



**Asia-Pacific
Economic Cooperation**



APEC Tourism Working Group & PECC Agenda

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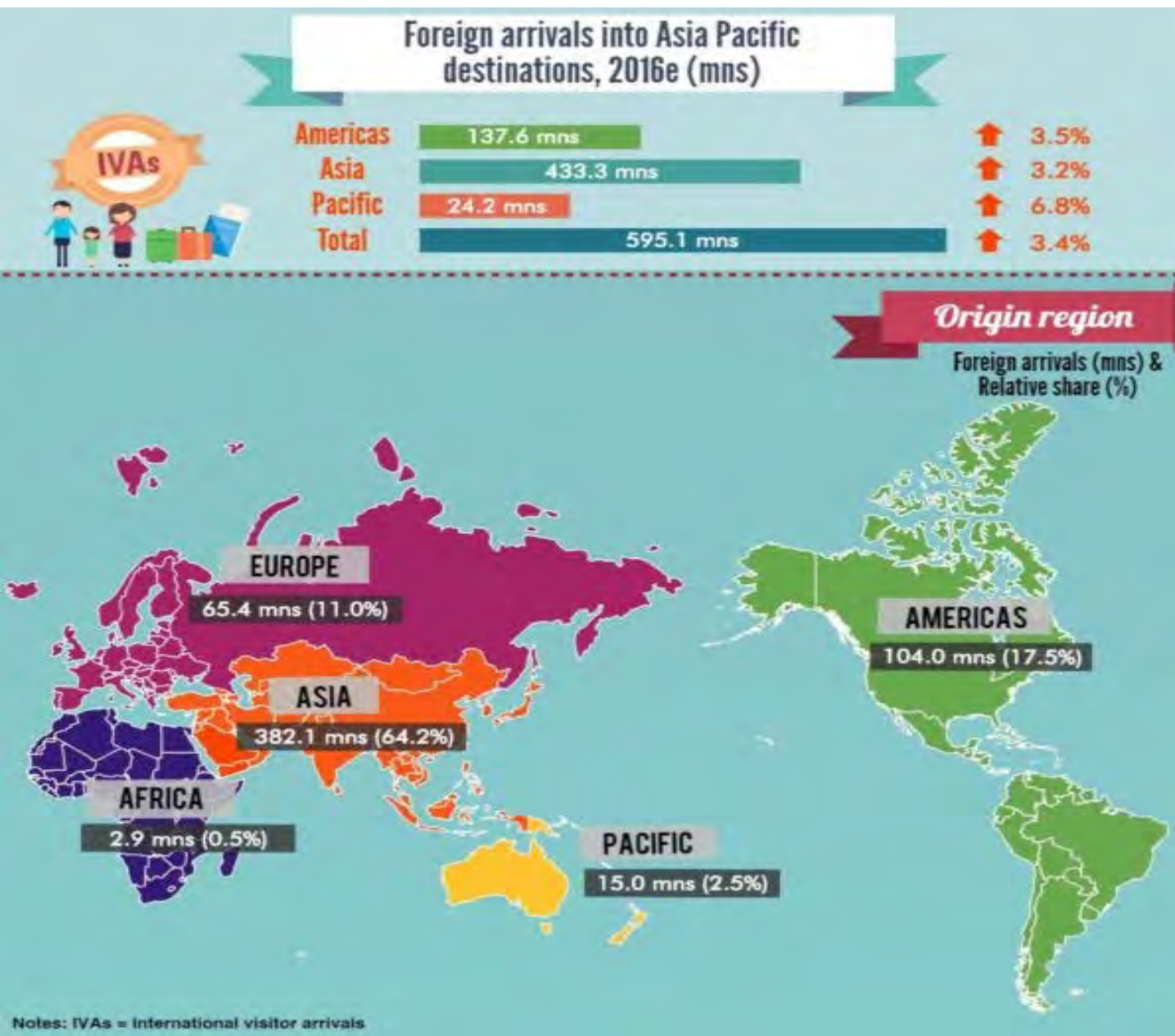
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Tourism matters:

