CAP/44/DEC Original: English

DECISIONS TAKEN BY THE UNWTO COMMISSION FOR EAST ASIA AND THE PACIFIC AT ITS FORTY FOURTH MEETING

Macao, China, 14 June 2006

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WTO COMMISSION FOR EAST ASIA AND THE PACIFIC

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Forty-fourth Meeting Macao, China 14 June 2006

AGENDA

- 1. Adoption of the agenda
- 2. Communication of the Chairman
- 3. Preliminary remarks of the Secretary-General
- 4. Tourism market trends in East Asia and the Pacific in 2005
- 5. Crisis preparedness in tourism
- 6. Regional activities
- 7. Country briefs: an overview of each member Country's tourism performance in 2005
- 8. Draft of the General Programme of Work for 2008-2009: Identification of priority issues
- 9. Place and date of the forty-fifth meeting of the Commission

PREAMBLE

- 1. The 44th meeting of the UNWTO Commission for East Asia and the Pacific was held in Macao, China on 14 June 2006, at the gracious invitation of the Government of Macao SAR. This meeting was held within the framework of the UNWTO's first Ministerial Roundtable on Asia-Pacific Tourism Policies, the nomination of the region's first Tourism Ambassador and the presentation of the Organization's market studies on 7 source markets of the Asia-Pacific region. The meetings were graciously inaugurated by H.E. Mr. Edmund Ho Hau Wah, the Chief Executive of Macau SAR.
- 2. The 44th meeting was chaired by H.E. Mr. Shao Qiwei, Chairman of China National Tourism Administration (CNTA) in his capacity as Chairman of the UNWTO Commission for East Asia and the Pacific. Upon calling the meeting to order, the Chairman proposed that the Commission observe a **minute of silence** in memory of the victims of the tragic earthquake of 27 May 2006 in Yogyakarta, Indonesia.

DECISIONS

ADOPTION OF THE AGENDA

Agenda item 1 (document CAP/44/Prov.Agenda.)

3. After reviewing the provisional agenda it was **adopted** and the final agenda of the meeting is located on page 2 of this document.

COMMUNICATION OF THE CHAIRMAN

Agenda item 2 (document CAP/44/2)

- 4. In his Communication, the Chairman stated that growth in tourism in the region has been very strong notwithstanding the Indian Ocean tsunami and other disasters. This is because of the great importance that countries attach to tourism. The Republic of Korea for example has designated tourism as a strategic industry. It has developed a series of distinctive tourist products in different localities in Korea, and this is attracting many international tourists. The Chinese Government also places great value on tourism and plans are underway to build the Chinese tourism industry into a key sector in the national economy within the next five years. However, there are a number of challenges that need to be addressed for tourism in the region to continue growing. The surging price of oil, natural disasters and the threatening bird flu are all having varying degrees of impact on both regional and country-specific basis. This calls for reinforcement of regional cooperation, the sharing of experiences and information in order to strengthen the crisis preparedness of the region.
- 5. The Chairman commended UNWTO highly on its continuous assistance to Member States especially in moments of crisis. He made particular reference to the Organization's expeditious reaction to the recent earthquake that hit Yogyakarta as well as all the counter measures it has been taking in anticipation of a possible outbreak of the bird flu.

PRELIMINARY REMARKS OF THE SECRETARY GENERAL

Agenda item 3 (document CAP/44/3)

