



ORGANISATION MONDIALE DU TOURISME  
WORLD TOURISM ORGANIZATION  
ORGANIZACION MUNDIAL DEL TURISMO  
ВСЕМИРНАЯ ТУРИСТСКАЯ ОРГАНИЗАЦИЯ

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WTO COMMISSION FOR EAST ASIA AND THE PACIFIC

DECISIONS TAKEN AT ITS TWENTY-FIRST MEETING

Beijing, China, 26 April 1991

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DECISIONS

CAP/DEC/1(XXI)

ADOPTION OF THE AGENDA

Agenda item 1 (document CAP/21/1 Prov.Ag.)

The Commission,

Adopts the provisional agenda of its twenty-first meeting as contained in document CAP/21/1 Prov.Ag. submitted by the Secretary-General.

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CAP/DEC/2(XXI)

COMMUNICATION OF THE CHAIRMAN

Agenda item 2

The Commission,

Having heard the communication of the Chairman,

1. Thanks him for his communication;
2. Appreciates his words of welcome and greetings extended to all Members, Associate Member, non-members, representatives of international organizations present at the meeting and the Secretary-General and his officers in attendance;
3. Agrees with his statement that the Members should give detailed consideration to the agenda submitted by the Secretary-General, particularly the agenda items on the general programme of work of the Organization for 1992-1993 and formulation of a regional strategy for East Asia and the Pacific; and
4. Joins him in thanking the Government of the People's Republic of China for hosting the twenty-first meeting of the Commission and for making excellent arrangements for the meeting.

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CAP/DEC/3(XXI)

COMMUNICATION OF THE SECRETARY-GENERAL

Agenda item 3 (document CAP/21/3)

The Commission,

Having heard the communication of the Secretary-General,

1. Thanks him for a very comprehensive review of the situation of world tourism after the Gulf Crisis;
2. Notes the summary of the latest tourism trends in the region and the world as a whole;
3. Congratulates him on the draft general programme of work of the Organization for 1992-1993; and
4. Appreciates submission of a Monograph on East Asia and the Pacific and a Spot Report on the Gulf Crisis, to the Commission.

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CAP/DEC/4(XXI)

SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS OF THE SEMINAR ON CHANGES IN INTERNATIONAL TOURISM DEMAND IN THE 1990s - THE EAST ASIA AND PACIFIC PERSPECTIVE

Agenda item 4 (document CAP/21/SEM)

The Commission,

Having considered the background paper prepared by the Secretariat,

1. Thanks the Secretariat for organizing the Seminar;
2. Thanks the WTO Consultant for a comprehensive presentation on the Seminar subject;
3. Adopts the conclusions and recommendations of the Seminar as contained in the Seminar report annexed to this document; and
4. Calls upon the Members to take appropriate steps to implement the recommendations of the Seminar.

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CAP/DEC/5(XXI)

DRAFT GENERAL PROGRAMME OF WORK  
OF THE ORGANIZATION FOR 1992-1993

Agenda item 5 (document CAP/21/5)

The Commission,

Having considered the document submitted by the Secretary-General on this agenda item,

1. Congratulates the Secretary-General for formulating a very comprehensive general programme of work for 1992-1993 keeping in view the needs of the Members; and
2. Endorses the general programme of work for 1992-1993.

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CAP/DEC/6(XXI)

FORMULATION OF A REGIONAL STRATEGY  
FOR EAST ASIA AND THE PACIFIC

Agenda item 6 (document CAP/21/6)

The Commission,

Having considered the document submitted by the Secretary-General on this agenda item,

Having listened to the views of various Members on the subject,

Taking into account the comments of the Secretary-General about the current rate of growth and the potential the region has for tourism promotion,

1. Decides to accept the offer of the Secretary-General to conduct a study on Tourism Demand and Supply in East Asia and the Pacific up to the Year 2000; and
3. Urges the Secretariat to submit the draft study to the Commission at its twenty-third meeting.

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CAP/DEC/7(XXI)

THE EAST ASIA AND PACIFIC TOURISM YEAR

Agenda item 7 (document CAP/21/7)

The Commission,

Having considered the document submitted by the Secretary-General on this agenda item,

1. Designates 1994 as the East Asia and Pacific Tourism Year;
2. Urges the Secretariat to formulate definite proposals for carrying out various activities during the Year; and
3. Decides to constitute a Steering Committee comprising a representative from each member State and non-member States interested and hold the first meeting of the Committee in conjunction with the twenty-second meeting of the Commission.

