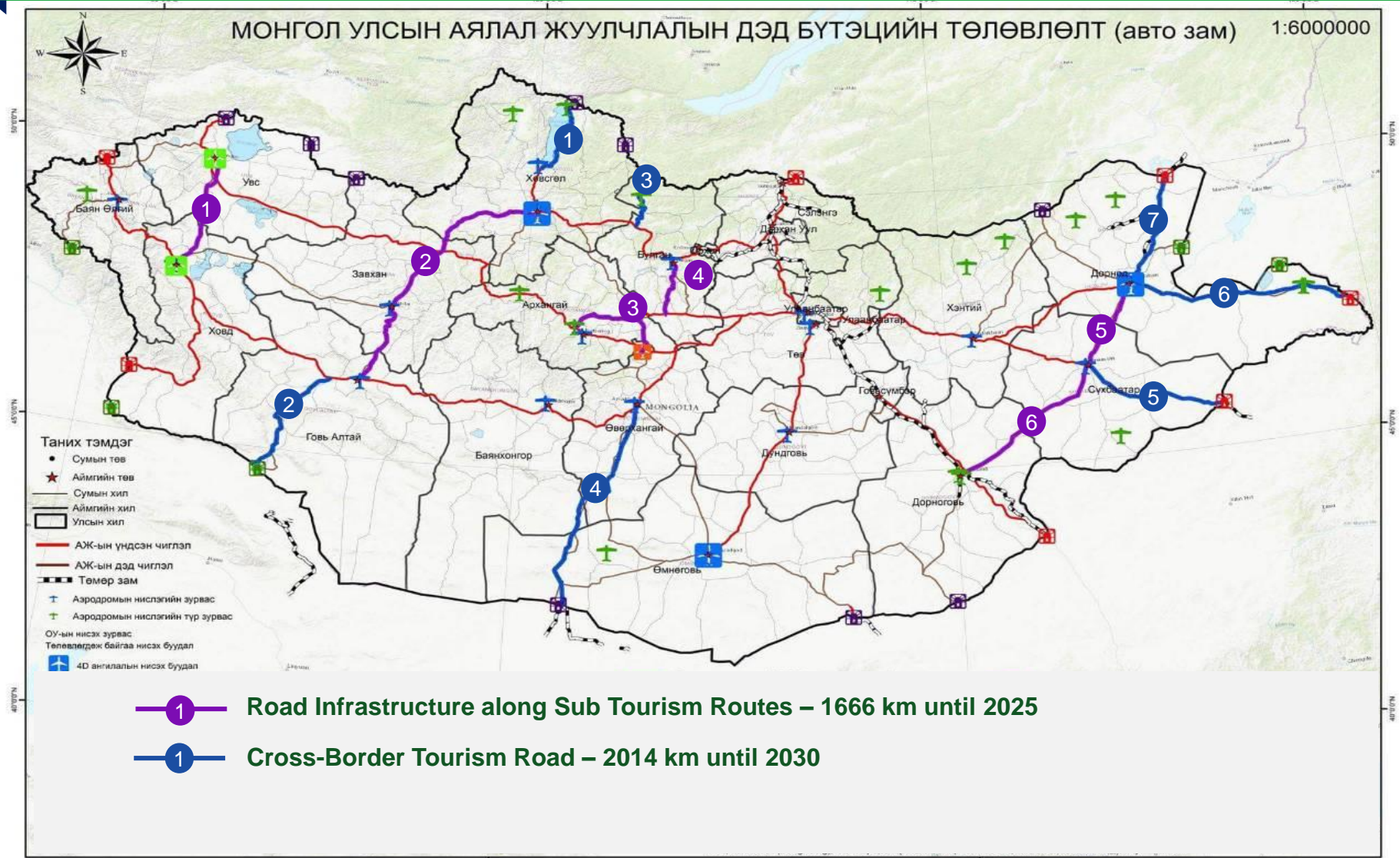
RAILWAY DEVELOPMENT PROJECTS (RAILWAY PROJECTS ARE DIVIDED INTO 2 PHASES)



3 Planned Road Infrastructure projects are a total length of 3680 km until 2030

...for development of Main, Sub Tourism Routes and Cross-border tourism...

ROAD INFRASTRUCTURE PROJECTS



4 Main Tourism Routes

...for development of Main, Sub Tourism Routes and Cross-border tourism...

