



ORGANISATION MONDIALE DU TOURISME
WORLD TOURISM ORGANIZATION
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ESCAP/WTO TOURISM WEEK

Macau
11-14 May 1999

REPORT

Note by the Secretary-General

*The Secretary-General submits to the Commissions, a
report on the ESCAP/WTO Tourism Week held
in Macau from 11-14 May 1999*

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I. Brief Overview

At the invitation of the Government of Macau, the UN Economic and Social Commission for Asia and the Pacific (ESCAP) and the World Tourism Organization (WTO) jointly organized a Tourism Week which was held in Macau from 11-14 May 1999.

The Tourism Week comprised of the thirty-seventh meeting of the WTO Commission for South Asia; the thirty-third meeting of the WTO Commission for East Asia and the Pacific; the fifteenth joint meeting of the WTO Commission for East Asia and the Pacific and the WTO Commission for South Asia; as well as a high-level technical seminar on Challenges for Human Resource Development in Tourism in the Asia-Pacific Region in the New Millennium which resulted in the Macau Declaration for Human Resource Development. During the Tourism Week, ESCAP also organized the second meeting of the Executive Committee of the Network of the Asia-Pacific Education and Training Institutes in Tourism (APETIT) and the First Meeting of the General Council of APETIT.

The Commission Meetings considered, amongst other matters, tourism market reports which provided statistical and analytical information on the development of international tourism in the region in 1998 and trends in tourism activities over the past ten years. They were apprised of the regional and technical co-operation activities carried out by the Organization in 1998 and 1999 within the region and, the salient features of the planned activities for 2000-2001. WTO also presented the findings of its latest study on the impacts of the Asian Financial Crisis on the Tourism Industry of the region. Finally, the Members were informed of the latest conclusions and recommendations of the Tourism 2020 Vision study for the region which takes into account the effects of the Asian Financial Crisis on long-term tourism forecasts.

II. Thirty-seventh Meeting of the WTO Commission for South Asia

Communication of the Chairman of the Commission

At the opening of the Meeting, the Members adopted the provisional agenda and proceeded to listen to the communication of its Chairman who was represented by H.E. the Minister for Information, Culture and Tourism of Pakistan, Mr. Mushahid Hussain Sayed.

After welcoming all the participants to the Meeting, the Chairman expressed his sincere thanks to ESCAP, WTO and the Government of Macau for organizing and hosting the Tourism Week. The Chairman remarked on the positive growth of international tourist arrivals and receipts in the South Asia region which is now the third fastest growing region of the world in terms of tourist arrivals. He felt that South Asia has much to offer in terms of tourist attractions, both cultural and natural, and South Asia should build upon its strategic position as a bridge between East Asia and the Pacific and the Middle East. The Minister also commented on the promotional campaigns of various South Asian countries such as Visit Maldives Year, Visit Nepal Year etc, and he mentioned that Pakistan has selected 2001 as the Visit Pakistan Year. The Chairman then

described a few of the initiatives Pakistan is taking to place it on the world tourism map such as the revamping of the leadership of the Pakistan Tourism Development Corporation, organizing the WTO Fourth International Meeting on the Silk Road in November this year and ensuring Pakistan's participation at all the major tourism events of the year.

Finally, the Chairman expressed his desire for a fruitful outcome of the Meeting as well as a successful Tourism Week and he hoped that this joint effort between ESCAP and WTP would lay the groundwork for further institutionalised cooperation within the region of South Asia and between South Asia and other regions vis-à-vis tourism.

World Tourism and Tourism in South Asia in 1998

On behalf of the Members, Dr. H. Varma, WTO Regional Representative for Asia and the Pacific, expressed his appreciation to the Chairman for his remarks and then presented the Commission with a detailed analysis on the state of tourism both globally and within South Asia in 1998. This analysis can be found in Section V of the report.

Application to the region of the General Programme of Work for 1998-99

Dr. Varma then detailed to the Members all the activities carried out by the Organization, through its six major sub-divisions, within the region, of which the following are highlighted:

- One technical cooperation project and two sectoral support missions were carried out during 1998 and early 1999 in the region in response to the specific needs expressed by the Members.
- The technical cooperation project was the Perspective Tourism Development Plan for the State of Andhra Pradesh (India). The Members were also informed that three more projects had been approved and activities expected to commence later in the year. The project were the Tourism Development Master Plan for the Islamic Republic of Iran, Study of the Social, Economic and Environmental Impacts of Tourism in the Maldives, and, the Tourism Development Master Plan of Pakistan.
- Sectoral support missions were carried out to India and Sri Lanka.
- The Secretariat mentioned its active participation at the 1999 International Horticultural Exposition at Kunming, China including the seminar on Ecotourism that it would organize therein.
- Various seminars were organized in the region including one of Public-Private Sector Partnership in Tourism Development (Japan), Pan-Asia Technical Seminar on Tourism Taxation (India), Asia-Pacific Seminar on Statistics and Tourism Satellite Accounts (India), WTO Educating the Educators Seminar (Thailand), and, a WTO High-Level Meeting on the Economic Impacts of Tourism (Japan).

- The Silk Road project benefited from three major events including the Silk Road Travel Forum (Japan), a Silk Road Tour Operators Workshop (Kazakhstan), and, the Third International Meeting on the Silk Road (Georgia). The Fourth International Meeting on the Silk Road is scheduled to be held in Pakistan from 30 November to 02 December 1999.
- Dr. Varma also briefed the Commission on WTO's cooperation with other international agencies including ESCAP and the Indian Ocean Tourism Organization (IOTO).
- The second session of the WTO Human Resource Development section's 1998 Practicum, held in September at the WTO Headquarters, had participants from India and Nepal.

Draft General Programme of Work for 2000 – 2001

WTO Secretary-General, Mr. Francesco Frangialli, briefly explained to the Commission the salient features of the Draft General Programme of Work of the Organization for 2000 – 2001. Mr. Frangialli mentioned the six policy considerations which were the stabilization of public contributions, the quest for a more equitable distribution of States' contributions, diversification of resources, inclusion of a new major priority in a strengthened programme of activities, reflecting the partnership concept in programme activities, and, developing new "work sites". New "work sites" including the following:

- the follow-up to the Nice Conference of June 1999 on the economic measurement of tourism and the preparation of a major international summit on employment in tourism and its measurement;
- the implementation of the recommendations of the session of the United Nations Commission on Sustainable Development, held in New York in April 1999;
- the conferences scheduled for the year 2000 on youth tourism and tourism development in small island States;
- the dissemination and implementation of the Global Code of Ethics for Tourism, submitted to the General Assembly in 1999;
- the activities undertaken by the newly established Themis Foundation in the field of quality in tourism education and training;
- the follow-up to the impact of the new information technologies on the tourism sector (an activity that will be financed in particular by the slight increase in the contribution of Affiliate Members); and
- the use of tourism promotion methods and techniques.