Growth, Inclusion and Connectivity Agenda

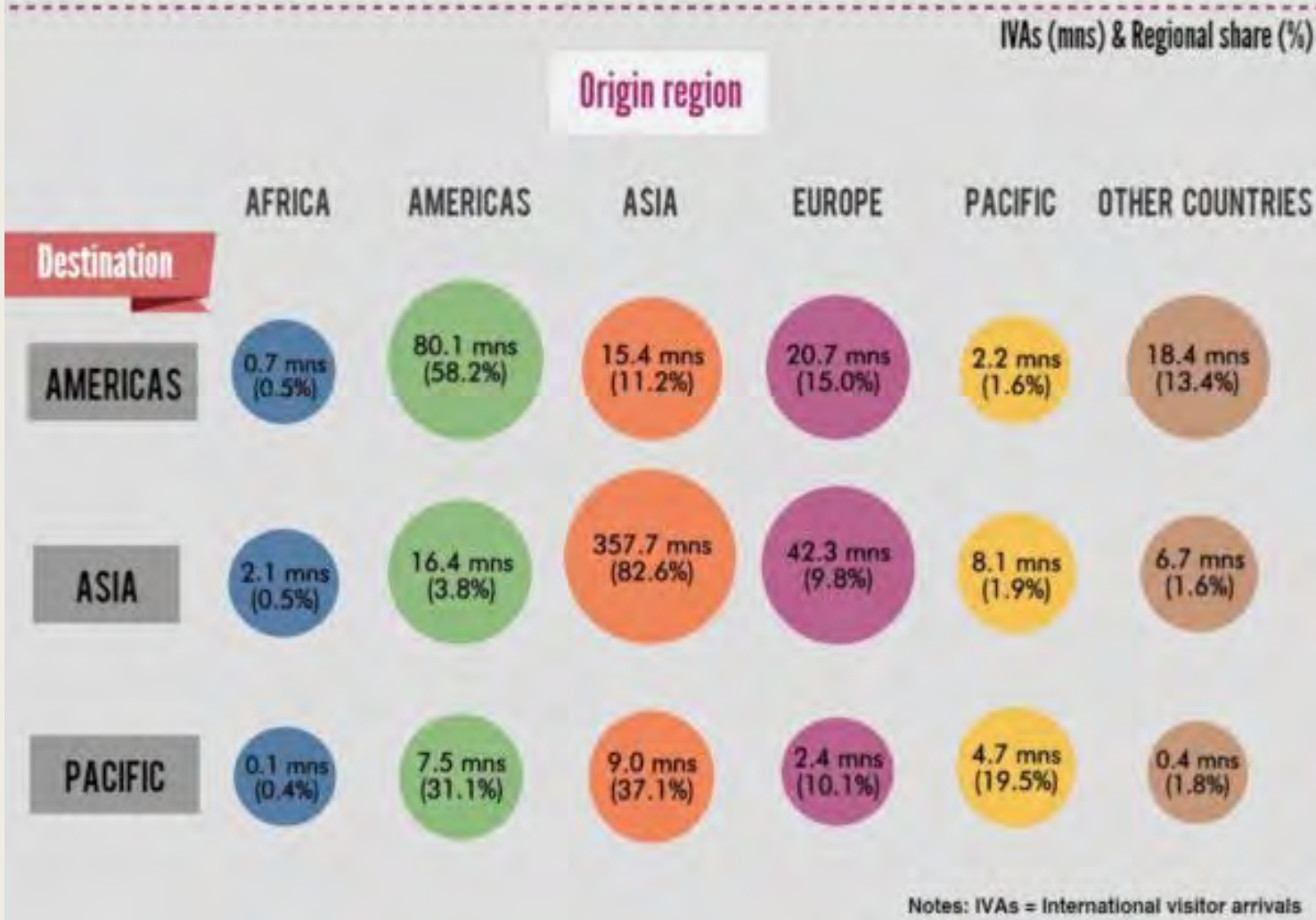
- APEC TWG
 - *Background and mission*
 - *Strategic plan (2015-2019)*
 - *Annual workplan 2017 (as discussed at TWG 51, Penang)*
 - *State of APEC Tourism Report 2017*
- PECC: Asia-Pacific Connectivity Index
- APEC Tourism Ministers' Meeting 2018, PNG
- Future forms of tourism



