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CARUNIA MULYA FIRDAUSY, Ir., M.ADE., Ph.D., Prof.

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UNLOCKING THE ECONOMIC POTENTIAL OF THE TOURISM INDUSTRY POST-COVID-19

PROCEEDINGS OF THE ADB–ASIAN THINK TANK
DEVELOPMENT FORUM 2021

UNLOCKING THE ECONOMIC POTENTIAL OF THE TOURISM INDUSTRY POST-COVID-19

PROCEEDINGS OF THE ADB–ASIAN THINK TANK
DEVELOPMENT FORUM 2021



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6 ADB Avenue, Mandaluyong City, 1550 Metro Manila, Philippines
Tel +63 2 8632 4444; Fax +63 2 8636 2444
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Notes:

In this publication, “\$” refers to United States dollars.
ADB recognizes “Macao” as Macau, China.

On the cover: As travel resumes across the world, policies, regulations, and protocols must be harmonized for seamless travel.

Cover design by Erickson Mercado.

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Abbreviations

| | |
|----------|----------------------------------|
| ADB | Asian Development Bank |
| ADB I | Asian Development Bank Institute |
| COVID-19 | coronavirus disease |
| FDI | foreign direct investment |
| GDP | gross domestic product |
| GMS | Greater Mekong Subregion |
| PRC | People's Republic of China |
| UNWTO | World Tourism Organization |

Background

Tourism is important to many economies, particularly those in Asia and the Pacific. Across the region, tourism generated financial inflows, with tourism receipts of \$411 billion in 2018. The sector boosts physical and digital infrastructure investment, strengthens links between people, promotes entrepreneurship, and stimulates employment, especially in emerging markets and developing Asia.

Global tourism grew steadily from 2008 to 2019, with the number of international tourists increasing from 920 million in 2008 to around 1.5 billion in 2019. The gains were encouraged by the liberalization of the air travel market, the emergence of budget airlines, and innovations in digital and mobile technology that facilitated bookings for accommodations and airfares.

However, the coronavirus disease (COVID-19) pandemic hit tourism hard since its onset in 2020, as international tourism collapsed around the globe. The millions of people who did not or could not travel due to transport restrictions and health concerns, among other things, translated into millions of lost jobs and livelihoods.

As such, countries must pursue policies and strategies that will mitigate this unprecedented slump in the tourism industry and explore ways to revive the faltering industry. The Asian Development Bank (ADB)-Asian Think Tank Development Forum 2021 provided a venue to share ideas about how to do that. Scholars and practitioners sought to answer the following questions:

- Can the tourism industry contribute to inclusive and sustainable economic development and growth? How should the tourism industry evolve and how should we educate and train tourism professionals to maximize the tourism industry's economic impact on sustainable development?
- What is the likely impact/How to measure the negative impact of COVID-19 on the tourism industry and receipts?
- What national and regional level tourism policies would help to cope with the growing challenges of vulnerability to natural hazards and health security (pandemic)?
- What are the backward and forward industrial linkages of the tourism industry domestically and internationally and what are the ways to strengthen these channels?
- How can big data be used to better manage tourism and to make it more sustainable?
- How can the tourism industry become more environmentally sustainable?
- What are the main obstacles in the development of sustainable tourism?

ADB-Asian Think Tank Development Forum 2021

Unlocking the Economic Potential of the Tourism Industry Post-COVID-19

16-17 November 2021

Virtual Forum Proceedings

Agenda

16-17 November 2021

2 p.m. - 5:20 p.m.

(Philippine standard time)

| Day 1 16 November 2021 | |
|--|--|
| Opening | |
| Emcee: ALELI ROSARIO, senior economics officer, Economic Research and Regional Cooperation Department (ERCD), Asian Development Bank (ADB) | |
| 2:00 p.m. | Welcome Remarks TETSUSHI SONOBE, dean, Asian Development Bank Institute (ADBI) |
| | Opening Remarks JOSEPH ZVEGLICH JR., deputy chief economist, concurrently deputy director general and officer-in-charge, ERCD, ADB |
| 2:10 p.m. | Keynote Speech SANDRA CARVÃO, chief, Market Intelligence and Competitiveness, World Tourism Organization (UNWTO) |
| Session 1: Regional Economic Outlook | |
| 2:20 p.m. | <i>Regional Economic Outlook</i> JONG WOO KANG, principal economist, Regional Cooperation and Integration Division, ERCD, ADB |
| 2:35 p.m. | <i>Economic Outlook of India</i> DEEPAK MISHRA, director & chief executive, Indian Council for Research on International Economic Relations |
| 2:50 p.m. | <i>Economic Outlook of the People's Republic of China</i> MINWEN ZHANG, deputy director general, International Economics and Finance Institute |
| 3:05 p.m. | Open Discussion |
| 3:15 p.m. | Break (10 minutes) |
| Session 2: TOURISM and COVID-19: Country Cases (Part- I) | |
| Moderator: KIJIN KIM, economist, ERCD, ADB | |
| 3:25 p.m. | <i>Cambodia in Global Tourism Project: Aspect and Perspective in Recoveries</i> TENG DELUX, research fellow, Cambodia Development Resource Institute |
| 3:40 p.m. | <i>COVID-19 and Tourism Sector: An Impact Assessment in Case of Azerbaijan</i> RAMIL HUSEYN, deputy executive director, Center for Analysis of Economic Reforms and Communication (CAERC) RASHAD HUSEYNOV, head of department, CAERC |
| 3:55 p.m. | Discussant - WOUTERUS SCHALKEN, senior sustainable tourism specialist, Urban Sector Group, Sustainable Development and Climate Change Department, ADB |
| 4:05 p.m. | Open Discussion |
| 4:15 p.m. | Break (10 minutes) |
| Session 3: TOURISM and COVID-19: Country Cases (Part - II) | |
| Moderator: PETER MORGAN, vice chair for research, ADBI | |
| 4:25 p.m. | <i>Unlocking Tourism's Post-COVID-19 Economic Potential: Elevating Governance from Destination to Tourism Industry Level</i> JOHN PAOLO RIVERA, associate director, Dr. Andrew L. Tan Center for Tourism, Asian Institute of Management |
| 4:40 p.m. | <i>Unlocking the Economic Potential of Tourism Industry Post-COVID-19 in Indonesia</i> CARUNIA MULYA FIRDAUSY, professor of economics, Faculty of Economics -University of Tarumanagara |
| 4:55 p.m. | Discussant - SANCHITA BASU DAS, economist, Regional Cooperation and Integration Division, ERCD, ADB |
| 5:05 p.m. | Open Discussion |
| 5:15 p.m. | Closing for the day and reminders for next day |

Day 2 | 17 November 2021

Session 4: CAPACITY-BUILDING SESSION

Moderator: SEUNGJU BAEK, deputy dean, ADBI

2:00 p.m. Panel Discussion with Think Tanks

MONZUR HOSSAIN, research director, Bangladesh Institute of Development Studies

SURIYAN VICHITLEKARN, executive director, Mekong Institute

MEDELINA K. HENDYTIO, deputy executive director, Centre for Strategic and International Studies Indonesia

3:20 p.m. Break (10 min)

Session 5: SUSTAINABLE TOURISM – An Emerging Issue in Post-COVID-19 Recovery

Moderator: SANCHITA BASU DAS, economist, Regional Cooperation and Integration Division, ERCD, ADB

3:30 p.m. *Lead Presentation*

WOUTERUS SCHALKEN, senior sustainable tourism specialist, Urban Sector Group, Sustainable Development and Climate Change Department, ADB

3:45 p.m. *Country Case Studies*

SARA CURRIE, tourism specialist, Pacific Private Sector Development Initiative, ADB

ERDENESAIKHAN NYAMJAV, associate social development officer (Safeguards), Mongolia Resident Mission, East Asia Department, ADB

MARK R. BEZUIJEN, principal environment specialist, Environment, Natural Resources and Agriculture Division, East Asia Department, ADB

4:00 p.m. Open Discussion

4:10 p.m. Break (10 min)

Session 6: TOURISM and TECHNOLOGY

Moderator: CYN-YOUNG PARK, director, Regional Cooperation and Integration Division, ERCD, ADB

4:20 p.m. *Big Data for Better Tourism Policy, Management, and Sustainable Recovery from COVID-19*MATTHIAS HELBLE, senior economist, ADB
(on leave with the World Health Organization)

4:40 p.m. Panel Discussion

RICKY HOI, deputy director, Macao Government Tourism Office

SARAH MATHEWS, head of Media Partnerships, APAC, Tripadvisor

NATALIA BAYONA, director, Innovation, Education, and Investments, UNWTO

5:05 p.m. Open Discussion

WAY FORWARD for the ADB-Asian Think Tank Network

5:15 Forum Summary and Recommendations

JONG WOO KANG, ADB

5:30 END

Opening Session



ADBI Dean Tetsushi Sonobe; ERCD Deputy Chief Economist, concurrently Deputy Director General and Officer-in-Charge Joseph Zveglic Jr.; and World Tourism Organization (UNWTO) Chief of Tourism Market Intelligence and Competitiveness Sandra Carvão

DAY

1

16 November

Welcome Remarks

Tetsushi Sonobe

Dean

Asian Development Bank Institute (ADBI)

Dean Tetsushi Sonobe warmly welcomed participants in the 2021 development forum. The pandemic battered tourism, he noted, with tourist arrivals falling by 77% in 2020 and 93% in 2021. While countries have been starting to reopen their borders, new mutations of COVID-19 and an uneven pace of vaccination undermine this effort. Several studies expect the tourism sector to return to pre-pandemic levels by 2023 at the earliest. Measures to boost the sector amid the pandemic, he said, include clear communication of policies and actions, updating business models to meet changing demand, tracking market trends, applying big data to help make policy decisions, and harmonizing travel protocols. These require multi-stakeholder participation from government, the private sector, and civil society across subregions.

