Workshop On
ASEAN Economic Community Outreach
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Tourism Cooperation Towards AEC

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Presentation Outline

- ASEAN Tourism Cooperation
- Tourism Towards AEC
- ASEAN Tourism Strategic Plan and Implementation
- The Progress
- ASEAN Tourism Towards Post 2015
ASEAN Tourism Cooperation

- ASEAN cooperation in tourism was formalised in 1976, following formation of Sub-Committee on Tourism (SCOT) under ASEAN Committee on Trade and Tourism

- The 1\textsuperscript{st} ASEAN Tourism Forum was held on 18-26 October 1981, Kuala Lumpur, Malaysia
ASEAN Tourism Cooperation

- Established ASEAN Promotional Chapter for Tourism (APCT) in 1986: Hong Kong, West Germany, UK, Australia/New Zealand, Japan, and North America by I, M, P, S, T
- Visit ASEAN Year 1992
- 1st MATM on 10 January 1998 in Cebu, Philippines
- Ministers signed the Ministerial Understanding on ASEAN Cooperation in Tourism and adopted PA ASEAN Cooperation in Tourism
ASEAN Tourism Cooperation

- ATA signed by ASEAN Leaders at 8th ASEAN Summit, 4 November 2002 in Phnom Penh

Encompasses following tourism policy issues:

- Facilitation of Intra-ASEAN and International Travels, Transport Services, Market Access, Quality Tourism, Tourism Safety and Security, Joint Marketing and Promotion and Human Resources Development
Accelerate economic growth, social progress and cultural development, with objectives:

- To enhance cooperation in tourism
- To develop and promote ASEAN as a single and collective tourism destination with world class standard, facilities & attractions
- To provide a common forum for discussion
Areas for Enhanced Tourism Cooperation

- Exchange info. & experience
- Harmonization tourism policy programs
- Marketing, training, research, info. dissemination
- Facilitation of intra-ASEAN travel
- Promote tourism incentives
- Promote public-private participation/cooperation
- Joint approaches in areas of common interest
- Closer coop. with ASEAN Dialogue Partners
In General:

- Tourism recognized among ASEAN
- ASEAN Secretariat coordinates cooperation
- ASEAN: Safety & traditionally friendly
- Well-developed entertainments (amenity, shops, etc.)
- Well-external linkage markets, e.g. with East Asia
- Greater Mekong Sub-region (GMS) alliance, BIMP-EAGA and others: synergistic effects ASEAN integration
- Access, unique destination images, tourism resources
Int’l Visitor Arrivals to ASEAN (1991-2013)

Arrivals

Millions

Int’l Visitor Arrivals to ASEAN by Region (2013)

- **ASIA (Excl. ASEAN):** 32%
- **INTRA ASEAN:** 46%
- **AFRICA:** 4%
- **EUROPE:** 12%
- **OCEANIA:** 4%
- **OTHER/UNSPECIFIED:** 2%
## ASEAN Top Ten Markets (2013 Preliminary)

<table>
<thead>
<tr>
<th>No.</th>
<th>Country of Residence</th>
<th>Total Arrivals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>China</td>
<td>8,335,903</td>
</tr>
<tr>
<td>2</td>
<td>Singapore</td>
<td>4,672,048</td>
</tr>
<tr>
<td>3</td>
<td>Malaysia</td>
<td>4,510,186</td>
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<tr>
<td>4</td>
<td>Indonesia</td>
<td>4,312,613</td>
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<tr>
<td>5</td>
<td>Rep. Korea</td>
<td>3,566,529</td>
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<tr>
<td>6</td>
<td>Japan</td>
<td>3,429,352</td>
</tr>
<tr>
<td>7</td>
<td>Australia</td>
<td>2,849,916</td>
</tr>
<tr>
<td>8</td>
<td>U.S.A</td>
<td>2,332,481</td>
</tr>
<tr>
<td>9</td>
<td>Thailand</td>
<td>2,308,442</td>
</tr>
<tr>
<td>10</td>
<td>Vietnam</td>
<td>2,180,796</td>
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</table>
ASEAN Tourism Towards AEC

- ASEAN will be transformed into a region with free flow of skilled labour, capital, goods and services and investments.

