

The role of tourism in the economy. The formation of tourist flows to the ASEAN countries

El papel del turismo en la economía. La generación de flujos turísticos a los países de la ASEAN

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Abstract

In the presented article on the base of statistical data from the World Tourism and Travel Council, the World Tourism Organization, the ASEAN Statistical Yearbook, and the official websites of national tourism organizations of the ASEAN countries the impact of tourism on the economy of the ASEAN countries is assessed. The region's tourist demand and supply are analyzed. The factors of the formation of the main tourist flows from Asia-Pacific, European, American and Australia and Oceania macroregions are studied.

Key words: tourism, tourist flow, tourist and recreational potential, ASEAN

Resumen

A partir de las estadísticas del Consejo Mundial de Viajes y Turismo, la Organización Mundial del Turismo, el Anuario Estadístico de la ASEAN y los sitios web de las organizaciones nacionales de turismo de la ASEAN, evalúa el impacto del turismo en las economías de la ASEAN. Analiza la oferta y la demanda turística en la región. Se estudian los factores que determinan los principales flujos turísticos de Asia y el Pacífico, Europa, América y Australia y Oceanía.

Palabras clave: turismo, flujo turístico, potencial turístico-recreativo, ASEAN

1. Introduction

Tourism is one of the most important and fast-growing sectors of the world economy. For many countries, it is an industry of specialization and the main source of income. Despite the short-term downturns, this sector continues to develop steadily, as well as demonstrate significant geographical expansion and diversification. The indicator of international tourist arrivals in the world is growing rapidly from 438 million people in 2000 to 952 million people in 2010, and reached 1460 million people in 2019. (UNWTO, 2020) Global revenues in this industry

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have steadily grown along with arrivals from 495 million dollars in 2000 to 980 million dollars in 2010 and reached the highest level of 1481 billion dollars in 2019. (UNWTO, 2020)

With the growth of the transnationalization and globalization of the world economy, along with traditional tourist destinations, such as Europe and North America, new ones have appeared. Southeast Asia is a promising region, rapidly passing the stage of forming the tourist market and actively proving its competitiveness on the world stage. Its states form an international organization called ASEAN. The countries under consideration have a huge potential for the development of the sphere of tourist services. Every year, the subregion attracts an increasing number of foreign tourists. As of 2019, the countries of Southeast Asia account for 9.8% of the world tourist flow and 9.9% of all tourist receipts. (UNWTO, 2020) This is due to the fact that the economy of Southeast Asia is growing rapidly, and the share of the tourism industry in the GDP of the region is one of the highest in the world.

Tourism has a great impact on the socio-economic development of the territories under consideration. That is why the study of this area in the region is relevant and important in the modern world. At the moment, the COVID-19 pandemic has had a significant impact on most segments of the economy and, above all, on tourism. As governments grapple with a global health emergency by closing borders and restricting travel, tourism is one of the most affected sectors. According to UNWTO data, the number of international arrivals to ASEAN in 2020 decreased by 80%. (UNWTO, 2021) In this regard, the ministers of tourism of the states of the region convened a meeting on this issue on 29.04.2020, where they adopted a special agreement on combating COVID-19. (ASEAN, 2020) The experience of overcoming and solving this problem in ASEAN is very interesting, first of all, for developing countries.

The purpose of this study is to identify the main trends and prospects for the development of the tourist market, the formation of tourist flows to the countries of Southeast Asia. In order to fully achieve this goal, it is necessary to perform the following tasks: to give a tourist and recreational characteristic of the countries under consideration; to analyze the economic importance of the tourism sector in the region; to identify the tourist demand of the ASEAN countries; to analyze the formation of tourist flows and income of the states; to characterize the current situation in the field of tourism of the countries of the region.

2. Methodology

To achieve this purpose, the following research methods were used: statistical, cartographic, logical, calculations of tourist arrival coefficients and the tourism balance to establish relationships between processes and phenomena in this sector. The general indicators of the socio-economic development of the countries were analyzed, which characterize the level and quality of life, on which the tourist activity of the population of the countries under consideration depends. To perform the study, the indicators of the importance of international tourism in the economy of countries were considered: the share of tourism in GDP (as a percentage of the country's GDP), the share of the employed population in international tourism (as a percentage of the total number of people employed in the country), the share of tourist services in the total volume of exports of the country (as a percentage). The indicators of tourist supply and tourist demand are studied.