Tourism 2020 Vision Study for South Asia

The Meeting then proceeded in accordance with the Agenda items contained in Annex 1 and a summary of the updated conclusions and recommendations of the Tourism 2020 Vision study for South Asia is found later in this report.

Next Commission Meeting

With regard to the next meetings of the Commission, the thirty-eighth meeting of the Commission would be held in Santiago de Chile in September 1999 within the framework of the thirteenth session of the WTO General Assembly. Based upon the interest expressed by the Government of Sri Lanka, the Commission was pleased to accord the thirty-ninth meeting of the Commission to Sri Lanka. The dates and place of this Commission meeting will be decided at a later date between the Government of Sri Lanka and the World Tourism Organization.

III. Thirty-third Meeting of the WTO Commission for East Asia and the Pacific

Communication of the Chairman of the Commission

After adopting the provisional agenda of the meeting, which was prepared and submitted by the Secretary-General, the Commission received the communication of Mr. Pradech Phayakvichien, Deputy Governor, Tourism Authority of Thailand in his capacity as Chairman of the Commission.

The Chairman expressed, on behalf of all the delegates, his sincere appreciation to WTO and ESCAP for jointly organizing the Tourism Week and its associated meetings which he felt would give the participants valuable opportunities to address several important issues facing the global and especially the East Asia and Pacific tourism industry. He also expressed his gratitude to the Government of Macau for hosting this event and for the warm hospitality accorded to all the participants.

The Chairman stated that WTO's statistics on tourism arrivals and receipts to the East Asia and the Pacific region in 1998 showed how badly the region had been affected by the financial crisis. However, he also informed the Members that the region's tourism sector had also proved to be remarkably resilient to the impacts and that certain economic indicators were showing that the regional economies were improving.

The Chairman approved of the provisional agenda proposed by the Secretariat as he felt that the presentation of WTO's study on the impacts of the Asian financial crisis on the tourism industries of the region, the statistical overview of tourism in East Asia and the Pacific in 1998, discussions of WTO's general programme of work for 1998-1999, and that of 2000-2001, as well as the Tourism 2020 Vision study for East Asia and the Pacific would provide ample food for thought to all the Members in assessing the region's tourism performance.

The Chairman concluded by welcoming all Members to participate actively in the session so that their collective approach and efforts to work together would benefit not only the region but also the world tourism industry.

World Tourism and Tourism in East Asia and the Pacific in 1998

After thanking the chairmanship of Thailand for his communication, Dr. H. Varma, WTO Regional Representative for Asia and the Pacific presented the Commission with an analysis on the state of world tourism as well as the tourism scenario in East Asia and the Pacific in 1998, the details of which are found in Section V of the report.

Application to the region of the General Programme of Work for 1998-99

Dr. Varma then detailed to the Members all the activities carried out by the Organization, through its six major sub-divisions, within the region, of which the following are highlighted:

- Three technical cooperation projects and four sectoral support missions were carried out during 1998 and early 1999 in the region in response to the specific needs expressed by the Members.
- The technical cooperation projects were the Tourism Development Master Plan for Sichuan Province (China), Support for Tourism Development and Eco-tourism in Lao PDR, and, Tourism Planning for Cua Lo Town, Nghe An Province (Vietnam).
- Sectoral support missions were carried out in China, DPR Korea, Malaysia and Thailand.
- The Secretariat mentioned its active participation at the 1999 International Horticultural Exposition at Kunming, China including the seminar on Ecotourism that it would organize therein.
- Various seminars were organized in the region including one of Public-Private Sector Partnership in Tourism Development (Japan), Pan-Asia Technical Seminar on Tourism Taxation (India), Asia-Pacific Seminar on Statistics and Tourism Satellite Accounts (India), WTO Educating the Educators Seminar (Thailand), and, a WTO High-Level Meeting on the Economic Impacts of Tourism (Japan).
- The Silk Road project benefited from three major events including the Silk Road Travel Forum (Japan), a Silk Road Tour Operators Workshop (Kazakhstan), and, the Third International Meeting on the Silk Road (Georgia). The Fourth International Meeting on the Silk Road is scheduled to be held in Pakistan from 30 November to 02 December 1999.
- Dr. Varma also briefed the Commission on WTO's cooperation with other international agencies including ESCAP, the Indian Ocean Tourism Organization (IOTO) and the UNDP's Tumen Secretariat.

The annual session of the WTO Human Resource Development section's 1998

Practicum, held in September at the WTO Headquarters, had participants from China and Thailand.

Draft General Programme of Work for 2000 – 2001

WTO Secretary-General, Mr. Francesco Frangialli, briefly explained to the Commission the salient features of the Draft General Programme of Work of the Organization for 2000 – 2001. Mr. Frangialli mentioned the six policy considerations which were the stabilization of public contributions, the quest for a more equitable distribution of States' contributions, diversification of resources, inclusion of a new major priority in a strengthened programme of activities, reflecting the partnership concept in programme activities, and, developing new "work sites". New "work sites" including the following:

- the follow-up to the Nice Conference of June 1999 on the economic measurement of tourism and the preparation of a major international summit on employment in tourism and its measurement;
- the implementation of the recommendations of the session of the United Nations Commission on Sustainable Development, held in New York in April 1999;
- the conferences scheduled for the year 2000 on youth tourism and tourism development in small island States;
- the dissemination and implementation of the Global Code of Ethics for Tourism, submitted to the General Assembly in 1999;
- the activities undertaken by the newly established Themis Foundation in the field of quality in tourism education and training;
- the follow-up to the impact of the new information technologies on the tourism sector (an activity that will be financed in particular by the slight increase in the contribution of Affiliate Members); and
- the use of tourism promotion methods and techniques.

Tourism 2020 Vision Study for East Asia and the Pacific

The Meeting continued according to the Agenda items (Annex 2) and a summary of the updated conclusions and recommendations of the Tourism 2020 Vision study for East Asia and the Pacific is included later in this report.

Next Commission Meeting

The thirty-fourth meeting of the Commission would be held in Santiago de Chile in September 1999 within the framework of the thirteenth session of the WTO General Assembly. Based upon the unanimous decision of the Commission, the Secretariat

gratefully accepted the invitation from the Government of Japan to host the thirty-fifth meeting of the Commission in its territory. The dates and venue of the meeting would be decided at a later stage between the Government of Japan and the World Tourism Organization.

IV. Fifteenth Joint Meeting of the WTO Commission for South Asia and the WTO Commission for East Asia and the Pacific

Communication of the Chairman of the Joint Commission

After adopting the Agenda of the Meeting of the Joint Commissions (Annex 3), the Chairman of the Joint Commissions, Mr. Pradech Phayakvichien, Deputy Governor, Tourism Authority of Thailand presented his communication to the Members.

After expressing his sincere thanks and appreciation to both WTO and the Government of Macau for hosting the ESCAP/WTO Tourism Week, the Chairman followed on by stressing the impacts that the Asian financial crisis on the regional tourism industry. He mentioned that WTO's 1998 tourism figures indicated quite clearly that the two regions had been the hardest hit in the world in both arrivals and receipts. In this difficult time, it was the Chairman's opinion that there were many areas in which the Commissions could work together to address a variety of issues to enable Asia and the Pacific to compete with other regions and to increase tourist traffic to the region.

