The 42nd Meeting of the WTO Commission for East Asia and the Pacific was held in conjunction with the technical seminar on Sustainable Management of the Landscape and Environment for Tourism in Otsu, Shiga prefecture, Japan on 07 June 2005.

The Commission meeting focused on a number of issues on the Agenda adopted by the members of the Commission, namely, the implementation of the Global Code of Ethics for Tourism, tourism market trends in East Asia and the Pacific, overview of each participating country’s tourism performance and the decision of the Commission to hold its future commission meetings as much as possible at the same venue as that of the meetings of the WTO Commission for South Asia. The members of the Commission added item 10 to the agenda, as other matters to discuss issues including Malaysia's hosting of the WTO General Assembly in 2007.

Communication of Chairman

The Communication of Chairman, which was presented by the Minister of Cambodia, applauded the Asia-Pacific region being the fastest growing region and the 2nd most visited destination of the world. During the past 2 years, the region has suffered from a series of calamities such as war, terrorism, virus and recent high fuel prices. Moreover, the tsunami at the end of last year devastated the region with huge losses of life, and damage to infrastructure and many economies. He mentioned however, that the tourism industry in the region comes out of this disaster rapidly stronger with the increased spending on infrastructure rehabilitation. He stressed that with the experience of these crises, all related agencies in the region should pull together and goes onto damage limitation marketing strategies without delay. He urged upon the need of developing ‘Intra-Asia-Pacific’ travel to minimise the impact of future crises. The chairman encouraged that the vigilance must remain strong and the region must continue to work together and come up with collective strategies and action plans in response to future threats to tourism.

Preliminary Remarks of the WTO Secretary-General

In the Preliminary Remarks of the WTO Secretary-General, delivered by the Deputy Secretary-General, the Commission was informed that the three preceding years, i.e. 2001-2003, was a period dogged by the negative developments of world economic slowdown, terrorist attacks, threats of war and military conflicts in Afghanistan and in Iraq, overall geo-political instability, and finally SARS, all of which created a widespread consumer uncertainty which
came together to adversely impact on the industry. Nevertheless, the industry did not collapse. 2004, however, contrasted starkly with these difficult years with a remarkable growth of 10% with respect to arrivals, recording an all-time record of 760 million – the best achievement in 20 years. Tourism’s resilience in the midst of hardships pushed the industry up another notch. He also mentioned the tsunami disaster and the fact that the Phuket Action Plan had been drafted to ensure that the tourism sector emerges from this disaster stronger and more resilient than ever, with more environmentally friendly systems, more civil society involvement and more revenues from tourism remaining in the local community.

With respect to the **Global Code of Ethics for Tourism**, the regional representative for Asia and the Pacific pointed out that the Code as a set of guiding principles is needed for the tourism industry to secure the long-term sustainability of the industry. Both the UN General Assembly and the WTO General Assembly have unanimously adopted the Global Code of Ethics for Tourism. 9 countries and territories in East Asia and the Pacific have responded on the subject and more countries have been translating the Code into their national or local languages. Furthermore, he announced that the World Committee has agreed to endorse Indonesia’s proposal to promote understanding and implementation of the Code through the Tri Hita Karana (“three causes of happiness”) Tourism Award as a concrete example. He noted that the Commission encouraged the member states to have regional seminars on this particular subject, and further encouraged those countries which have not appointed a national focal point to do so.

**Market Trend Report**

In presenting the **Market Trend Report**, the Regional Representative for Asia and the Pacific drew a historical analogy of the bouncing-back pattern of the tourism industry during world and regional crisis situations since the oil crisis of the early 1980s. In all these, the tourism industry experienced the so-called mirror effect of huge drop and an equally steep climb, which further illustrates the resilience and phoenix characteristic of tourism. The year 2004 was not an exception after the pent up travel demand of the three preceding years. It was the best results in 20 years since 1984, achieving a 10% growth rate the highest in the world. It caused international tourist arrivals to shoot up by more than 69 million – a number that is equal to the inbound tourism of France. All regions performed positively with the Asia and the Pacific region leading by a 29% increase.

