ASEAN Travel & Tourism

ASEAN Tourism Strategic Plan 2011-2015

ASEAN Tourism Marketing Strategy 2012-2015

ASEAN Travel & Tourism Competitiveness Report 2012

THAILAND convention & exhibition bureau

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Data as of July 2012

Photo from aseanwatch.org, ASEAN Logo from http://www.aseansec.org

Association of Southeast Asian Nations (ASEAN)

ASEAN Tourism Strategic Plan 2011-2015

Photo from aseanwatch.org, ASEAN Logo from http://www.aseansec.org

ASEAN Tourism Strategic Plan 2011-2015

VISION

"By 2015, ASEAN will provide an **increasing number of visitors to the region with authentic and diverse products, enhanced connectivity, a safe and secure environment, increased quality of services**, while at the same time ensuring an **increased quality of life and opportunities for residents** through responsible and sustainable tourism development by **working effectively with a wide range of stakeholders**."

Responsible and Sustainable Tourism Development

All strategic directions and actions in the ATSP are guided by responsible and sustainable tourism principles recognizing the significant role that tourism plays in poverty reduction, climate change, gender and minority issues, capacity building, cultural preservation and natural conservation.

Source: ASEAN Secretariat 2011

Strategic Directions & Actions

	1	2	3
Strategic Directions	**Develop experiential regional products and creative marketing and investment strategies**	**Strategically increasing the quality of services and human resources in the region**	**Enhancing and accelerate travel facilitation and ASEAN connectivity**
Strategic Actions	1.1 Develop and implement a **tourism marketing strategy** for the ASEAN region	2.1 Develop a set of **ASEAN tourism standards** with a certification process	3.1 Advocate for a **single visa** for the ASEAN region
	1.2 Develop **experiential and creative regional/sub regional circuits and packages** together with investment strategies	2.2 Implement the **Mutual Recognition Arrangement (MRA) on ASEAN tourism professionals** and its requirements	3.2 Work with other ASEAN bodies to **expand connectivity through air, water, rail and ground transportation**
	1.3 Enhance the **external relation policies and procedures** of ASEAN tourism	2.3 Provide **opportunities for increase knowledge and skill development**	

Source: ASEAN Secretariat 2011

Strategic Direction 1: Actions & Activities

Develop experiential regional products and creative marketing and investment strategies

1.1 Develop and implement a tourism marketing strategy for the ASEAN region	1.2 Develop experiential and creative regional/sub regional circuits and packages together with investment strategies	1.3 Enhance the external relation policies and procedures of ASEAN tourism
ASEAN tourism marketing strategy	Nature-based tourism	Public relation policy and program to promote the ASEAN NTOs*
Market research group	Cultural and heritage tourism	Policies and procedures for cooperating with dialogue partners
	Community-based tourism	Policies and procedures for cooperating with international organizations
	Cruise tourism and river-based tourism	Communication systems and policies for communicating with private sector stakeholders
	Reducing barriers and encouraging investment in product development	

Source: ASEAN Secretariat 2011

*ASEAN NTOs = National Tourism Organizations

Strategic Direction 2: Actions & Activities

Strategically increasing the quality of services and human resources in the region

2.1 Develop a set of ASEAN tourism standards with a certification process	2.2 Implement the MRA on ASEAN tourism professionals and its requirements	2.3 Provide opportunities for increase knowledge and skill development
ASEAN green hotel standard ASEAN homestay standard	Human resource development programs for housekeeping division	Policies and procedures for the development for capacity building programs
ASEAN public toilet standard ASEAN spa services standard	Human resource development programs for front office, food and beverage services, food production, travel agencies and tour operation division	Yearly human resource development plan based on regional priorities
ASEAN tourism security and safety guidelines ASEAN tourism to address the climate change issue	Monitor the tourism labor market situation in each ASEAN member state	

Source: ASEAN Secretariat 2011

Strategic Direction 3: Actions & Activities

Enhancing and accelerate travel facilitation and ASEAN connectivity

3.1 Advocate for a single visa for the ASEAN region	3.2 Work with other ASEAN bodies to expand connectivity through air, water, rail and ground transportation
Continue to work towards a single visa for the region by identify obstacles and opportunities	Identify and clearly define land-based, air and maritime obstacles and opportunities to increase connectivity into and within the region
Define the case for and advocate the implementation of an e-visa system	Ensure the adoption and implementation of ASEAN NTO* priority activities
Explore the possibility for innovative visa arrangements that facilitate travel	

Source: ASEAN Secretariat 2011

*ASEAN NTOs = National Tourism Organizations

Southeast Asia
feel the warmth

Tourism Marketing Strategy 2012-2015

THAILAND convention & exhibition bureau

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Photo from aseanwatch.org, Southeast Asia Logo from http://www.southeastasia.org/

Strategic Objectives

To ensure that there are an **increased number of international visitors** traveling to Southeast Asia and **visiting more than one country**.

To determine how the ASEAN NTOs*, using their resources, can **contribute to the overall positioning of the region** as a preferred destination.