The session on capacity building of think tanks, he added, will hopefully promote dialogue on evolving needs and challenges from COVID-19. While the pandemic provided the catalyst for accelerating digital solutions, greater importance should be placed on quick knowledge solutions and dissemination, and innovations in the use of data.

He encouraged everyone to participate and share their best ideas.

Opening Remarks

Joseph Zveglic Jr.

Deputy Chief Economist

Economic Research and Regional Cooperation Department

Asian Development Bank (ADB)

Joseph Zveglic Jr. welcomed think tank members and participants and thanked ADBI for jointly hosting the event. Global tourism and travel industry growth have been upended by COVID-19. The decline in tourist arrivals in 2020 translated to a loss of \$4.5 trillion and 62 million jobs globally. In 2021, restricted growth lingers amid plans and

efforts to open up as new variants and slow progress in vaccination continue to pummel the sector. Greater effort and cooperation, through public-private partnerships and regional initiatives, are required to recover and transition into a sustainable and resilient tourism sector.

He underscored the importance of the forum for policy makers as a venue to share information, experiences, and perspectives of the challenges at hand.

He reiterated ADB's commitment to knowledge sharing and capacity building in its member countries.

Keynote Speech

Sandra Carvão

Chief

Market Intelligence and Competitiveness

World Tourism Organization (UNWTO)

Sandra Carvão shared insights on how the pandemic impacted and will reshape tourism. Historically, the impact of the pandemic on international tourist arrivals was highest in 2020, with international tourism arrivals declining by 73%, compared with 4% in 2009, the year of the global economic crisis. This means international tourism demand fell to levels last seen 30 years ago. The impact of the pandemic in tourism translated into a loss of \$2 trillion in direct gross domestic product (GDP), or 70% of the loss in global GDP (\$2.8 trillion). Tourism in Asia and the Pacific continues to take the biggest hit among regions, with the number of international tourists contracting an immense 95% from January to July 2021, as compared to pre-pandemic 2019. Other regions, such as the Americas, Europe, and the Middle East, are slowly recovering, helped by faster vaccination rollout and easing of travel restrictions, namely the development of vaccine certificates that allowed travel in Europe. For the rest of the year and beginning in 2022, Asia is expected to pick up, with countries opening up to vaccinated individuals. However, UNWTO scenarios have 2021 global tourist arrivals down from 70%-75% compared to 2019.

Further, an expert survey by UNWTO has shown that international tourism is perceived to return to pre-pandemic levels only in 2024 or later for Asia and the Pacific. Factors that affect this include travel restrictions, ambiguous travel protocols, and other factors.

New travel patterns have emerged over recent months. Domestic tourism has gained significant traction amid restrictions in international travel, with nature and rural tourism as preferred choices. Authentic travel experiences are also becoming more popular. Moreover, concerns for health and safety measures, and volatility of travel requirements are among the most important factors shaping travel decisions. Another emerging trend is the higher spending pattern of travelers at destinations.

Key factors for short-term recovery include the speed of vaccine rollout, which has a positive correlation with the ease of travel restrictions and consequent rebound in travel flows. Coordination between and among countries is also paramount, while the most challenging issue is the creation of mechanisms for agreed safe and seamless mobility. There is also the need to continue supporting domestic markets to cushion the impact of slow recovery in international tourist arrivals.

“We have lost a level of arrivals that has taken us back to 30 years ago.”

—Sandra Carvão

Four points are critical to the tourism sector moving forward: (i) digitalization and innovation, including the use of big data to improve travel experience; (ii) investing in talent and education to create tourism added value jobs; (iii) whole of government approach; and (iv) alignment of actions with the Sustainable Development Goals.

Challenges remain, but it is important to develop mechanisms to measure tourism's social and environmental impacts, such as improving capacity to report and measure the impact of tourist arrivals.



Welcome to the

ADB-Asian Think Tank Development Forum 2021

House rules for attendees:

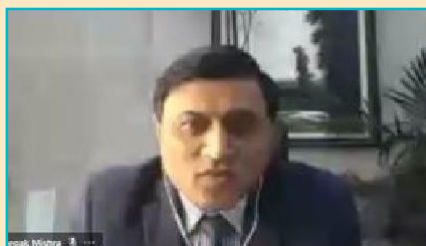
1. Please mute your microphone.
2. Type in your questions in this chat box or click the “raise hand” icon and the moderator/emcee will acknowledge you.

Thank you.

Unlocking the
Economic Potential
of the **Tourism Industry**
Post-COVID-19
ADB ASIAN THINK TANK
DEVELOPMENT FORUM 2021

DAY 1

Session 1: Regional Economic Outlook



ERCI Principal Economist Jong Woo Kang; Indian Council for Research on International Economic Relations Director and Chief Executive Deepak Mishra; and International Economics and Finance Institute Deputy Director General Minwen Zhang.

Session 1.1: Regional Economic Outlook

Jong Woo Kang, principal economist, ADB

The first session kicked off with a presentation by Jong Woo Kang on the *Regional Economic Outlook*. Economic growth recovery paths are uneven in Asia and the Pacific, owing to diverse vaccination progress and pandemic containment measures. Successful vaccination boosts recoveries, particularly in the region's largest economies, while rising infections and slow vaccination progress have held back growth in others. Fiscal policy in the region is largely accommodative, while monetary stance remains expansionary. Broad recovery in exports is expected to bring regional GDP growth to 7.1% in 2021 and moderate to 5.4% in 2022. Ongoing concerns about COVID-19, such as new waves of infections from variants, and delayed vaccine rollout continue to cloud the outlook. Other risks to growth include elevated geopolitical tensions, tightening financial conditions and, in the medium term, extreme weather events related to climate change.

“Economic growth is still subject to significant downward risks mainly from the threat of the pandemic ...”

—Jong Woo Kang

Session 1.2: Economic Outlook of India

Deepak Mishra, director and chief executive, Indian Council for Research on International Economic Relations

Deepak Mishra discussed the *Economic Outlook of India*. The COVID-19 pandemic unfortunately emerged as India's economy was already suffering from a growth slowdown, thereby pushing the country into its deepest recession in 50 years. A persistent decline in private investments and a series of one-time shocks had protracted economic deterioration prior to the pandemic. However, in 2021, as exports and foreign direct investment (FDI) improved and the stock market reached an all-time high, GDP growth is expected to accelerate to around 10%, sustaining that pace until 2022, and moderating to 5%-8% in the medium term. New sources of growth, such as green energy and disruptive technologies, are projected to bring India to a higher growth trajectory. The risks to the otherwise optimistic outlook includes slowdown in reform momentum, persistent implementation challenges, unfavorable global outlook, and geopolitical considerations, which could cause GDP



Jong Woo Kang





Regional Economic Outlook

Unlocking the **Economic Potential**
of the **Tourism Industry** Post-COVID-19
ADB ASIAN THINK TANK
DEVELOPMENT FORUM 2021