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CAP/DEC/8(XXI)

ARREARS IN CONTRIBUTION TO THE ORGANIZATION'S BUDGET BY COMMISSION MEMBERS

Agenda item 8 (document CAP/21/8)

The Commission,

Having considered the document submitted by the Secretary-General on this subject,

1. Calls upon the Full Members who are in arrears of their contributions to initiate action to discharge their financial obligations to the Organization without further delay, according to the procedures established by the General Assembly and the Executive Council; and
2. Appeals to Full Members to approach the Affiliate Members in their respective countries who are in arrears, with a view to persuading them to settle their outstanding contributions as soon as possible.

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CAP/DEC/9(XXI)

CELEBRATION OF WORLD TOURISM DAY 1990

**Agenda item 9 (document CAP/21/9)**

The Commission,

Having taken note of the information report on World Tourism Day 1990,

Recognizing the importance of this day which was instituted by the General Assembly in order to promote greater awareness among local populations about the economic, cultural and political values of tourism as well as its real potential benefits,

1. Commends the member States belonging to the region that organized events to commemorate World Tourism Day 1990;
2. Recommends to the member States to celebrate World Tourism Day 1991, whose theme is: "Communication, information and education: powerlines of tourism development"; and
3. Invites the member States of the region to communicate to the Secretary-General full information on the activities they carry out to mark World Tourism Day 1991.

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CAP/DEC/10(XXI)

PLACE AND DATE OF THE TWENTY-SECOND MEETING OF THE COMMISSION

**Agenda item 10**

The Commission,

1. Takes note that the twenty-second meeting of the Commission will take place during the ninth session of the General Assembly which is scheduled to be held at Buenos Aires, Argentina, from 27 September to 5 October 1991; and
2. Accepts with gratitude the offer of Indonesia to host the twenty-third meeting of the Commission in its territory during the first quarter of 1992.

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LIST OF PARTICIPANTS

CHAIRMAN OF THE COMMISSION

REPUBLIC OF KOREA

Mr. Kim Kyu-Sun  
Director  
Int'l Cooperation Division  
Ministry of Transportation

MEMBER STATES

CHINA (PEOPLE'S REPUBLIC OF)

Mr. Liu Yi  
Chairman  
China National Tourism  
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Mr. Cheng Wen Dong  
Vice-Chairman  
China National Tourism  
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Mr. Li Tie Ying  
Director of Tourism Regulations  
and Policy (CNTA)

Mr. Yang Liu Yin  
Deputy-Director  
International Liaison (CNTA)

Mr. Gu Shu Bao  
Deputy-Director  
International Marketing and  
Promotion (CNTA)

Mr. Xu Jing  
Deputy Division Chief  
International Relations (CNTA)

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National Directorate of Tourism

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**INDONESIA**

**Mr. Wagimin Judi Pranoto**  
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**Mr. Dang Van Tin**  
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ASSOCIATE MEMBER

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Mr. Joao Manuel Costa Antunes  
Director  
Macau Government Tourist Office

AFFILIATE MEMBER

KOREA NATIONAL TOURISM  
CORPORATION

Mr. Seo Kyung-Jo  
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MALAYSIA

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Malaysia Tourist Information  
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Ministry of Culture, Arts and  
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Second Secretary  
Embassy of Myanmar in Beijing

PHILIPPINES

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Tourism Attaché for Japan/Korea  
in Tokyo  
Department of Tourism

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Chief, International Marketing  
Planning Division  
Department of Tourism

TONGA

The Hon. Baron Vaea  
Deputy Prime Minister and  
Minister for Tourism

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Mr. Ryuji Yamakawa  
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UNITED NATIONS INTERNATIONAL  
LABOUR ORGANISATION (ILO)

Mr. Adnan Habboo  
Senior Technical Adviser

UNITED NATIONS DEVELOPMENT  
PROGRAMME (UNDP)

Ms. Jia Lusheng  
Programme Officer  
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WTO SECRETARIAT