MAIN TOURISM ROUTES



REST AREA, SERVICE CENTERS AND PARKING LOTS ALONG THE MAIN TOURISM ROUTES

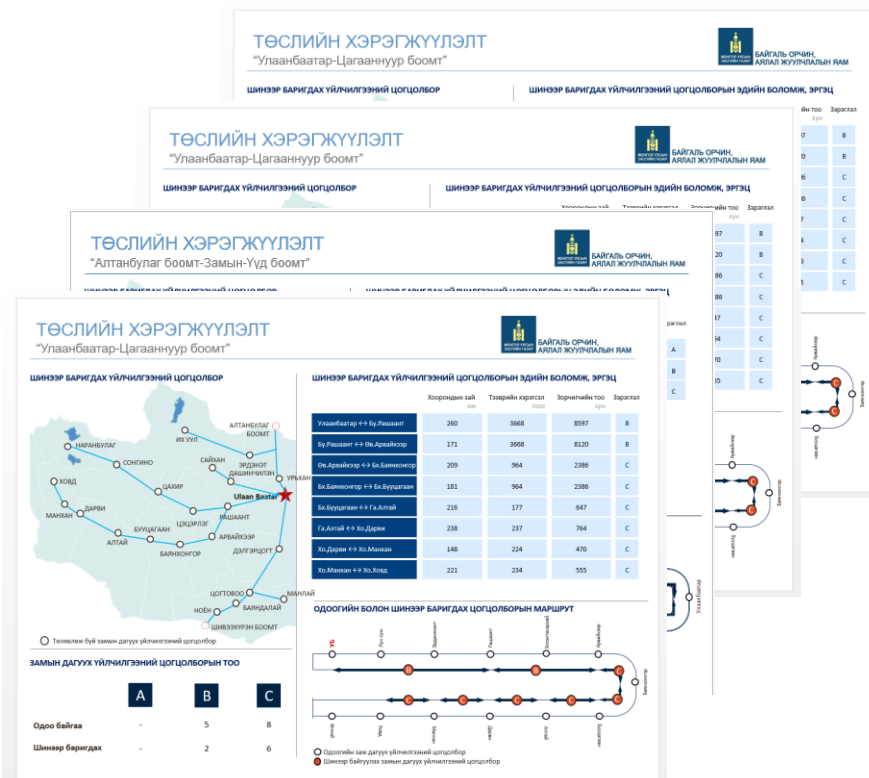
	A	B	C
Existing Rest Area, Service Centers	-	19	25
Planned New Rest Area, Service Centers	1	13	25



B Class



FEASIBILITY STUDY FINISHED RECENTLY



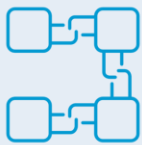
***Rest area, service centers and parking lots along the main tourism routes,
border area***



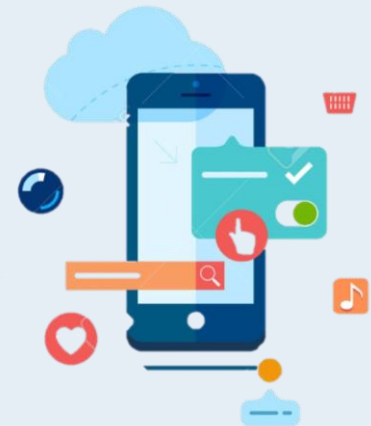
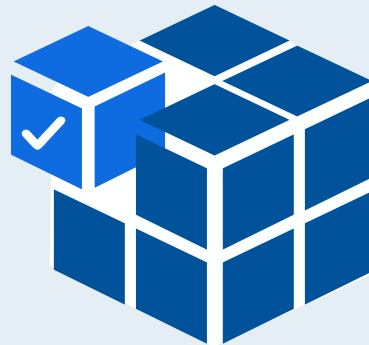
DIGITAL TOURISM



WHAT3WORDS



Blockchain





TOURISM SERVICE TRAINING

TOURISM SERVICE TRAINING

HOTEL SERVICE TRAINING

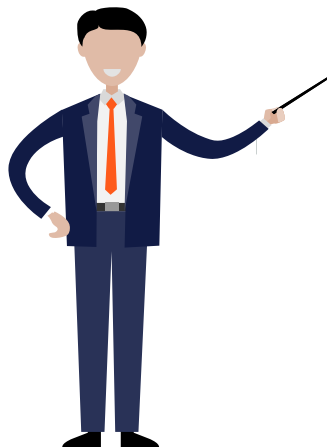
1

TOURIST GUIDE TRAINING

2

CATERING SERVICE TRAINING

3



6

HOTEL, RESORTS STANDART

7








HUMAN RESOURCE TRAINING












8

OTHER REQUIRED TRAINING

ACCESSIBILITY

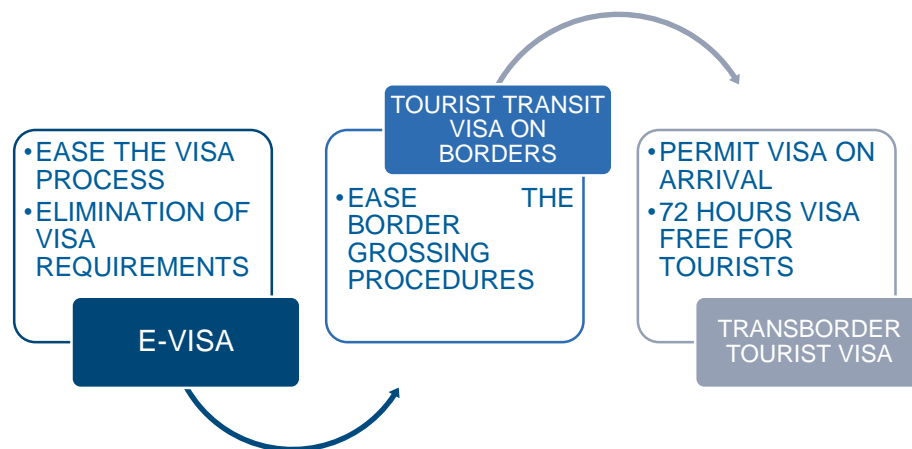
VISA EXEMPT COUNTRIES

-  Belarus
-  Brazil
-  Kazakhstan
-  Kyrgyzstan
-  Macao
-  Serbia
-  Ukraine¹
-  United States

-  Canada
-  Cuba
-  Germany
-  Israel
-  Japan
-  Laos
-  Malaysia
-  Russia
-  Singapore
-  Turkey
-  Thailand

-  Philippines

-  Hong Kong
-  South Korea¹



THANK YOU FOR YOUR ATTENTION