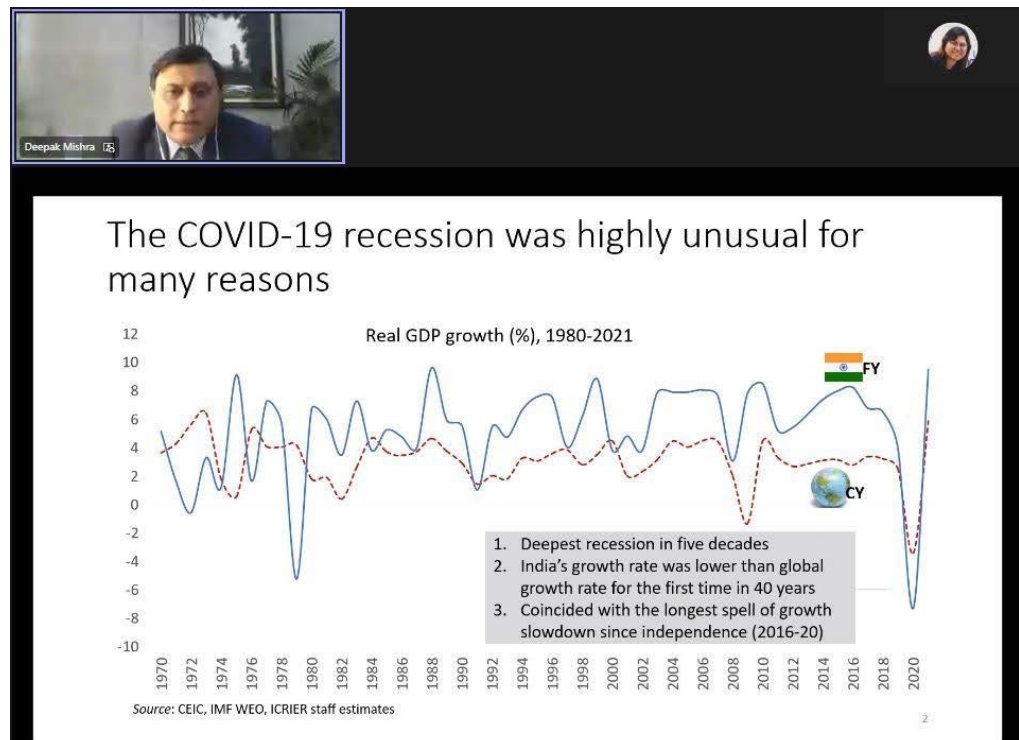
16-17 November, 2021

Jong Woo Kang
Principal Economist
Economic Research and Cooperation Department
ADB









growth to settle at the lower end of the forecast. Nonetheless, the debate on whether India will return to its 8% “golden growth” period or remain stuck at 5% growth in the medium term hinges on the country’s ability to break out of its investment and export pessimism.

Session 1.3: Economic Outlook of the People’s Republic of China

Minwen Zhang, deputy director general, International Economics and Finance Institute

Minwen Zhang shared the *Economic Outlook of the People’s Republic of China (PRC)*, highlighting that the country’s economy was due to pickup in 2021 after recording a 9.8% growth rate in the first 3 quarters. The rapid recovery of trade and investment supported the strong economic growth. Inflation is subdued at 0.6% in the same period, way below the target of 3%. In 2022, GDP is expected to return to its potential growth rate of 5.5%. Proactive fiscal policy and prudent monetary policy continue to be the bedrock of its macroeconomic policy. With its aim to see carbon peaking by 2030 and carbon neutrality by 2060, the PRC will strike a balance between low-carbon transition and ensuring the living needs of its people and between development and carbon reduction. Other long-term reform priorities include innovation, achieving “common prosperity” by resolving income inequality and a more open economy through lower tariffs and global cooperation.

Minwen Zhang (张敏) (Guest)

IEFI 国际财经中心
International Economics and Finance Institute

contents

- 1.Economic Situation
- 2.Adjustment of Economic Structure
- 3.Macroeconomic Policies
- 4.Reform Priorities

Minwen Zhang (张敏) (Guest)

Open Discussion

Moderator: Jong Woo Kang, principal economist, ADB

The moderator inquired about the efforts of the Indian government to enable FDI flows and pump up economic growth. Mr. Mishra replied that India's FDI is increasing, with the FDI-to-GDP ratio above 1%, while government investment is also steady and picking up. However, he noted that uncertainties remain in private investment, which had not rebounded fully.

In response to the moderator's inquiry on a potential trade-off between the PRC's goal of common prosperity and climate transition, Ms. Zhang pointed out that the PRC achieved stable economic growth, is on track to achieve common prosperity, and continues to strive for high quality development while promoting a green transition.

Session 2: Tourism and COVID-19: Country Cases (Part I)



ERCI Economist Kijin Kim; Communication Head of Economic Analysis and Analytical Information Department Rashad Huseynov, and Center for Analysis of Economic Reforms and Communication Deputy Executive Director Ramil Huseyn; Cambodia Development Resource Institute Research Fellow Teng Delux; and Sustainable Development and Climate Change Department Senior Sustainable Tourism Specialist Wouterus Schalken.

Key Messages and Policy Implications

- Implementing proper hygiene protocols is crucial to gradually reopening the tourism sector to visitors.
- Introduction of vaccine passports could be considered in pursuing the ease of travel restrictions.
- An appropriate assessment of infrastructure capacity and carrying capacity of attraction sites could help design reopening strategies of the tourism sites.
- Tax incentives for businesses have been an effective policy support for the faltering tourism sector.

Session 2.1: Cambodia in Global Tourism Project: Aspect and Perspective in Recoveries

Teng Delux, research fellow, Cambodia Development Resource Institute

Teng Delux presented *Cambodia in Global Tourism Project: Aspect and Perspective in Recoveries*. The tourism sector is a vital engine of growth for Cambodia. From 2000 to 2020, GDP grew an average annual 7.2%, driven mainly by the services sector, which employs 38.4% of the labor force. However, the pandemic slashed international tourist arrivals by 80% in 2020. Perceived as a critical path towards economic recovery, the government has crafted a Roadmap for Recovery of Cambodia Tourism During and Post COVID-19, which aims to receive 7 million international tourists by 2025. Although first quarter figures for

“ ... recovery in tourism sector will depend on the effectiveness of the vaccination and support programs government and the international community put in place ... ”

—Teng Delux



2021 showed no signs of recovery, efforts to jump-start tourism are already under way with the collaboration of health and tourism agencies in implementing health and safety protocols for local tourism. Apart from this, the government has set up training for skills development for workers in the tourism sector. While these efforts are laudable, key reforms are recommended to sustain the competitiveness of the sector. These include

- further diversification of the economy through greater connectivity and investment in rural and urban infrastructure;
- limiting the number of tourists in a destination and observing proper hygiene protocols to manage the spread of the virus;
- easing travel restrictions with the introduction of vaccine passport;
- promoting domestic tourism and diversifying inbound tourism by exploring the potential of waterways for international tourism, particularly along the Mekong River.

Given the dramatic changes brought by the pandemic, policy frameworks need to take these into account while calibrating data and analysis that are responsive to these transformations.

Session 2.2: COVID-19 and Tourism Sector: An Impact Assessment in the Case of Azerbaijan

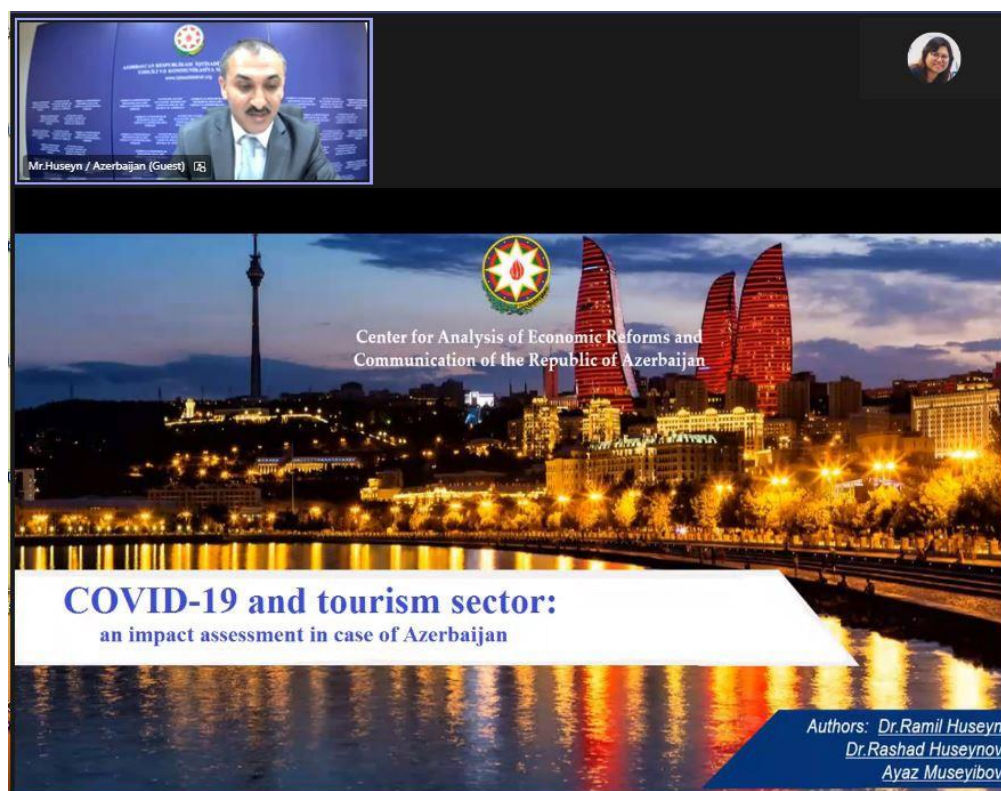
Ramil Huseyn, deputy executive director, Center for Analysis of Economic Reforms and Communication (CAERC)

Rashad Huseynov, head of department, CAERC

Ramil Huseyn and Rashad Huseynov presented their paper on *COVID-19 and Tourism Sector: An Impact Assessment in Case of Azerbaijan*. As elsewhere, Azerbaijan suffered a massive decline in the number of foreign arrivals in 2020 (down about 75% from 2019) as it closed its borders in response to the spread of COVID-19. This seriously impacted the country's development priorities, such as the creation of an additional 35,000 jobs in the tourism sector by 2020. To soften the negative impact, support programs and financial assistance were extended to those affected. Using an input-output model to analyze the situation has shown that the tourism sector can aid rapid economic recovery and produce significant gains. Efforts to stimulate tourism include the abolition of visa requirements from Turkey to Azerbaijan. This may also be expanded to accommodate other countries to facilitate smooth travel post-pandemic. Other measures to consider involve policies supporting small and medium-sized enterprises and freezing of value-added tax on the tourism sector. Azerbaijan is targeting 5 million tourists by 2025, assuming that the pandemic would last until 2021. The extension of the pandemic until 2022 curtails the target to 2.5 million-4.0 million tourists. Further out, its Strategic Roadmap targets getting Azerbaijan into the top-20 tourist destinations in the world after 2025.