To ensure that the power of **tourism as a development tool** is recognized and incorporated into a marketing approach that will be directed at meeting specific social, economic and cultural goals.

To **guide budgetary decisions related to positioning the region** and various dimensions of the travel experience.

To work effectively together to **promote travel within the region under the theme "ASEAN for ASEAN"** (Intra-ASEAN Visitors)

*ASEAN NTOs = National Tourism Organizations

Source: ASEAN Secretariat 2012

ASEAN Targets Market Segments

Generic & mass travel
- Sightseeing
- Food
- Shopping
- Visiting family
- Spas
- Entertainment
- Urban experiences

Experiential travel
- Health tourism
- Spas
- Culinary tourism
- Cultural tourism
- Community-based tourism
- Urban tourism
- Ecotourism
- Volunteer tourism
- Marine-based tourism

Creative travel
- Museums
- Art galleries
- Festivals
- Music
- Handicraft
- Performing arts

Adventure travel
- Extreme tourism
- Adventure tourism
- Community-based tourism
- Gap year tourism

Extended, long stay travel
- Housing
- Food
- Insurance
- Car rentals
- Maids and drivers
- Healthcare

Business related travel
- Meetings
- Incentives
- Conventions
- Exhibitions

Source: ASEAN Secretariat 2012

ASEAN Strategic Market Development

2012
- ASEAN for ASEAN
- China and India Market

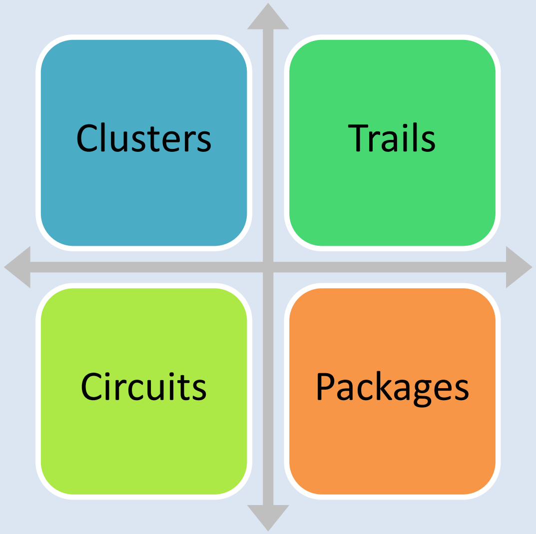
2013
- Experiential Market
- Creative Markets

2014
- Adventure Market
- Business Travelers

2015
- Extended Stay Markets

Source: ASEAN Secretariat 2012

Products Development & Implementation



The regional experiences and products will take the form of **circuits, clusters, trails and packages**. The emphasis of the development process must always be on what is **unique to the region**. <u>The product and experience development process will be organized around themes and stories.</u>

Product Development Implementation

1 The **Product Development Working Group (PDWG) will identify products and experiences that can be packaged into circuits, clusters and trails** in keeping with the ATSP and the marketing strategy.

2 Based on the scheduled in the market segment development the PDWG will **provide the products and experiences to the Marketing Communication Working Group (MCWG)** for promotion purposes

3 The PDWG & MCWG will **work together to agree on the specifics of each product and experiences**. Both working groups will consult with the relevant stakeholders and partners.