He also congratulated the Secretariat for all its preparatory work especially in the contents provided in the agendas of the individual commission meetings (General Programme of Work 1998-1999 and 2000-2001, and the Tourism 2020 Vision Study) as well as those to be presented at the joint meeting (Presentation of the Study on the Impacts of the Financial Crisis on the Asia-Pacific Tourism Industry, Global Code of Ethics for Tourism, Preparation for the World Conference on the Measurement of the Economic Impact of Tourism and the WTO Satellite Account in Nice, France and Preparation for the thirteenth session of the General Assembly of the Organization in Santiago de Chile later this year).

Communication of the Co-Chairman of the Joint Commission

The Co-Chairman of the Joint Commission, represented by H.E. the Minister for Information, Culture and Tourism of Pakistan, Mr. Mushahid Hussain Sayed, then addressed the participants and recalled the productive meeting of the Commission for South Asia which was held the previous day. He mentioned that South Asia participants were very heartened to learn that the region, notwithstanding serious economic difficulties faced by the countries whose population make up one-fifth of mankind, would remain one of the fastest growing regions in terms of tourism. The Co-Chairman felt that the history, heritage, natural attractions and culture to be found in both regions makes them very important in terms of tourism. The location of South Asia is also a potential as it acts as a bridge between the Middle East, Central Asia and East Asia.

Therefore, the Co-Chairman stressed the need for institutionalized interaction between the regions of South Asia and the East Asia which has not been there in the past. He explained that East Asia has been the engine for economic growth in Asia and that it needed to share its technology, support and expertise with the vast human resource potential of South Asia. South Asia with its sound education systems, skilled manpower, **strong middle class and people conversant with the English language** has a human resource infrastructure arguably unmatched anywhere else.

The Co-Chairman also encouraged inter-regional travel between the two region advocating for more liberal visa procedures between Asian countries. He mentioned 2001 as being the Visit Pakistan Year and invited all the Members to the Fourth International Meeting on the Silk Road which would be held in Lahore later that year.

Preliminary Remarks by the Secretary-General

The Secretary-General informed the Members that the year 1999 would be marked both by pursuit of the implementation of the strategic public-private partnership policy adopted at the twelfth session of the General Assembly at Istanbul, and by preparations for the future. The year would be punctuated by four major meetings for the Organization: its participation in the *United Nations Commission on Sustainable Development* in New York in April, the *World Conference on the Measurement of the Economic Impact of Tourism* at Nice, France in June, the *Thirteenth General Assembly* in September-October at Santiago, Chile and, lastly, the *International Forum for Parliamentarians and Local Authorities* to be held at Rio de Janeiro, Brazil in November.

The Secretary-General also mentioned in detail the work to be carried out by the Organization in the six "work-sites" already mentioned previously which would stress the Organization's interest in implementation of public-private sector partnership; economic measurement of tourism; sustainable development of tourism; presence amongst local players and national parliaments; education and quality in tourism; and, expansion and diversification of the Organization's resources.

Presentation of the Study on the Impacts of the Financial Crisis on the Asia-Pacific Tourism Industry

A detailed summary of this presentation can be found later in the report.

Global Code of Ethics for Tourism: Ideas and Guidelines

The Secretary-General provided the Members of the Joint Commission with the draft of a series of ideas and principles in view of the setting up of a global code of ethics for tourism. The aim of promoting a global code of ethics falls within the Secretariat's wish to promote responsible and sustainable tourism in the context of an open and competitive international market economy. It also keeps in line with the principles of the Universal Declaration of Human Rights and reasserts the aims set out in the Statutes of the World Tourism Organization. Furthermore, following up with the Manila Declarations of 1980 on World Tourism and of 1997 on the Social Impact of Tourism, and the Tourism Bill of Rights and the Tourist Code adopted in Sofia in 1985 under the aegis of WTO, the

Secretariat believes that the global code of ethics would comprise a set of interdependent principles on the basis of which the main actors in tourism development should regulate their conduct at the dawn of the 21st century.

Preparations for the World Conference on the Measurement of the Economic Impact of Tourism and the WTO Satellite Account (Nice, France, 15-18 June 1999)

The "World Conference on the Measurement of the Economic Impact of Tourism" represents one of the most important activities carried out by WTO in recent years and whose efforts would lead to the adoption of new methodological instruments -basically a conceptual framework for a "Tourism Satellite Account"- that will be presented and afterwards submitted, for approval, to the appropriate body in the United Nations, as happened with the conclusions of the Ottawa Conference.

The economic reality of the tourism industry is still not well known and the better measurement of the economic importance of tourism through the supply side, capital formation, value added, its contribution to Gross National Product, to employment generation and to the Balance of Payments would serve as a guiding instrument for public policies and a means to understand and to promote the importance of this sector. The goal of this Conference is to provide governments and the private sector with policy making tools that help them make informed decisions and will improve the overall image of the tourism sector.

The participants would include the representatives of WTO Member States, representatives of associate members and affiliate members of WTO and the representatives of international organizations (intergovernmental and non-governmental), private and public institutions, particularly concerned by the work of the Conference.

Preparations for the thirteenth session of the General Assembly of the Organization (Santiago de Chile, 24 September - 01 October 1999)

Finally, the Secretariat updated the Members of its Joint Commission on the preparations for the thirteenth session of the WTO General Assembly which would be held in Santiago de Chile later in the year. The General Assembly, which would be inaugurated by H.E. the President of the Republic of Chile, H.E. Mr. Eduardo Frei Ruiz-Tagle, would comprise of several meetings including the Credentials Committee; Sixty-first and sixty-second sessions of the Executive Council; Regional Commissions; meeting of the Affiliate Members - WTO Business Council; Round Tables on the Economic Dimension of Tourism and the Sustainable Tourism Development; Information on WTO's education and training activities; and, the General Assembly session.

The General Assembly is the supreme organ of the Organization composed of delegates representing Full Members and meets every two years.

Date and Place of the Sixteenth Joint Meeting of the WTO Commission for South Asia and the WTO Commission for East Asia and the Pacific

Finally, both Commissions were grateful to accept the kind invitation of the Government of Japan to host the sixteenth joint Meeting of the WTO Commission for South Asia and the WTO Commission for East Asia and the Pacific in Japan. The dates and venue of the Meeting would be decided mutually between the Government of Japan and the Secretariat.

V. WTO Tourism Statistics for 1998

Despite the Asian economic crisis, tourism arrivals in 1998 maintained the same level of growth as in 1997 (a 2.4 per cent growth rate) to reach 625 million worldwide. This flow of tourists generated US\$ 445 billion (+2.0 per cent) over 1997. However, the growth rate of tourism receipts has been fluctuating greatly over the last decade and this has been attributed mainly to the fluctuating value of the US dollar. Europe remained the most visited region of the world with over half the share of world tourist arrivals and tourism receipts, followed by the Americas. Africa, though having a low share in world tourism arrivals, was the fastest growing region in 1998 with a growth rate of 7.5 per cent more over 1997.