- Integrate ASEAN into the global economy by 2015.

- ASEAN tourism is contributing to transformation under the pillar of AEC.
ASEAN Tourism Towards AEC

- Promotes ASEAN as an important market in the global economy, helps contribute to economic growth and helps drive investment

- Role play for development of the Region (preservation of nature and culture, socio-economic development, environmental conservation and improvement of green productivity to ensure sustainable tourism)
ATSP 2011 – 2015

Background

- The 28th Meeting of ASEAN NTOs held on 8-9 July 2008 in Manila, agreed on the need to prepare the ASEAN Tourism Strategic Plan 2011-2015 as the successor of the Roadmap for Integration of Tourism Sector (RITS) which has been expired in 2010.

- The 12th M-ATM held on 8 January 2009 in Ha Noi, reaffirmed its commitment to accelerate the integration process and, endorsed the initiative of the ASEAN NTOs to formulate the ATSP 2011-2015 to further integrating tourism sector towards establishment of AEC in 2015.
ATSP 2011 – 2015

- The 14th MATM held in January 2011 in Phnom Penh considered and adopted on the Term of Reference to prepare ATSP 2011-2015

- ATSP provides the blueprint for harmonizing the policies, programs and projects of the ASEAN NTOs in areas of marketing, product development, standard, HRD, cruise tourism, investment, and crisis communication, among others
Implementation of ATSP 2011-2015

Following requirements:

- Attract more investors to region and transform ASEAN Tourism Investment Forum (ATIF) to enhance ASEAN’s tourism profile
- Enhance product development through regional packages, increase public awareness of ASEAN products and offerings
- Strengthen cooperation and collaboration with industry stakeholders
Implementation of ATSP 2011-2015

Following requirements:

- Enhance industry and ASEANTA’s roles, and public-private partnership with ASEAN
- Identify ways to standardize, implement and enforce criterias in ASEAN
- Support implementation of MRA on Tourism Professionals, and their preferential treatment
- Enhance ASEAN connectivity and travel facilitation (e.g. establish an ASEAN Common Visa or an alternative through bilateral and sub-regions’ visa).
ASEAN Tourism Marketing Strategies 2012-2015

1. Website Development and Maintenance
2. Design and Implementation of the India and China Tourism Digital Campaign
3. Design and Implementation of the Experiential and Creative Market Campaign
4. Establishment of Public/Private sector distribution partnership
5. Design and Implementation of Marketing Campaign for Business Travel (MICE)
6. Design and Implementation of Marketing Campaign for Adventure Travel

7. Design and Implementation of Marketing Campaigns for Senior and Long stay market

8. "ASEAN for ASEAN Campaign" can be defined as efforts to promote internal regional tourism in ASEAN, using resources of the individual NTOs.
ASEAN Tourism Products Development

1. Developing the ASEAN Ecotourism
2. Strategic Plan Progress of Work Plan of ASEAN Cultural and Heritage Tourism Products
3. Technical Assistance from UNWTO project to River-based Tourism Development in ASEAN
4. ASEAN Health and Wellness Tourism
5. ASEAN Tourism Investment Forum
6. ASEAN-Japan Cruise Promotion Strategy (AJCPS)
7. ASEAN Traditional Cuisine Coffee Table Book
8. MICE Initiative
ASEAN Quality Tourism

ASEAN Green Hotel Standard *Lead Coordinator: Thailand*

- **ASEAN Green Hotel Award Ceremony**
  Held at ATF 2014 - 86 hotels received awards

- **First draft handbooks on Conformity Assessment of ASEAN Green Hotel and ASEAN Spa Services standards** will be distributed in May.