The Commission noted with interest that more than half of these international tourists were received by Asia and further noted that Asian destinations such as China and Hong Kong were ranked in the world’s top ten tourism destinations in 2004. Within the framework of the major global factors, a number of factors were cited as attributable to Asia’s exceptional performance. First of all, the impact of external shocks faded away and consumer confidence has been restored again and not damaged by recent tragic events in the Indian Ocean. He added that exchange rates have shifted destination choice, and greater volumes of air traffic also confirmed the upbeat trend.
The leading role of East Asia and the Pacific on the growth of world tourism was outstanding during the last 2 years. The region has achieved a 6.8% average growth in international tourist arrivals since 1995, while the average world growth was 3.9%. In 2004, international tourist arrivals in East Asia and the Pacific were 146 million, which is a 19% market share in the world. By sub region, North East Asia’s growth rate was 30% and a 50% market share in the region, South East Asia’s growth was 33%, and Oceania’s growth was 13%. As qualitative factors in the region, there was the evident recovery of the Japanese economy after ten years of stagnation; improved air capacity and the boom of low-cost airlines; strong intra-regional flow of traffic (78%) and rebound of long haul travel; and an extremely strong Chinese outbound (42%) market.

It was highlighted that the recent marketing initiatives in East-Asia and the Pacific such as ‘Amazing Thailand’ and ‘Malaysia, Truly Asia’ showed impressive success, and other countries have been professionally implementing their slogans such as ‘Dynamic Korea’, ‘Yokoso, Japan’ and ‘Indonesia – Ultimate Diversity’.

He concluded that the outlook for tourism in Asia and the Pacific is positive. It is estimated that international tourist arrivals in 2005 will grow by 5%. The continued strength of the Chinese outbound market will bring good prospects for intraregional tourism. It is also expected that sustained economic growth will occur in major generating markets, a rapid development of regional low cost airlines and increased regional cooperation to boost tourism in the region.

**Phuket Action Plan and Post-Tsunami Tourism Recovery**

The Regional Representative for Asia and the Pacific briefed the Commission on the Phuket Action Plan and the series of emergency actions for post-tsunami tourism recovery undertaken by WTO after the calamitous Indian Ocean tsunami of 26 December 2004.

For the first time in the history of the organization, an emergency Executive Council meeting was held on 1 February 2005 in Phuket, Thailand. The Emergency Task Force, which was constituted of industry leaders from the public and private sectors, submitted the draft action plan, and the Executive Council unanimously adopted it as the Phuket Action Plan. The Phuket Action Plan prioritized five operational areas: Effective communications, Community relief, Professional training, Sustainable redevelopment, and Risk management. Within a short span of a little over a month, WTO has developed 44 project activities for the implementation of the Phuket Action Plan. Some of these activities are already being carried out, and others are being directly implemented through WTO or submitted to other institutions for implementation or funding.

The various reports and analyses showed that despite the magnitude of the tsunami in terms of death and destruction, the impact on global tourism is limited as the region constitutes only 3% of worldwide tourist arrivals and the affected countries less than 1%. However, in spite of the overall confidence for tourism recovery and the active global efforts, there is still a huge gap of
information between the readiness of the destinations and the lack of this knowledge at the source markets. WTO, therefore, is focusing its ongoing efforts on effective communications and conveying the message to the source markets and encouraging tourists to return to the destination for their holidays.

While much has been achieved in the short period of time, much more can be done with further support from the international community and all its stakeholders. WTO complimented the various governments, especially the government of the Republic of Korea for its donation of US$500,000 for the activities relating to the Phuket Action Plan, as well as the government of Japan and China for their bilateral efforts in the assistance of the tsunami recovery. The Regional Representative also informed the Commission that WTO has launched the new initiatives in micro credit financing, within the frame of ‘Community Relief’ in the Phuket Action Plan, in collaboration with the International Finance Cooperation (IFC) of the World Bank Group to assist mainly SMEs in Thailand and Sri Lanka. Furthermore, WTO has dispatched two communication experts to Indonesia and Maldives in order to convey the message to the media and general public.

The government of Japan made reference to its various activities towards the tsunami recovery as a major generating market such as a series of survey missions and FAM tours to the affected countries.

General programme of work 2004-2005

The Regional Representative for Asia and the Pacific reported to the Commission its activities to reflect the priority areas of action of the Organization within the framework of the general programme of work during the period 2004-2005. The activities within this period focused on sustainable tourism development, poverty alleviation, tourism communications, strategic capacity-building and cooperation for development.