International tourism in 1998 was characterized mainly by the setback of vulnerability of international tourism in East Asia and the Pacific; uncertainty in the world's financial markets causing changes in holiday habits with further increases in late bookings and a tendency towards less spending by tourists while on holiday; increased marketing and promotional activities of NTAs of most regions; and, increased public:private sector cooperation.

Tourist arrivals to South Asia grew by 5 per cent which is twice the world average to reach 5 million representing a percentage of 0.8% of the world total. Tourist receipts grew by 2.8 per cent to reach US\$ 4.4 billion. South Asia was the only region of the world which recorded faster growth in the second half of the decade. With the exception of 1993, it has always experienced a greater growth rate in tourist arrivals than that for the world. This encouraging positive growth has been attributed to the strong growth of tourism to India, the sustained growth in long-haul leisure travel from traditional European source markets, as well as the recovery of the Sri Lanka market. India still remained the dominant tourism destination in the region with the Islamic Republic of Iran and Sri Lanka following with significant growths in tourism and the Maldives becoming an increasingly important destination in the region. Even though the region grew both in terms of tourist arrivals and receipts over 1997, the rates of growth have slightly decreased when compared to previous years.

East Asia and the Pacific was the only region to show a decrease in world share for tourism arrivals which continued to fall by 1.2 per cent over 1997 and tourist receipts fell by 3.8 per cent. These decreases have been due to the Asian financial crisis with the most hard-hit countries being those who depend on outbound Asian tourists, such as Australia, New Zealand, Indonesia, Japan, Philippines, Hong Kong (China) and Singapore.

Countries that showed increase in tourism activity were those who took advantage of attracting long-haul arrivals through cheaper airfares and who concentrated their marketing efforts on alternative source markets. These countries included Thailand, Republic of Korea and China.

Last year, France was again the world's most visited country with 70 million arrivals, followed by Spain (47.7 million) and the United States of America (47.1 million). So far as receipts were concerned, the United States came in first, ahead of the three European countries that attained virtually the same level, namely Italy, France and Spain.

VI. Impacts of the Financial Crisis on the Asia-Pacific Tourism Industry

Ever since the financial crisis hit Asia a few years ago, WTO has been closely monitoring its affects on the tourism industry. At a high-level WTO meeting on the economic impacts of tourism held in Kobe, Japan in November 1998, a general assessment of the impact of the Asian financial and economic crisis on tourism in the Asia-Pacific region was considered. The meeting concluded that the protracted nature of the problem had implications for tourism in the region and that a serious policy response would be necessary in order to minimise the impacts on the medium to long-term growth prospects for tourism in the region.

In this context, WTO decided to conduct a Study to carry out a more detailed assessment of the impact of the Asian financial and economic crisis on the tourism sector in the Member States and the policy responses that have been made so far at the government and private sector levels. The results of this study were presented at the Joint Meeting of the WTO Commissions for South Asia and East Asia and the Pacific and, after taking into account comments made at this meeting, a final publication titled "*Impacts of the Financial Crisis on Asia's Tourism Industry*" has been produced and is on sale.

In a survey of Asian National Tourism Organizations (NTOs) in October 1998, the WTO concluded that:

- 1998 and 1999 would be difficult years for the industry but that recovery would be seen in 1999 and strengthened into 2000;
- as a result of the Asian financial crisis, intra-regional tourism would be down by 10% in 1998 - equal to a loss of around 7 million arrivals while total arrivals would be down 5.6%;
- the airlines and hotels were hardest hit by the crisis;
- the response of the tourism sector to the crisis demonstrated how broad based and flexible the industry is compared to many other industries which have proven to be much more sensitive to the crisis;
- the tourism sectors in Thailand and the Republic of Korea were big winners from the crisis as they took advantage of the cheaper prices to increase total arrivals;

- the psychological impact of moving from strong economic prosperity to a severe reduction in buying power and slower economic growth was as damaging for the region's tourism prospects as the financial consequences themselves;
- the resumption of past regional tourism patterns could be assumed;
- the introduction of foreign exchange controls - such as those in Malaysia - and regulations to artificially maintain currency values, acted as deterrents to international tourism and were widely believed to be ineffective and damaging to a country's economy; and
- with positive signs from Latin America and Japan, a worldwide recession looked unlikely.

Given the above situation, the WTO concluded that the:

- intra-regional market was not in a financial position to engage in discretionary travel at the same rate as in the past and that the buoyant 9% annual growth assumed in this market between 1995 and 2000 has to be reduced by 83% to 1.5% per annum;
- long haul markets were diverted to the region because of the currency depreciation but not to the extent thought likely because of the rioting in Indonesia and to political problems in Malaysia. On this basis, the long haul market was expected to increase at around the same level as previously predicted between 1995 and 2000, i.e. 6.7% per annum;
- revised forecasts of arrivals for the region between 1995 and 2000 would be 2.7%, or around 50% of the rate of expansion anticipated in the WTO's original Tourism 2020 Vision; and
- the impact of these downward revisions in growth rates would reduce the 2020 forecast by 50 million arrivals to 1,550 million arrivals.

The study aimed at showing how the Asian Financial Crisis affected the region's tourism sector; the extent to which the sector was prepared for such an event; the strategies that have been used to minimise the impacts of the crisis; and the policies and strategies that could be considered in order to minimise the impacts of similar events in the future.

The study was carried out first through desk research of available data and papers on the subject; followed by a detailed questionnaire distributed to NTOs in Australia, China, India, Indonesia, Lao, Macau, Malaysia, Nepal, Pakistan, Philippines, Republic of Korea, Sri Lanka, Thailand and Vietnam; and then through in-depth interviews with NTOs and key tourism industry leaders in four selected case study countries: China, Malaysia, Philippines and Thailand.

The questionnaires sought data on various components of international tourism such as tourism demand data (arrivals, expenditure and length of stay and market origin); tourism supply data (hotels, travel operators, restaurants, training institutions); NTO profile (number of staff, number of regional offices, number of overseas offices and staff, number of contract marketing representatives, annual budgets and proportion spent on marketing); economic impact (gross expenditure in country, gross expenditure including international air fares earned by local carriers, net foreign exchange earnings, employment, GDP contribution, gross investment and proportion of gross receipts outside capital city); and an assessment of the degree to which the Asian Financial Crisis was responsible for the results.

The in-depth country studies looked at the impact of the Asian Financial Crisis on the activities of the NTOs and on specific sub-sectors including the airlines, accommodation, travel and tour operations, restaurants, car rental and other small tourism related businesses in terms of the performance of these sectors on key indicators and the extent to which these were impacted by the financial crisis; the extent to which the crisis had been anticipated; and the responses to the crisis in terms of the operational and marketing strategies adopted.