Source: ASEAN Secretariat 2012

The ASEAN Brand

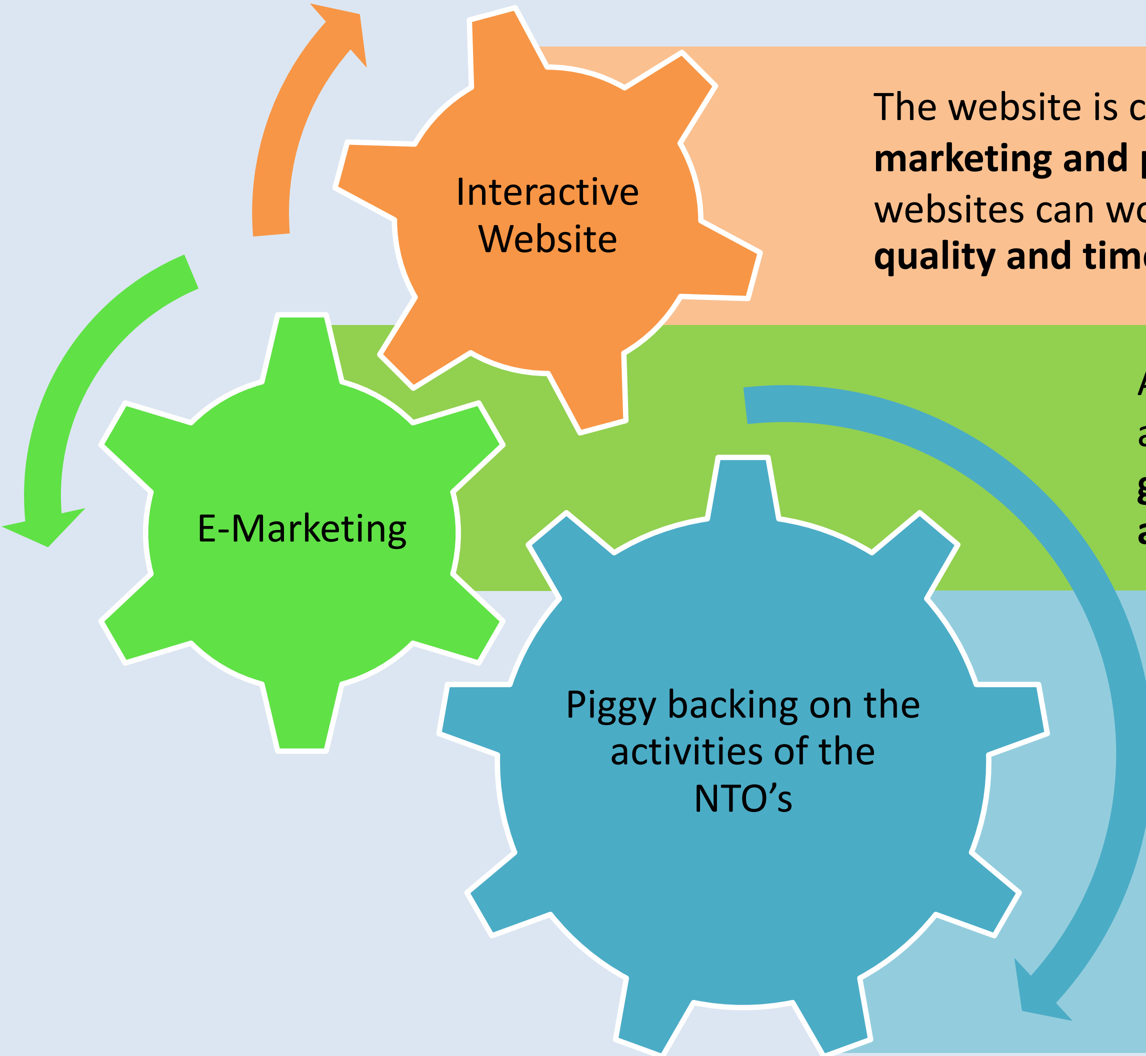
Southeast Asia
feel the warmth
A S E A N

Source: ASEAN Secretariat 2012

ASEAN Tagline and Logo
http://www.southeastasia.org/

Accessed 13 July 2012

ASEAN Major Distribution Channels



The website is critical to the **success of the overall marketing and promotion effort**. Both ASEAN and NTO's websites can work effectively together to **ensuring the quality and timeliness of the content**.

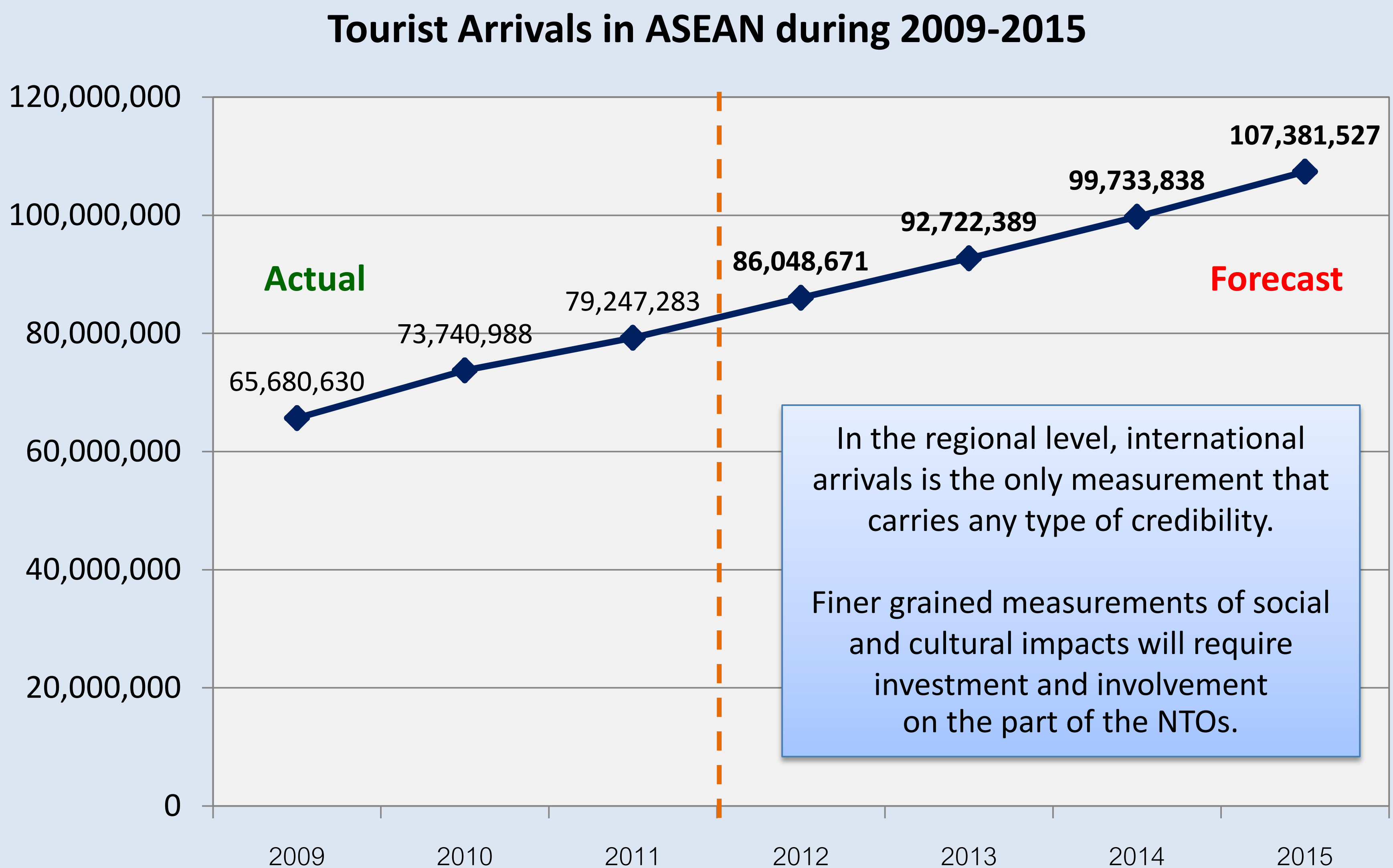
An appropriate e-Marketing approach will allow the region to **target specific interest groups with a great deal of accuracy and a minimal level of funding**.