- **August 2014:** Special Meeting on Conformity Assessment of ASEAN Green Hotel Standard to finalise the audit checklist and certification process

- **November 2014:** Training for Auditor/Assessor for both standards
ASEAN Homestay Standard

Lead Coordinator: Malaysia

- **June 2014**: Training of Master Auditors/Assessors for ASEAN Homestay Standard in Malaysia

- **June-November 2014**: ASEAN Member States to conduct pilot test program

- **November 2014**: Special Meeting on the Implementation of ASEAN Homestay Standard

- **December 2014**: Finalisation of the ASEAN Homestay Standard for implementation in 2015
Preliminary pilot testing to be carried out by the Project Team

Training for auditor/assessor and pilot testing would be carried out to further refine and finalise APTS.

June 2014: Special Meeting on APTS to further refine the draft Guideline of APTS for endorsement at ATF 2015
General principle of certification process of ASEAN Spa Service Standard adopted at ATF 2014

August 2014: Special Meeting on Conformity Assessment of ASEAN Spa Service Standard Special Meeting

November 2014: Training for Auditor/ Assessor for ASEAN Spa Standards
Website is online and running.

Proposed activity - Workshop or Seminar on tsunami recovery held in Indonesia or Philippines.
ASEAN Tourism Standards in Responding to Climate Change

Lead Coordinator: Philippines

- Workshop on Establishing Tourism and Climate Change Monitoring System and Work Plan was held 23-24 April 2014 in Bohol, Philippines

- On-going – Establishing the Framework, Approaches, Parameters and Measures
ASEAN Clean Tourist City Standard (ACTCS)

Lead Coordinator: Cambodia

- ACTCS with indicators, criteria, implementation mechanism and Work Plan endorsed at ATF 2014

- At last QTWG Meeting, the general certification and audit process were agreed

- Test pilot of audit process to be held in Cambodia - AMS encouraged to attend
ASEAN Community-Based Tourism Standard

Lead Coordinator: Cambodia

- **Definition** of Community-based Tourism finalised
- **On-going** – development of ASEAN Community-based Tourism Standard and draft ASEAN Community-based Tourism Standard
- Cambodia convened the ASEAN Special Meeting on Community-based Tourism (CBT) Standard held from 25-27 April 2014 in Siem Reap
Progress ASEAN Tourism Toward AEC

• At 17\textsuperscript{th} MATM held during ATF 2014 in Kuching, Malaysia, the \textit{good progress in implementing ATSP 2011-2015}, where 65 (75\%) out of 86 ATSP measures had been duly completed.

• Need expedite work progress to timely fulfill the requirements of AEC

• Challenging tasks are waiting for us to develop and implement the successor of ATSP beyond 2015
Framework for enhanced ASEAN economic integration for the next ten years (2016-2025)
Proposed Vision Statement 2016-2025

‘By 2025, ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, and will be committed to responsible, sustainable and inclusive tourism development, so as to contribute significantly to the socio-economic well-being of ASEAN people’.

Vision for 10 years
ATSP period divided into two stages - 2016-2020 & 2021-2025
**Proposed Tourism Focus Areas**

i) Marketing & Promotion  
ii) Product Development/Standards  
iii) Manpower Development  
iv) Tourism Investment  
v) Quality Tourism  
vi) Sustainable growth & Development

*Focus Areas not within NTOs’ Control*

- Connectivity & Travel Facilitation  
- Safety and Security  
- Infrastructure Development (Hardware/Software)  
- Climate Change
“Towards Post 2015 ASEAN Tourism Vision”

Possible focus areas:
• Sustainable Growth/sustainable development
• Networking & Connectivity
• Increasing competitiveness
• ASEAN’s role in global platforms
• Climate Change
• Strengthening Intra-ASEAN Cooperation (strengthened consolidation)
• Quality Tourism
Proposed Next Steps

Possible ideas:

- ASEAN Secretariat to lead develop the post ATSP strategy
- Approach development partners to seek support to the development of post ATSP
- Task Force could be open to partners such as UNWTO, ADB, PATA, WTTC and APEC
Thank You