“... informal (sector) employees suffered the most from the negative impact of COVID-19.”

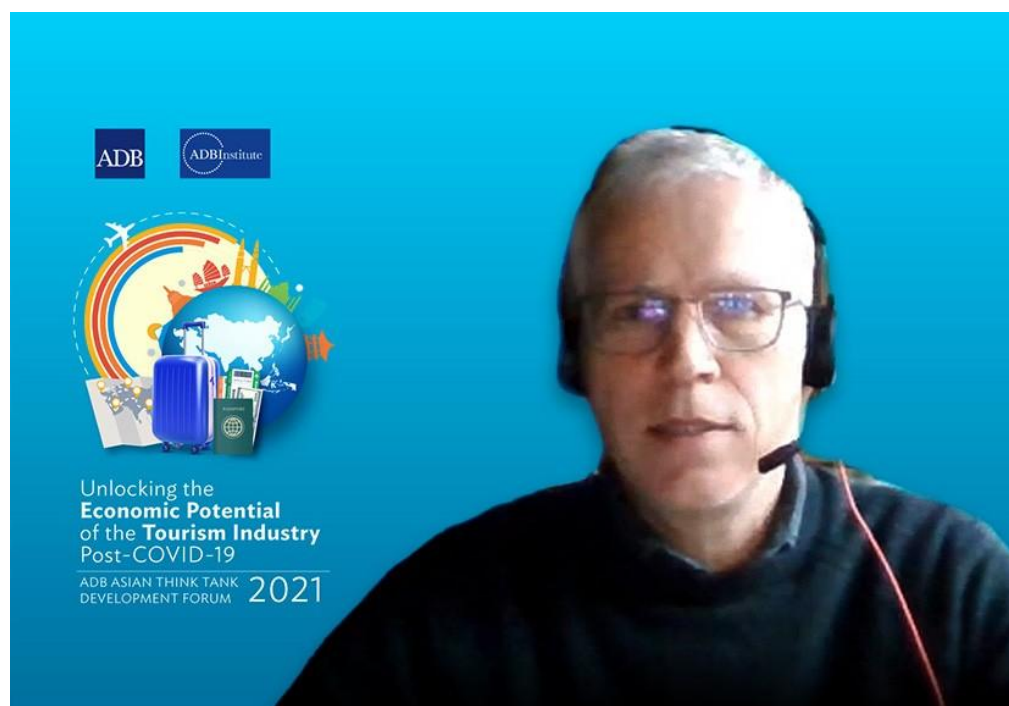
—Rashad Huseynov



Discussant:

Wouterus Schalken, senior sustainable tourism specialist, Urban Sector Group, SDCC, ADB

Wouterus Schalken added valuable insights looking beyond just the number of tourist arrivals. Equally important is also examining the structure of the sector (i.e., market players, market linkages) in policy decisions. One way to do this is to evaluate infrastructure capacity (i.e., hotel capacity and airlines seats) relative to carrying capacity of attractions (i.e., beaches, heritage sites) to manage foot traffic of visitors as countries start to open up. Identifying source countries is also imperative as those from long-haul markets tend to stay longer and therefore spend more. For Azerbaijan, expanding the target markets beyond the Russian Federation, Turkey, and Georgia and looking at long-haul markets could drive multiplier systems. Adjustments should be made quickly with the help of information technology solutions and digital infrastructure to make relevant information available to travelers, especially on travel safety and hygiene standards.



Open Discussion

Moderator: Kijin Kim, economist, ADB

The moderator asked if opening tourism to fully vaccinated individuals will accelerate tourism recovery in Cambodia. Mr. Teng informed the forum that the Government of Cambodia has started to do so and opened local tourism first as a pilot case.

A question was also asked about the current situation in Azerbaijan and whether there were any bilateral agreements to reopen tourism. Mr. Huseyn replied that the government wants to open air transportation first, and then rail and land transportation to jump-start the tourism industry.



A question was asked from the floor about health facilities and tourist insurance policies in Azerbaijan and Cambodia. Mr. Teng replied that domestic and international tourists are treated the same in Cambodia, where free medical insurance is provided. Mr. Huseyn explained that tourists in Azerbaijan must have health insurance to enter the country, but health care for emergencies is free.

Session 3: Tourism and COVID-19: Country Cases (Part 2)



Asian Institute of Management Dr. Andrew L. Tan Center for Tourism Associate Director
John Paolo Rivera; University of Tarumanagara Professor of Economics Carunia Mulya
Firdausy; ERCI Economist Sanchita Basu Das; and ADBI Senior Consulting Economist and Vice
Chair of Research Peter Morgan.



“The pandemic has rendered most tourism models obsolete but it has provided opportunities for a pivot from mass tourism towards genuine sustainable recovery.”

—John Paolo Rivera

Key Messages and Policy Implications

- The Multiregional Input-Output database reveals the dynamics and linkages of the tourism sector, domestically and internationally.
- The slump in the tourism industry could have negative spillover effects on other industries through both backward and forward linkages.
- Reforming the governance structures in tourism sectors should aim for sustainable and balanced growth in the industry.
- Regional cooperation could play a significant role in stimulating and supporting cross-border tourism.

Session 3.1: Unlocking Tourism's Post-COVID-19 Economic Potential: Elevating Governance from Destination to Tourism Industry Level

John Paolo Rivera, associate director, Asian Institute of Management

John Paolo Rivera presented the institute's study on *Unlocking Tourism's Post-COVID-19 Economic Potential: Elevating Governance from Destination to Tourism Industry Level*, in which he emphasized the concept of sustainability in the tourism industry given prospects for a new or better normal. The dramatic halt in global mobility as the pandemic began led to a decline in the tourism industry and higher unemployment. This prompted a second look, calling for a paradigm shift away from complete reliance on the capitalist model and toward other measures to encourage sustainable and balanced tourism.

The augmented framework incorporates disaster risk management and resilience in tourism that necessitates horizontal and vertical coordination among various stakeholders. In facilitating post-pandemic recovery, an elevated form of governance emerges, in which tourism development is organized and managed along the tourism value chain. All actors play an essential role and need to cooperate to manage the transition to recovery. Through this framework, tourism can evolve into a sustainable and more resilient sector.

Session 3.2: Unlocking the Economic Potential of Tourism Industry Post COVID-19 in Indonesia

Carunia Mulya Firdausy, professor of economics, Faculty of Economics, University of Tarumanagara.

Carunia Mulya Firdausy presented *Unlocking the Economic Potential of Tourism Industry Post COVID-19 in Indonesia*. He noted that Indonesia, like other countries, has also greatly suffered from the pandemic. The tourism industry contributed 15% to GDP in 2019, but shrank in 2020 as the pandemic took hold and subsequently drove the economy into recession. Using the Multiregional Input-Output database revealed the dynamics and linkages of the tourism sector, domestically and internationally. Apparently, intermediate inputs, which largely come from agriculture, food and beverage, and wholesale and commissions used in the tourism industry are sourced domestically. Therefore, shocks to the tourism sector will primarily impact trade in those areas. Forward linkages for hotels and restaurants also declined from 2008 to 2018, demonstrating the deterioration of the sector's contribution as an intermediate input to other sectors. To estimate the impact of the pandemic on tourism, transmission channels were assumed, namely: output, value-added, and labor income. The simulations using the 2021 input-output tables showed that limited capacity to operate at 25% and 75% increased the output loss of the tourism industry from 4.3% to 12.8% of GDP; the value added loss of 2.1% to 6.3% of GDP; and the labor income loss of 0.8% to 2.5% of GDP. To maximize potential gains in the tourism industry post-COVID, government policies must be geared toward infrastructure development, focused on 10 tourism destinations outside Bali; assist employers and employees of the tourism sector; and maintain the availability of intermediate inputs used in accommodation and restaurant services, among others.