- Imbed the **ASEAN tagline and logo in all of NTOs' campaigns, collaterals and websites**
- Promote individual sites or attractions countries and **tie to the larger regional context**
- **Work together to promote the region** by distribute ASEAN collateral

*ASEAN NTOs = National Tourism Organizations

Source: ASEAN Secretariat 2012

Measure of Success: International Arrivals



In the regional level, international arrivals is the only measurement that carries any type of credibility.

Finer grained measurements of social and cultural impacts will require investment and involvement on the part of the NTOs.

*ASEAN NTOs = National Tourism Organizations

Source: ASEAN Secretariat 2012

Implementation Activities and Timeline

Activities	2012	2013	2014	2015
1. Hiring a coordinator to work on the implementation of the marketing plan				
2. Website development and maintenance	Design	Website maintenance		
3. Development of tourism digital campaign/ distribution channels (research & PR)				
3.1 Mass tourism - India and China market	Design Implement			
3.2 Experiential and creative market	Design	Implement		
3.3 Adventure travel market		Design Implement		
3.4 Business sector market		Design Implement		
3.5 Seniors and long-stay market		Design	Implement	
4. Promote the ASEAN for ASEAN campaigns				
5. Assessment of the effectiveness of distribution channels				
6. Establishment of private/ public sector partnerships and collaborations (ASEANTA, APCT, AJC, AKC, ACC and international organisations)	Discuss the possibility	Further develop the partnerships/ collaborations		
7. Assessment of the effectiveness of the brand (Southeast Asia Feel the Warmth)				
8. Development of the 2016-2021 marketing strategy				

Source: ASEAN Secretariat 2012

ASEAN Travel & Tourism Competitiveness 2012

Measuring Travel & Tourism Competitiveness

Travel & Tourism Competitiveness Index (TTCI) is a comprehensive index that aims to measure the factors and policies that make it attractive to develop the Travel & Tourism (T&T) sector in different countries.

Select tourism and economic indicators for ASEAN members, 2011

	TTCI	International tourist arrivals		International tourism receipts			Population	GDP per capita
	Rank /139	thousand	per 100 pop.	US$ million	% of GDP	US$ per capita	million	US $
Brunei Darussalam	67	214*	51.7	254†	1.8†	613.5†	0.4	29,852
Cambodia	109	2,882	19.3	1,683	15.0	112.6	15.0	753
Indonesia	74	7,650	3.2	7,952	1.1	33.5	237.6	2,981
Lao PDR	—	1,670*	25.9	382*	6.8*	59.3*	6.4	1,004
Malaysia	35	24,714	87.5	18,259	7.7	646.3	28.3	8,418
Myanmar	—	391	0.6	73*	0.2*	1.2*	61.2	742
Philippines	94	3,917	4.2	2,783	1.7*	29.6	94.0	2,123
Singapore	10	10,390	200.4	17,990	7.9	3,470.3	5.2	43,865
Thailand	41	19,098	29.9	26,256	8.2	411.0	63.9	4,992
Vietnam	80	6,014	6.8	5,620	5.4	63.7	88.3	1,174
ASEAN	—	76,940*	12.8	68,639*	4.6*	114.4*	600.2	3,117

Sources: World Economic Forum; UNWTO 2012; IMF, World Economic Outlook (April 2012); and authors' calculations.
*2010 †2009