To facilitate the action for sustainable tourism development, a series of workshops and conferences are organized in the region in accordance with the Organization’s goal to raise the level of awareness on sustainability issues in tourism. Exercising the newly published guidebook on ‘Indicators of Sustainable Development for Tourism Destinations’, a regional workshop was held in Thailand, with another planned to be held in China next July.

WTO has signed an agreement with the Republic of Korea concerning the establishment of the ST-EP Foundation in Seoul. Some field missions are planned to identify potential projects.

The Regional Representative for Asia and the Pacific drew the attention of the Commission to the importance of tourism communications, and stressed that the tourism industry should be active in communicating with the media on a regular basis. The Tourism Communications Network (TOURCOM) was introduced as an effective mechanism to improve communications among stakeholders and the Secretariat encouraged the member states to be the part of this process.
While the member states in the region actively participated in the practicum programme to build knowledge capacity, it is especially noted that the tsunami-affected countries participated into the practicum in April 2005 with the full financial support from the government of Korea. Relating to the continued capacity building, the Regional Representative for Asia and the Pacific also encouraged the NTAs and other institutions to participate in the internship at the headquarters of WTO for their mutual benefits. He informed the Commission that WTO and the government of the Philippines are organizing a seminar on ‘Evaluating NTO Marketing Activities’ this coming September.

Technical support missions and tourism development projects have been undertaken in the region by the department of Technical Cooperation, a newly established office within the WTO Secretariat. Activities have included a Master Plan in the southern provinces and a impact study of the tsunami for Thailand, a coastal development Master Plan for Shandong Province, China, the transformation of an institute of tourism in Guilin, China, the formulation of a tourism development Master Plan for Mongolia, and capacity building for Human Resources Development in DPR Korea. There are other ongoing regional projects such as the Sustainable Tourism and Capacity Development in the Emerald Triangle Region, the Sustainable Tourism Development and Promotion of the Heritage Necklace Circuit in the Mekong area, and Silk Road projects in the region. Regarding other issues, he announced that ‘the International Conference on Tourism and Handicrafts’ was scheduled to be held in Tehran, Iran as the first conference relating to this subject in Tourism.

The first issue of ‘WTO Asia Newsletter’ was launched and had been dispatched to the member states under the collaboration with the Kyung–hee University in Korea as well as the support of the government of Korea. ‘Asia Tourism Monitor’ is planning to be published at the end of 2005 in collaboration with the Hong Kong Polytechnic University to visualize mainly strategic tourism policy and the future vision of tourism industry in the region. The Regional Representative for Asia and the Pacific drew to a close encouraging the member states to use the WTO elibrary and the official web site actively.

Country Briefs

During the session on country briefs, the 10 member states and 2 associate members, represented by Australia, Cambodia, China, Indonesia, Japan, Malaysia, Philippines, Republic of Korea, Thailand, Vietnam, Hong Kong SAR, and Macao SAR - took turns to present the Commission with an overview of their respective country’s tourism performance in 2004.

Australia, which was participating in the Commission for the first time since they rejoined WTO in 2004, presented to the Commission the present status of tourism in Australia. During the 2003-2004 financial year, tourism contributed $32 billion which is equivalent to 3.9% of Australia’s total GDP. A total of $17,317 million was generated in exports, which represents 12.1% of total exports from Australia. The tourism industry in Australia provided in excess of 536,000 jobs, or 5.6% of total employment in Australia. Australia highlighted that tourism is the largest services exporter in Australia as well.
Domestic tourism has remained fairly static for the past few years leaving the industry to rely on international tourism for growth. International visitor arrivals are forecast to grow at an average annual growth rate of 5.8% over the next ten years, reaching over 9.3 million visitors by 2014. Outbound travel by Australians has been growing more slowly than inbound tourism. By 2014, outbound travel by Australians is expected to grow by an average annual growth rate of 3.2% reaching 6.1 million. During 2004, international visitor arrivals increased by 9.9% compared to the previous year with the strongest markets being China (42.7%) and New Zealand (23.1%). Over 18% of all outbound travel was to New Zealand, due to its close proximity and the value of the Australian dollar. The United States of America, United Kingdom and Indonesia were also popular destinations for Australians traveling abroad. During 2004, 4.3 million Australians traveled abroad.

