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REPORT OF THE REGIONAL DIRECTOR FOR ASIA AND THE PACIFIC

**Implementation of the Programme of Work in Asia and the Pacific 2022-2023
(Regional and Technical Activities)**

REPORT OF THE REGIONAL DIRECTOR FOR ASIA AND THE PACIFIC

This report summarises UNWTO's activities in Asia and the Pacific region from the latter part of June 2022 to May 2023. It spans a period during which the effect of the pandemic was waning increasingly, thus making it possible for most countries around the world to open their borders to international tourism with very minimal or zero restrictions.

The report covers an overview of international tourism trends and outlook in the region; main challenges and opportunities impacting on its tourism sector, UNWTO's major initiatives and activities; as well as political visits, bilateral relationships and their outcomes.

I. Overview of international trends and outlook in Asia-Pacific

After two very difficult years for world tourism, resulting from the unprecedented impact of the pandemic, followed by a robust recovery in 2022 during which over 960 million tourists (representing 66% of pre-pandemic levels) travelled around the world, international tourist arrivals are expected to reach 80% to 95% of 2019 numbers globally in 2023. This is corroborated by the fact that according to the latest data of UNWTO's World Tourism Barometer, international arrivals reached 80% of pre-pandemic levels in the first quarter of 2023 with an estimated 235 million tourists crossing international borders, equivalent to more than double the same period of 2022.

This notable increase in international tourist numbers is led by the Middle East – the only region to have exceeded 2019 arrivals by +15%, and to have fully recovered pre-pandemic figures during the 1st three months of 2023. The next strong performer is Europe with 90% pre-pandemic recovery followed by Africa and the Americas reaching 88% and 85% respectively. In the case of Asia and the Pacific, even though it has recuperated only 54% of its tourist figures of 2019, it has recovered more than half of the 23% of its pre-pandemic numbers at the end of 2022. And it is set to accelerate even more, now that most destinations, particularly China, have re-opened.

The appreciable positive trend in global arrivals is reflected in the international tourism receipts which climbed to 65% of pre-pandemic levels in 2022. USD 1 trillion was recorded for the first time since 2019, with several destinations recovering or exceeding pre-crisis receipts. However, while Europe registered 87%, Africa 75%, Middle East 70% and Americas 68%, Asia and the Pacific earned less than 30% owing to prolonged border shutdowns to non-essential travel.

II. Main Opportunities for the Growth of the Tourism Sector in the Region

The **recent reopening of several Asian source markets and destinations** including the Republic of Korea, Japan, and China, is expected to consolidate the recovery in 2023. And as the world's largest outbound market in 2019, China's recent lifting of its COVID-19 related travel restrictions is an added boost to the hope of a very robust recovery of the tourism sector. In the short term, Asian destinations will particularly benefit from the resumption of travel from China as it constitutes the main source market for many countries in Asia and the Pacific region.

While international travel restrictions were in force, many countries recalibrated their tourism strategy to enhance the domestic tourism market. For example, destinations in Vietnam that had previously been popular among international tourists, such as Hoi An, turned themselves into domestic tourism hotspots by, for example, adding more local dishes to their menus. Tourism authorities launched a programme titled "Vietnamese People Travel in Vietnam" to stimulate domestic tourism.

In terms of the **responses to the survey UNWTO** carried out among its members on the General Programme of Work for 2024-2025, the main opportunities for tourism development in the immediate future which the region singled out, include destination marketing; digitalization and innovation; development of tourism infrastructures, facilities, products or attractions; domestic and community-based tourism / short haul travel; policy and strategy; and product diversification.

III. Main Challenges to Tourism Recovery in the Region

The challenging economic environment including high inflation and interest rates, the spike in oil and food prices resulting in higher transport and accommodation costs, translating in turn into lower purchasing power and weaker consumer confidence, as well as the fears of a global recession, are the main factors that could slacken the pace of the recovery of tourism.

The tourism sector also faces **labour shortages**, as reflected in OECD's 2023 report on the Economic Outlook for Southeast Asia, China and India. According to this report, "Workers in the tourism sector tend to work longer hours and earn lower wages than average, without opportunities for upward mobility, which makes the jobs unattractive. This poses a major problem as the tourism sector recovers, especially now that China has reopened its borders".