The study concluded that the Asian Financial Crisis reduced tourist arrivals in 1998 in most of the region's destination countries that had a heavy exposure to the regional market. The exceptions were Thailand and the Republic of Korea which, because of their more attractive cost structure after currency depreciation and their relative political stability, were able to significantly increase their markets - especially from long haul locations - if not their yields. Overall, total arrivals were down by 4% in 1998 on 1997 while total in country expenditure was down by 9.4%. The loss in income and markets has caused serious dislocation in the tourism sectors of all the countries surveyed. Most major tourism service providers such as the airlines and hotels have or are undergoing major restructuring in terms of ownership, management, operations and marketing orientation.

The financial crisis has had both negative and positive impacts. On the negative side, it has:

- reduced the volume and value of tourism to all countries in the region with a high exposure to the regional markets;
- induced the loss of many jobs in the industry - especially in the city hotel and airline sectors while those still employed have had to take salary and wage cuts in return for greater productivity; and
- reduced the value of many tourism related businesses - especially in the airline and hotel sectors.

On the positive side, the Asian Financial Crisis has:

- demonstrated the resilience of the tourism industry compared to other sectors of the economy;

- exposed poor management, marketing and financial practices in the operation of tourist facilities and services;
- helped to rid the industry of fly-by-night operators and other opportunists;
- brought about a major restructuring of the tourism sector in all countries seriously affected; and
- set the framework for the development of a much leaner, more aggressive and competitive tourism industry in the region.

To prevent being surprised, and to minimise the sort of value losses that were caused by the recent crisis in Asia, NTOs and larger tourism service providers such as airlines and hotel companies could adopt a "value at risk" approach. They would also need to develop and monitor leading indicators in their major markets to warn of pending collapses.

In terms of the implications of the financial crisis on the long term forecasts of arrivals in the region, the Asian financial crisis has had less of an overall impact than was first considered in the WTO reviews of January and October 1998. In this context, the October 1998 revisions to the long-term 2020 projections of arrivals to the region are probably reasonable if now somewhat conservative.

The crisis has also shown that it is not necessarily the absolute volume of tourism that is important to a country. The yield must also be considered as this ultimately determines the health of all tourism service businesses in the market place. It is clear that not enough attention has been paid to this important factor with the result that even in countries where volumes continues to increase, tourism service providers faced major losses in income and asset value because yields did not increase and in most cases declined significantly. Yet, few NTOs seriously address the question of yield improvement and even fewer actually make this a part of their strategic planning and tactical programs.

Finally, given the increased volatility in financial markets throughout the world, and the high probability that there will be more regional and country based financial crises in the future, NTOs and tourism service businesses will need to put in place contingency plans that are designed to minimise the losses, shorten the impact and bring about recovery as soon as possible.

VII. Tourism 2020 Vision – Updated Conclusions and Recommendations for the Asia-Pacific Region

After almost three years of research and analysis, the World Tourism Organization is in the process of completing its Tourism 2020 Vision which looks at what the major determinants and influences which shape tourism activity are; followed by assessment of how these forces would change over the next quarter of a century and to what consequences such changes would lead. The economic and financial crisis which started

in Thailand in May 1997 and then spread to the rest of Asia, Russia and Brazil has been the major development which has held up the finalisation of the Tourism 2020 Vision forecasts and has led to two revisions to the forecasts.

WTO's second round of research with Asian National Tourism Administrations (NTAs) indicated that political and economic unrest in Indonesia and Malaysia received unfavourable media coverage in major source markets creating apprehension for travelling to any country in the region. Marketing activities need to persuade generating markets that most countries of the region are stable and problems are highly isolated. The International Monetary Fund's "rescue packages" were not a total success with the result that investor confidence in its role as "lender of last resort" was considerably eroded. Winning back, and establishing a system to prevent a recurrence of the loss of, investor confidence is crucial as is the restoration of the Asian consumer's confidence.

WTO predicts that even if Asia pulls out of its recession over the next two years, growth of 1 or 2 percent will not seem like recovery to people used to 8% annual growth, so resumption of consumer spending patterns (including on tourism and other forms of recreation) are unlikely in the short term. Furthermore, the intraregional tourist in East Asia and the Pacific (EAP) is either not in the financial position to engage in discretionary travel or chooses not to do so, opting instead to save and/or rebuild his economic status. In consequence, the buoyant 9% a year growth originally anticipated for EAP intraregional travel between 1995 - 2000 has been revised down to just 1.5% a year. This represents a loss to other regions around the world of almost 11 million arrivals. South Asia's share of this is small, at just 0.2 million arrivals: EAP region generated arrivals in South Asia in 2000 will be 0.6 million, as against 0.8 million in the original **Tourism 2020 Vision** forecast.

For long haul travel, European and North American tourists tend towards shorter duration and haul trips, travel out-of-season, and lower daily expenditure which involves increased price scrutiny. The long haul (interregional) tourist to EAP is being diverted away from other destination regions, attracted by the value-for-money possible through the currency devaluation's, but not to the extent thought likely at the beginning of 1998 because of the negative publicity of Indonesia and Malaysia. Nonetheless, there will be good rates of growth with long haul tourism into the EAP region likely to grow by 6.8% a year between 1995-2000, a similar level to that originally forecast but nearly two percentage points down on the January 1998 forecasts. Within the long haul market, European travel into the region will show 7.2% a year growth and the Americas 6% a year growth between 1995 and 2000.

The diversionary factor of interregional tourists to EAP from other regions would cost South Asia around 0.18 million arrivals in 2000. In total, the Asian crisis will cost South Asia around 0.38 million arrivals in the year 2000, though account should be taken of the increase in intraregional tourist arrivals as a result of would-be South Asian tourists travelling to EAP who switch back to an intraregional destination.

Combining intraregional and interregional tourist flows, the revised forecasts for the period 1995-2000 for the EAP region is an average annual rise of 2.7% a year, half the rate of expansion anticipated in January 1998 and a full five percentage points a year down on the original Tourism 2020 Vision project forecast.

South Asia's forecast growth rate in inbound arrivals will be consistently above the global average throughout the 1995 - 2020 forecast period. Taking the full period, while the average annual growth in worldwide arrivals will be 4.2 percent, the corresponding rate of increase for the South Asia region will be 6.2 percent. Between 1995 - 2000, South Asia will experience a slightly reduced but still strong 5.5 percent growth - placing it third among WTO's six regions in terms of growth rate, a position it holds in the two decades after 2000 albeit with higher annual growth rates of 6.8 percent (2000 - 2010) and 5.9 percent (2010 - 2020).

By 2020, the South Asia region will attract close to 19 million arrivals, almost five times the level of 1995. While its share of global arrivals will still be the lowest of all WTO's regions, at 1.2 percent, this represents a near doubling of share over the forecast period. South Asia will be successful in attracting long haul, interregional tourists - average annual growth of 6.7 percent between 1995 and 2020. The growth rate in intraregional arrivals will be lower than for interregional arrivals at 4.0 percent a year. Africa, the Americas and Europe will be the fastest growing generating regions for South Asia, though EAP will show strong growth after its countries achieve economic recovery over the course of the next decade.