Tourism, a massive economic driver for the Asia-Pacific region

<https://www.pata.org/pata-asia-pacific-visitor-forecasts-2017-2021/>

Share of foreign arrivals by origin and destination region, 2016e



Asia-Pacific intra-regional travel and tourism

- 58% of arrivals into the Americas (Americas to the Americas),
- 82.6% of arrivals into Asia (Asia to Asia)
- China alone accounts for 23% of all arrivals into AP

(Source: PATA)

<https://www.pata.org/pata-asia-pacific-visitor-forecasts-2017-2021>

APEC TWG: Background

To help support growth in the region through travel and tourism, the APEC Tourism Working Group (TWG) was formed in 1991 as a platform for tourism administrators of APEC economies to share information, exchange views, and develop areas of cooperation in travel and tourism trade and policies.

TWG Mission Statement

- ▶ The Tourism Working Group exists to foster economic development in the Asia-Pacific region through sustainable tourism growth, recognizing that tourism is a key economic driver for the region, creating jobs and promoting investment and development.
- ▶ The TWG's objective is to support and enhance the benefits of regional economic integration in travel and tourism for Member Economies by increasing visitor movement and expenditure, stimulating investments in destination development and infrastructure, and strengthening the capabilities of industry workers and institutions, in close cooperation with multilateral organizations.

Communication of TWG work

- ▶ The TWG prepares an annual workplan for submission to SCE (Steering Committee on Ecotech). This workplan will outline the current priorities and projected outputs of the TWG for the year as well as proposed cooperation/consultation with other APEC fora, the private sector, and other international organizations.
- ▶ The TWG prepare a State of Tourism in APEC report annually for submission to Ministers and APEC leaders.
- ▶ A report outlining the achievements of the APEC TWG will be submitted to SCE at its final meeting each year.

TWG Strategic Plan

- ▶ To achieve the above objectives, the TWG will develop and implement its Strategic Plan every four years and annual workplan to:
 - Provide a mechanism that will enable a better understanding of the importance of tourism by leaders and policy makers, including APEC Leaders and member economy decision makers;
 - Establish stronger linkages with other APEC working groups, the private sector and international organizations to address various issues affecting the movement of travelers, destination and product development, human resources development, and the understanding of the travel and tourism industry; and
 - Foster appreciation of the region as a competitive tourism destination through sharing of best practices on marketing and promotion, sustainable growth, travel facilitation models and capacity building.



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APEC Tourism Working Group

Strategic Plan 2015 – 2019



Priority Areas

- ▶ Promote better understanding and recognition of tourism as an **engine for economic growth** and prosperity in the APEC region.
- ▶ Ensure **sustainable and inclusive growth** in the travel and tourism sector, by encouraging socially, culturally and responsible tourism.
- ▶ Promote **labor, skills development and certification** through increased cooperation in order to develop the tourism workforce in the region.
- ▶ Promote competitiveness and **regional economic integration** through policy alignment and structural reform.

Objective 1

Cooperate with international organizations and private sector stakeholders to exchange best practices in tourism statistics.

Activities	Start	Completion
Participate in meetings on tourism statistics	2015	Ongoing
Invite statistical experts to TWG meetings	2015	Ongoing

Objective 2

Increase communication on the value of tourism, the work of the TWG and the efforts of the economies to increase tourism in the region.

Activities	Start	Completion
Publish a State of APEC Tourism report	2015	Annually
Develop a communications strategy	2015	Ongoing

Objective 3

Assist micro, small and medium enterprises, including women, youth, disabled and other local entrepreneurs, to gain better access to global markets.