Cambodia commenced the presentation by emphasizing the importance of tourism for the country. Cambodian tourism in 2004 achieved a positive growth of 50.53% after the difficult year of 2003 with 1,055,202 tourist arrivals. Being one of the most important factors of Cambodia’s economic priorities, tourism has significantly contributed to the Cambodian economic development and poverty alleviation.

The government is now focusing on cultural and natural tourism as a main policy to develop its tourism in line with the world tourism development trend. Cambodia has shown various efforts to preserve and conserve its cultural heritage, and simultaneously focus attention towards the protection of natural resources. By 1969, the country had established six national parks and wildlife sanctuaries covering nearly 2.2 million ha, about 12% of the country’s total land area. Cambodia also affirmed their ongoing efforts to attract greater international arrivals through increasing regular air transportation from major generating markets.

China informed the Commission that China’s tourism industry has become a new growth point of the national economy and an advantageous industry in the service industry. With strong growth momentum, especially in the recent decade, China has become one of the most influential countries in the global tourism industry. In 2004, the inbound visitor arrivals totaled 109 million; the overnight tourist arrivals reached 41.76 million, the tourism receipts in foreign exchanges reached USD 25.7 billion. China was ranked 4th in the world in terms of overnight tourist arrivals and ranked 5th in terms of receipts in foreign exchanges according to WTO figures.

In its outbound market, China has become a new fast-growing tourist generating country. The trips of outbound travel in China numbered 28.85 million in 2004. By May 1st 2005, outbound group travel by Chinese nationals is allowed to operate to 66 approved destination countries and regions.

In response to the Phuket Action Plan to assist tsunami affected countries, China introduced the ‘China-ASEAN’ tourism workshop hosted by the China National Tourism Administration, which serves as a platform for the ASEAN
countries to introduce their own markets to China’s tourism industry along with other activities such as study tours to Thailand and Indonesia.

Despite facing a series of crises since 1997 and the recent devastating tsunami and earthquake, Indonesia stressed that tourism’s evolution of Indonesia is positive with continuous support from WTO and the international tourism community. The number of international tourist arrivals reached 5.32 million, an increase of 19.12% in 2004 compared to the preceding year. This figure has exceeded the target of 5.1 million tourist arrivals.

The government of Indonesia has set a target of international tourist arrivals for 2009 of 10 million visitors, given the increase of 1 million tourists on average per year starting in 2005. In order to reach 6 million tourist arrivals in 2005, Indonesia has been undertaking some efforts as follows: firstly, implementing general policies regarding safety and security, visa, tax reduction, and air transport policy in response to the needs of the tourism industry; and secondly, by undertaking routine activities such as international events, trade fairs, FAM trip, and enhancing international networking. The new branding - “Indonesia: Ultimate in Diversity”- has been introduced and needs to be intensively socialized. Indonesia urged the Commission to actively participate in the upcoming International Conference on Cultural Tourism and Local Communities, which will be held in Yogyakarta, Indonesia in February 2006.

Japan, the host country of the Commission meeting, introduced various activities for its relatively modest inbound tourism market to balance its tourism industry with its large outbound tourism market. Japan launched the “Visit Japan Campaign” in 2003 with a target of doubling the number of foreign tourists to Japan to 10 million by 2010. Various plans and strategies have been set up to achieve this goal. 12 countries and regions have been designated as “major focused markets” and the budget has reached 31 million US dollars in 2005 for intensive promotion. “Yokoso! Japan Week” was phased in February 2004 as a part of implementation of Visit Japan Campaign. The number of charter flights between East Asian countries and Japan more than doubled during this campaign. Additional activities have included setting up a numbering system in metropolitan subways and improving gateway airports so as to provide tourists with a friendly environment. Currently, Japan is in the process of expanding Narita and Haneda Airports in Tokyo, and Kansai Airport in Osaka, in addition, a new international airport called Centrair in Nagoya, opened in February 2005. Furthermore, “Expo 2005 Aichi Japan” and the improvement of landscape to contribute to sustainable tourism were some of the other ongoing efforts for the betterment of its inbound tourism. In 2004, the number of foreign visitors increased by 17.8 % compared to 2003.