Massive business closures and layoffs during the pandemic have resulted in workers being redeployed in other sectors. This mass exodus of workers away from tourism occupations have exacerbated skills shortages and will further threaten the human and resilience capacities of the industry in the long run.

With reference to **responses to the survey UNWTO carried out** among its members on the General Programme of Work for 2024-2025, the Asia-Pacific region identified several challenges in the short term for its tourism development. These include lack of expertise / human resources, climate change, economic recession and inflation, global crisis, post COVID-19 safety and security and measurement, strong regional competition, destination Management / Marketing, and Lack of financial resources / investment.

IV. UNWTO's Major Initiatives, Services, Projects and Activities

1. UNWTO Regional Workshop on Measuring Tourism in Asia and the Pacific (Kathmandu, Nepal, 15-17 March 2023)

UNWTO organised the *Workshop on Measuring Tourism in Asia and the Pacific* jointly with the Ministry of Culture, Tourism and Civil Aviation of Nepal and the Nepal Tourism Board in Kathmandu with the generous support of the Ministry of Culture, Sports and Tourism of the Republic of Korea.

The aim of the workshop was to equip participants – particularly tourism statisticians with the necessary capacities and skills to better measure tourism and produce high-quality tourism statistics based on the internationally agreed standards.

The event began with a high-level discussion on the theme of "Measuring the Sustainability of Tourism for people, planet and prosperity". In accordance with the main objective, it was followed by training on tourism statistics; measuring the economic impact of tourism; and measuring the sustainability of tourism. This was intended to enable the tourism and statistical communities to better understand basic tourism statistics, the main variables to be collected in accordance with the UN statistical standard "International Recommendations for Tourism Statistics 2008", as well as examples of best practices in countries. Approximately 200 participants from the region took part in the workshop.

2. 7th UNWTO World Forum on Gastronomy Tourism (Nara, Japan, 12-15 December 2022)

The 7th UNWTO World Forum on Gastronomy Tourism was organised by the World Tourism Organization in collaboration with its Affiliate Member, the Basque Culinary Center. Since its inauguration in San Sebastian (Spain) in 2015, this event has served as a meeting space for experts in tourism and gastronomy to promote the exchange of experiences and ideas between professionals and, ultimately, allow the dissemination of knowledge and the application of good practices.

This 7th edition was held under the theme "Gastronomy Tourism for People and Planet: Innovate, Empower and Preserve", with the aim of highlighting the importance of gastronomy tourism as a lever to promote women empowerment and young talent; environmental sustainability; a channel for cultural exchange; and the protection of the authenticity and identity of tourism destinations. Likewise, the Forum spotlighted the role of gastronomy tourism as a generator of value in destinations through the

offer of local products and the recognition of the work done by producers and other members of the value chain. In this edition, UNWTO also launched the Global Roadmap for food waste reduction in tourism. The Forum attracted over 550 onsite participants from 30 countries and about 1,200 online attendees.

3. 16th UNWTO/PATA Forum on Tourism Trends and Outlook (Hybrid, Guilin, China, 6 December 2022)

The 16th UNWTO/PATA Forum on Tourism Trends and Outlook themed *Transforming Tourism: Understanding Trends and Capitalising on Change* was held in a hybrid format.

Discussions focused on understanding trends to shape tourism transformation; tourism destination resilience; re-imagining tourism in uncertain times; technology transformation in the global tourism industry.

It drew the participation of representatives of National Tourism Administrations, National Tourism Organizations, Destination Management Organizations, industry practitioners and the academia from the Asia and the Pacific region.

4. 14th IFTM-UNWTO Training Programme (virtual, December 5-7, 2022)

The 14th IFTM-UNWTO Training Programme themed *Capacity Building for Sustainable Tourism through the Meetings Industry* was organised jointly by the Global Centre of Tourism Education and Training of the Macao Institute for Tourism Studies (IFTM) and the World Tourism Organization (UNWTO).

The main objective of the training was to enhance participants' knowledge and skills in organising and bidding for events in their respective destinations. The event also emphasized the utilisation of the meetings industry as part of a broader destination tourism strategy that aligns with the United Nations Sustainable Development Goals (SDGs).