While the EAP region's 1995-2000 inbound growth rate - 2.7 percent a year - will be the lowest of the six WTO regions, which will be headed by the Middle East and Africa both at in excess of 6 percent a year, for the remainder of the period (i.e. 2000-2020), it will be the fastest growing region and will achieve between the 1995-2020 period an average annual growth of almost 6.6 percent a year, more than one-and-a-half times the global rate of growth, and second (marginally) to the Middle East.

Africa and Europe will receive the largest growth rates in generating tourist arrivals for the EAP region between 1995-2020, largely on account of strong growth from the Southern Africa and Central/Eastern Europe sub-regions respectively.

The short-term prospects for outbound tourism by the people of the EAP region are poor. Outbound flows to long haul destinations fell sharply in 1998 and early 1999 with only modest recovery anticipated in the next two years. Taking the 1995-2000 period as a whole, there will be a slight fall in EAP - interregional tourism (i.e. less by 0.3 percent a year as against the 7.75 percent a year growth originally forecast). This represents a loss to other regions around the world of almost 11 million arrivals in 2000.

Meanwhile, WTO forecasts that there will be just under 17 million outbound tourist arrivals generated from the South Asia region by 2020 i.e. an average annual rise of 5.5 percent - above the worldwide average of 4.2 percent - with consistent growth throughout the period. Long haul outbound tourism will grow at a faster rate than intraregional arrivals over the period i.e. 5.9 percent compared with 4 percent. By 2020,

83 percent of all outbound arrivals generated by residents of South Asian countries will be in destinations outside the region.

The Tourism 2020 Vision study forecasts that there will be over 405 million outbound tourist arrivals generated from the EAP region in 2020 i.e. an average annual rise of approximately 6.5 percent - the highest outbound growth rate of all the WTO regions, despite negligible growth between 1995 -2000. In respect of arrivals received, the EAP region will be responsible for over a quarter of all arrivals generated by 2020. The Northeast Asia sub-region will remain the largest generating sub-region accounting for over 7.2 percent of total arrivals generated by residents of EAP countries in 2020.

China will be the leading inbound destination, both for its ability to attract long haul discretionary and business tourists, as well as the huge volumes of ethnic Chinese travellers. Thailand, Indonesia, Malaysia, Australia, Vietnam and the Philippines will attract discretionary tourists in the main - both intraregional and long haul. The principal tourist generating countries in the EAP region will be China, Japan, Republic of Korea and Australia.

India will continue to dominate the South Asia region recording an average annual growth rate in arrivals over the 1995 - 2020 period of 5.9 percent, slightly below the regional average of 6.2 percent. Countries which will record above average annual growth over the forecast period are: Iran (8.4 percent), particularly from the Middle East and CIS countries; Nepal (7 percent); and Maldives (6.2 percent). India will also be the main South Asian region generator of outbound tourist arrivals i.e. 6.7 million in 2020, at an average annual growth from 1995 of 5.7 percent.

In a period of global economic slowdown, the short-term need is to generate sufficient demand to allow the tourism sector, and individual businesses, to maintain growth momentum, even if at a reduced rate. Faced with strong price pressures from the neighbouring competing region to the east, South Asian countries can focus their marketing on the (relative) stability of their countries, and the diversity and quality of their product offerings.

For the mid-long term, tourism policy makers should closely examine the series of megatrends identified in the Tourism 2020 Vision study with the view to identifying opportunities and strategies to maximise the benefits they can obtain through exploitation of these megatrends.

In EAP, on the operational side and in the short term, WTO feels that sufficient demand should be generated by one means or another to allow the tourism sector, and individual businesses, to "tick over". Price cutting is one approach; focused marketing is another i.e. concentrating on the most rewarding markets in the short term, that is domestic and long haul but not intraregional markets.

There was general recognition that there was a need to look to their marketing response to mitigate the intraregional shortfall in arrivals and to maximise their realisation of the interregional potential. Over half the NTA respondents reported an increase in marketing budgetary allocation to respond to the crisis and many are concentrating their

resources on the (short term) more lucrative long haul origin markets while others are upping their long haul market expenditure without decreasing their intraregional marketing activity.

For the long term, from the viewpoint of investment in the tourism sector, the underlying strength of the EAP countries both to attract and generate tourism remains especially in the long-term. Investing in infrastructure facilities and equipment for tourism will be needed for the region within limits of growth between 5 and 10% a year from the early-mid (say 2003) to long terms. Many of these investment decisions have to be made now!

Finally, WTO forecasts that the next year or so will remain generally weak (at best moderate) years in tourism in the EAP region. The Millennium will witness the start of the recovery of the tourism sector, but much recovery will not become fully-fledged until 2002 and beyond. From then in, however, strong growth rates in international tourism will be resumed, with the countries of the EAP region leading the way and South Asia producing a consistent, above global average pattern of growth in its tourism sector even if it is not so dynamic as some other regions.

VIII. Challenges for Human Resource Development in Tourism in the Asia-Pacific Region in the New Millennium

Also within the framework of the ESCAP/WTO Tourism Week, ESCAP and WTO jointly organized a High Level Technical Seminar on Challenges for Human Resource Development in Tourism in the Asia-Pacific Region in the New Millennium on 12-13 May 1999. The seminar drew approximately 60 to 70 participants, including public policy makers with a tourism portfolio and educators representing universities and technical schools and institutes. The first session provided welcoming remarks and broad perspectives of human resource development (HRD) concerns from the Under Secretary-General of the UN and Executive Secretary of ESCAP; the 2nd Secretary and Deputy Permanent Representative to ESCAP, Japan Embassy in Thailand; and the Secretary-General of the WTO. ESCAP also made a statement on the network of Asia-Pacific Education and Training Institutes in Tourism (APETIT) and the WTO Chief for Human Resource Development presented WTO's work on TEDQUAL (Tourism Education Quality) and the GTAT (Graduate Tourism Aptitude Test). The keynote address by the WTO consultant addressed human resource development trends and requirements to meet the future needs of a dynamic and rapidly changing global travel industry, including observations on the impact of the current Asia economic crisis which has had profound influence in motivating paradigm shifts in tourism employment and skills requirements.

This was followed by a session on presentations on human resource development in the tourism sector from member countries including India, China, Fiji (two papers), Islamic Republic of Iran, Philippines, Sri Lanka, and Thailand (two papers). These presentations offered useful case studies of an individual country or institution's approach to human resource development for the tourism sector, insights of the problems or impediments faced (mostly resource constraints) and often creative ways to provide an adequate (or inadequate) response for meeting the education and training needs of the

tourist industry and specific national goals. The consultant provided a summary of the common themes drawn from these presentations and his own analysis of the problems and challenges faced by tourism/hospitality educators. The seminar concluded with the vetting of the draft *Macau Declaration on Human Resource Development in the Tourism Sector in the Asia and Pacific Region*. With the addition of two new clauses and minor modifications for language, The Macau Declaration was adopted by unanimous acclaim.