The study described in this paper was conducted based on official statistical information from the ASEAN countries, various international organizations, as well as the work of scientists on this topic. The information base was mainly used by foreign sources, such as the World Tourism and Travel Council, the World Tourism Organization, the official website of ASEAN, the ASEAN statistical yearbook.

3. Results

3.1. The tourist supply of the ASEAN countries

The tourist supply is everything that can be used to meet the tourist demand: recreational resources, namely the climate, landscape, hotels, restaurants, entertainment facilities, etc.

The geographical location of Southeast Asia is favorable and has a significant impact on the development of the tourist services market. The ASEAN countries are located in the Eastern Hemisphere in the extreme southeast of the Eurasian continent. They occupy the Indochina Peninsula, the mountainous areas to the north of it and the Malay Archipelago. The region under consideration attracts many tourists due to a large number of factors: geographical location, namely, the location of the subregion at the crossroads of important sea routes from Eurasia to Australia and from the Indian to the Pacific Ocean; the large length and strong indentation of the coastline; a high number of beach destinations; a favorable climate, namely a small variability of high air temperature throughout the year, a comfortable humidity level, weak winds; a variety of equatorial, sub-equatorial and tropical landscapes with endemic flora and fauna, a high number of national parks; a large number of cultural and historical sites, in particular those included in the UNESCO World Heritage List (41 in total in the region).

The leading branches of tourism specialization of the ASEAN countries are: beach and cultural and educational tourism due to the geographical location of the region and its socio-cultural diversity. A strong influence can be traced from water tourism, namely cruise tourism, surfing, diving and rafting. This fact is due to the geographical location of Southeast Asia, the presence of unique World Heritage Sites, favorable natural and climatic conditions. Agro- and ecotourism, as well as business tourism have a weak impact. (Safina S.S., 2020)

Business tourism is developed only in a small number of Southeast Asian countries. Since Singapore is the most highly developed country in the region, it is the only one in ASEAN where business travel has a great influence on tourism. This is due to such factors as the most developed infrastructure, a large number of business centers and conference halls with modern high-tech equipment, state support for business and a low level of corruption, as well as the presence of a huge number of representative offices of international companies. In addition to Singapore, Malaysia has begun to strengthen its position in the field of business tourism, which is currently developing rapidly.

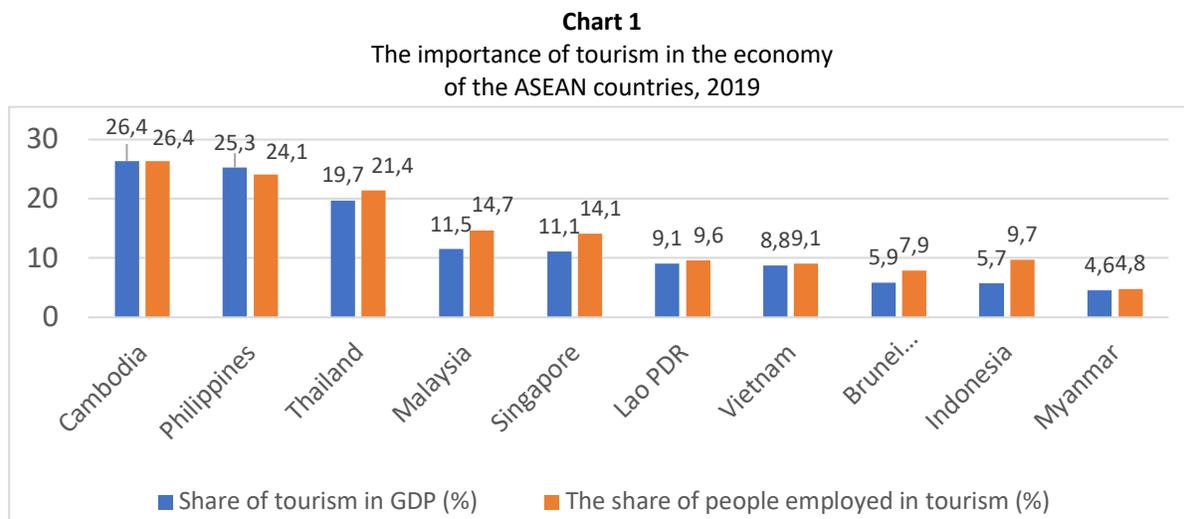
3.2. The economic importance of the tourism sector in the ASEAN countries

The tourism sector makes a significant contribution to the economy of Southeast Asia. It affects it in a positive way in the following aspects: a source of income for the population; stimulation of the development of industries related to the production of consumer goods for tourists; the growth of entrepreneurial activity; infrastructure development; an increase in the inflow of funds in foreign currency to the country. Thus, tourism has both direct and indirect effects on the economy, the first of which is the result of visitors spending on specific tourist goods, and the second is expenses not directly related to the purchase of a tourist tour.