Thirty-seven participants took part in the programme from Bangladesh, Brunei, Democratic People's Republic of Korea, Fiji, Iran, Lao PDR, Malaysia, Maldives, Myanmar, Philippines, Sri Lanka, and Macao, China.

5. World Tourism Conference 2022 (Kota Kinabalu, Malaysia, 28-30 November 2022)

The 6th edition of the World Tourism Conference (WTC) 2022 was jointly organised by the Ministry of Tourism, Arts and Culture (MOTAC) and the World Tourism Organization (UNWTO) in Kota Kinabalu, Sabah, Malaysia from 28 – 30 November 2022.

Against the backdrop of the recovery of tourism from the unprecedented impact of the global pandemic, the theme of the conference – *Tourism Futures Reimagined* was aimed at generating discussions on innovation, trends, challenges and practical strategies that can drive tourism's recovery and resilience in a post-pandemic world.

It drew the participation of over 1,000 delegates from 60 countries including high-level policy-makers, specialists and experts from the public and private sectors, academicians and media practitioners.

6. 16th UNWTO Asia/Pacific Executive Training Programme on Tourism Policy and Strategy (Seoul, Republic of Korea, 7-11 November 2022)

The 16th Asia/Pacific Executive Training Programme on Tourism Policy and Strategy (ETP) was organised by the UNWTO in collaboration with the Ministry of Culture, Sports and Tourism of the Republic of Korea and the generous support of the latter.

The training programme was held under the theme of *Investment in Sustainable Tourism*, which aligns with contemporary issues prevailing at the regional and global levels.

As the first in-person Executive Training Programme held after the COVID-19 pandemic, it brought together 19 high-level government officials across the Asia and the Pacific region and 2 guest delegates from Europe and South America to share knowledge and best practices on the formulation and implementation of tourism policy and strategy on sustainable tourism investment. It also provided a platform for participants to network and engage with counterparts in the region.

7. World Tourism Day 2022 (Bali, Indonesia, 27 September 2022)

The official 42nd World Tourism Day celebration was hosted by the Government of Indonesia in Bali on 27 September 2022 and was themed *Rethinking Tourism*. Against the backdrop of the ongoing recovery of the sector from a post-pandemic world and the worst crisis in its history, the aim of the choice of this theme was to inspire debate around reimagining tourism for development, including through education and jobs, while reassessing how our sector can address longstanding challenges in relation to tourism's impact on natural resources and ecosystems and opportunities to grow more sustainably. People were placed at the centre of key discussions about where tourism is going, where tourists want to go, and how they get to their destination.

World Tourism Day 2022 also provided a platform for inclusive dialogue to identify solutions to realise tourism's potential as a vehicle for recovery and transformation. It brought together stakeholders from every part of tourism's uniquely broad value chain - from political and private sector leaders to community representatives, and youth and indigenous ambassadors.

Ministers, Deputy Ministers and other high-level representatives from Indonesia, Bahrain, the Republic of Korea, Fiji, Cambodia, Japan, Spain, Germany, Saudi Arabia, Canada and the United States of America came together to commemorate the World Tourism Day celebrations.

UNWTO launched its first World Tourism Day Report – the first in an annual series of updates and analysis of the Organization's work guiding the sector in its recovery endeavours. This inaugural report is titled "Rethinking Tourism: From Crisis to Transformation", reflecting the timely relevance of the 2022 theme as well as the unprecedented crisis that hit the sector in 2020.

8. UNWTO and the G20 Indonesian Presidency

Indonesia's presidency of the G20 in 2022, coincided with its nomination as host of World Tourism Day 2022. The Government of Indonesia thus joined hands with UNWTO as its key institutional partner – particularly for the G20 Tourism Ministerial Meeting in Bali on 27 September 2022, under the theme of '*Recover Together, Recover Stronger*.'