The main summary of problems and challenges in human resource development in Asia and the Pacific may be briefly categorised under the four "R's" as follows:

A. Recognition

Tourism education does not often receive the recognition nor respect it deserves considering its importance in the economic and employment structure of a country, province, or community. While tourism education, training, and research may well be included in a country's strategic tourism planning/plan, these are seldom a priority in the general budget allocation for education within a ministry of education's strategic plan. This low prioritisation partially reflects the industry's ongoing problem with its image as providing less desirable employment conditions, such as low pay, poor working conditions, inconsistent (seasonal) work, and irregular hours.

B. Resources: Budgets and People

- *Teachers* - virtually every country presentation specified the shortage of qualified teachers as a basic problem and a priority to be resolved.
- *Facilities* - practice facilities for catering and hotel training are not a universal problem, but adequate facilities are lacking in many developing countries where tourism is still a young industry.
- *Equipment* - the need for equipment may range from cooking equipment to computers. The problem is one of technical adequacy, quantity, and in the case of computers, rapid obsolescence and need for frequent updating and replacement depending on the level of technology training offered to students.
- *Materials* - the vast majority of textbooks, articles, and training material are written by authors with a western slant. These seldom consider the cultural or religious beliefs outside of the country of the authors nor are they available in other languages, excepting for popular works which have sold their translation rights to foreign publishers. This problem is compounded by the difficulties noted by several presenters regarding the tourism workforce's lack of skill with non-native languages, including English.
- *Standards* - standards as a resource for education and training are typically established by professions or volunteer associations reflecting the highest ideals or criteria of the profession. While these standards are well established for fields such as medicine, law, engineering, and accountancy, they do not exist (for any defensible debate) for tourism-related professions. Instead, some professional associations offer certification

as an alternative, but the problem is that there is little, if any, universal recognition of such certification.

C. Reality Checks

Professional education exists to validate and to serve the needs of particular professions. As such, tourism education and training must mirror (and lead whenever possible) the practices of the professions they serve. Given the service nature of tourism-related occupations, practice and experience are essential to complete the more theoretical aspect of a tourism or hospitality curriculum. One of the common needs of all tourism/hospitality programs is finding an adequate number of openings for internships or practicums at non-entry levels for management students; this is especially true in the case of the search for international opportunities for exceptional students.

D. Results

The output of education and training institutions is measured in terms of the quality of their graduates and the learning acquired. If the graduate is unable to analyse problems or apply critical thinking for resolving business problems, communicate effectively verbally and in written form, manage people, etc., the investment in education and training is wasted. A universal problem faced by all institutions is the development of outcome measures which will match input resources and the production of talent that will serve the needs and aspirations of graduates as well as be enthusiastically received by employers.

RECOMMENDATIONS

The main recommendations to the foregoing problems/issues that the Secretariat puts before the Members of the Commissions are as follows:

A. Recognition

The work of the WTO to secure broad international agreement on the measurement of tourism's economic impact through a reliable system known as the Tourism Satellite Account can help the tourism education and training sector gain a measure of recognition by providing countries with hard facts and figures on the size and scope of investment, revenue, and direct and indirect benefits, including employment generated by tourism.

Other international organizations - governmental and non-governmental - such as ESCAP, UNESCO, PATA, WTTC, etc., can assist by making seed funds available for human resource development within their respective programs of work or charters.

Education and training institutions and the private sector can assist by elevating the professional standards of tourism-related occupations and by searching for cutting edge approaches to training through basic and applied human resource development research. In addition, better manpower forecasting methods need to be developed and utilised in

order to improve planning to accommodate the specific demographic and workforce profiles of countries and destinations.

B. Resources

Cooperation is a fundamental key to resource-based problems. Human resource development is generally resource-intensive and takes many years to yield its full benefits. In contrast, the needs of the industry are often urgent and require immediate attention. Cooperation across institutions, sectors (public and private), and borders is an essential strategy that will enable participants to focus their efforts on their own areas of competitive advantage, without having to spread resources too thinly in order to cover all aspects of tourism education and training. Areas of cooperation include the sharing of information on teacher development and executive development, facilities design, and alternative approaches such as outsourcing, materials and standards development, etc.

The Macau Declaration itself advocates the support of governments, NGOs, the private sector, and institutions such as the World Bank to assist with meeting resource needs for human resource development in the tourism sector.

The WTO Network of International Education and Training Centers is engaged in developing, refining and implementing programmes such as TEDQUAL and GTAT which assist in standards setting for tourism.

The Thailand Human Resource Development report submitted by the Tourism Authority of Thailand (TAT) suggests an intervention approach by establishing central agencies to coordinate government human resource development policies and education and training institutions, and to bridge the work of education and training institutions and the needs of employers. A human resource development committee works with an internal network of education and training centers in identifying a number of areas for research and information, including curriculum development, the labour needs of the hotel and tourism sector, library resources, translation of material, etc.

C. Reality Checks

A significant benefit of closer cooperation between instructional institutions and the private sector will be an increase in the kinds of intellectual and experiential exchange between the two that will improve the workplace competence of students. Faculty development is a crucial issue, particularly with respect to an industry that is rapidly growing and changing. Greater faculty communication and involvement with their colleagues in industry can serve both as a means of development (keeping current on technology applications, management techniques, sector trends, etc.); at the same time, this development will directly improve the quality of instruction provided to the students. Students will be better prepared for internships and practicums, and hopefully will develop better skills for their eventual roles in the workforce. In addition, such cooperation among schools and industry will provide the kind of data and experiences for faculty to develop better theoretical models of the industry. Students need to grapple with larger theoretical understandings of the tourism industry in order to take full advantage of the kinds of skills they acquire in pursuing a degree in higher education.

D. Results

Many of the issues raised during the presentations were closely related to the issue of assessment. How do we determine the quality of our human resource development strategies? This issue speaks directly to the problem of the lack of accreditation that many tourism and hospitality schools face. In turn, accreditation is directly related to issues of curriculum quality and standards. Clearly, there is a need to collectively answer some basic questions regarding tourism curriculum. Do we need to have standards for all aspects of the curriculum? To what extent can standards be based in outcomes or performance measures? Simply assessing students using a standardized measure that may or may not be appropriate from a cultural or practical perspective is not the answer. Customization of general standards such as TEDQUAL may be one possible solution.

The issue of assessment is also relevant to another imperative recently raised by the U.N. Secretary-General Kofi Annan, who cautioned that the integration of technology into the industry must be monitored for its effects on the quality of jobs and the equitable distribution of work and benefits. The tourism industry, as has been repeatedly noted, suffers from a negative image as a low-skilled, poorly paid line of employment. As we develop new curricula and instructional methods to keep pace with the needs of the industry, it is important that we not exacerbate this image by structuring the industry towards the benefit of only a few, technologically privileged elite. Our means of assessment must therefore account for a broader, more democratic notion of competence, in which the preparation and success of individual workers is commensurate with that of job groups and work units.