Mr. Antonio Enríquez Savignac  
Secretary-General

Dr. Harsh Varma  
Regional Representative for Asia  
and the Pacific

Ms. Jacqueline Chartraire  
Assistant to the Regional  
Representative

REPORT ON TECHNICAL SEMINAR ON  
"CHANGES IN INTERNATIONAL TOURISM DEMAND IN  
THE 1990s - THE EAST ASIA AND  
PACIFIC PERSPECTIVE"

INTRODUCTION

Within the framework of the WTO Commission for East Asia and the Pacific, a technical Seminar on "Changes in International Tourism Demand in the 1990s - The East Asia and Pacific Perspective" was held at Beijing, China, on 25 April 1991. The Seminar was attended by China, the Democratic People's Republic of Korea, Indonesia, Japan, Macau, Malaysia, Mongolia, Myanmar, the Philippines, the Republic of Korea, Tonga and Viet Nam.

The objectives of the Seminar were:

- to increase awareness among countries of the East Asia and Pacific region of emergent trends in tourism demand; and
- to identify appropriate product development and marketing strategies for the countries of the East Asia and Pacific region, to pursue individually and collectively, which will take maximum advantage of these new developments.

The Seminar was conducted in three sessions. In the first session, the WTO representative made a presentation dealing with influence on and determinants of tourism demand for East Asia and the Pacific, emerging trends in the growth, pattern and characteristics of tourism demand for East Asia and the Pacific, and resultant impacts of the developments in international tourism on and prospects for East Asia and the Pacific. In the second session, participating countries made brief country presentations on tourism product and market development policies, strategies and trends. In the final session, open discussion took place of points arising from the WTO representative's presentation related to individual countries' experience and plans.

WTO PRESENTATION

1. The East Asia and Pacific Region (the Region) recorded the highest rate of growth in international tourist arrivals during the 1980s i.e. 9.3 per cent a year against the global

average of just under 4 per cent. This above-average performance can be attributed to four main factors:

- inbuilt advantages (i.e. the volume, quality and diversity of resources - natural, historical, cultural - to attract tourists, making it the most heterogeneous tourist region in the world);
- stage of development (i.e. in the product demand curve the Region is at the stage of rapid growth whereas other parts of the world, such as Europe/Mediterranean, are at the mature - lower growth - phase);
- service (i.e. high standards of service by tour operators in the countries of the Region);
- economic performance (i.e. the high rate of economic growth of the countries of the Region has resulted in rapid rates of expansion of intraregional tourist demand).

2. To answer the key question of whether the past rate of growth can be sustained, analysis is necessary of the factors which influence and otherwise determine tourism demand. They fit into two broad categories:

- exogenous variables (i.e. factors not directly related to tourism but which influence the extent and form of demand for tourist activity);
- market forces i.e. interest in (for discretionary leisure tourism) and need for (business travel) tourism; the supply of tourism products and services; and the ways these are distributed to the prospective tourist.

3. Seven sub-categories of exogenous variables are identified:

- demographic and social change;
- economic and financial developments;
- political, legislative and regulatory changes;
- technological developments;
- trading developments;
- transport infrastructure;
- safety of travel.

4. The relevance of these "groups" of influence on tourism demand is as marked for the Region as for anywhere else in the

world, the following aspects being noted as of particular importance:

- higher numbers of middle-aged and elderly European, American and Asian tourists (i.e. mature market segment);
- growing importance of single-member (i.e. singles) and childless couples (i.e. empty nest) households;
- greater amounts of leisure time and greater flexibility in using this time;
- improved educational standards combined with communications technology leading to an increase in different people's awareness and knowledge of each other and the emergence of a global lifestyle;
- income levels, economic performance and relative exchange rates are vitally important factors, accounting for between two-thirds and three-quarters of all fluctuations in travel growth to and within the Region;
- the globalization of business (e.g. through global trading alliances as well as cross-border takeovers and strategic shareholdings) are fuelling the continued strong growth in international business travel;
- tourism in the Region will benefit from the liberalization of the international trading environment. It is of vital importance that the Uruguay Round of the General Agreement on Trade and Tariffs (GATT) talks reach a substantial final deal and do so swiftly;
- the liberalization of air travel will reshape world travel and tourism. As aviation becomes progressively less constrained in Europe as the result of the Single Market measures from end 1992, airlines are seeking to establish trading alliances to strengthen their positions. The British Government is leading the way by opening up London's Heathrow airport as a means of forcing other governments to liberalize their airports and air routes. The "knock on" effect will be felt by the Region's carriers who will need to enter into trading alliances (or form cross-equity groupings) to succeed;
- the integration of Europe from the beginning of 1993 will produce not only a less-constrained aviation sector but also some development of transnational tour wholesaling operations, and changes in the

structure of travel and tourism business with the growing importance of large, multinational companies on one hand and small, "niche" operators on the other;