Activities	Start	Completion
Policy study on supporting MSME growth	2015	2016
Research on tourism sustainability – the development of eco-tourism in the Asia-Pacific	2015	2016
Host a high-level dialogue on Sustainable Tourism Development	2017	2017

2017 APEC High-Level Dialogue on ST Development: *Promoting Sustainable Tourism for an Inclusive and Interconnected Asia-Pacific*

What the Tourism Ministers said:

- ▶ Welcome the implementation of the Lima Declaration on Connecting Asia-Pacific Tourism through Travel Facilitation, the APEC Travel Facilitation Initiative, and the APEC Connectivity Blueprint (2015-2025)
- ▶ Support a more connected AP region that facilitates efficient and secure travel toward 800 million by 2025 (8th tourism ministerial, 2014)
- ▶ APEC destinations received 415 million international tourists – an increase of 24 million tourists (6.1%) from 2015 according to the UNWTO

Objective 4

Encourage innovation, new tourism products and niche segments.

Activities	Start	Completion
Muslim-friendly tourism as a new product	2016	2019
Study on contribution of sport tourism in tourism development	2016	2018
Development an assessment on innovative tourism products with high potential to be replicated in APEC economies	2016	2017
Project: APEC Workshop on Volun-Tourism Best Practices: Promoting Inclusive Community-Based Sustainable Tourism Initiatives. (PNG)	2016	2017

Objective 5

Encourage improvement of tourism skills standards and certification programs, capacity building, access to tourism training and create long-term career pathways for young people and women across the APEC region.

Activities	Start	Completion
Map implementation of APEC Tourism Occupational Skill Standards	2015	2019
Survey/workshops on best practices in tourism professional certification processes	2016	Ongoing

Objective 6

Explore barriers and mechanisms to facilitating tourism labor mobility across the APEC region. Identify and facilitate adoption of best practices in labor mobility.

Activities	Start	Completion
Conduct a survey on possibility of Mutual Recognition Agreement in the APEC Region	2016	2017
Workshops on the implementation of MRA model	2017	Ongoing

Objective 7

Develop and showcase best practices and key characteristics for traveler-friendly airports to improve the passenger experience in the APEC region.

Activities	Start	Completion
Project: Developing Traveler-Friendly Airports to Improve the Passenger Experience in the APEC region	2015	2016
Traveler friendly airport dialogue/training	2016	2017
Traveler-friendly airport follow-up.	2018	2019

Objective 8

Provide recommendations to improve air connectivity and infrastructure in the region.

Activities	Start	Completion
Project: Develop Air Connectivity in the APEC region.	2014	2016

Objective 9

Review tools that work to ensure traveler safety and improve crisis communications in APEC economies.

Activities	Start	Completion
Implementation of Developing Smart Traveler Programs to Facilitate International Travel in the APEC Region.	2015	2016

Objective 10

Guide policy and decision makers in APEC destinations in developing policies that support tourism growth.

Activities	Start	Completion
Develop an APEC-wide code of conduct for travel providers.	2016	2019
Workshops on policy issues that support tourism growth.	2015	Annually

2017 Outcomes - Workplan

- High Level Policy Roundtable on Sustainable Tourism (Halong Bay, Vietnam | June 2017)
- APEC TWG 51 (Penang, Malaysia | October 2017)
- Produced and distributed the 3rd annual report of *State of APEC Tourism* to APEC Leaders, public and private sector stakeholders.
- Distribute recommendations for best practices on creating traveler-friendly airports and self-assessment tool (TWG 01 2015).
- Create and distribute a follow-up evaluation survey for traveler-friendly airport study (TWG 01 2015).
- Recommendations for best practices on developing labor and skills in the tourism workforce and creation of a cross-fora roadmap for implementation (TWG 02 2015).
- Held an APEC Workshop on Volun-Tourism Best Practices: Promoting Inclusive Community-Based Sustainable Tourism Initiatives (TWG 01 2016).
- Develop and agree on a plan to better incorporate the private sector into TWG work.
- Develop an APEC Framework on Sustainable Tourism Development in the context of Climate Change.



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STATE OF APEC TOURISM REPORT 2017

IN THE 2014 MACAU DECLARATION, APEC TOURISM MINISTERS ADVOCATED FOR A TARGET OF 800 MILLION INTERNATIONAL TRAVELLERS AMONG APEC ECONOMIES BY 2025.