According to the indicators of the share of tourism in GDP and the share of people employed in tourism, shown in Chart 1, the importance of this service sector for the economy of the countries of the region was assessed and their typology was presented:

1. High importance of tourism (the share of tourism in the economy is more than 15%): Cambodia, the Philippines, Thailand.
2. The average importance of tourism (the share of tourism in the economy from 11 to 15%): Malaysia, Singapore.

3. Low tourism importance (the share of tourism in the economy from 0 to 10%): Vietnam, Myanmar, Brunei, Indonesia, Laos.



Source: WTTC (16.08.2021)

According to the presented typology, it can be seen that in Southeast Asia there is a wide variation in the overall contribution of tourism to GDP. The economies of Cambodia, Philippines and Thailand depend to a greater extent on the services sector under consideration, and Myanmar and Indonesia to the least.

An important economic indicator in the tourism sector is the tourism balance (the difference between income and expenses from tourism). In the industry under consideration, states are divided into exporters and importers. The export of tourist services is the income from inbound tourism, and the import is the cost of outbound tourism. Thanks to the tourism balance, it is possible to identify what prevails in a particular state. In the first case, the states are significantly enriched by income from the sale of tourist goods and services, transport costs of foreign visitors, investment of foreign capital, etc. The importing states spend money on the purchase of tourist goods and services, transportation of visitors and investment in the foreign tourism sector. The tourism balance for the ASEAN countries for 2019 is presented in Table 1.

Table 1
The tourism balance of the
ASEAN countries, 2019

| Country | Revenue (USD million) | Expenses (USD million) | Tourism balance (USD million) |
|-------------------|-----------------------|------------------------|-------------------------------|
| Thailand | 60521,1 | 14238,1 | 46283 |
| Malaysia | 19820 | 12381 | 7439 |
| Vietnam | 11830 | 6150 | 5680 |
| Indonesia | 16912,1 | 11321 | 5591,1 |
| Cambodia | 4772,8 | 910,5 | 3862,3 |
| Myanmar | 2477,1 | 185,5 | 2291,6 |
| Lao PDR | 934,7 | 1024 | -89,3 |
| Brunei Darussalam | 216,6 | 612,7 | -396,1 |
| Philippines | 9806 | 12038 | -2232 |
| Singapore | 20051,8 | 26604,9 | -6553,1 |

Source: ASEAN Stats (16.08.2021)

Thus, according to the indicator of the tourism balance, the states of Southeast Asia can be divided into 3 groups:

1. High positive balance (tourism balance from 4000 and above): Thailand, Malaysia, Vietnam, Indonesia.

Malaysia has a high positive balance due to price competitiveness. Despite the high level of development of the state, it has only recently begun to gain popularity as a tourist destination. That is why tourists can afford to relax in a country that is rapidly following the path of neighboring Singapore, without spending a large amount of money.

Thailand, Vietnam and Indonesia are developing countries with a promising tourism sector that attracts millions of tourists every year.

2. Average positive balance (tourism balance from 1 to 3999): Cambodia and Myanmar.

These states are characterized by a low level of economic development, but the tourism services sector is one of their priorities, which is why the economy is dependent on it. Countries are attracted not only by the cheapness of recreation, but also by a wide variety of both cultural and natural objects.

3. Negative balance (tourism balance less than 0): Laos, Brunei Darussalam, Philippines and Singapore.

Both Singapore and Brunei Darussalam are the richest among the ASEAN countries. That is why the citizens of these countries have the opportunity to consistently travel abroad, as a result of which the countries are importers of tourist services. However, many more foreign visitors come to Singapore than to Brunei Darussalam due to the fact that Singapore is one of the largest transport hubs in the world, receiving a high number of transit flights every day. (Safina S.S., 2020) Also, the low rate of arrivals in Brunei is associated with its level of development and politics. Despite the high economic indicators, the country is developing, and citizens live according to Sharia law, which dictates a large number of restrictions that apply to tourists too.