Discussant:

Sanchita Basu Das, economist, ADB

Sanchita Basu Das provided useful feedback on the presentations. Defining terms such as “tourism products” and “disaster risk” in the context of tourism; providing a diagram on the stakeholders of tourism governance; and adding a “what” question aside from how, are additional points that would strengthen Mr. Rivera's paper, she said. On the other hand, Mr. Firdausy's paper can expand on the sections on inclusive tourism and the dynamics of international and domestic tourism in Indonesia and highlight the fieldwork conducted as an additional source of data. Both presentations illustrated the complexity of the tourism sector with its direct, indirect, and induced impacts on other sectors of the economy. She also highlighted the importance of including regional cooperation in the story. Since tourism is a cross-country issue, it is relevant to discuss regional cooperation and the role that regional arrangements play in stimulating and supporting development.

“Stakeholder cooperation is important to revive the tourism industry.”

—Sanchita Basu Das

Open Discussion

Moderator: Peter Morgan, vice chair for research, ADBI

A question from the audience asked if international brands help Indonesian tourism and how this is reflected in Indonesia's input-output matrix. Mr. Firdausy explained that the contribution of international brands could not be distinguished in the input-output matrix because no data were available in this breakdown. When asked if hotels and restaurants are importing more inputs from abroad than before based on the forward and backward linkages, Mr. Firdausy responded that this only means that the tourism industry has more power to pull intermediate inputs. Mr. Rivera highlighted the importance of coordinating among stakeholders to discuss concrete plans for tourism recovery in the Philippines.

DAY 2

Session 4: Capacity-Building Session



Bangladesh Institute of Development Studies Research Director Monzur Hossain; ADBI Deputy Dean Seungju Baek; Centre for Strategic and International Studies Indonesia Deputy Executive Director Medelina K. Hendytio; and Mekong Institute Executive Director Suriyan Vichitlekarn

Panel Discussion with Think Tanks

Monzur Hossain, research director, Bangladesh Institute of Development Studies

Monzur Hossain discussed the role of BIDS as a think tank and its relevance to policy makers. Established in 1957, the institute is an autonomous public organization that conducts research on development issues. It is governed by the Board of Trustees, chaired by the minister of planning, and headed by a director general. It provides capacity-building programs for the application of advanced research methodologies, internships, and training. It also assists the government in its policy decisions by providing inputs based on its data collection and research analysis. True to its mission of facilitating learning and disseminating research findings, it has its own flagship quarterly journal, called the Bangladesh Development Studies. It also publishes research monographs, research reports, books and a journal in Bangla. With funding assistance from the government, BIDS will offer a master's degree program in development economics soon.

However, the institution is not without its challenges. Faced with competition and better prospects in private entities, BIDS does not have sufficient human capital. Its incentive structure allows researchers to accept unlimited research consultancies to complement government salary. Yet, this too impedes their career advancement as quality research papers are not being published, which is a prerequisite for promotion. The organization is also experiencing insufficient research funds.

BIDS continues its work in research to contribute to society to a great extent and enjoys a good reputation worldwide.

DAY

2

17 November

“... build institutional strength in conducting research independently, and also advocate evidence-based policy changes.”

—Suriyan Vichitlekarn

Suriyan Vichitlekarn, executive director, Mekong Institute

Suriyan Vichitlekarn familiarized participants with the various facets of the organization. The institute began in 1996 as a development assistance project initially aimed at capacity building for government officials in transitioning economies to market-based systems. In 2003, it became a nonprofit autonomous organization by virtue of a charter signed by the six member countries of the Greater Mekong Subregion (GMS). It evolved in 2009 into an intergovernmental organization that works to strengthen regional cooperation, integration, and community building through capacity development. Mekong Institute (MI) is governed by the Council, which is composed of representatives from member countries, the private sector, and selected development partners. The organization's work is guided by its Strategic Plan 2021-2025 centered on GMS development through its regional development themes, and institutional strengthening. As part these goals, the institute is establishing a GMS Knowledge Network this year, working with the GMS Secretariat to implement the 2030 Strategic Framework and supporting its members in the formulation of development frameworks. However, the limited capacity to conduct independent research, weighed down by the pandemic, remains a hindrance. An innovative financing mechanism could be an excellent tool to link resources and research needs as well as translating policies into action in coming years.

Medelina K. Hendytio, deputy executive director, Centre for Strategic and International Studies Indonesia

Centre for Strategic and International Studies Indonesia (CSIS), as discussed by Medelina K. Hendytio, is a policy-oriented research institution that focuses on international and domestic development issues. In its 5 decades of existence, CSIS has learned to cope with the challenges of different times, having survived several global and domestic crises that have followed since its inception. COVID-19 generated yet another set of challenges. The first of these is how to stay relevant, as the organization has limited expertise on current issues, such as public health and disaster management. While the organization has accumulated knowledge on different sets of issues throughout its existence, it is not easy to adapt to abrupt changes. In the meantime, CSIS probes current issues from the perspective of international and domestic relations. Moreover, it is building alliances with other institutions and scholars to bridge this gap. In the meantime, we have witnessed rapid digital adoption and the amount of data that this process generates is unprecedented. As a result, CSIS is building its expertise in data-driven analysis and data science by investing in human capital and digital infrastructure, but without losing sight of the importance of human interaction in policy engagement.

Open Discussion

Moderator: Seungju Baek, deputy dean, ADBI

A question was asked about the challenges BIDS is facing in disseminating policy options in times of a pandemic. Mr. Hossain responded that they conduct surveys online and through calls, research papers are disseminated digitally, and capacity building is done online and in person. When asked how annual or multi-year research topics are determined based on government requests, Mr. Hossain explained that while the government does not impose on BIDS, they do what is requested—research or evaluation of government projects—by the government. He said that there is no set annual program for government research, but

that the board or senior members of BIDS provide guidance on what research to undertake. When asked about BIDS teaching programs and post-graduate degrees, Mr. Hossain confirmed the creation of a master's program in economics in 2020.

In response to a question if MI had an implementation monitoring system, Mr. Vichitlekarn replied that this is ongoing, and that they had developed indicators and targets to assess and monitor progress. He explained that they conducted a baseline survey to determine the benchmark for their strategic plan, but that much still needs to be done to enhance their capacity.

Dean Sonobe asked if they organize webinars, produce knowledge products, and what other channels are used to advertise the MI's products. Mr. Vichitlekarn said that they have an online forum that is streamed through Youtube and Facebook, and that they publish research papers on their website and social media. He also pointed out that they have an e-learning platform for various learning modules. When asked about the receptiveness of policy makers, Mr. Vichitlekarn said that the challenge remains, but MI continues to provide advice to GMS countries and share the research findings directly with line ministries to help in national policy making.

When asked how CSIS identifies the needs of its clients, Ms. Hendytio explained that CSIS conducts an annual strategic meeting and midterm planning to predict burning issues based on pronounced government policies. Dean Sonobe asked about gender balance in CSIS management and whether they work with other think tanks in the region. Ms. Hendytio noted the difficulty in achieving the gender balance—women's participation in leadership roles is encouraged, but men still dominate. She also pointed out that CSIS is working with local and international institutions to fill in knowledge gaps and improve their capacity. A participant requested more information on how CSIS initiated the digital team or task force and what areas of work it covers. Ms. Hendytio said that they have formed a knowledge management team that is looking at digitalization and finding ways to reach a wider audience for their knowledge products.

Session 5: Sustainable Tourism—An Emerging Issue in Post-COVID-19 Recovery



East Asia Department Principal Environment Specialist Mark R. Bezuijen; Sustainable Development and Climate Change Department Senior Sustainable Tourism Specialist Wouterus Schalken; Pacific Private Sector Development Initiative Tourism Specialist Sara Currie; ERCI Economist Sanchita Basu Das; and Mongolia Resident Mission Associate Social Development Officer (Safeguards) Erdenesaikhan Nyamjav.



Key Messages and Policy Implications

- Advances in technology have made tourism a fun and interactive experience.
- Environmental sustainability requires knowledge of destinations' carrying capacities and social sustainability ensures communities benefit from the resources they share and the tourism activities they enable.
- Policies, regulations, and geographical linkages need to be considered holistically to balance the interests of multiple stakeholders and the environment.
- ADB projects are geared toward enhancing economic viability and environmental sustainability at the same time.

Lead Presentation

Wouterus Schalken, senior sustainable tourism specialist, Urban Sector Group, Sustainable Development and Climate Change Department, ADB

Wouterus Schalken threshed out the emerging issue of sustainable tourism after the pandemic. Tourism is an important contributor to economic development. The current crisis, which caused deep contraction in tourist arrivals and revenues, is an opportunity to look deeper into the sector and reevaluate it. The Sustainable Tourism Value Framework provides such an avenue. The framework consists of three main pillars—economic, social, and environmental sustainability—with technology an emerging driver. Technological advances have made tourism a fun and interactive experience. Millennials are combining

tourism and technology—using digital platforms to plan their travel and share their experiences—making it an integral part of tourism. Economic sustainability involves expenditure on both the demand and supply side of the tourism economy. Tourists spend money on travel, accommodations, and experiences, while country destinations invest in public infrastructure to improve accessibility and connectivity, and promotion to attract more tourists. Environmental sustainability, on the other hand, includes an awareness of destinations' capacity to effectively manage what is possible and available without overloading it. Meanwhile, social sustainability ensures that communities benefit from sharing their tourism resources and participating in tourism activities, even without the need to commercialize their culture and community. Tourism is a multi-stakeholder industry with different stakeholders (i.e., government, private operators, hosts, visitors) having different expectations. The challenge is to manage these multiple expectations in a way that benefits everyone. This is where policy, regulations, and geographic linkages come into play to balance such interests with the environment.