KEY STATISTICS 2016

	APEC	% GROWTH 16/15	% TOTAL APEC ECONOMY	% GLOBAL T&T
T&T GDP (Direct contribution)	US\$1.2 TRILLION	4.3%	2.8%	54%
Arrivals	414 MILLION	5.9%	N/A	33.5%
Receipts	US\$550 BILLION	N/A	N/A	45.1%
Employment (Direct contribution)	47.6 MILLION	2.4%	3.2%	43.7%
Export Value	US\$642 BILLION	4.0%	6.6%	46%

Sources: WTTC data for 2016 GDP, employment and export value / UNWTO for 2016 arrivals and receipts.

State of APEC Tourism Report: Opportunities to Drive Growth



Facilitate travel while enhancing safety and security



Increase connectivity and infrastructure capacity

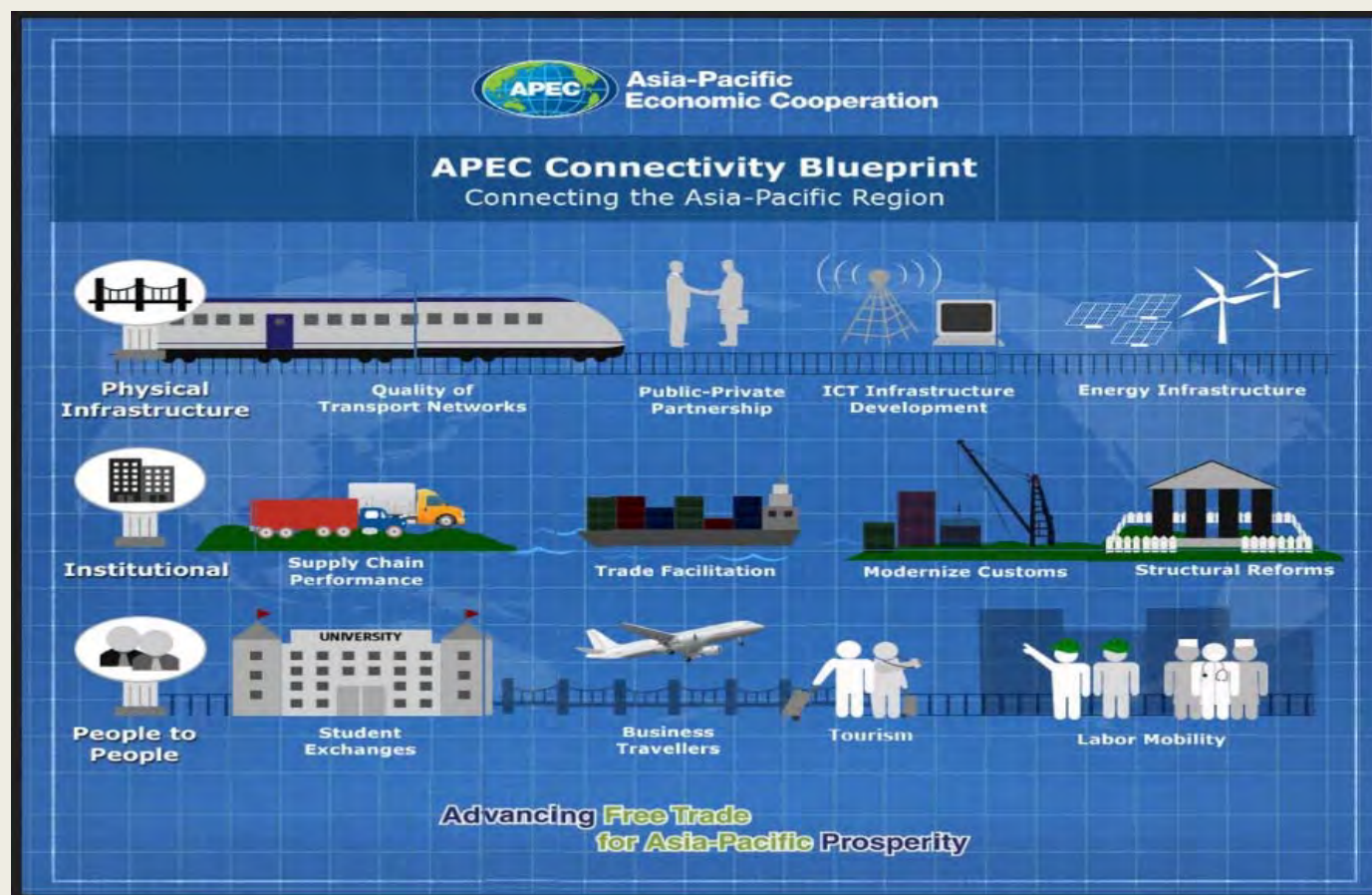


Ensure sustainable use of cultural and environmental assets



Develop a mobile and skilled workforce

PECC: Asia-Pacific Connectivity Index



Connectivity = the economy's level of integration with the rest of the world, as manifested by its participation in flow of products and services, capital, information and people via in physical, institutional and people-to-people linkages

Pillar 3. People-to-people Connectivity:

Movement of people (e.g. students, travelers and immigrants) across borders, and exchange of information and knowledge



Pillar 1. Physical Connectivity:

Extent and quality of linkages at the infrastructure level, including transportation (e.g. land, air and maritime), information and communication technologies and energy

Pillar 2: Institutional Connectivity:

Progress made in trade facilitation, structural and regulatory reforms and trade and logistics facilitation

Asia-Pacific Connectivity Index

- APEC Connectivity Blueprint (2015-2025): Total tourist arrivals in APEC region 800 mn by 2025
- APEC needs CAGR of 7% to achieve the target tourist arrivals
- APEC TWG focus areas:
 - *enhancing international and domestic air connectivity,*
 - *implementing travel facilitation measures,*
 - *development of the tourism sector's labour skills and workforce programs,*
 - *small business and entrepreneurship development for inclusive tourism growth*