Speaking about Laos, it is important to note that despite the allocation of the tourism sector as a priority, it is important for the country to improve its level of development in order to increase the tourism balance. The state needs to improve the infrastructure, protect cultural and natural objects, as well as develop an effective advertising campaign, since it lacks access to one of the most important and attractive resources for the region – the sea.

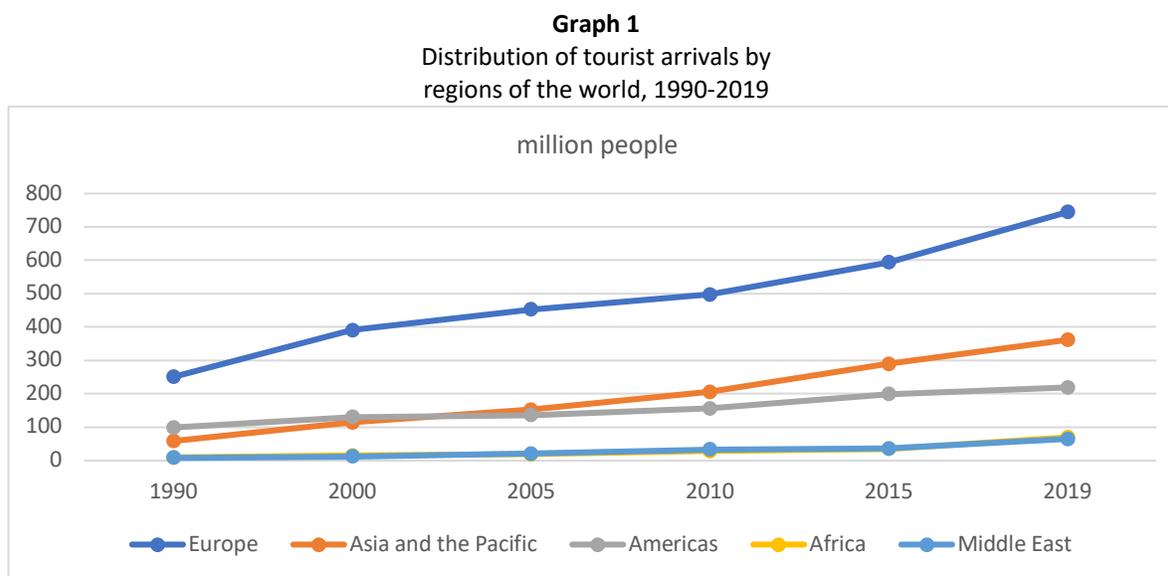
The Philippines in this case has a rather contradictory result, since the country is developing and poor, and also depends on international tourism. That is why its balance indicator should be positive. However, there is a tendency for illegal migration to developed countries among citizens of the Philippines. Due to the fact that entry to another country occurs on a tourist visa or for the purpose of tourism, these cases are taken into account in statistics, therefore, the balance is negative.

3.3. Tourism demand of the ASEAN countries

Tourist demand is the total number of people who travel or want to travel, use tourist services outside of their traditional place of residence. The indicators reflecting tourist demand include: indicators of tourist arrivals and tourist departures, the country's share in the total volume of tourist departures in the world, the share of recreational spending in household budgets. When analyzing the statistics of tourist flows, the most important indicator is the number of arrivals (the number of registered tourists in certain countries/regions for a certain period). In the presented paper, this indicator of demand is considered.