Considerations for sustainable tourism include (i) offering the right product to maintain competitiveness, (ii) ensuring the spatial spread of tourism activities, (iii) the need for tourism operators to be more sustainable by considering social and environmental impacts, (iv) effective coordination between source and destination markets, and (v) the availability of sufficient and updated data for policy decisions.

“We shouldn’t underestimate the role of technology in tourism development and management going forward.”

—Wouterus Schalken





Re-opening Pacific Tourism post COVID-19

- Different approaches across ADBs Pacific Member Countries
- Bilateral 'travel bubbles' initially the great hope for safe re-opening
 - Palau: 'Travel bubble' commenced in April 2021; halted after 7 weeks; only 2% of pre-pandemic arrivals in April-May
 - Cook Islands: May 2021 'travel bubble' with New Zealand. Bookings were strong; bubble halted after 3 months
- Re-opening by vaccination status now a focus for tourism dependent economies
- Less tourism dependent economies may be slower to reopen



THE PACIFIC
PRIVATE SECTOR
DEVELOPMENT
INITIATIVE

A technical assistance program delivered in partnership with:





Country Case Studies

Sara Currie, tourism specialist, Pacific Private Sector Development Initiative (PSDI), ADB

“For a lot of the smaller economies (in the Pacific), it is difficult for them to put sufficient protocols in place.”

—Sara Currie

Sara Currie looked at the reopening of Pacific member countries to foreign travelers. Palau and the Cook Islands tested bilateral travel bubbles in early 2021. Palau began a bilateral travel bubble with Taipei, China in April 2021, but ended it after 7 weeks due to a COVID-19 outbreak. The Cook Islands terminated its travel bubble with New Zealand after 3 months, despite strong bookings, due to a COVID-19 outbreak in New Zealand. Hopes for reopening now turn to vaccination status. Palau and Fiji reopened their borders to fully vaccinated travelers in late 2021, with similar approaches planned for Kiribati and the Cook Islands in early 2022.

However, this raises a number of issues on sustainability in the region. It will be difficult for smaller economies to implement sufficient health protocols, especially for smaller operators who will struggle to comply with protocols given manpower constraints. Greater issues related to visitor dispersal will likely occur in Fiji since visitors prefer to stay at major areas, close to health services. To attract tourist arrivals, price cutting and competition between Pacific countries may also become a challenge without regional collaboration. The difficulty of balancing economic advancement with sustainability has been demonstrated in the Cook Islands, where the renewed influx of New Zealand tourists in 2021 led to environmental degradation, despite strong coordination between the government and operators.

PSDI is a regional technical assistance program undertaken in partnership with ADB and the governments of Australia and New Zealand. PSDI provides technical, advisory, and capacity-building assistance to improve the business environment and support inclusive,

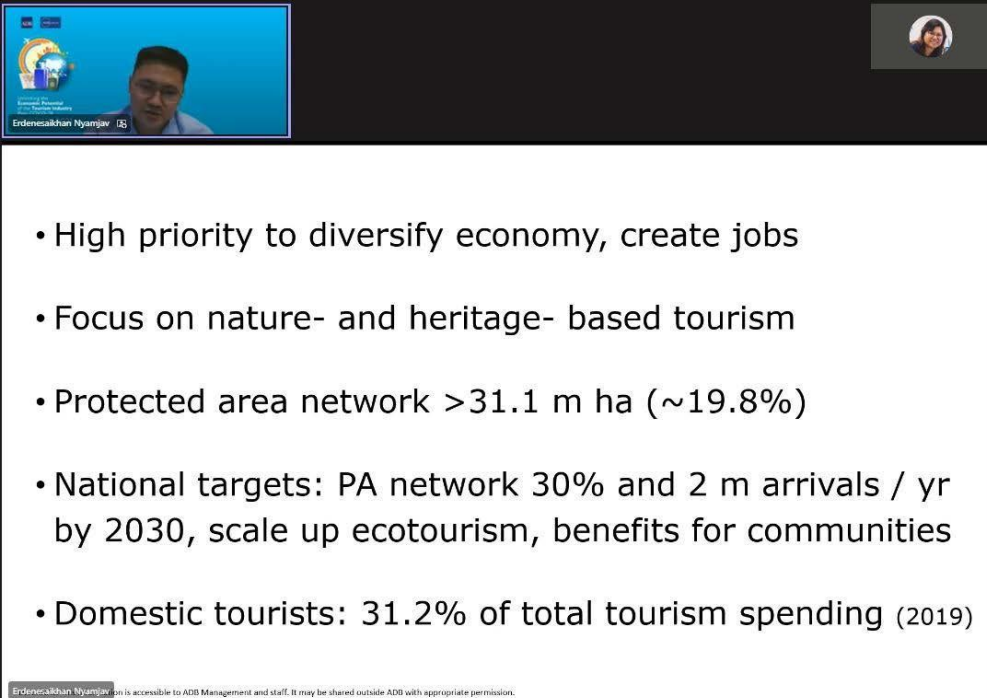
private sector-led economic growth in ADB's 14 Pacific member countries. PSDI's dedicated tourism program works to improve tourism data and evidence-based planning, build crisis management and resilience, support improved access to finance and the tourism enabling environment, and advocate for inclusive, sustainable tourism. In 2021, PSDI released a series of reports on the impact of COVID-19 on Pacific tourism and recommendations for recovery and resilience.

Erdenesaikhan Nyamjav, associate social development officer,
Mongolia Resident Mission, East Asia Department, ADB

Mark R. Bezuijen, principal environment specialist, Natural Resources
and Agriculture Division, East Asia Department, ADB

Erdenesaikhan Nyamjav and Mark R. Bezuijen conveyed the experiences of Mongolia in sustainable tourism. The country aims to be a global destination for nomadic culture. Tourism, while small, is an emerging sector with around half a million arrivals in 2019 that is expected to double by 2030. In 2019, this translated into about 7.2% of GDP. Tourism is seen as an opportunity to diversify the economy and create more jobs. It is a priority sector for the government, especially the promotion of nature and cultural heritage tourism.

The COVID-19 pandemic has not spared Mongolia's tourism industry. Early published and unpublished estimates from various agencies indicate that following national border closures, international arrivals declined to almost zero, equivalent to an estimated loss of \$421 million in 2020. In 2021, lockdowns were still enforced, and early estimates indicate this has caused a 90% decline in revenues, and 60% income loss for rural households. In response, the government is trying to revive tourism with the creation of national working groups and the introduction of an e-visa application system for ease of entry.



- High priority to diversify economy, create jobs
- Focus on nature- and heritage- based tourism
- Protected area network >31.1 m ha (~19.8%)
- National targets: PA network 30% and 2 m arrivals / yr by 2030, scale up ecotourism, benefits for communities
- Domestic tourists: 31.2% of total tourism spending (2019)

Erdenesaikhan Nyamjav is accessible to ADB Management and staff. It may be shared outside ADB with appropriate permission.

“... multi-sector coordination approach is highly required in Mongolia.”

—Erdenesai Khan Nyamjav



ADB support 2015–2025

- Country and regional support
- 2015: Grant – 1 national park (**\$3 m, JFPR**)
- 2019: Loan – 2 national parks (**\$1.1 m JFPR, \$38 m**), CAREC Regional Technical Assistance (**\$2.2 m**)
- 2021: Loan and Grant – 3 provinces (**\$2 m JFPR, \$30 m**)
- From 1 grant → thematic area of portfolio
- JFPR has been critical to catalyze support

Erdenesai Khan Nyamjav is accessible to ADB Management and staff. It may be shared outside ADB with appropriate permission.

ADB has been supporting sustainable tourism in Mongolia since 2015 with a multi-sector approach to address key issues such as limited inclusive planning, insufficient infrastructure, inadequate sanitation and waste management, inadequate management of cultural sites and protected areas, and a post-COVID-19 recovery and resilience plan. These issues require a balanced approach between development, livelihoods, and nature and heritage protection to catalyze tourism; green building standards for water and energy efficiency; and measures for recovery and resilience from COVID-19 and the risks of future disease outbreaks, to help support economic revitalization.