The Japanese travel industry has also formulated the “20 million Action Plan” that is aimed at increasing the number of Japanese outbound travelers to 20 million by 2007. The government highlighted the importance of the expansion of two-way tourism exchanges and urged the Commission to support these efforts to encourage outbound tourism. A recently held symposium in Tashkent is a good example of increasing the number of Japanese tourists to Central Asia.
The most striking announcement by the Government of Japan in 2004 was that Japan is determined to build its nation on tourism development.

Forging ahead months after traveling confidence resumed in the fourth quarter of 2003 and much positive growth a year on, the actual arrival figures for Malaysia recorded between January and December 2004, soared 55.75% to 15.7 million tourists from 9.2 million the year before. Analysis of arrival figures for 2004 has confirmed the increase of intraregional travel. The top markets contributing a considerable number of tourists to Malaysia remain Singapore, Thailand, Indonesia and Brunei Darussalam. A new development was the rise of the China market which will soon be one of the main tourists generating market to Malaysia. The bulk of tourist arrivals are from the short haul market. Thus, there is an urgent need to overcome dependence on the regional traffic. Medium and long haul markets need to be revived to offset the gross imbalance of regional arrivals to Malaysia.

The Philippines proudly presented the robust growth of its tourism sector in 2004, as visitor arrivals reached 2.29 million, posting a 20% increase over the volume recorded in 2003. The double digit gain is attributed to growth of global tourism business; increase travel to the Asia Pacific region; and aggressive and sustained marketing of the Philippines through the WOW Philippines. The United States remained the top tourism source for the Philippines, up by 23.3% for a share of 20.9% of the total tourist traffic in 2004. Japan and Republic of Korea followed posting an increase of 18.4% and 24.6%. China is rapidly edging itself into the top ten markets in 2004 with 39,561 arrivals for an increase of 23.5% over the same volume in 2003. Visitor receipts in 2004 also gained a double digit growth at 30.7%. Estimated visitor receipt during the year was recorded at US$ 1.99 billion.

The Philippines reported that tourism products such as health, sports, nature and adventure, ecotourism, convention and business have been aggressively promoted by the Department of Tourism both in international and local tourism fora. In addition, new types of tourism products are continually being developed by the government in coordination with the private sector and local government units not only to attract more tourists but to promote a more quality tourism experience.

The Republic of Korea has briefed that after a setback of 11.2% in foreign tourist arrivals in 2003, 2004 set a new record of 5.8 million international arrivals that is an increase of 22.4% over the previous year. The number of Korean outbound tourists reached a record high 8.2 million with 24.5% increase over 2003. International tourism receipts in 2004 was US$ 5.7 billions and expenditures US$ 9.5 billion, resulting in the international tourism of US$ 3.8 billion.

The Commission noted several international events and domestic developments that took place in Korea in 2004, including the PATA Annual Conference in Jeju in April 2004, Tourism Working Group meeting of APEC in Jinju in May 2004. WTO’s ST-EP Foundation was established in Seoul on September 24, 2004 with the goal to help eliminate poverty in developing
countries through promoting sustainable tourism. The Foundation will be fully functional after the WTO General Assembly endorses its missions and organizational matters. The KTX, an express railway, started its operation in April 2004. The introduction of the Five Working Days becomes a sensational facilitator of both domestic and international tourism.

**Thailand**’s brief focused mainly on the disaster-relief effects of the tsunami on tourism industry and phased steps which the government has been taking to recuperate the tourism industry. Since the devastating tsunami on December 26, 2004, the government has introduced an early warning system and has allocated a budget for the sustainable redevelopment of two pilot beach projects in Phuket. Measures are to include the planting of trees in particular areas and the rebuilding of sand dunes destroyed by the tsunami. The government has also allocated funds for the continuing promotion of affected areas as safe and viable tourism destinations. Thailand announced that drafting a crisis management master plan is now in the process to be placed in the national tourism plan. The implementation of this plan will be very effective in providing long-term solutions, initially to the six affected provinces.

**Vietnam** presented the growth of its tourism performance in 2004 with 2.9 million of international arrivals comparing to 2.4 million in 2003, an increase of 20.5% in domestic tourists. China, being a top generating market for Vietnamese tourism, showed a 12.3% growth with 78,000 international arrivals. The United States, Japan, Taiwan (Province of China), and Republic of Korea are other leading source markets. Republic of Korea and Japan also showed impressive 79.1% and 27.5% growth rates due to the authorization to waive visa requirements for tourists staying for 15 days. The government also authorized to waive visa for citizens from northern Europe countries: Denmark, Finland, Norway, and Sweden within 15 days starting from May 1, 2005.