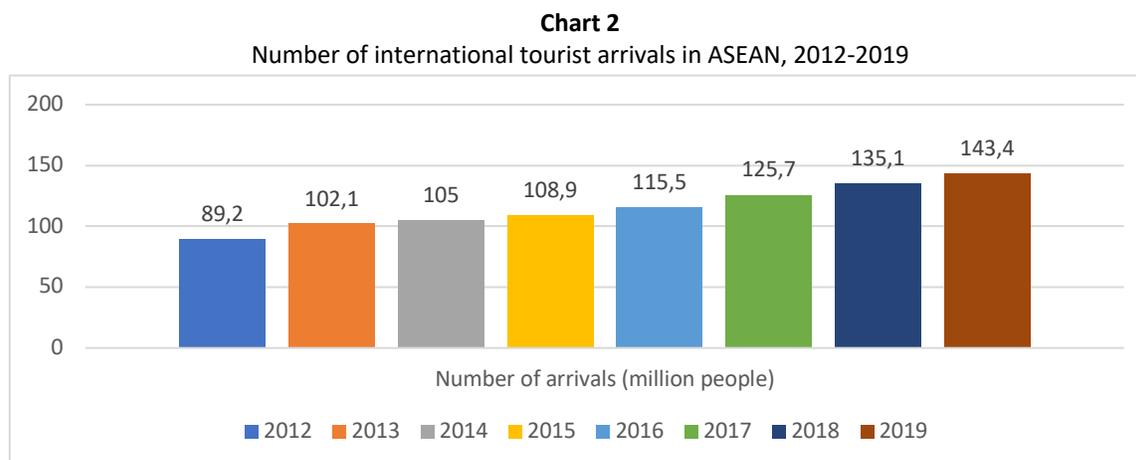
The distribution of tourist flows in the world is characterized by a high degree of unevenness. The World Tourism Organization identifies five tourist macroregions of the world. The most dynamic development is characterized

by the Asia-Pacific region, the average growth rate of the number of arrivals of which was nine times higher than the global average over the past decades. (Alexandrova A. Y., 2016) That is why in the XXI century, the Asia-Pacific region overtook the American region and took second place after Europe in terms of the number of tourist arrivals. The share of arrivals in the Asia-Pacific region is 25% of the world figures for 2019. (UNWTO, 2020) The distribution of tourist arrivals by region is shown in Graph 1.



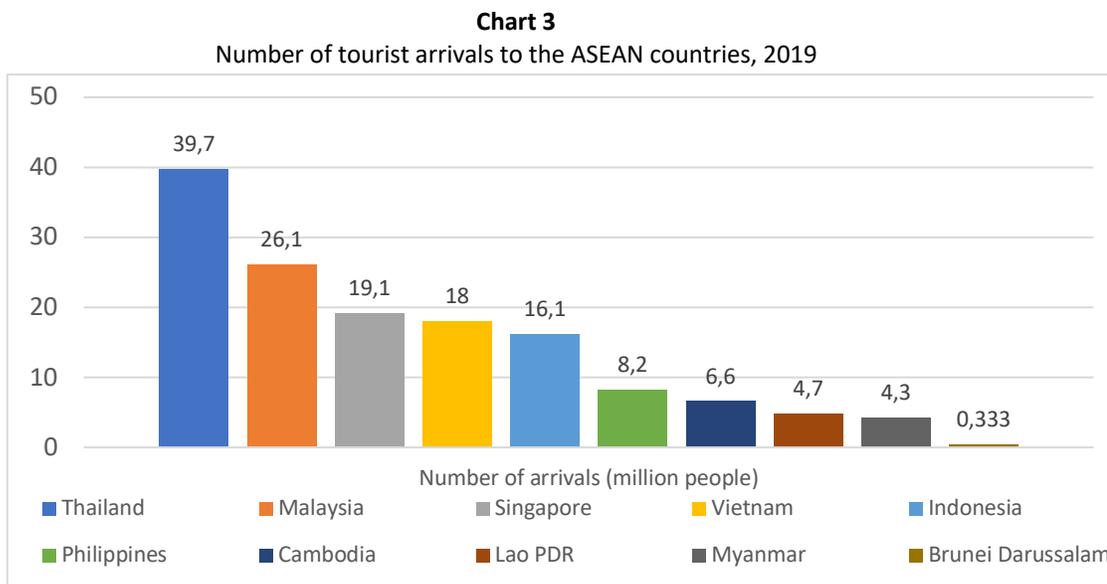
Source: UNWTO (16.08.2021)

The Asia-Pacific region includes the subregion of Southeast Asia, so it is important to highlight its role in the development of world tourism, since it is the group of countries under consideration that has shown incredible growth in this direction over the past ten years. The growth of tourism is caused by accelerated socio-economic development, the deepening of integration processes, and the improvement of the geopolitical situation. This tourist region is young, due to which its development is taking place at a faster pace than in traditional destinations such as Europe and North America. The number of tourist arrivals to Southeast Asia in 2019 increased by 6%, and tourism revenues – by 4%. (UNWTO, 2020) Thus, the number of tourists to ASEAN has increased almost 2 times since 2012, which is significant for such a relatively small region. In 2019, the countries received 143 million foreign tourists, and the share of global arrivals was 9.8%. (ASEAN, 2020) The dynamics of tourist arrivals in the region is shown in Chart 2.