Open Discussion

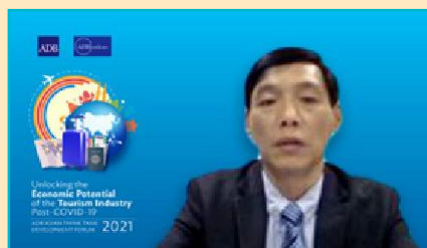
Moderator: Sanchita Basu Das, economist, ADB

The moderator asked what is meant by a positive approach and baby steps to achieve sustainable tourism. Mr. Schalken explained that sustainability requires intervention at different levels aside from constant dialogue with stakeholders. When asked if regional tourism will pick up in the Pacific, Ms. Currie replied that the Pacific islands are open to regional collaboration, but interisland connectivity is a problem as the lack of direct flights limits tourism. Regarding the Mongolia project, the moderator inquired about the outcomes and the time frame for achieving those. According to Mr. Nyamjav, the key outcome is sustainable and inclusive tourism in the national park. Mr. Bezuijen added that the aim is to have the national park included in the green list of protected areas after 5 years, coinciding with the term of the first project loan. Regarding the role of tourism in achieving the SDGs, Mr. Schalken confirmed that tourism contributes to the SDGs and that it also contributes to other sectors in a positive way.

Session 6: Tourism and Technology



Innovation, Education and Investments Strategy of UNWTO Director Natalia Bayona; ERCI Director Cyn-Young Park; World Health Organization Research for Health Department Scientist Matthias Helble; Macao Government Tourism Office Deputy Director Ricky Hoi; and Tripadvisor Head of Media Partnerships, APAC Sarah Mathews



Key Messages and Policy Implications

- Big data has the potential to effectively support recovery plans and policies for the tourism industry. Data accessibility can be made through data philanthropy or the public-private partnership scheme of opening up data.
- The resumption of international travel will also require harmonization of travel health protocols using digital technology for seamless travel.
- Leveraging big data to build back a better tourism industry requires investment in skills and technology and cooperation among all stakeholders.
- Collaboration with big tech platforms is being explored for data collection and processing to improve public service.

Session 6.1: Big Data for Better Tourism Policy, Management, and Sustainable Recovery from COVID-19

Matthias Helble, senior economist, ADB

Matthias Helble presented *Big Data for Better Tourism Policy, Management, and Sustainable Recovery from COVID-19*. Big data is a large and more complex set of information that is characterized by 5 Vs: volume, velocity, variety, veracity, and value. Volume is the amount of data generated, velocity is how fast data are created, variety refers to various data formats, veracity is the data quality, and value is the value that we generate using the data. Big data on tourism can be sourced from flights and hotels information, the loyalty programs of airlines and hotels, bookings and reservations, and travel reviews, among others. There is also non-

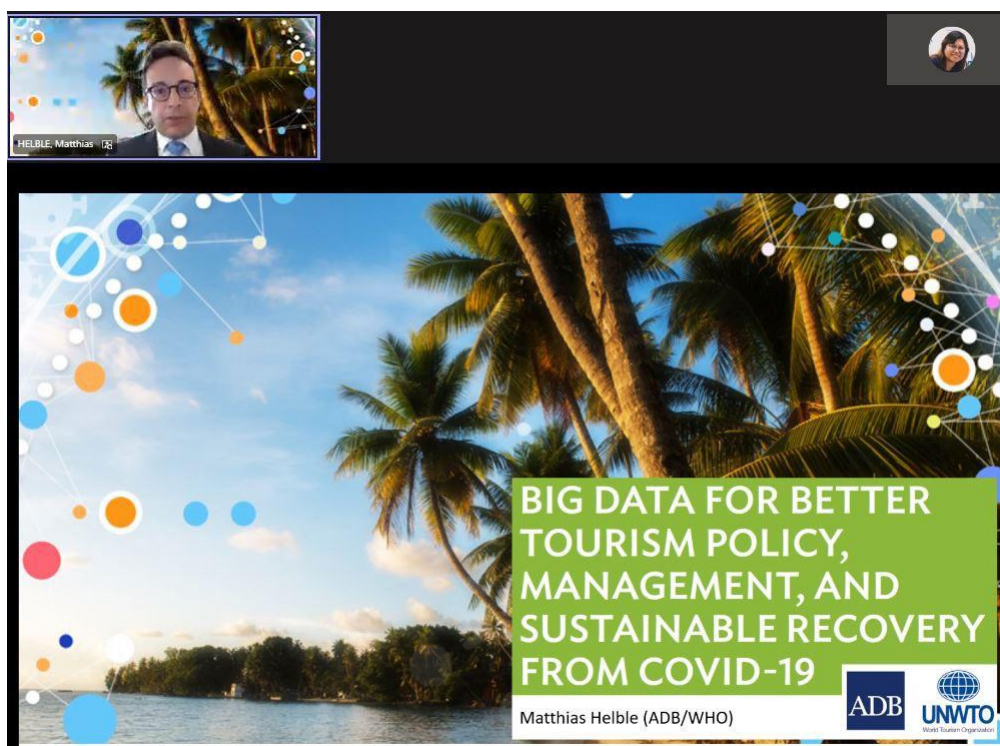
“Big data offers the potential to measure ... externalities caused by tourism.”

—Matthias Helble

tourism data that are sourced from financial services, mobile network providers, smart city sensors, and others. Countries like Japan and Australia have already started exploiting information collected from big data to understand tourist behavior by tracking their spending patterns. Yet, challenges abound with the use of big data. The rapid progression of digitalization created an estimated shortfall of 3.1 million cybersecurity professionals globally and 2.1 million in Asia and the Pacific. This led to tightening competition between private and government sectors to recruit professionals. In return, the Thai government decided to train its own employees in big data skills. Data privacy and cybersecurity are other imminent and common concerns, particularly for consumers. The big data landscape is also uneven, notably for developing countries that lag on information and communication technology readiness scores, and small firms that are less digitized. Further, governance and policy support are deficient when it comes to facilitating data sharing between government and the private sector. Big data also engenders structural dependency and selectivity bias due to the digital divide.

Big data has the potential to effectively support recovery plans and policies. Data accessibility can be made through data philanthropy or public-private partnership schemes opening up data by each sector to enable evidence-based planning and policy. The Organisation for Economic Co-operation and Development estimates that when public and private sectors share their data, it could boost GDP by 1% to 2.5%.

The resumption of international travel will also require harmonization of travel health protocols using digital technology for seamless travel. Recognizing the importance of data for sustainable tourism, the UNWTO launched a new framework in measuring tourism sustainability as auxiliary statistical information. Leveraging big data to build back a better tourism industry requires investment in skills and technology and cooperation among all stakeholders.



Panel Discussion

Ricky Hoi, deputy director, Macao Government Tourism Office

The first discussant, Ricky Hoi shared how Macau, China maximized the use of big data for tourism. The Macau, China government has forged a partnership with Alibaba Group to develop the economy as a smart city with the intent of using Alibaba's data processing capability to improve the quality of public service. The tourism sector was identified as one of the pilot areas, with the goal of collecting visitor behavior to boost travel experience. Following this, the government built a shared data platform, where various government bureaus can share relevant information. For example, the Macao Government Tourism Office was able to construct real-time visitor dashboard using data from immigration. To further understand the demographics of visitors, data from Amap—an Alibaba subsidiary providing digital map navigation and location-based solutions—are also consumed. All these information, combined with other data, can create better travel experiences for visitors. For instance, their "Smart Application for Visitor Flows" merged data on the number of visitors and weather forecast to predict the density flow of visitors for several tourism attraction sites at certain times. This helps visitors and operators plan their itineraries accordingly.

Sarah Mathews, head of media partnerships, APAC, Tripadvisor

Sarah Mathews provided insights on how Tripadvisor uses big data in its operation. She said that data is powerful because it is crisis proof, provides tremendous insights, and a beacon during tough times. Tripadvisor possesses an enormous amount of data that can steer destination and source markets toward a common good. For instance, Tripadvisor helps destinations better understand its consumers, their preferences, and needs to be able to offer the right product. For prospective travelers, it provides information on top attractions, best places to eat and stay, etc. The government can also benefit from information on the economic impact of tourism by looking at spending patterns.

The pandemic also triggered a shift in market behavior, altering travel patterns. Ms. Mathews noted that based on their data, Asia and the Pacific is losing its market share due to conservative measures like border controls. Outbound markets prefer destinations that have clear policies on when they are open and the corresponding travel safety protocols. Hence, these kinds of information will strengthen government in tourism revival plans and transitions to a more sustainable path.

Natalia Bayona, director, Innovation, Education, and Investments, UNWTO

Natalia Bayona imparted the initiatives that UNWTO is doing on bridging skills gap. UNWTO is promoting entrepreneurs and start-ups as part of its innovation program. It has identified various start-ups with data analytics globally and connected these with ministries to create new dashboards.

She said that technology giants like Google, Mastercard, and Facebook are also working with UNWTO to create data analytics reports to foster tourism sustainability. Google is also providing training related to data analytics to UNWTO's member countries.