- 6. The Secretary-General informed the Commission of estimates of international tourism receipts for 2005, the top earners, the top spenders and the ranking of tourism in international trade. Estimates of international tourism receipts for 2005 amounted to USD 685 billion; however, this is to be taken with some caution given that it is a preliminary approximation. In comparison with 2004, there was a 7.7% increase. Asia as a whole received 20% of this amount, i.e. 139 billion. The countries that earned the most were USA, Spain, France, Italy, UK and China. The highest spenders were Germany, US, UK, Japan, France, Italy and China. With respect to international trade tourism is in the fourth position after petroleum products, chemicals and automotive products.
- 7. With regard to the outlook for 2006 the rising cost of fuel is certainly a concern for the tourism industry. However, tourism's proven resilience in the face of unfavourable circumstances makes us confident that its effect will be minimal. UNWTO's projected growth for the Asia-Pacific region is 5% barring any unforeseen negative major incident. In a survey the Organization conducted on the effect of price increase in oil it was found out that 60-70 per cent increase is a level the industry can sustain. Two groups of airlines are going to be affected by this situation: USA and small developing countries but globally, we do not expect the aviation industry to experience major difficulties.
- 8. Avian flu, climate change, environmental insecurity and poverty issues all go to show that tourism is part of global challenges. It is incumbent on us therefore to be active for the benefit of the tourism industry.
- 9. The Secretary-General also informed the Commission that UNWTO for the first time in its history hosted the UN Chief Executives Board meeting last April. It was chaired by UN Secretary-General Kofi Annan. The United Nations System Chief Executives Board, formerly known as the Administrative Committee on Coordination is the forum that brings together the executive heads of all Organizations to coordinate and cooperate on a whole range of management issues facing the United Nations system. As the youngest Specialised Agency of the UN this Board meeting in Madrid contributed remarkably to UNWTO's visibility and its importance within the UN system.
- 10. He continued his remarks by highlighting the Organization's activities. Even though we are half way in the year we are way ahead as far as our programme of work is concerned: we have held several seminars on destination management, new emerging markets, evaluation of promotional activities, sustainability indicators for tourism destinations, tourism and handicrafts and many other subjects directly related to the major components of the Organization's programme of work. We have already held the commission meetings for Europe, the Americas and Africa.
- 11. The Secretary-General informed the Commission that the financial situation of the Organization was good. Up to May we had received about 57% of contributions from our member countries, out of which only 29% has been spent so far. As far as membership is concerned we hit the 150 mark as of the last General Assembly (the 16th Session in Senegal). Comoros in Africa, is considering formalising its membership. The same goes for Brunei Darussalam. With regard to the US we have made remarkable strides in its attempt to have it rejoin the fold.

12. The Secretary-General concluded his remarks by informing the Commission that during the next Executive Council meeting in Ecuador (the 78th Session) he will announce to the Council the reinforcement and restructuring exercise he intends to carry out in the Organization. Some young staff members have been slated for promotion and new ones are going to be brought in through the external recruitment procedure.

TOURISM MARKET TRENDS IN EAST ASIA AND THE PACIFIC IN 2005

Agenda item 4 (document CAP/44/4)

- 13. The UNWTO's Regional Representative for Asia and the Pacific based his presentation on UNWTO's latest Tourism Market Trends for Asia and the Pacific and its quarterly Tourism Barometer but he intends to expand this to include information on regional outbound situation as of next year. It is common knowledge that in the last 4 5 years tourism has suffered a series of crises of all kinds; however it is also a paradox that both tourists and the industry are gradually becoming inured to the proliferation of these crises. We have come to the realisation that staying at home is no safer than travelling.
- 14. In 2005, global annual growth rate was 5% and international tourist arrivals crossed the threshold of 800 million for the first time. 42 million more tourists were received worldwide and out of this, the share of Asia and the Pacific was 11 million recording a growth rate of 7.4%, which was higher than the world average. We received 156 million international tourist arrivals which can be translated into 19% market share of the world. The strongest performer was Northeast Asia: it recorded 8 million new arrivals out of the 11 million received by the whole region. South East Asia and South Asia on the other hand did not perform as well, owing to the impact of the tsunami. They received less than the regional average.
- 15. If we make a historical comparison from 2000 2005 of international tourist arrivals, we see an increase of 40%, i.e. 45 million in numerical value. Asia's market share of 6 years ago was 16%, and despite persistent crises this has increased to 19%. UNWTO's forecast for growth in the region also continues to hold. In the last 10 years, global average growth rate (6.6%) has superseded the projected growth rate of 5.2%. World average growth rate forecast for this year is 4.5%, but that of Asia and the Pacific is 8.9%.

16.	From	January to	April this y	ear prel	iminary	estimates	on	tourist	arrivals	availabl	e in co	untries
on	individua	l basis are:	China +4%	6; Hong	Kong,	China +12	2%;	Macac	, China	+21%;	Japan	+18%
Phi	ilippines +	-13%; Vietna	am +17%.	Ü	· ·						•	

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CRISIS PREPAREDNESS IN TOURISM

Agenda item 5 (documents CAP/44/5 and its annexes)