Source: ASEAN Stats (16.08.2021)

As for international tourist arrivals to certain countries of the region, most of them were recorded in Thailand in 2019 – 39.7 million people, and the least in Brunei Darussalam – 333 thousand (Chart 3). (ASEAN, 2020)



Source: ASEAN Stats (16.08.2021)

To assess the intensity of tourist migration, an indicator such as the arrival coefficient is used, acting as a measure suitable for temporal and spatial comparisons. It is calculated as the ratio of the number of foreign tourists arriving in the state per year and the average annual number of its population, expressed in per mill and characterizes the level of the phenomenon per 1000 people. (Alexandrova A. Y., 2016) The calculated indicator for all ten ASEAN countries is shown in Table 2.

Table 2
The coefficient of tourist arrival of the ASEAN countries, 2019

| Country | Population (thousand people) | Number of tourist arrivals (thousand people) | Arrival coefficient (‰) |
|-------------------|------------------------------|--|-------------------------|
| Singapore | 5703,6 | 19113,8 | 3351,2 |
| Malaysia | 32581,4 | 26100,8 | 801,1 |
| Brunei Darussalam | 459,5 | 333,2 | 725,1 |
| Lao PDR | 7123,1 | 4791,1 | 672,6 |
| Thailand | 67989,8 | 39797,4 | 585,3 |
| Cambodia | 16289,3 | 6610,6 | 405,8 |
| Vietnam | 96484 | 18008,6 | 186,6 |
| Myanmar | 54100 | 4364,1 | 80,7 |
| Philippines | 108274,3 | 8260,9 | 76,3 |
| Indonesia | 266911,9 | 16107 | 60,3 |

Source: ASEAN Stats (16.08.2021)

According to the indicator of the arrival coefficient, the states of Southeast Asia can be divided into 3 groups:

1. The most visited countries (arrival coefficient above 1000‰): Singapore.

In 2019, the number of tourists in Singapore was 3 times higher than its average annual population, which indicates a high degree of attractiveness of this destination.

2. Frequently visited countries (arrival coefficient from 100 to 1000‰): Malaysia, Brunei Darussalam, Laos, Thailand, Cambodia and Vietnam.

Indicators above 100 shows that the number of tourists is less than the average annual population. However, this group of countries differs in that the indicators do not vary much, which shows a good attractiveness for their level. Among them there are both countries with a developed tourism sector (Malaysia, Thailand and Vietnam), which have a high potential in the market, and with a developing one (Brunei, Laos and Cambodia), which need to increase their tourism potential.

3. Less visited countries (arrival coefficient less than 100‰): Myanmar, Philippines and Indonesia.

The States in this group can be divided into those with a low indicator due to a high population (Indonesia and the Philippines), and those with a low indicator of tourist arrivals (Myanmar). However, it is important for both of them to increase tourism potential, since they have the resources for this.

The Asia-Pacific region is a constant leader in the formation of the tourist flow to the countries of Southeast Asia. In 2019, the ASEAN countries received 62.9 million people from the Asia-Pacific region. (ASEAN, 2020) The countries of the Asia-Pacific region and the number of tourists arriving from them are presented in Table 3. To the greatest extent, the leadership of the Asia-Pacific region in the formation of tourist flows to the ASEAN countries is justified by its geographical location. In this case, there is a tendency to strengthen the exchange of tourists between neighboring countries. The South-East Asia subregion is part of the Asia-Pacific region, therefore, the distances between the countries are small, and with the development of transport infrastructure, it becomes easier and cheaper to move between them. At the same time, most of the states that form tourist flows to the ASEAN countries have common borders with them. Another important factor is the cultural characteristics of the region. Cultural and historical homogeneity and kinship of languages make it easier for tourists to integrate during the trip and feel more comfortable.