Open Discussion

Moderator: Cyn-Young Park, director, ADB

The moderator inquired what government should do to maximize the use of big data to support tourism recovery. Ms. Mathews pointed out that Tripadvisor partnered with governments by providing analytics and insights on tourism trends and data. She added that training for small businesses are available to help them understand how they can develop the right products. On UNWTO's part, Ms. Bayona mentioned that its mandate is to encourage public-private partnerships for data sharing. She gave examples of interventions using big data which in Portugal, confirmed that trade shows do not generate tourist arrivals and that tourist decisions are made online; and in Argentina, overcrowding was avoided as data on queries from the private and public sectors enabled capacity management of destinations. For Macau, China, Mr. Hoi explained that data from telecom providers enable better planning and strategies.

Closure

Jong Woo Kang acknowledged the rich discussions and informative sessions and the benefits they could bring to think tanks for their future policy agendas as well as in crafting policy measures supporting tourism revival in the context of sustainability with the aid of big data.

The secretariat will contact the members, in due course, to discuss potential topics for next year's forum and to identify possible hosts.

He ended with the hope for a face-to-face forum next year.

List of Participants

1. Think Tanks

Afghanistan¹

- Abdul Basir Azimi, research fellow, Afghan Institute for Strategic Studies

Armenia

- Melik Gasparian, director, AVAG Solutions Ltd

Azerbaijan

- Ramil Huseyn, deputy executive director, Center for Analysis of Economic Reforms and Communications (CAERC)
- Ayaz Museyibov, head of department, CAERC
- Rashad Huseynov, head of department, CAERC

Bangladesh

- Monzur Hossain, research director, Bangladesh Institute of Development Studies

Cambodia

- Teng Delux, research fellow, Cambodia Development Resource Institute

China, People's Republic of

- Minwen Zhang, deputy director general, International Economic and Finance Institute

Georgia

- Tamar Sulukhia, director, ISET Policy Institute (ISET PI)
- Maka Chitanava, senior researcher, ISET PI

India

- Deepak Mishra, director and chief executive, Indian Council for Research on International Economic Relations

¹ ADB placed on hold its assistance in Afghanistan effective 15 August 2021. [ADB Statement on Afghanistan | Asian Development Bank](#) (published on 10 November 2021). Manila.

Indonesia

- Carunia Mulya Firdausy, professor of economics, Faculty of Economics and Business, University of Tarumanagara
- Medelina K. Hendytio, deputy executive director, Centre for Strategic and International Studies Indonesia

Kyrgyz Republic

- Altaaf Hasham, partnerships advisor, Aga Khan Development Network

Pakistan

- Samina Khalil, director, Applied Economics Research Centre, University of Karachi

Philippines

- John Paolo Rivera, associate director, Asian Institute of Management (AIM) - Dr. Andrew L. Tan Center for Tourism
- Eylla Laire Gutierrez, research manager, AIM

Thailand

- Suriyan Vichitlekarn, executive director, Mekong Institute (MI)
- Mohammad Halimur Rahman, monitoring evaluation and learning, MI

Regional Think Tank

- Khalid Umar, chief, Strategic Planning Division, CAREC Institute

2. Government, International Organizations, and the Private Sector

- Jose Diaz, Innovation and Digital Transformation, World Tourism Organization (UNWTO)
- Khandakar Mushfiquur Rahman, senior assistant secretary, Planning Commission in Bangladesh
- Natalia Bayona, director, innovation, education, and investments, UNWTO
- Naung Naung Lin Aung, director, Ministry of Hotels and Tourism
- Ricky Hoi, deputy director, Macao Government Tourism Office
- Sandra Carvão, chief, market intelligence and competitiveness, UNWTO
- Sarah Mathews, head of media partnerships, APAC, Tripadvisor

3. Other Guests

- Ashraful Islam, private sector engagement manager, Winrock International
- Amri Saiful, Popon, Trc Perlindungan Perempuan Dan Anak Korda Bireuen Aceh
- Guiller Asido, administrator, Intramuros Administration
- Jayant Menon, director, Iseas-yusof Ishak Institute

- Jojo Villamin, faculty, Polytechnic University of the Philippines Manila
- Latdavanh Songvilay, acting director general, Lao Academic of Social and Economic Sciences
- Maricar Besa, assistant professor, Holy Angel University
- Meruert Makhmutova, director, Public Policy Research Center
- Nai Chira, student, Build Bright University (BBU)
- Paul Pio Lagaso, self-employed
- Sopheak Men, BBU
- Zalina Enikeeva, research fellow, University of Central Asia

4. Asian Development Bank Institute

- Tetsushi Sonobe, dean
- Widya Alwarritzi, results management coordinator
- Linda Faustina Arthur, senior capacity building and training specialist
- Seungju Baek, deputy dean
- Joice Eva, administration, management, and coordination
- Nella Sri Hendriyetti, senior capacity building and training economist
- Derek Hondo, capacity building and training coordinator
- Peter Morgan, senior consulting economist and vice chair of research
- Misuzu Nakamura, administrative staff
- Pradeep Panthi, research associate
- Izumi Shimura, administrative staff
- Pitchaya Sirivunnabood, capacity building and training economist
- Kayo Tsuchiya, program coordinator
- Yixin Yao, senior research fellow

5. Asian Development Bank

- Joseph Zveglic Jr., deputy chief economist, concurrently deputy director general and officer-in-charge, Economic Research and Regional Cooperation Department (ERCD)
- Cyn-Young Park, director, ERCD
- Aiken Rose Tafgar, consultant, ERCD
- Aleli Rosario, senior economics officer, ERCD
- Annazoe Garcia, events management assistant, Corporate Services Department (CSD)
- Anna Fink, country economist, Indonesia Resident Mission
- Asadullah Khan Sumbal, principal regional cooperation specialist, Southeast Asia Department (SERD)

- Carol Ongchangco, operations coordinator, ERCD
- Clemence Fatima Cruz, consultant, ERCD
- Concepcion Latoja, consultant, ERCD
- Dominique Hannah Sy, consultant, ERCD
- Dorothea Lazaro, regional cooperation specialist, East Asia Department (EARD)
- Erdenesaikhan Nyamjav, associate social development officer (Safeguards), Mongolia Resident Mission
- Geoffrey Tapas, Information Technology Department (ITD)
- Jong Woo Kang, principal economist, ERCD
- Karen Capunihan, event manager, CSD
- Kijin Kim, economist, ERCD
- Lindy Lois Gamolo, senior operations assistant, Sustainable Development and Climate Change Department (SDCC)
- Loreli De Dios, consultant, EARD
- Maria Criselda Aherrera, associate operations analyst, ERCD
- Maria Josephine Duque-Comia, senior programs officer, SERD
- Maria Pia Ancora, senior urban development specialist, Central and West Asia Department (CWRD)
- Marilyn Parra, senior operations assistant, ERCD
- Mark R. Bezuijen, principal environment specialist, EARD
- Matthias Helble, senior economist, ERCD (on leave with the World Health Organization)
- Nanette Lozano, events assistant, ERCD
- Paulo Rodelio Halili, senior economics officer, ERCD
- Pia Tenchavez, senior operations assistant, ERCD
- Raymond Gaspar, consultant, ERCD
- Rolando Avendano, economist, ERCD
- Sanchita Basu Das, economist, ERCD
- Sara Currie, tourism specialist, Pacific Private Sector Development Initiative (PSDI)
- Shawn Tan, senior economist, ERCD
- Sing Cho, senior urban development specialist, SDCC
- Steven Schipani, principal tourism industry specialist, SERD
- Teodor Justin Ducay Tulio, service desk analyst, ITD
- Vivian Camille Pabelico, senior events management officer, CSD
- Wouterus Schalken, senior sustainable tourism specialist, SDCC
- Xinglan Hu, principal regional cooperation specialist, CWRD
- Zemma Ardaniel, consultant, ERCD
- Zulfia Khamitovna Karimova, principal regional cooperation specialist, EARD

Unlocking the Economic Potential of the Tourism Industry Post-COVID-19

Proceedings of the ADB-Asian Think Tank Development Forum 2021

Tourism generates significant flows of finance into economies and has positive impact through its encouragement of infrastructure, connections among people, employment, and entrepreneurship. Yet the coronavirus disease (COVID-19) pandemic halted what would have been a steady increase in the industry's growth and drastically reduced tourism volumes, destroying millions of jobs, incomes, and livelihoods. The ADB-Asian Think Tank Development Forum, jointly organized by the Asian Development Bank and the Asian Development Bank Institute, provided a platform for sharing knowledge and discussing policies and strategies to help revive this vital industry. This publication captures the presentations and discussions during the event.

About the Asian Development Bank

ADB is committed to achieving a prosperous, inclusive, resilient, and sustainable Asia and the Pacific, while sustaining its efforts to eradicate extreme poverty. Established in 1966, it is owned by 68 members—49 from the region. Its main instruments for helping its developing member countries are policy dialogue, loans, equity investments, guarantees, grants, and technical assistance.



ASIAN DEVELOPMENT BANK
6 ADB Avenue, Mandaluyong City
1550 Metro Manila, Philippines
www.adb.org