- 17. The Regional Representative for Asia and the Pacific made introductory remarks on this item, after which the representatives of Australia and Thailand shared their experiences on how to tackle crisis situations and to develop recovery plans.
- 18. The Regional Representative informed the Commission that the raison d'être of this agenda item is the series of crises that the tourism industry has been living with these past few years. Our reaction to them has been on adhoc basis, but given that crises are constantly featuring in today's world, there is the need for a more defined and strategic approach in order to overcome them as efficiently as possible. UNWTO is thus taking all the necessary measures in order to pre-empt or mitigate the effects of potential crisis on international tourism. During the recent session of the 16th session of the General Assembly in Dakar, the issue of disasters affecting tourism was considered and a Working Group on Risk-assessment and Crisis Preparation and Management was established to develop UNWTO's strategic action on disaster risk mitigation. France is the Chairman of this group and Thailand is one of its Vice Chairmen. The task force held its first meeting last March in Paris in order to prepare proposals for the Executive Council in June.
- 19. In fact the issue of crisis is now an integral part of the Organization's programme of work. UNWTO is now part of the UN crisis coordination team. We have also created a Tourism Emergency Resource Network (TERN) with the aim to rally the support of all partners at international, national and regional levels. PATA, IHRA and UFTAA are our partners.
- 20. At UNWTO's headquarters, we have established a permanent unit for crises and have appointed a national coordinator in each Member State for Avian flu. We are going to organise a series of seminars on management issues relating to crisis in anticipation of any possible unfavourable incident. We have also created a sub-page on crisis management on UNWTO's home page and have also prepared some guidelines on crisis management.

Australia's Crisis Management Approach (delivered by General Manager, Market Access Group Department of Industry, Tourism & Resources, Ms. Helen Cox)

- 21. Tourism is vulnerable to crises and shocks as witnessed in cases such as SARS, Iraq war, terrorism, natural disasters (tsunami, Hurricane Katrina, Cyclone Larry) and the threat of pandemic influenza. The government of Australia established a crisis response network for state/territory government agencies. The Tourism Incident Response Plan (NTIRP) is an all-hazards plan which delivers a coherent national response to minimise the impact of incidents affecting the tourism industry. The key elements of the NTIRP are: coordination-providing stakeholders with direction for monitoring, managing and responding to incidents, communication facilitating accurate and timely information exchanges between stakeholders, research analysing the immediate and long term impact of the incident, and policy response providing targeted and timely industry support and other recovery initiatives.
- 22. The Australian government allocated a \$599 million budget funding for avian influenza and pandemic preparedness in Australia and another \$141million to help regional neighbours. The Australian Government also held consultations with leading tourism industry associations to brief

industry on country preparedness for avian influenza and discuss potential impacts of avian influenza on tourism industry. In line with this, the Australian Government has prepared a business continuity guide and business kit to help businesses prepare for a crisis such as a pandemic. It is up to businesses to prepare and ensure they are in the best position to manage the effects of a pandemic and recover as soon as possible. Australia appeals to the industry and government to work together to develop the tools needed to build a stronger, more resilient tourism industry.

Crisis Management –The ASEAN Approach (delivered by the Deputy Permanent Secretary of the Ministry of Tourism and Sports of Thailand, Dr. Sasithara Pichaichannarong)

- 23. The ASEAN Crisis Communication Team (ACCT) is one of the five task forces within ASEAN National Tourism Organizations mechanism and is responsible for assisting the ASEAN NTOs in all matters related to tourism communication. ASEAN Crisis Communication Team agrees upon matters concerning accurate, timely and reliable information during crisis such as the ASEAN Holding Statement classifying the crisis situations and how to liaise with the Media during the crisis. ASEAN member countries have prepared an ASEAN Holding Statement informing the updated status of avian flu and the Crisis Communication and Preparedness of the region. In dealing with crisis situations, member states should involve organizations like UNWTO, WHO, and PATA in their current initiatives. The member countries should also refer to current practices of an international organization in classifying levels of crisis.
- 24. In addition, ASEAN updates the information of the crisis and encourage the proactive participation of UNWTO's member countries, and recognizes the use of UNWTO as a benchmark in setting up their action plans. The ASEAN Secretariat has been assigned to involve UNWTO in future cooperation. Donor countries and organizations are encouraged to draft national plans and regional strategies on risk assessment and crisis management using the TERN (Tourism Emergency Response Network) model.

REGIONAL ACTIVITIES

Agenda items 6 (documents CAP/44/6 a,b,c)

- 25. With reference to Agenda item 6, the Commission was apprised of the activities carried out and planned in the region since its forty-seventh meeting held in Dakar, Senegal in November 2005. These activities are based on the outcome of a series of meetings the Regional Representative for Asia and the Pacific had with the delegations from each Member State in the region represented at the General Assembly. The aim of these meetings was exchanging views and ascertaining the national agendas of each country as far as their tourism industry was concerned. Some of the activities already undertaken include the formulation of crisis management and national contingency plan, sustainable tourism indicators workshops and a seminar on new emerging markets.
- 26. For the very first time, the subjects of handicrafts and tourism were married in an international conference in the handicraft-rich country of Iran; and for being a relatively new phenomenon, it shockingly drew and held the attention and participation of more than 500 delegates from over 30 countries. Internationally renowned experts from UNWTO member States and non-members, international organizations and private sector representatives in handicrafts provided

technical support for the Conference. The aim of the Conference was to raise awareness about the importance and role of local handicrafts for tourism development and reciprocally the importance of tourism as an agent for the protection and preservation of traditional crafts, methods of production and culture. The successful outcome of this 1st Conference made delegates agree that the 2nd be held in Thailand, another handicraft-rich country. They also concurred that a plan of action be formulated to guide the major conclusions of this Conference. It was further agreed that in view of the wide-range of specialists that the Conference attracted, there will be the formation of a panel of tourist handicraft experts.

