To identify the issues of ASEAN tourism industry, and highlight the key areas of improvement.
Why Tourism Matters?

- Cultural Preservation
- Environmental Protection
- Peace & Security
- Jobs
- Economic Growth
- Development
- USD 1.6 Trillion in exports
- 30% of services exports
- 1/10 world’s jobs
- 7% of world’s exports
- 10% of world’s GDP

Source: World Travel & Tourism Council (WTTC), 2018

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2 Main measures of tourism performance

- **Number of tourist arrivals**
- **Tourism receipts**

Source: World Tourism Organization (UNWTO), 2018
ASEAN tourism performance vs EU

Number of tourist arrival per population

- ASEAN average: 0.16
- EU average: 1.02

- ASEAN has 15.6% of EU

Source: The World Bank Group Database

Amount of tourist receipt (USD) per population

- ASEAN average: 231.25
- EU average: 989.19

- ASEAN has 23.3% of EU

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### ASEAN tourism performance trend* (2008-2017)

#### Number of tourist arrival per population

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Cambodia</td>
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Notes: Brunei, Laos, and Myanmar are excluded due to lack of data

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### Amount of tourist receipt (USD) per population

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Cambodia</td>
<td>92.19</td>
<td>103.81</td>
<td>155.28</td>
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<td>Philippines</td>
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<td>93.98</td>
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</tbody>
</table>

Notes: Brunei, Laos, and Myanmar are excluded due to lack of data
ASEAN member states tourism performance measure focus (based on performance trend)
Tourism Performance Pillars

Travel and Tourism Competitiveness Report by the World Economic Forum

Indicators of country’s tourism performance

14 pillars (International Openness is excluded)


Relationship of overall pillar score vs tourist arrival per population

Positive correlation between the overall pillar scores of each countries with their respective tourist arrival per population.

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Performance Pillars vs Performance Measures

Pearson’s Correlation Coefficient
To identify strength of the relationship between each pillars with the tourism performance measures

The TOP 4 pillars for both Tourist Arrival and Tourist Receipt

- Tourist service infrastructure
- Air transport infrastructure
- Health hygiene
- Natural resources

Development pillars vs Tourist Arrival

Development pillars vs Tourist Receipt
### Key Improvement Area of each ASEAN member states

<table>
<thead>
<tr>
<th>Country</th>
<th>Tourism performance measure focus</th>
<th>Pillars to be prioritized upon</th>
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</thead>
<tbody>
<tr>
<td>Cambodia</td>
<td>Tourist Arrival</td>
<td>Air Transport Infrastructure, Cultural Resources &amp; Business Travel, Tourist Service Infrastructure</td>
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<tr>
<td>Indonesia</td>
<td>Tourist Arrival</td>
<td>Cultural Resources &amp; Business Travel, Tourist Service Infrastructure</td>
</tr>
<tr>
<td>Malaysia</td>
<td>Tourist Receipt</td>
<td>Natural Resources, Cultural Resources &amp; Business Travel</td>
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<tr>
<td>Philippines</td>
<td>Tourist Arrival</td>
<td>Air Transport Infrastructure, Cultural Resources &amp; Business Travel, Tourist Service Infrastructure</td>
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<td>Singapore</td>
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<td>Vietnam</td>
<td>Tourist Arrival</td>
<td>Air Transport Infrastructure, Cultural Resources &amp; Business Travel, Tourist Service Infrastructure</td>
</tr>
</tbody>
</table>

Source: World Economic Forum, 2017

Note: Numbers in graph have been rounded off
Proposed Initiatives

Tourist Service Infrastructure

Consider tourist as a part of primary infrastructure user

Establish tourism infrastructure priorities

Practice high performance tourist infrastructure maintenance system
Proposed Initiatives

Air Transport Infrastructure

Governments engage in a consultative process of long-term aviation infrastructure planning.

Latest technology to improve efficiency of airports.

Establish more direct flights to and from other countries.
Proposed Initiatives

Strengthening Natural Resources Management

Local community capacity building

Formulate effective policy and governance framework

INNOVATIVE MECHANISMS FOR FINANCING BIODIVERSITY CONSERVATION

Natural Resources

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Proposed Initiatives

Cultural Resources & Business Travel

Create a permanent and travelling exhibition

Focus marketing efforts on the cultural uniqueness of ASEAN

Promote business leisure travel in MICE industry

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In the case where the highlighted pillars scores have been increased, both tourism performance measures of all ASEAN member states would be improved in the future. Thus each member state are recommended to emphasize upon the highlighted pillars.
1. The World Bank Group database
6. ASEAN Tourism Strategic Plan 2016-2025.
Thank You

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