(Source: www.apec.org)

Travel Facilitation Initiative (since 2011)

Easier, faster, and more secure

- Airport partnership
- APEC Business Travel Card
- Trusted Traveler
- Facilitation of Passenger Security Screening
- Advance Passenger Information (API)/ Personal Name Record (PNR)
- Air Connectivity Project

Travel & tourism promotion and facilitation: a holistic approach

- Infrastructure upgrade and improvement
- Aviation and airports/ Cruise ships and passenger ports: E.g. seasonal chartered flights, open skies arrangements (e.g. ASEAN's full ratification toward ASEAN Single Aviation Market, less ambitious than that of EU)
- Visa relaxation, temporary waivers/ exemptions while addressing safety and security concerns
- Destination and experience promotion, branding campaigns using mass media (e.g. *Malaysia Truly Asia*, *Amazing Thailand*, *Wonderful Indonesia...*), thematic programs (e.g. Muslim-friendly tourist destinations, experiences and facilities)

Tourism vs. Sustainable Tourism

- Long-term vision vs. short-term gains
- Quality over quantity
- Respect for the ecosystem: People (community, cultural assets and heritage) and planet (nature), not just for profit (economy)
- Reinvestment

But... can ST be inclusive?

Smart Tourism

Efficiency, circular economy

Peer-to-peer, sharing economy, inclusive

Digital tool-enabled, uses big data analytics, IoT (e.g. sensors, real-time data)

Diversified and tailored to individual preferences

Educated and well-informed travelers and service providers

APEC 2018 PAPUA NEW GUINEA

**THEME: Harnessing Inclusive
Opportunities, Embracing the Digital Age**

Growth

Connectivity

Digital Future



10th APEC Tourism Ministerial Meeting

Madang, PNG | 8 March 2018

(52nd TWG 5-6 March 2018)





THEME:
**"HARNESSING INCLUSIVE & SUSTAINABLE
TOURISM IN THE APEC REGION"**





HOST LOCATION: MADANG PROVINCE





KEY FOCUS AREAS



1. Promoting Community Oriented Tourism



2. 'Smart Tourism' in the Digital Age



3. Fostering a Sustainable Tourism Industry