- 27. Another novel activity is the market study of 7 major outbound markets of Asia and the Pacific region (Australia, China, Hong Kong, Japan, India, Republic of Korea and Thailand). These market studies are equally unique in that they have been done on Asia, for Asia and by Asian experts. The aim in undertaking these intra-regional studies is to assist Members in policy adjustment and readjustments.
- 28. Phuket Action Plan has been drawn to a close with the production of a DVD documentary reflecting the one-year-on situation of the countries affected with special emphasis on depicting the recuperation undergone since the disaster. The aim is to broadcast this film on pan-European television channels as well as TV channels of these countries' source markets in order to boost the growth of their tourism.
- 29. With respect to planned activities, the Secretariat intends to conduct more seminars and workshops on crisis management, sustainable tourism indicators and poverty alleviation. A follow-up will be made on the nomination of Jackie Chan as Asia-Pacific first Ambassador by considering the possibility of using other celebrities along the same poverty alleviation lines.
- 30. Representatives of UNESCAP and SNV gave short briefs on their activities in Asia. While the latter continues to focus on sustainability and human resource development through APETIT, SNV centres its activities mainly on fighting against poverty. They have 700 advisors around the world with about 100 in Asia.
- 31. The Chief of UNWTO's Regional Support Office for Asia and the Pacific region based in Osaka apprised the Commission of their activities in the region since its inception 11 years ago. They have maintained close collaboration with UNWTO in the organisation of some events in Asia. The most recent ones are the UNWTO Japanese Symposium on Encouraging Regional Tourism in China, (last May); and the 42nd Meeting of the UNWTO Commission for East Asia and the Pacific & Technical Seminar on Sustainable Management of the Landscape and Environment for Tourism, Shiga, Japan, (June 2005).
- 32. A number of issues emerged from the foregoing agenda items. Among the priority issues, the Commission reconfirmed the emphasis on the industry's preparedness for crisis in the tourism sector which should be treated as a permanent agenda in its business dealings. The Commission thanked the Philippines and Macau SAR for their offer to host seminars and courses on crisis preparedness and management.

COUNTRY BRIEFS: AN OVERVIEW OF EACH MEMBER COUNTRY'S TOURISM PERFORMANCE IN 2005

(Agenda item 7, document CAP/44/7)

- 33. During the session on **country briefs**, the 15 Members represented (including the two associate members), i.e. Australia, Cambodia, China, DPR Korea, Hong Kong, China, Indonesia, Japan, Lao PDR, Macao, China, Malaysia, Mongolia, Philippines, Republic of Korea, Thailand and Vietnam took turns to present the Commission with an overview of their respective country's tourism performance in 2005. Owing to time constraints countries did not go into much detail. However, the following is the summary of the scripts that were distributed on each country's report.
- 34. The total number of international tourist arrivals in **Australia** for 2005 was 5.5 million, registering an increase of 5.4 per cent over the previous year. Tourism arrivals increased from Korea (up 18.1 percent), China (up 13.0 percent) and Taiwan (up 12.1 percent), New Zealand (up 6.3 percent), the United Kingdom (up 4.6 percent), Germany (up 4.3 percent) and the United States of America (up 2.7 percent). Tourism arrivals decreased from Japan (down 3.5 percent), Thailand (down 3.3 percent), Indonesia (down 1.2 percent) and Malaysia (down 0.7 percent). Tourism was responsible for the employment of 550,100 persons (or 5.6 per cent of total employment), an increase of 2.5 percent over 2003-04. Tourism accounted for 3.7 percent of expenditure on Gross Domestic Product (GDP) and 3.2 percent of Gross Value Added (GVA).
- 35. Some of the key issues in 2005 were the Australia-China Approved Destination Status (ADS) scheme for Chinese visitors which were strengthened in 2005 with a range of reforms to ensure Chinese tourists receive a quality Australian tourism experience. Another was the significant increase of the bilateral aviation capacity with Hong Kong and India and opportunities were identified for outbound airline services beyond these countries.
- 36. Cambodia tourism has increased at a steady growth ranging from 25-30 percent annually. In 2005, Cambodia attracted 1.4 million international visitors with reported revenue of US\$770 million, creating 64,000 direct jobs and 400,000 indirect jobs. In the first quarter of 2006, Cambodia received 457,305 tourists. The ten major markets for Cambodia shows that the Republic of Korea is the main source market for Cambodia, with Japan and USA in the second and the third ranking followed by France, UK, Thailand, China, Taiwan, Vietnam and Australia.
- 37. Cambodia has a central location in Southeast Asia and potentially good air access. With its wealth of natural and cultural heritage, Cambodia has tremendous potential for the further development and promotion of its tourism sector. The policies for tourism in Cambodia are based on three basic principles: tourism should be sustainable and tourism development should contribute to poverty reduction; creative promotion of tourism to make Cambodia a preferred "culture and nature" tourist destination in the region and the rest of the world; and increase tourist arrivals and stays as well as expenditures and domestic travel. The Royal Government also continues to improve the infrastructure (roads, airports, ports) in addition to providing a climate of peace and law and order.
- 38. **China**'s tourism industry has become a new growth point of the national economy and has become one of the most influential countries in the world tourism industry. In 2005, the inbound visitor arrivals totaled 120 million, increasing by 10% over the previous year; the tourism receipts in foreign exchange reached USD 29.3 billion, increasing by 14% over the previous year. In 2005, the