- the main impact on the Region of the integration of Europe is likely to be from an increased tourist volume organized by European transnational tour operators (offset by some growth in the volumes of Asian tourists to Europe, who might otherwise have spent their time in the Region) and increased open competition between European and Asian carriers;
- the Region's tourist growth potential may not be fully realized because of capacity constraints, both in accommodation and, in particular, air transport. Many of the Region's airports are at, or fast approaching, their capacity and inadequate new capacity developments are under way or planned;
- safety - or the potential traveller's perception of safety - is a key factor in travel, as evidenced by the large falls during the Gulf War. The exaggerated and (on occasions) erroneous media reporting can exacerbate the problem. It is vital for the countries national tourism administrations and tour operators to establish close communication links with the travel trades of major tourist generating markets to offset these damaging media reports.

5. The sumtotal of the main factors which comprise the market forces category are positive for the Region:

- market segmentation is vitally important for the Region because not only do its various origin markets exhibit different "tastes", but those "tastes" are changing, with individual markets being increasingly characterized by sub-markets (or market segments), each with significantly varying requirements. Apart from changes in "tastes" - a slow, evolutionary process - there is change occurring in the market segments being attracted to the Region, e.g. though the European beach-holiday market is large and long established, it has only begun to be attracted in significant numbers to the Region in recent years;
- there remains high-growth potential in the European market for beach resort holidays, particularly in South East Asia, provided that the right type of accommodation is developed (i.e. good quality, not too large, physically unobtrusive with high hygiene and environmental standards) and also for special interest (e.g. culture, adventure) holidays,

particularly in China, Japan, Indonesia, Malaysia, Thailand and the countries of Indo-China;

- fifteen of the leading twenty long-haul destinations for Europeans are in the Region and continued strong growth in European tourism to the Region is foreseen throughout the 1990s, i.e. upward of 8 per cent a year;
- despite the European market's good prospects, it is the countries of the Region itself who will provide the greatest growth in tourism for the Region. Most of Asia is changing from economies fuelled by exports to economies fuelled by domestic consumer spending. Part of this "domestic" consumption takes the form of intraregional tourism.
- the NICs (newly industrialized countries) of the Region, along with Malaysia and Japan in particular, have strong outbound growth prospects. Overseas travel from the Republic of Korea tripled between 1987 and 1990 when 1.56 million trips were made; and growth of 13 per cent a year is predicted by the Korean authorities during the 1990s reaching a total of 6.1 million overseas trips by the year 2001. The bulk of these trips are made by first-time overseas travellers, so there is a high preponderance of visits to fellow Asian countries with which Koreans share certain cultural features. Taiwan is another strong-growth country for overseas travel - increasing numbers from one million in 1987 to 2.5 million in the present year - and, again there is strong preference for intraregional destinations, the top seven countries chosen by the Taiwanese being in the Region. Japan remains the largest market for intraregional travel reaching a total of 11 million overseas trips in 1991 (up from 6 million in 1987 in line with the Government of Japan's policy of promoting overseas travel to reduce the country's large balance of payments trade surplus). Though there is likely to be a slowdown in growth rates, this is unlikely to prevent a near doubling in outbound tourism to 20 million by the year 2000 - this level of expansion could even be achieved faster, depending on how quickly airport capacity constraints are resolved;
- the potential impact of the Japanese tourist market's continued expansion, both in terms of arrivals and tourist receipts, will be greatest in destinations in the Region. Though the number of Japanese travellers visiting new or "off-the-beaten-track" destinations is growing, the traditional tourist destinations in Asia are absorbing much of the increase in Japanese outbound travel because Japanese first-time travellers (who constitute one



in seven Japanese overseas tourists) opt for well-known and established destinations.