Source: World Economic Forum 2012

Travel & Tourism Competitiveness Index

The Structure of the TTCI and the allocation of the 14 pillars

Travel & Tourism Competitiveness Index

Subindex A: T&T regulatory framework	Subindex B: T&T business environment and infrastructure	Subindex C: T&T human, cultural, and natural resources
Policy rules and regulations	Air transport infrastructure	Human resources
Environment sustainability	Ground transport infrastructure	Affinity for Travel & Tourism
Safety and security	Tourism infrastructure	Natural resources
Health and hygiene	ICT infrastructure	Cultural resources
Prioritization of Travel & Tourism	Price competitiveness in the T&T industry	

Source: World Economic Forum 2012

T&T regulatory framework

Subindex A:
T&T regulatory framework

Policy rules and regulations	Captures the extent to which the policy environment is conducive to the development
Environment sustainability	Measures the stringency of the government's environmental regulations in each country, as well as the extent to which they are actually enforced
Safety and security	Takes into account the costliness of common crime and violence, the prevalence of terrorism, and the incidence of road traffic accidents
Health and hygiene	Assesses the quality and availability of heath and sanitation infrastructure
Prioritization of Travel & Tourism	Measures to what extent the government has in place a vision for developing the T&T sector and makes the sector a priority

Source: World Economic Forum 2012

T&T business environment and infrastructure

Subindex B:
T&T business environment and infrastructure

Air transport infrastructure	Measures both the quantity and quality of air transport infrastructure
Ground transport infrastructure	Measures both the quantity and quality of ground transport infrastructure
Tourism infrastructure	Measures the quality of infrastructure that is either tourism-specific or particularly relevant for tourism, namely, density of hotel rooms and ATMs and presence of car rental companies
ICT infrastructure	Assesses uptake of different information and communication technologies (ICT), an important enabler of T&T development
Price competitiveness in The T&T industry	Measures the relative costliness of a destination

Source: World Economic Forum 2012

T&T human, cultural, and natural resources

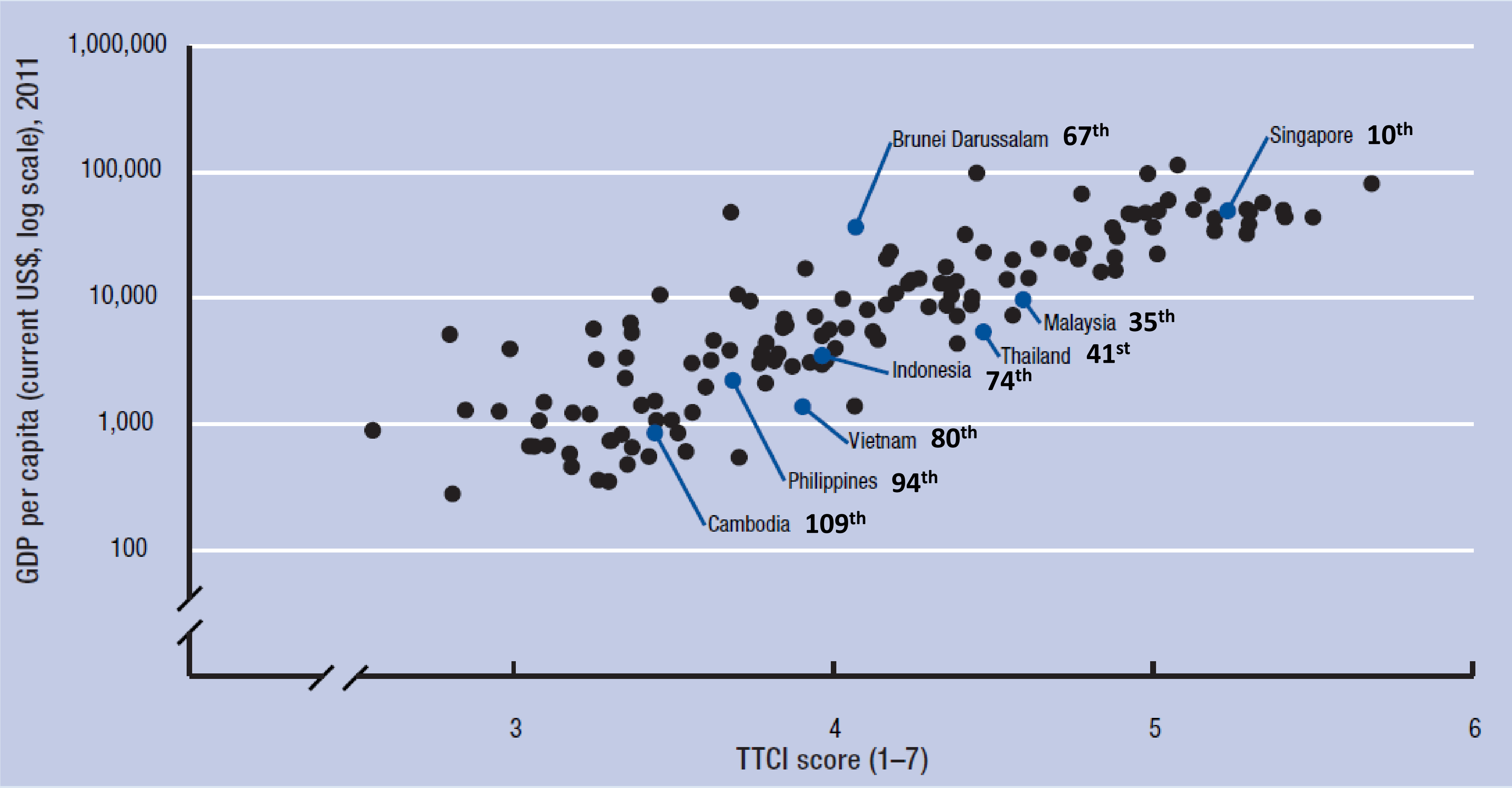
Subindex C:
T&T human, cultural, and natural resources