trips of domestic travel reached 1.2 billion, increasing by 10% over the previous year. The trips of outbound travel in China numbered 31 million in 2005, with an increase of 8% over the previous year. As of June 1st 2006, 124 countries and regions had been granted the Approved Destination Status by the Chinese government, and the outbound group travel by Chinese nationals is allowed to operate to 81 approved destination countries and regions.

- 39. The goal of China tourism in 2006 is centered on the expansion of domestic demand and the construction of socialist new countryside. For 2006, the forecast for China's inbound visitor arrivals is 130 million, and that of tourism receipts in foreign exchanges is USD 32.2 billion. Domestic tourism for 2006 is expected to reach 1.3 billion, with an increase of 8% over the previous year.
- 40. Some major issues in tourism for 2005 that achieved notable progress were the adjustment of industry structure, boosting regional economy, creating employment opportunities and helping poverty alleviation. The vision for 2010 is that China's tourism receipts in foreign exchange will reach USD 47 billion and that China tourism will create 10 million employment opportunities, with an average increase of 0.5 million jobs each year.
- 41. **DPR Korea**'s National Directorate of Tourism is responsible for the development of the tourism industry of the country. DPR Korea attaches great importance to its recent close collaboration with UNWTO, corroborated by the on-going Ecotourism Project of Mount Chilbo, one of the most beautiful and unspoiled mountains on the Korean peninsular. This project aims at improving Mount Chilbo's infrastructure in order to increase the flow of tourists to the area, while at the same time minimising the negative impacts of the growth in tourists on the environment. An example of measures being taken for this purpose is the development of new approaches to accommodation by utilising homestays.
- 42. In 2005, owing to the remarkable improvement in the quality of its tourism products and service facilities, DPR Korea was able to organise its most successful event for the year the Arirang Gymnastics and Art Performance. It was the largest choreographic gymnastic display in the world with over 100,000 performers. The event was so successful that the performance was extended for several weeks and received very positive publicity in major travel journals and websites. Two other events of significance which took place in DPR Korea were the 60th Anniversary of Liberation Day and the 60th Anniversary of Workers Party.
- 43. Hong Kong performed very well in 2005 and hit a new arrival record of 23 million, up 7.1 year-on-year, and generated a visitor expenditure of US\$13.5 billion. Arrivals from the long haul markets including the Americas, Europe, Australia and short haul markets like South and Southeast Asia picked up strongly with double-digit growth. Mainland China remained the largest source market bringing in more than 12.5 million tourists. The Hong Kong Disneyland opened in September 2005 and Phase II of "A Symphony of Lights" was staged in December of the same year. Other major new tourist attractions including The Hong Kong Wetland Park and Ngong Ping 360 were completed in May and June of 2006 respectively. Together with the vigorous worldwide promotions and the mega events launched by the Hong Kong Tourism Board (HKTB), it is expected that tourism of Hong Kong would further flourish in 2006. This is based on the promising tourism performance in the first quarter of 2006 with total arrivals of 6.23 million, representing a growth rate of 13.8% as compared to the same period last year. The government would continue to adopt multi-faceted strategies to promote tourism in Hong Kong. These strategies include enhancing tourist attractions, enhancing service

quality and supporting the Hong Kong Tourist Board in the field of promoting the image of Hong Kong as a premier tourist destination.

