



Mandate Spotlight: 049 ASEAN NTOs

Study to Inform the Post-COVID-19 Recovery Plan for ASEAN Tourism

Location: Indonesia (ASEAN)

Beneficiaries: ASEAN National Tourism Officials (NTOs) & ASEAN Information and Communications Technology (ICT) & Tourism Division

Consultant: Greenview Hospitality Pte Ltd.

Start: Nov. 2020

End: May 2021

CTIF Contribution:
CAD \$99,790

Context

Tourism is a key economic driver in the ASEAN Economic Community, accounting for 14.3% of the region's gross domestic product and 13.7% of total employment in 2018. As such, reductions in economic activity in the tourism sector inevitably take a huge toll on the ASEAN economy. In the first quarter of 2020, ASEAN reported that the tourism sector had suffered a loss of approximately 36% in tourism receipts, and international arrivals had declined by approximately 34% as compared to the same period in 2018 and 2019, respectively. By mid-2020, many ASEAN countries had already revised their tourism revenue projections downwards by approximately 65%. In this context, ASEAN Tourism ministers agreed on a set of actions in April 2020 to mitigate and respond to these impacts. Among them was the development of an ASEAN Tourism Sector Post-Pandemic Recovery Plan, which was expected to introduce policy recommendations, guidelines, and scalable best practices on security and health factors for protecting employees and communities in the hotel industry and others related to tourism. It would also serve to enhance the environmental sustainability, resilience, and gender and social inclusiveness of ASEAN's tourism industry. Development of the Recovery Plan was considered an urgent and important undertaking that would require collaborative efforts among ASEAN officials and its partners.

Brief Description of the Mandate

Working with officials from the ASEAN Secretariat's ICT and Tourism Division, CTIF provided technical assistance (TA) in the form of a study assessing the impact of COVID-19 on ASEAN's tourism sector and advice on the contents of the ASEAN Post-Pandemic Tourism Recovery Plan for consideration by the ASEAN NTOs, a body responsible for coordinating programs and policy directions set by the ASEAN Tourism Ministers. Aligned with Canada's Feminist International Assistance Policy, this assistance was designed to help ensure that the Recovery Plan would be climate-smart, gender-responsive and socially inclusive, as well as aligned with the ASEAN Tourism Strategic Plan 2016-2025.

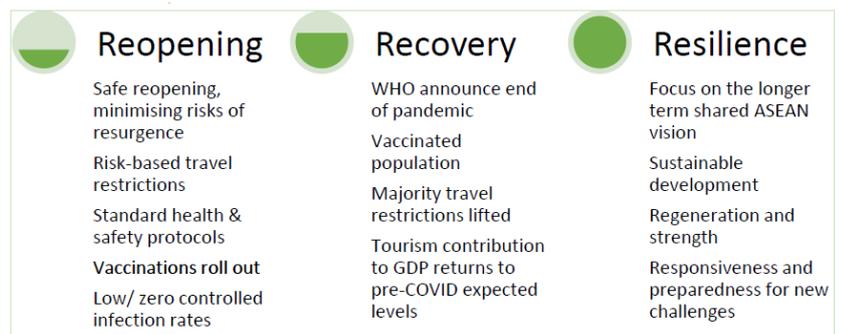


Figure 1: Phased Tourism Recovery Framework

Selected Findings and Observations

- The recovery is not going to be linear. Each ASEAN country may go through the three phases of the Recovery Framework at its own pace, and there are likely to be setbacks as circumstances change. There will be a need for constant review of progress at the country level to adapt to changing circumstances over time.
- A key challenge for the reopening phase will be keeping businesses open and employees paid until tourism numbers return to pre-pandemic forecast levels. An added challenge is the large number of workers in unregistered jobs, where women tend to be overrepresented.
- The ongoing climate and biodiversity crises are urgent matters to address and therefore must be woven into all policy responses and initiatives from the start.
- The preparedness of health systems will be an important health factor to be accounted for when restarting tourism, as travellers need to be assured of their safety.

Key Recommendations

1. Support tourism businesses with recovery and adaptation to the requirements of recovery

- Unlock financial support to secure the viability of tourism businesses in the short term
- Provide appropriate training and skills development to serve the recovery-driven needs of tourism
- Develop specific support programs for women
- Establish formal support structures for tourism MSMEs

2. Enable the safe and seamless restoration of intra-regional and international travel

- Promote ASEAN-wide alignment for the reopening of travel
- Encourage alignment of health and safety standards and protocols across ASEAN
- Move forward quickly on the establishment of a process to develop and trial travel corridors and bubbles
- Establish a mechanism for clear communications with travel businesses, buyers, operators, and travelers

3. Ensure that recovery is underpinned by principles of sustainability and inclusivity

- Establish new measures of tourism success to supplement international arrivals data, such as social and environmental indicators
- Invest in vital infrastructure in tourism destinations such as green transport, broadband and waste management
- Promote action against gender-based discrimination and modern slavery and enhance child protection measures

4. Reinvent tourism services to drive competitiveness

- Promote ASEAN-wide product development to respond to new travel trends
- Focus on specific segments which will kickstart recovery, such as the cruise sector, visiting friends and relatives (VFR), and tourism 'in your own backyard'.

5. Underpin recovery with long term resilience and crisis preparedness

- Set up an ongoing advocacy program for assuring the importance and interdependence of travel and tourism
- Centralize resources to support the tourism sector in times of crisis
- Enhance usage and understanding of digital technology in the tourism sector



Figure 2: Screenshot from virtual TA workshop

Environment & Climate Change

Sustainability analysis and recommendations were included in all phases of TA delivery. Policy recommendations, and a related action plan, included a specific section to ensure that recovery is underpinned by principles of sustainability and inclusivity, such as:

- Establishing new measures of tourism success that incentivize social and environmental benefits.
- Setting foundations for sustainable tourism.
- Investing in vital infrastructure in tourism destinations to better address to climate change threats and other environmental challenges such as biodiversity loss, desertification, and waste management.

For instance, CTIF's consultant recommended that ASEAN could champion new ways to measure tourism's impacts on destinations over and above revenues. These may include numbers of sustainability- and quality-certified businesses; funding generated for local conservation; resident well-being scores; physical status of visited natural and cultural heritage sites; resource usage and intensity figures of carbon emissions, energy, water, and waste within the sector.

Gender and Social Inclusion

GESI analysis and recommendations were integrated throughout this mandate. For example, CTIF's consultant conducted a gender-based analysis of the differentiated impact of the pandemic on women and men engaged in the tourism sector. The consultant also ensured that its recommendations were aligned with existing ASEAN plans and standards, with particular focus on the ASEAN Gender and Development Framework on Tourism.

Key actions recommended by CTIF's consultant to protect women and children in tourism destinations over the coming years include:

- Engaging with organisations already working to eliminate modern slavery in the tourism sector's supply chain.
- Raising awareness of gender-based discrimination/harassment through public education programs and training.
- Encouraging tourism businesses to sign the Code of Conduct for the Protection of Children from Sexual Exploitation in Travel and Tourism (ECPAT Code).