Human resources	Assesses the general health of the population and the quality and availability of education and training
Affinity for Travel & Tourism	Measures the extent to which a country and society are open to tourism and foreign visitors
Natural resources	Captures the quality of a country's natural heritage and richness, as well as its efforts to preserve it
Cultural resources	Assesses the quality of a country's cultural heritage and richness

Source: World Economic Forum 2012

ASEAN countries' TTCI 2011 rankings

TTCI rank*, score and GDP per capita



Source: World Economic Forum 2012

***Rank out of 139 economies**

ASEAN TTCI 2011 rankings by Pillars

Rank
(out of 139 economies)

Pillars	Singapore	Malaysia	Thailand	Brunei Darussalam	Indonesia	Vietnam	Philippines	Cambodia	ASEAN (median)
TTCI 2011	**10**	**35**	**41**	**67**	**74**	**80**	**94**	**109**	**75**
1. Policy rules and regulations	1	21	76	120	88	67	70	132	73
2. Environmental sustainability	41	64	97	136	127	115	94	82	96
3. Safety and security	13	83	94	23	72	68	109	79	76
4. Health and hygiene	55	75	80	70	115	89	97	133	85
5. Prioritization of Travel & Tourism	2	46	38	127	15	107	70	13	42
6. Air transport infrastructure	14	34	23	41	58	85	80	113	50
7. Ground transport infrastructure	2	36	56	49	82	77	114	103	67
8. Tourism infrastructure	33	74	40	91	116	110	98	131	95
9. ICT infrastructure	20	52	81	47	96	67	98	123	74
10. Price competitiveness	29	3	15	1	4	16	20	31	16
11. Human resources	2	37	74	47	51	72	86	109	62
12. Affinity for Travel & Tourism	12	17	24	78	121	87	65	21	45
13. Natural resources	96	22	21	38	17	51	70	53	45
14. Cultural resources	30	33	32	91	39	36	76	111	38

Source: World Economic Forum 2012

ASEAN TTCI 2011 scores by Pillars

Score (1–7 scale)

Pillars	Singapore	Malaysia	Thailand	Brunei Darussalam	Indonesia	Vietnam	Philippines	Cambodia	ASEAN (average)	TTCR sample*
TTCI 2011	**5.2**	**4.6**	**4.5**	**4.1**	**4.0**	**3.9**	**3.7**	**3.4**	**4.2**	**4.1**
1. Policy rules and regulations	6.0	5.1	4.4	3.7	4.2	4.4	4.4	3.4	4.4	4.3
2. Environmental sustainability	4.9	4.6	4.2	3.6	3.9	4.1	4.2	4.3	4.2	4.6
3. Safety and security	6.1	4.5	4.4	5.7	4.7	4.8	4.1	4.6	4.9	4.8
4. Health and hygiene	5.2	4.5	4.4	4.7	2.6	4.1	3.8	1.5	3.8	4.5
5. Prioritization of Travel & Tourism	6.4	4.8	4.9	3.3	5.7	4.0	4.5	5.8	4.9	4.5
6. Air transport infrastructure	5.0	4.2	4.5	4.0	3.3	2.7	2.8	2.3	3.6	3.3
7. Ground transport infrastructure	6.6	4.6	4.1	4.2	3.2	3.3	2.8	3.0	4.0	3.9
8. Tourism infrastructure	5.1	3.6	4.9	2.8	2.0	2.1	2.6	1.4	3.1	3.8
9. ICT infrastructure	5.2	3.7	2.9	3.9	2.5	3.2	2.5	1.9	3.2	3.4
10. Price competitiveness	5.1	5.6	5.2	5.8	5.6	5.2	5.2	5.1	5.3	4.6
11. Human resources	6.1	5.2	4.8	5.1	5.0	4.9	4.7	4.3	5.0	4.8
12. Affinity for Travel & Tourism	5.7	5.4	5.3	4.5	4.2	4.5	4.6	5.3	4.9	4.7
13. Natural resources	2.6	4.5	4.6	4.0	4.7	3.6	3.3	3.5	3.9	3.3
14. Cultural resources	3.9	3.8	3.9	1.8	3.5	3.6	2.2	1.6	3.0	2.9

* Average score of the 139 economies covered in the TTCI.