A more detailed report on the seminar proceedings is currently being prepared. The Macau Declaration on Human Resource Development in Tourism in the Asia and the Pacific Region is enclosed as Annex 4 in this report.

WTO COMMISSION FOR SOUTH ASIA

Thirty-seventh Meeting

Macau, 11 May 1999

Provisional Agenda

1. Adoption of the agenda
2. Communication of the Chairman of the Commission
3. Presentation of the statistical monograph of the region
4. Application to the region of the General Programme of Work for 1998 - 1999
5. Draft General Programme of Work for 2000 - 2001
6. Presentation of the updated conclusions and recommendations of the Tourism 2020 Vision study for South Asia
7. Date and place of the thirty-eighth meeting of the Commission

WTO COMMISSION FOR EAST ASIA AND THE PACIFIC

Thirty-third Meeting

Macau, 11 May 1999

Provisional Agenda

1. Adoption of the agenda
2. Communication of the Chairman of the Commission
3. Presentation of the statistical monograph of the region
4. Application to the region of the General Programme of Work for 1998 - 1999
5. Draft General Programme of Work for 2000 - 2001
6. Presentation of the updated conclusions and recommendations of the Tourism 2020 Vision study for East Asia and the Pacific
7. Date and place of the thirty-fourth meeting of the Commission

WTO COMMISSION FOR SOUTH ASIA**WTO COMMISSION FOR EAST ASIA AND THE PACIFIC**

Fifteenth Joint Meeting

Macau, 12 May 1999

Provisional Agenda

1. Adoption of the agenda
2. Communication of the Chairman of the joint meeting
3. Communication of the Co-Chairman of the joint meeting
4. Preliminary Remarks by the Secretary-General
5. Presentation of the Study on the Impacts of the Financial Crisis on the Asia-Pacific Tourism Industry
6. Global Code of Ethics for Tourism: Ideas and Guidelines
7. Preparation for the World Conference on the Measurement of the Economic Impact of Tourism and the WTO Satellite Account (Nice, France, 15-18 June 1999)
8. Preparation for the thirteenth session of the General Assembly of the Organization (Santiago de Chile, 24 September - 01 October 1999)
9. Date and place of the sixteenth joint meeting of the two Commissions

**1999 MACAU DECLARATION ON HUMAN RESOURCE DEVELOPMENT
IN THE TOURISM SECTOR IN THE
ASIA AND PACIFIC REGION**

We, the participants in the ESCAP/WTO Seminar on Challenges for Human Resource Development in Tourism in the Asia-Pacific Region in the New Millennium held at Macau on 12 and 13 May 1999,

Recognizing the crucial role of human resource development in sustaining the development of tourism,

Appreciating that the United Nations Economic and Social Commission for Asia and the Pacific (ESCAP) and the World Tourism Organization (WTO) have jointly organized the above seminar to assess the current status of human resources in the region, examine the problems ahead, and consider policies and strategies to ensure that initiatives to develop human resources will meet the challenges of tourism in a global economy;

Recognizing that changes in labour demand and supply will accelerate the need for a regional and global tourism workforce that is well-educated and trained to meet industry-wide standards which transcend national borders, and necessitate regional and international cooperative efforts to ensure that education and training will prepare workers for new trends in tourism technology, distribution, management, and tourism administration;

Realizing that the seminar participants have explored the issues and the policies related to human resource development and identified the initiatives necessary to encourage action to assist the regional economy to overcome the current economic crisis and move the region towards a leadership position in global tourism;

Recalling that the Economic and Social Commission for Asia and the Pacific, at its fifty-fifth session held in Bangkok in April 1999, adopted a Plan of Action for Sustainable Tourism Development in the Asian and Pacific Region, in which human resource development in the tourism sector is an integral part of the plan;

Recognizing the role played by ESCAP in the establishment of the Network of Asia-Pacific Education and Training Institutes in Tourism (APETIT) in Tehran in 1997 which is an effective mechanism to promote regional cooperation in tourism education and training;

Noting the significant role being played by five regional focal points of APETIT in promoting cooperation in tourism education and training in respective areas of their responsibilities;

1. **Affirm** the importance of investing in human resources by means of development strategies that can contribute to the economic prosperity of the Asia-Pacific region and promote the continued growth of the tourism industry;
2. **Acknowledge** that the rapid changes in the structure and nature of labour in the tourism industry require new standards for a regional and global workforce with transferable skills shaped by the demands of a changing travel market, technological innovation and greater environmental consciousness to achieve high standards of quality;
3. **Reaffirm** the critical role that education and training institutes and government and public policy play in the development of human resources;
4. **Request** the governments, education and training institutes and the private sector to further strengthen their cooperation to achieve high quality standards in the work force to ensure that Asia and the Pacific has a leadership role in global tourism in the twenty-first century;

5. **Encourage** initiatives to develop regional models of education and training appropriate to various countries, diverse cultures, differing levels of tourism development, that are broad-based to prepare human resources for all major segments of the industry;
6. **Request** governments to further strengthen cooperation with ESCAP, WTO and other international organizations involved in tourism to develop regional initiatives designed to encourage greater cooperation and collaboration in meeting the human resources challenges in the future;
7. **Endorse** the efforts of WTO to initiate quality standards in tourism education and training including the General Tourism Aptitude Test (GTAT) and the Tourism Education Quality (TEDQUAL) methodology to evaluate and certify performance standards among educational institutions;
8. **Support** the continues efforts of ESCAP in assisting countries in capacity building to address the issue of human resource development;
9. **Appreciate** the increasing cooperation which is developing between WTO and ESCAP covering a wide range of areas in tourism with special emphasis on human resource development;
10. **Recommend** further regional development of tourism education and training programmes through APETIT to ensure a work force in Asia and the Pacific that will be responsive to the future needs of the industry;
11. **Urge** the members of APETIT to mobilize both collectively and individually resources from the tourism industry; trade and industry associations; NGOs; business enterprises related to tourism such as airlines, hotel chains, credit card companies, travel related service companies, food and equipment companies, etc., and to promote greater cooperation in tourism education and training by their active participation in the Network;

12. **Request** the governments of ESCAP and WTO member countries and areas as well as other international organizations and non-governmental bodies involved with tourism including PATA to support and facilitate the activities of APETIT;
13. **Also Request** the governments, private sector, and educational institutions to conduct research with a view to improving the quality and standard of human resources in the tourism industry;
14. **Urge** the employers of tourism graduates to acknowledge and utilise the high level of skills of these graduates and to continue to develop their human resources by contributing to the cost of certain specialised training services and by providing structured, challenging and meaningful career paths within their organizations; and
15. **Request** the Secretary-General of the World Tourism Organization to submit this Declaration to the next session of its General Assembly, through its Executive Council, and the Executive Secretary of ESCAP to submit to the Committee on Transport, Communications, Tourism and Infrastructure Development, with a view not only to raising the stature of the Declaration but also to drawing the attention of multi-lateral donor agencies, led by the World Bank to consider investment in physical infrastructure and programmes of tourism and hospitality education and training institutes.

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