- the Region's countries are making greatly increased marketing and promotional efforts. There is growing evidence to show that the designation of a specific "year" for tourism has both short- and long-term benefits for the country or area concerned.
- there is extensive product development under way in the Region. With higher occupancy rates and gross operating profits than in North America and Europe, the Region is attracting a spate of hotel construction. Three main types of opportunity exist:
  - secondary cities (e.g. Chiang Mai, Chiang Rai - Thailand; Osaka, Kobe, Yokohama, Nagoya, Nagasaki, Fukuoka - Japan; Swabaya, Sanarang, Yogyakarta, Medan - Indonesia);
  - resorts, of which the Region has the largest untapped potential (e.g. Kosanui - Thailand; Langkawi - Philippines; Lombok - Indonesia; Cheju - Republic of Korea; Okirawa - Japan);
  - new tourist destinations of Indo-China and the South Pacific (e.g. Saigon/Ho Chi Minh City, Hanoi - Viet Nam; Rangoon - Myanmar; Fiji).

6. To succeed in tourism in the 1990s a fully professional approach will be essential. This will entail considerable upgrading of knowledge and skills (both on the part of tourism administrators and tour operators). The vital areas for improvement and expansion will be:

- comprehensive and integrated tourism development planning, based on absorptive, or carrying, capacity study, and on the principle of "matching" the capacities of transport infrastructure, tourist plant and trained tourist personnel. These plans should specify full and clear development strategies (and the implementation and control instruments needed);
- public-private sector collaboration, i.e. channels for consultation and joint programmes of activities, between national tourism offices (and other government departments, where relevant) and travel and tourism operators;

- regional cooperation, covering aspects as varied as aviation policies, common standards, regional promotion and training.

7. Stress was laid on the need for the countries of the Region to ensure that:

- environmental aspects are integral to all new plans and project feasibility studies; and
- sufficient diversity is maintained in the developments undertaken both to cater for different market segments' interests and to build on the features of their nation's resources which are unique, i.e. to encourage and sustain the development of a varied and heterogeneous tourism product.

#### COUNTRY PRESENTATIONS

1. Individual country presentations were made by nine country delegates attending the Technical Seminar, i.e. China, Democratic People's Republic of Korea, Indonesia, Japan, Mongolia, Republic of Korea, Macau, Malaysia and the Philippines. Many of the points highlighted in these individual presentations endorsed and/or elaborated in the key features of the Technical Paper and are incorporated in the summary of points above. The following additional points emerged from the country papers.

2. All countries are embarked in tourist expansion programmes, and foresee substantive and sustained growth rates of tourism in the 1990s.

3. Major tourism policy/planning studies have recently been completed or are presently under way in DPR Korea, Indonesia, Mongolia, Malaysia and the Philippines. All of these studies pay the fullest attention to the examination of all tourism impacts (i.e. economic, socio-cultural, environmental) and lay great stress on the need for coordination of all aspects (particularly international access, hotel capacity, infrastructure and trained personnel).

4. The governments of those countries with market economies are all taking measures to create conditions conducive for the tourism private sector - both for the foreign investor and the local entrepreneur - to prosper. Indonesia is liberalizing the national carrier, deregulating the banking system, relaxing financial controls on/providing incentives for foreign investment, and simplifying the system of licences, etc. for tourism operations. Malaysia is introducing measures to encourage private sector investment in tourism (details to

be established in the ongoing Tourism Policy Study). The Philippines will relax its air transport policy and decentralize decision-making in order to encourage the wider spread of tourism (and its economic benefits) to other parts of the country, according to identified regional "clusters".

5. Diversified product development strategies are being pursued in China, Indonesia and Malaysia, while the focus of the Tourism Master Plan being presently prepared for the Philippines is the country's abundant supply of white sand beaches. For the newly emerging tourist destinations participating in the Seminar (i.e. DPR Korea, Mongolia), the present emphasis is on developing necessary infrastructure and facilities in the main centres for tourism.