- 44. In the last five years, international tourist arrivals in **Indonesia** have been unstable. This is due to a number of unfavourable circumstances such as the effects of the tsunami and the two Bali terrorist attacks. While at the end of 2004, Indonesia reached 5.32 million international tourist arrivals, an increase of 19.12%, at the end of 2005 however, Indonesia reached only about 5 million international tourist arrivals, a decrease of 6.07%. The ten major markets of international tourists for Indonesia remain the same as the preceding years: Singapore, Japan, Malaysia, Australia, Taiwan, the Republic of Korea, USA, Germany, United Kingdom, and the Netherlands respectively. South East Asia contributes the biggest number of international arrivals (about 40% of tourist arrivals), followed by other Asian countries which contribute 30% of the tourist arrivals. The European region contributes 16%, Oceania: 9%, the Americas: 4%. The African region contributes only 1% of the total international tourist arrivals. The government of Indonesia has also put in efforts to attract the emerging new markets such as China and India.
- 45. In line with instability, disasters and other inevitable challenges in tourism, Indonesia has set up priority programmes of tourism development for 2005 2009 which are planned in four areas namely: marketing, tourism destination, tourism partnership, and capacity building. The marketing programme involves image recovery and new market penetration. Tourism destination programmes cover product diversification, community based tourism and the development of facilities and infrastructures. Tourism partnership programmes are directed at the improvement of coordination among stakeholders (public and private at national, provincial and local levels) while capacity building programmes are focused on human resource development.
- 46. In **Japan**, tremendous efforts are being poured into the promotion of inbound tourism. In 2003, Prime Minister Junichiro Koizumi declared turning Japan into a country built on tourism and set targets to increase foreign tourists visiting Japan to 10 million by 2010. The national budget for inbound tourism has increased each consecutive year from 2 billion yen (USD 18 million) in 2003 to 3.2 billion yen (USD 29 million) in 2004, 3.5 billion yen (USD 31 million) in 2005 and 3.6 billion yen (USD 32 million) in 2006. Thanks to the initiatives in attracting foreign tourists, the number of foreign tourists in 2005 increased significantly from 5.21 million in 2003 and 6.14 million in 2004 to 6.73 million in 2005, an increase of 9.6% from the previous year.
- 47. Many tourists see Japan as expensive in comparison to Asian tourist countries such as Thailand. This coupled with the low level of English has made Japan embark on an aggressive campaign depicting the importance of aggressively communicating the country's attractiveness and beneficial characteristics such as its clearly defined four seasons, coexistence of traditional culture, state-of-the-art technology and pop culture, as well as its high level of safety. The tourism campaign in Japan has set up priority markets that generate the most visitors to Japan and concentrated on these markets for increased efficiency in promotion. Due to the fact that there is a lack of travel products promoting Japan, the campaign has moved forward in initiatives to create specific tours to Japan, and carry out the promotion of tourist attractions in Japan through media such as newspapers, magazines, and television.
- 48. Tourism is among **Laos**' eight priority sectors for socio-economic development. During the past decade, there have been public sector infrastructure and human resource investments, road and

airport upgrades, telecommunication investment and public health improvements, all of which have made Laos a better place to invest in the tourism industry. There are 15 international immigration checkpoints and 3 international airports offering visas on arrival. Currently, 8 ASEAN countries have already removed visa and travel barriers between member nations which are leading to advance growth of intra-regional travel. The Lao government also instituted its open-door policy in the early 1990's and growth in the tourism sector has been impressive. The number of international arrivals has grown from only 14,400 in 1990 to over 890,000 in 2004. The year-on-year percentage increase from 2003 – 2004 was a high 41%. Tourism is currently Laos' number one earner of foreign exchange, bringing in over US\$ 118 million in 2004 and employing nearly 30,000 people. In 2005, the tourist arrivals were 1,1million visitors. Main markets include regional tourists from bordering countries, which make up about 70% of the market. Long-haul tourists from America, Europe and the Eastern Rim make up the remaining 30% of arrivals.