UNWTO's main contribution to this partnership was the formulation of the *G20 Bali Guidelines for Strengthening Communities and MSMEs as Tourism Transformation Agents – A People-centred Recovery*, which was prepared in coordination and consultation with the G20 Tourism Working Group. The Guidelines provide guidance for key policies that can create resilient and sustainable MSMEs and communities spanning five key pillars including Human Capital; Innovation, digitalization and the creative economy; Women and youth empowerment; Climate action, biodiversity conservation, and circularity, and Policy, governance and investment. They are also intended to provide a framework to advance the transformation of the tourism sector through policy action on MSMEs and communities.

MSMEs are the backbone of the tourism sector, accounting for an estimated 80% of all tourism businesses worldwide and reaching as much as 98% in some G20 economies, as concluded in the survey conducted for the purpose of these guidelines.

9. Tourism Expo Japan (TEJ) 2022 (Tokyo, Japan, 22-25 September 2022)

The Tourism Expo Japan 2022 (TEJ) took place in Tokyo and was organised by three prominent UNWTO Affiliate Members, i.e. Japan Association of Travel Agents (JATA), Japan National Tourism Organization (JNTO) and Japan Travel and Tourism Association (JTTA).

Within the framework of the Tourism Expo, UNWTO partnered with Japan to co-organise the 5th Ministerial Roundtable at a time when Japan had started to open its borders to international tourists with much anticipation for the recovery of tourism in the region.

The Ministerial Roundtable was a great opportunity to promote UNWTO's leading role in the process of adapting the tourism sector to the new challenges deriving from the pandemic and to deliver our institutional messages on the most important topics on UNWTO's recovery agenda.

UNWTO's Affiliate Members' Department capitalised on the occasion and on the presence of all the 21 Japanese Affiliate Members to organise a promotional session aimed to attract more members in order to increase UNWTO's presence in the region. This special gathering also served as a unique platform for knowledge sharing and strengthening the members' relations with each other and with UNWTO officials from the Secretariat.

10. List of technical assistance projects in the Region

- China: Silk Road Tourism Development for the Gansu Province
- Mongolia: Tourism Recovery Technical Assistance to Mongolia and Development of the System of Tourism Statistics and Tourism Satellite Account in Mongolia
- Nepal: Development of an experimental Tourism Statistics and Tourism Satellite Account
- Sri Lanka: Strengthening the National Tourism Statistical System and Compilation of TSA tables
- Timor Leste: Women Empowerment and Tourism Recovery

V. Political Visits to the Asia-Pacific Region, Bilateral Relationships & Key Outcomes

1. The Secretary-General's Post-Pandemic Official Visit to China (February 2023)

The Secretary-General paid an official visit to China in February 2023. It was the first visit of the head of a UN agency after China's announcement of the end of its Zero-COVID policy. This was aimed at demonstrating UNWTO's strong support of China's lift of its Covid-19 restrictions – a significant shift from its COVID policy because of the great importance of the Chinese market to both global and regional tourism development. As the largest outbound market worldwide in 2019, the reopening of China's borders to international tourism signifies a potential acceleration of the ongoing recovery of tourism around the world. China's reopening will also revive its inbound tourism activities as a destination.

The Secretary-General took advantage of this first post-pandemic official visit to China to have in-person meetings with several Chinese partners to discuss and enhance ongoing and future collaboration. This has generated positive feedback from the partners and their commitments to active participation in UNWTO's activities and programmes.

2. World Tourism Day Celebrations, Bali, Indonesia (September 2022)

Within the context of the World Tourism Day celebrations in Bali on 27 September 2022, the Secretary-General had **bilateral meetings** with Cambodia, Fiji, India and Indonesia. The outcomes of the meetings include the following:

- **Cambodia:** Arrangement of a courtesy call on the Prime Minister in the context of the 35th CAP-CSA Joint Meeting in Phnom Penh; the possibility of hosting a UNWTO international event in the near future; and closer collaboration with UNWTO on projects and initiatives related to tourism recovery.
- **India:** UNWTO's partnership with India during its G20 Presidency in 2023 as its main knowledge partner in the production and promotion of the *Goa Roadmap for Tourism as a Vehicle for Achieving the Sustainable Development Goals* document; and request for UNWTO's support in areas such as tourism employment, youth and women in tourism, culture, UNWTO best tourism villages and rural tourism and sustainable tourism.
- **Indonesia:** Intention to play a more active role in UNWTO activities and statutory bodies such as the Regional Commission and the Executive Council.