To bolster its tourism, Vietnam participated in various international events and organized series of domestic tourism events such as Hue Festival. In 2005, Vietnam expects its tourism to grow by 3.2 million in international arrivals (14%), and 15 million in domestic tourists (10.5%). Vietnam introduced its ongoing development projects of 4 national tourism complexes and 17 national theme parks.

Total visitor arrivals to **Hong Kong SAR** in 2004 achieved the best ever figures of 21.8 million. Overall growth of arrivals for the year was 40.4% compared with 2003. The record-breaking arrivals generated an all-time high visitor expenditure of US$ 11.8 billion for Hong Kong. The strong performance of the tourism industry in 2004 was mainly attributable to the spectacular 45% of growth of the Mainland visitor arrivals, which accounted for 56% of the total visitor arrivals in the year. The strong growth of Mainland visitor arrivals has been boosted by a new visit scheme implemented since July 2003 by the Mainland authority: the Individual Visit Scheme.

The government of Hong Kong introduced multi-faceted strategies to promote tourism development. First of all, to enhance tourist attractions and facilities, three flagship projects will be completed in the coming year. The Hong Kong
Disneyland complex will open on 12 September 2005 and is expected to attract 5.6 million visitors per year. Ngong Ping 360, the cable car system, is another ongoing project, and the Hong Kong wetland Park will be completed in early 2006 to develop green tourism. To sustain the growth of visitor arrivals and prepare for the opening of various new attractions, the year 2006 has been designated as ‘Discover Hong Kong year’ and the Tourism Board will launch a targeted booster programme to stimulate more family and business visitors. Hong Kong expects visitor arrivals to set a new record again in 2005, reaching 23.4 million, up 7.3 % year-on-year.

Macau SAR commenced the presentation by introducing the current geographical and political situation of Macau. Since Macau SAR’s establishment in 1999, various policies such as the Closer Economic Partnership Arrangement (CEPA) and the visa relaxation policy (FIT) from the central authority have made a very wide impact on Macau’s tourism development. In 2004, visitor arrivals have reached 16.6 million with a 40 % increase. The capacity of current accommodation is 11,000 and 24,500 additional hotel rooms are expected to be completed in 10 years. Macau expressed its strong will to position Macau as a quality tourism destination with diversified tourism products mainly targeting gaming and entertainment, culture and leisure. Macau highlighted that it has been presented by the central authority as a candidate for UNESCO World Heritage status and will be decided by UNESCO in July 2005. Macau also briefed the liberalization of gaming concessions and investment of various resorts such as Fisherman’s Wharf, Grand Lisboa, Ponte 16 Theme park, Wynn Resorts Ltd., Galaxy Casino Company Ltd. and short and long term projects by Las Vegas Sands, Inc. Macau concluded its presentation emphasizing that the areas of gaming, tourism and MICE will be the development direction of Macau.

General issues: Apart from the foregoing, the Commission agreed to include the new agenda item - Country Brief as a permanent feature of the future Commission meetings. Also, the Commission decided to agree on the request of the WTO Commission for South Asia to hold the annual commission meeting jointly with the WTO Commission for East Asia and the Pacific. This will not only reduce NTAs’ budgetary allotments for meetings, but will also give the two commissions the opportunity to share experiences in issues relating to sustainable development of tourism, tourism growth, planning and management of their tourism industries. Correspondingly, Macau pledged that it will provide the necessary arrangements to hold the consecutive Commission meeting for East-Asia and the Pacific and South Asia in Macau in 2006. Malaysia informed the Commission that it has registered its interest to host the 17th WTO General Assembly in Kuala Lumpur. Malaysia has made this offer in conjunction with its 50th golden anniversary celebration of its independence and the launching of ‘Visit Malaysia Year 2007 Campaign’. Malaysia sought the support and endorsement of the Commission. The Commission unanimously adopted a decision to support Malaysia in this respect.

The Chairman of the Commission brought the meeting to a close by expressing on behalf of the commission, thanks and appreciation to the Government of Japan for its warm hospitality extended to the meeting.
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