Source: World Economic Forum 2012

Overview Performance of ASEAN countries

- **Singapore leads the ASEAN** and is also the best-performing advanced economy outside Europe and North America.
- **Cambodia is ASEAN's worst performer**.
- **Malaysia and Thailand do comparatively well across the board**.
- At the regional level, the common **strengths** include **price competitiveness, affinity for T&T and the prioritization of T&T.**
- Natural resources and cultural heritage also relatively strong.
- Common **weaknesses** include **environmental sustainability, health and hygiene, tourism infrastructure and ICT infrastructure.**
- **ASEAN does better than the average performance of the full sample of 139 countries** covered by the index.

Source: World Economic Forum 2012

Pillar 1: Policies and regulations

Pillar 1	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank*	1	21	76	120	88	67	70	132
Score	6.0	5.1	4.4	3.7	4.2	4.4	4.4	3.4

***Rank out of 139 economies**

- Singapore is on top among the 139 economies.
- Only Malaysia and Vietnam feature in the top half of the ranking.
- Cambodia is the lowest-ranked ASEAN country.
- Most counties spare no efforts in developing their travel & tourism sector.
- The institutional framework for doing business remains difficult.
- ASEAN will need to improve performance in other compartments of their institutional framework.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 2: Environmental sustainability

Pillar 2	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	41	64	97	136	127	115	94	82
Score	4.9	4.6	4.2	3.6	3.9	4.1	4.2	4.3

***Rank out of 139 economies**

- ASEAN countries perform so poorly in this dimension.
- Best-ranked Singapore is only 41st.
- Malaysia (64th) is the only other country in the top half of the ranking, while Brunei (136th) ranks nearly last.
- Environmental protection has not emerged as a key priority in ASEAN.
- The environmental regulation perceived as rather lax.
- Many countries in ASEAN are still neglecting sustainability aspect in their development.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 3: Safety and security

Pillar 3	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	13	83	94	23	72	68	109	79
Score	6.1	4.5	4.4	5.7	4.7	4.8	4.1	4.6

***Rank out of 139 economies**

- ASEAN countries show a mixed picture in this pillar.
- Singapore ranks 13th, followed by Brunei (23rd).
- The overall scores are generally high, so a low rank does not mean that a country is unsafe.
- The region is safer than a number of destinations in the rest of the developing Asia, and most places in Latin America and Africa.
- ASEAN countries should improve safety and security within their territories, which be benefits not only the T&T sector but also the overall investment climate and the entire society.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 4: Health and hygiene

Pillar 4	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	55	75	80	70	115	89	97	133
Score	5.2	4.5	4.4	4.7	2.6	4.1	3.8	1.5

***Rank out of 139 economies**

- Singapore is ASEAN's best-performing country, while the situation is worrisome in Cambodia.
- In Cambodia, Indonesia, the Philippines, and Vietnam, access to safe drinking water is not yet universal.
- Poor health and hygiene standard, coupled with a hot and humid climate, results in a high prevalence of communicable diseases, such as Hepatitis, Dengue fever, Malaria, and Tuberculosis.
- Health care infrastructure remains underdeveloped in several countries, and access to it is difficult.
- Traveling to areas outside the main tourist attractions raises some health concerns, especially in Cambodia and the Philippines.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 5: Prioritization of travel and tourism

Pillar 5	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	2	46	38	127	15	107	70	13
Score	6.4	4.8	4.9	3.3	5.7	4.0	4.5	5.8

***Rank out of 139 economies**

- ASEAN countries score relatively high on this pillar.
- Singapore ranks 2nd overall, followed by Cambodia (13th) and Indonesia (15th).
- The degree of prioritization is also high in Thailand and Malaysia.
- The performances of the Philippines, Vietnam, and Brunei are disappointing.
- Government prioritization of T&T sector tends to be high across ASEAN.
- Tourism promotion has always been a cornerstone of ASEAN's Travel & Tourism strategy.
- Performance is less compelling with regard to actual government spending on T&T.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 6-7: Air and ground transportation and connectivity

Pillar 6	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	14	34	23	41	58	85	80	113
Score	5.0	4.2	4.5	4.0	3.3	2.7	2.8	2.3
Pillar 7	**Singapore**	**Malaysia**	**Thailand**	**Brunei**	**Indonesia**	**Vietnam**	**Philippines**	**Cambodia**
Rank	2	36	56	49	82	77	114	103
Score	6.6	4.6	4.1	4.2	3.2	3.3	2.8	3.0

***Rank out of 139 economies**

- Except Singapore, the state of infrastructure in ASEAN varies from satisfactory to bleak.
- Infrastructure represents the weakness aspect of ASEAN's performance in the TTCI.
- Infrastructure is underdeveloped, especially in Cambodia, while basic infrastructure is sometime lacking in the Philippines, Indonesia, and Vietnam. The situation is more satisfactory in Thailand and Malaysia.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 8: Tourism infrastructure

Pillar 8	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	33	74	40	91	116	110	98	131
Score	5.1	3.6	4.9	2.8	2.0	2.1	2.6	1.4