- 49. In the year 2005, foreign tourist arrivals in **Malaysia** recorded 16.4 million which indicated an increase of 4.6% over the previous year. Tourism receipts for the year reached US\$8.42 billion, which was 7.8% more than that of 2004. The tourism industry was the second most important sector of the economy in terms of foreign exchange earnings in which tourists from the Asian region, like Singapore and Thailand, contributed the most. Arrivals from West Asia, Australia and the U.K. increased. The increase in the income level of the population in China and India, together with the improved airlines connectivity and improvement in visa facilitations, contributed to the position of these two countries as the fastest growing markets for Malaysia. In general, the implementation of the aggressive and strategic tourism planning and marketing and the provision of government incentives to encourage the private sector to participate in the development of tourism contributed to the growth of tourism industry in Malaysia. A promising growth was forecasted for 2006 and 2007 as a result of *Visit Malaysia Year 2007* and the celebration of the 50th Anniversary of Malaysia's Independence. Tourist arrivals are expected to be 17.5 million in 2006 and 20.1 million in 2007, bringing in tourism receipts of US\$9.84 billion and US\$11.71 billion respectively.
- 50. In 2005, Mongolia recorded 338,000 international tourist arrivals, a 15.4% increase compared to that of 2004. Tourism receipts for the year were US\$201 million, showing an increase of 15%, which accounted for 10% of the country's Gross Domestic Product. Mongolian tourism employed 12,000 people and nearly 54 states and private universities and colleges have been running classes on tourism management. The international airport, Buyant Ukhaa, is the only international air access to Mongolia from the developed source markets of East Asia and the West while Mongolian Airlines, the national flag carrier of Mongolia, is responsible for 95% of all air transportation. The railway and truck roads are also gateways for tourist arrivals. There are about 160 tourist camps and about 300 hotels in Mongolia. The government recognizes tourism as a priority sector with a great potential to contribute to socio-economic development of Mongolia. The "Master Plan on National Tourism Development in Mongolia" was developed to guide the direction of tourism development up to the year 2015. The Government Action Plan for 2004-2008 and Basic Guidelines for Socio-economic Development include a specific set of measures for promoting tourism and implementing Tourism Law. It is expected that tourist arrivals would further grow in 2006 because of the 800th Anniversary of the Great Mongolian State which will feature unique state events aimed at attracting tourists from the main source markets.
- 51. As a result of the **Philippine** government's market-driven campaign, visitor arrivals have grown at an average rate of 17% over the past 2 years. In 2005, the visitor arrival was 2,623,084 with

a 14.5% increase compared to that of 2004. The USA was the largest tourist generating market, followed by Korea and Japan. China was the fourth with 43,511 arrivals and with an increase of 64% over the same period in the previous year. With the rising volume of tourists, expansion and modernization of tourism facilities were aggressively undertaken by the government and the private sector in the Philippines. A total of 35 new tourism projects amounting to over US\$ 213 million was endorsed by the Department of Tourism and 19 projects worth US\$212 million, focusing on construction and upgrading of tourist accommodation facilities, were invested in the same year. Occupancy rates of major hotels and resorts reached 75-90%. Major infrastructure is being upgraded and an additional 20,000 to 40,000 would be needed to accommodate the targeted 5 million tourists in 2010. The government has introduced policies to expand the tourism capacity of the Philippines. These include developing tourism enterprise zones to encourage international chains of hotels to invest; modifying the Omnibus Investment Regime and amending some laws to attract investment into the country. Tourism arrivals are expected to be 3 million in 2006 and 3.5 million in 2007, with an average annual growth of 15%.

- 52. In 2005, the number of international tourist arrivals in the **Republic of Korea** increased to 6 million inbound tourists, registering a 3.5% growth over the previous year. Outbound tourism escalated to 10 million a 14.2% growth in comparison with 2004. Factors affecting the growth in outbound tourism included an increase in leisure time due to the initiation of a national five-day workweek and a strong Korean Won. The increased arrivals of visitors to Korea was attributed to an economic recovery in the East-Asia region, the resumption of regular airlines operations between Korea and Taiwan, and the tourism marketing efforts. The top five favourite destinations of Korean travellers in Asia was China followed by Japan, Thailand, Philippines and Hong Kong.
- Besides the highest record number of visitors, the year 2005 featured some other major issues indicating a continued development in tourism area. First is the booming of a Korean drama *Daejanggeum*, "The Great Jewel in the Palace", which has contributed to the increase in arrivals of Asian tourists. Secondly, the ST-EP (Sustainable Tourism-Eliminating Poverty) Foundation was officially launched as a non-profit international organization at the 16th UNWTO General Assembly held in Senegal last December. The Korean government has committed itself to play an active role in alleviating poverty in the least developed countries in the world. Lastly, a Korea-Japan Friendship Year was held to expand the existing bilateral exchanges. As a result, the tourist exchanges between the two countries reached 4.18 million in 2005, reflecting an increase of 170,000 over the previous year. The government with its promotional efforts aspires to position itself as a tourism power by attracting 10 million inbound tourists by 2010.
- Thailand received 13.38 million international tourist arrivals and 450,000 million baht in tourism receipts in 2005 whilst the number of domestic visitors was 76.24 million trips, generating revenue of 347,300 million baht. During the year, the first meeting of UNWTO Emergency Task Force in Phuket was held in January and the first special session of Executive Council, adopting the Phuket Action Plan of 5 operational areas, was hosted in February. Besides, UNWTO's international press trips and familiarization trips of Chinese tour operators and travel writers to Phuket took place in February and August respectively. A workshop on indicators of sustainable development of tourism destinations was organized in May. The government also launched the *Happiness on Earth* campaign to promote Thailand's image. These measures were used to aid in the recovery of the tourism industry in Thailand after the adverse effect of the tsunami in 2004. They were also intended to further boost the industry. The tourism strategy of 2006 would focus on increasing tourism