6. Marketing and promotion is seen as a major issue for the countries of the Region, requiring as it does both high levels of specific knowledge (i.e. on trends in generating market tourist demand and on the travel trades and mass media of those countries) and expenditure on advertising, public relations, etc. Most of the Region's countries with well-established tourism sectors (e.g. Indonesia, Malaysia, Philippines) plan to increase marketing expenditure and to promote aggressively; other countries in the Region acknowledge their lack of knowledge and understanding of tourist markets and are more restrained in their marketing activity intentions until they rectify this situation (e.g. China); while a third group have neither the market knowledge or access to funds to engage in more than a limited overseas tourism marketing activity (e.g. DPR Korea, Mongolia).

7. Japan's initiative to provide technical and other assistance to the countries of the Region to promote more effectively in the Japanese market will serve to increase Japanese intraregional tourist flows.

8. The need to cooperate regionally in the area of marketing and promotion to improve the cost effectiveness of the expenditure in this area was widely recognized.

9. The establishment of training programmes to produce the numbers and calibre of skilled personnel to meet the anticipated continued strong growth in tourist arrivals is central to the plans of the Governments of China, Indonesia, Malaysia and the Philippines. Training is an activity where the more established tourist destinations of the Region can assist the newly emerging tourist destinations (e.g. DPR Korea, Mongolia).

CONCLUSIONS OF THE SEMINAR

1. The countries participating in the Seminar agreed on the desirability of maintaining a high growth rate of tourist arrivals and receipts growth during the 1990s, at an average level of around 10 per cent a year.
2. The principal motors for this sustained period of tourist expansion will be the generating markets of South East and East Asia (i.e. intraregional) and, to a lesser extent, Europe.
3. Despite the Region's desire to sustain its above-average growth rate in international tourism, there is a high degree of awareness of the difficulties associated with rapid expansion (namely the risk of the various interlinked components of tourism supply and demand becoming "out-of-line", or "mismatched", and of the occurrence of negative socio-cultural and environmental impacts) and the need to undertake comprehensive and coordinated tourism development planning to minimize these potential problems.
4. Tourism plans can only lead to successful tourism development if they are realistic and capable of being implemented within the resources (i.e. human, technical, financial) available, or obtainable. Full consultation in the planning process with the communities and authorities in the areas under planning is essential, and all plans should include an implementation programme (i.e. appropriate institutional arrangements, educational/training programmes) to assist local authorities in achieving the plan's objectives.
5. It was recognized that the continued success of the Region is most likely to result from the countries diversifying their tourism products to attract and expand demand from both existing and new market segments.
6. Such diversification for special interest market segments requires especially careful planning since it typically involves rural communities (where cross-cultural impact is most marked) and areas with sensitive ecosystems.
7. Exaggerated and/or erroneous media reporting (particularly in respect of the Gulf War, and the internal situation in certain of the Region's countries) serves to depress tourist demand.
8. Many aspects of tourism development (e.g. aviation policies, common standards, promotion, training) would benefit from collaboration and cooperation by taking a regional approach through agencies such as the WTO Commission for East Asia and the Pacific.

### RECOMMENDATIONS OF THE SEMINAR

In line with the Conclusions reached by the Seminar, the following series of recommendations were agreed:

1. The countries of the Region should seek to diversify their tourism products and markets, basing such development on the features of their nations which are unique, in order to encourage and sustain variety and heterogeneity in the Region's tourism.
2. Tourism strategies should be based on comprehensive and coordinated development planning (i.e. covering development policy, international access, tourist accommodation and attractions, trained personnel, infrastructure), a key aspect of which should be absorptive, or carrying, capacity study (related to the various criteria of economic, socio-cultural and environmental assessment).
3. All tourism development plans should involve full consultation with local communities and authorities; and include an implementation programme.
4. All tourism development projects should be subject to environmental impact assessment study.
5. Quality control should be sought through well-researched and fully-implemented development and operating standards.
6. The improved cost effectiveness of tourist marketing should be sought through increased public-private sector collaboration.
7. Destination countries should pay especial attention to, and develop specific programmes for, creating tourist awareness when developing tourism in rural communities - both of the host community and of tourists.
8. WTO and other international tourist organizations should establish communication systems and programmes to encourage the world's mass media to exercise responsibility and due caution in their reporting, especially insofar as it affects consumer's confidence in making international travel.
9. The Seminar recommended that the WTO Commission for East Asia and the Pacific should address the following aspects on a cooperative, regional basis: aviation policies, common standards, promotion and training.