Apart from the above, and within the period under review, the Secretary-General, the Regional Director and other senior officials in the Secretariat also held **bilateral meetings** with **Mongolia, China, Maldives, Japan, Iran, Brunei Darussalam, India, Nepal, Philippines** and **Thailand**.

Some of the highlights of these meetings include **Mongolia's** declaration of 2023-2025 as Visit Mongolia Years; the need to focus on rural development, investments & education to create jobs (**China**); **Maldives'** success story as the first country in Asia-Pacific to restart tourism early and sustainably while saving millions of livelihoods in the midst of the pandemic but with the right protocols in place; **Japan's** strong determination to get tourism back on track; **Iran's** focus on innovation, education and investment as a means to relaunch a comprehensive and more sustainable tourism strategy for recovery; **Brunei's** plan to nominate some of its villages to join the UNWTO Best Tourism Villages initiative; the need to reposition **Nepal** as an all-year round destination; as well as **Philippines'** and **Thailand's** intention to play a more active role in UNWTO's activities and programme of work.

3. MOU between UNWTO and Center for Language Education and Cooperation

As a follow-up to the entry into force of Chinese as one of the official languages of UNWTO in January 2021, an MOU was signed between UNWTO and the Center for Language Education and Cooperation (CLEC) – an educational institution affiliated to the Ministry of Education of China in July 2022. The main objective of the MOU is to enhance cooperation between UNWTO and CLEC and to identify areas of mutual interest with a view to promoting the Chinese language in the global tourism industry, promoting post-COVID tourism recovery, enhancing friendship among peoples, and promoting people-to-people exchanges.

Areas of collaboration include supporting the creation of Chinese online/offline language courses for UNWTO member States and officials of the Secretariat; the development and organization of Chinese tourism training programmes; and the provision of translation and interpretation services in Chinese that may be needed for some of UNWTO's meetings.

The launching ceremony of the "Chinese+Tourism" Online Training Programme for UNWTO Officials and International Tourism Professionals took place on 20 April 2023 – a day which marked the United Nations Chinese Language Day.

VI. Other Activities and Collaboration with Members and External Partners

- EATOF General Assembly (Ha Long Bay, Vietnam, 25 – 27 October 2022)
- 2023 ASEAN Tourism Forum (Yogyakarta, Indonesia, 2 – 5 February 2023)
- Bilateral meetings and Signing Ceremony of an MOU with Global Tourism Economy Forum (GTEF) (Madrid, Spain, 17 January 2023; Hangzhou, China, 22 February 2023; and Lisbon, Portugal, April 2023)
- Official visit of Sarawak (Malaysia) to UNWTO Headquarters (Madrid, Spain, 10 March 2023)
- Bilateral meeting with Chimelong Group (Hangzhou, China, 22 February 2023)
- 2nd edition of World Tourism Industry Conference (, Seoul, Republic of Korea, 3 – 6 May 2023)
- One observatory from the Philippines joining UNWTO INSTO network

VII. Upcoming events

- G20 Tourism Ministers' Meeting (Goa, India, 21-22 June 2023)
- International Tourism Investment Forum (Bali, Indonesia, 26-27 July 2023)
- International Conference on Responsible Tourism and Hospitality 2023 (Bogor, Indonesia, 21-25 August 2023)
- Global Tourism Economy Forum (Macao, China, 21-23 September) back-to-back with IFTM-UNWTO Training Programme on "Event + Gastronomy Tourism" (Macao, China, 17-24 September 2023)

- 25th Session of the UNWTO General Assembly (Samarkand, Uzbekistan, 16-20 October 2023)
- 17th UNWTO/PATA Forum on Tourism Trends and Outlook (Guilin, China, Date TBC)
- Tourism EXPO Japan 2023 (Osaka, Japan 26 – 29 October 2023)
- 17th UNWTO Asia/Pacific Executive Training Programme on Tourism Policy and Strategy (Danang, Vietnam, 13-17 November 2023)
- 2024 ASEAN Tourism Forum (Vientiane, Laos 15 – 19 January 2024)
- UNWTO Regional Conference on Rural Tourism Development (Brunei Darussalam, Date TBC)