***Rank out of 139 economies**

- The tourism-specific infrastructure is relatively weak in several ASEAN countries.
- Only Singapore (33rd) and Thailand (40th) feature in the top half in this pillar.
- The contrast between countries is particularly large in the terms of hotel infrastructure.
- Thailand leads in the number of major car rental companies with 6 of the 7 companies operate there.
- The number of ATMs accepting Visa cards, represent financial infrastructure development, is generally limited in ASEAN, except in Singapore.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 9: ICT infrastructure

Pillar 9	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	20	52	81	47	96	67	98	123
Score	5.2	3.7	2.9	3.9	2.5	3.2	2.5	1.9

***Rank out of 139 economies**

- Singapore ranks 20th in this pillar and the gap is wide with the rest of the region.
- High cost, slow speeds, and technical limitations remains significant obstacles to widespread adoption of mobile internet in most countries.
- Internet uptake beyond business use remains limited, except Singapore and Malaysia.
- ASEAN's ICT Master Plan 2015 proposes specific measures to improve digital connectivity and to bridge the digital divide, which include creation of an ASEAN broadband corridor and Internet exchange network.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 10: Price competitiveness

Pillar 10	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	29	3	15	1	4	16	20	31
Score	5.1	5.6	5.2	5.8	5.6	5.2	5.2	5.1

***Rank out of 139 economies**

- ASEAN achieves a remarkable and consistent group performance in this pillar.
- This area is where member countries earned some of their best scores, higher than 5.0, with Brunei ranks first overall.
- ASEAN is an affordable destination by international standards, which for some travel categories confers a major competitive advantage.
- The average price for the first-class hotel accommodation is among the cheapest in Indonesia, Thailand, Malaysia and the Philippines.
- The price of hotel room in Singapore is about the same as in the United States, Japan, Hong Kong, Australia, and the Untied Kingdom.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 11: Human resources

Pillar 11	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	2	37	74	47	51	72	86	109
Score	6.1	5.2	4.8	5.1	5.0	4.9	4.7	4.3

***Rank out of 139 economies**

- Singapore ranks 2nd overall in this pillar and leads ASEAN by a wide margin.
- The eight ASEAN countries under review are close to achieving universal enrollment in primary school.
- The situation is less impressive fro secondary school. Enrollment is universal in Singapore and Brunei, while enrollment in Cambodia is near the bottom.
- ASEAN achieves mixed results in the quality of education. Singapore ranks an impressive first out of all countries, followed by Malaysia.
- Human resources represent a key aspect of ASEAN's strategy to develop the T&T sector, in particular mobility and training.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 12: Affinity of travel and tourism

Pillar 12	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	12	17	24	78	121	87	65	21
Score	5.7	5.4	5.3	4.5	4.2	4.5	4.6	5.3

***Rank out of 139 economies**

- The performance of ASEAN countries in this pillar is mixed, due to very different degree of tourism openness.
- Tourism openness measures tourism expenditures and receipts as a percentage of GDP. The more tourists received and the more residents traveling abroad, the more “tourism-ready” a society is.
- Singapore is the most open of ASEAN countries, with combined tourism expenditures and receipts equivalent to 13.7% of its GDP.
- The attitude of the population towards visitors is very welcoming across ASEAN.
- The extension of business trip recommend is also high in ASEAN with the exception of Brunei.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 13: Natural resources

Pillar 13	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	96	22	21	38	17	51	70	53
Score	2.6	4.5	4.6	4.0	4.7	3.6	3.3	3.5

***Rank out of 139 economies**

- With the exception of Singapore (94th), ASEAN countries all feature in the top half of the rankings in this pillar.
- The region is home to 12 of the world's 211 UNESCO natural World Heritage sites, 23 of the 580 UNESCO biosphere reserves, and 2 of the world's 34 biodiversity hotspots.
- Several measures of pollution and environmental quality is still not well aware. The very popularity of a site, if not well managed, can lead to its degradation or destruction.
- Sustainable tourism promises that nature is better protected and maintained, the tourist experience is enhanced, and the local economy benefits as a result.

Source: World Economic Forum 2012

***Remark** Best Worst

Pillar 14: Cultural resources

Pillar 14	Singapore	Malaysia	Thailand	Brunei	Indonesia	Vietnam	Philippines	Cambodia
Rank	30	33	32	91	39	36	76	111
Score	3.9	3.8	3.9	1.8	3.5	3.6	2.2	1.6

***Rank out of 139 economies**

- The richness of ASEAN countries' cultural heritage is beyond doubt, but it seems that those countries are not particularly successful at showcasing it.
- There are only 19 UNESCO cultural World Heritage Sites in the entire ASEAN region. The Philippines is home to 3 sites, which one of them is on the List of World Heritage in Danger. The 19 sites account for only 2.5% of the 753 cultural heritage sites listed worldwide.
- Singapore does remarkably well being the most popular destinations for international exhibitions and fairs with an average of 129 recurring events, followed by Thailand and Malaysia. The excellent connectivity and good infrastructure of those three countries contribute to making them popular venues for large-scale events.

Source: World Economic Forum 2012

***Remark** Best Worst

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