competitiveness, developing tourism products and services, developing destinations according to their potentiality levels, developing standards of tourism services, tourists' safety and security, sustainability of tourism, developing human resource and encouraging foreign film shooting in Thailand. The number of tourists is expected to grow to 15 million in 2006-07 because of these strategies coupled with the staging of major events, the open sky policy, the operations of the new airport and air route, as well as the operation of new tourism products.

Despite the impact of the Avian Flu in the region, **Vietnam** received more than 3.4 million international tourist arrivals in 2005, with an increase of 17% over 2004. Tourism receipts were US\$1.8 billion which was 15.4% higher than that of the previous year. North East Asia, namely Japan, Republic of Korea and Taiwan, were the biggest source markets. They are followed by China and Hong Kong. ASEAN was also one of the most important tourist source markets for Vietnam. Cambodia, Singapore, Thailand and Malaysia were countries with high growth rates in arrivals. There are 6,000 tourism accommodations in Vietnam and 1,068 hotels, with a total of 49,000 rooms. In 2005, a more comprehensive legal framework for tourism was developed and would be in place during 2006. Meanwhile, a new promotion campaign was launched to enhance the image of Vietnam tourism. A new logo with a slogan "Vietnam-the hidden charm" was introduced for promotion during 2006-2010. In 2006, together with the new logo and slogan, Vietnam would organize "Visit Quang Nam Year 2006" to attract tourists to the two world heritage sites in Quang Nam. Vietnam would also host its first APEC meeting in 2006. It is expected that Vietnam would receive 3.6-3.8 million international tourist arrivals in 2006, increasing by 10.5%-11.7%.

DRAFT OF THE GENERAL PROGRAMME OF WORK FOR 2008-2009: IDENTIFICATION OF PRIORITY ISSUES

(Agenda item 8, document CAP/44/8)

56. The Commission was reminded of the Secretary-General's "Survey on the Organization's General Programme of Work" which was circulated among Full, Associate and Affiliate Members on 15 March 2006. These questionnaire-surveys which are conducted by the Organization biennially have a three-pronged objective, of which the latter two relate specifically to the present agenda item. Firstly, the questionnaire assesses, from the standpoint of evaluation, Members' perception of the results achieved in implementation of the now completed general programme of work for 2004-2005. Secondly, the survey ascertains Members' expectations regarding the general programme of work for 2006-2007, which is now getting underway. Thirdly, and finally, the survey consults Members concerning the strategic priority issues that they wish to see included in the draft programme of work for the future biennium 2008-2009. Members of the Commission that have yet to return their surveys were urged to do so to enable the Organization to complete its findings.

PLACE AND DATE OF THE 45TH MEETING OF THE COMMISSION

(Agenda item 9, document CAP/44/9)

57. Prior to the Commission meeting, the Government of Japan sent a communication to the UNWTO expressing its desire to host the 45th meeting of the Commission for East Asia and the Pacific and the 49th Meeting of the Commission for South Asia in Kobe in 2007 and requested that

this be communicated to the Chairmen of the two commissions. Under this agenda item, the Secretariat reminded the Commission that according to the decision taken during the 46th Meeting of the Commission for South Asia in Pakistan and the 42nd Meeting of the Commission for South Asia in Japan, there was a unanimous agreement that future meetings of the two commissions be held at the same venue but in a rotational manner. And since the current one was being hosted in East Asia and the Pacific, the next host would have to be South Asia. Japan responded that if 2007 was not possible then it reiterated its desire to host future meetings of the two commissions in 2008. The Commission was informed of Pakistan's proposal to host the 45th Commission meeting for East Asia and the Pacific and the 49th Commission meeting for South Asia, which was approved by the Commission.

58. The Chairman closed the 44th meeting of the Commission expressing on behalf of all the Members, his sincere thanks and appreciation to the staff of the Macau Government Tourist Office as well as to the UNWTO Secretariat for the successful organization of the meeting.

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