The main tourist flow is emerging in China. That is why an important part of the success of the ASEAN countries in the development of the tourism sector has been their ability to attract tourists from China. The growth of Chinese tourists to the region is due to the fact that the government of the country recommended to visit primarily neighboring countries where the Chinese diaspora lives (Approved Destination Status). This agreement allows travel agencies approved by the Government of the People's Republic of China to sell group tours and issue visas. This factor, as well as the growing desire of Chinese residents to travel abroad, led to an increase in the number of Chinese arrivals to the ASEAN countries from 5.4 million in 2010 to 32.2 in 2019. (ASEAN, 2020)

Table 3
The number of tourist arrivals to the ASEAN countries
from the Asia-Pacific region (in thousands), 2019

| Country | To ASEAN | To Brunei Darussalam | To Cambodia | To Indonesia | To Lao PDR | To Malaysia | To Myanmar | To Philippines | To Singapore | To Thailand | To Vietnam |
|-------------------|----------|----------------------|-------------|--------------|------------|-------------|------------|----------------|--------------|-------------|------------|
| China | 32280 | 74,5 | 2361 | 2073 | 1022 | 3114 | 1463 | 1743 | 3627 | 10994 | 5806 |
| Republic of Korea | 10460 | 15,8 | 254,9 | 388,3 | 203,2 | 673,1 | 111,8 | 1989 | 645,8 | 1887 | 4290 |
| Japan | 5655 | 10,7 | 207,6 | 519,6 | 41,7 | 424,7 | 125,6 | 692,8 | 884,3 | 1806 | 952 |

Source: ASEAN Stats (16.08.2021)

The European region ranks second in terms of the formation of tourist flows to the ASEAN countries. In 2019 Southeast Asia received 16 million tourists. (ASEAN, 2020) The countries of Europe and the number of tourists arriving from them are presented in Table 4. This indicator largely depends on the high growth rate of the tourism services sector in Southeast Asia. The ASEAN member states demonstrate improved service every year, which attracts tourists from developed countries. Also, the high number of tourist arrivals from Europe was influenced by the improved advertising policy of the region and its brand.

In addition, the historical factor is of great importance, namely the connection of the former metropolises and colonies. Traditional cultural and economic ties and the absence of a language barrier are important prerequisites for the development of tourist exchange. The countries that form the largest flow of tourists to Southeast Asia had their colonies there, and their residents have been accustomed to resting on their territory since the last century. For example, Malaysia, Singapore and Brunei are former colonies of Great Britain, as a result of which the largest number of tourist arrivals is recorded from this state. The same can be said about Laos and Cambodia, which are visited by the largest number of French people. In frequent cases, Europeans are attracted by the interest in the past and present of the former colonies.

Also of great importance in the formation of tourist flows from the European region is the tendency to contrast when choosing a destination, which is often manifested in the fact that residents of northern countries prefer to choose a beach holiday.

Table 4
The number of tourist arrivals to the ASEAN countries from the EU (in thousands), 2019

| Country | To ASEAN | To Brunei Darussalam | To Cambodia | To Indonesia | To Lao PDR | To Malaysia | To Myanmar | To Philippines | To Singapore | To Thailand | To Vietnam |
|----------------|----------|----------------------|-------------|--------------|------------|-------------|------------|----------------|--------------|-------------|------------|
| United Kingdom | 3113 | 14,2 | 163,2 | 397,7 | 32 | 346,5 | 34,1 | 209,2 | 607,8 | 994 | 315,1 |
| Germany | 2127 | 1,8 | 94,4 | 277,7 | 25,3 | 130,2 | 29,4 | 103,8 | 380,7 | 857,5 | 226,8 |
| France | 2012 | 1,4 | 164,1 | 283,8 | 44,4 | 141,7 | 42,6 | 88,6 | 212,8 | 745,3 | 287,7 |
| Netherlands | 809 | 1,4 | 28,3 | 215,3 | 8,9 | 82,1 | 9,6 | 41,3 | 99,4 | 241,7 | 81,1 |
| Italy | 698 | 0,6 | 40,9 | 91,2 | 7,3 | 54,7 | 19,1 | 39 | 102,7 | 272,3 | 70,8 |
| Other Europe | 7327 | 1 | 276,7 | 802,7 | 64,5 | 300,6 | 67,9 | 290,3 | 729,1 | 3608 | 1186 |

Source: ASEAN Stats (16.08.2021)

As for America and Australia and Oceania, these regions form the smallest tourist flows to the ASEAN countries. In 2019 6.4 million tourists arrived from America, and 5.2 million from Australia and Oceania. (ASEAN, 2020) Speaking about the American region, it is important to note that tourists from the USA and Canada mainly visit the states of Southeast Asia, which is due to the high level of development of these countries, and therefore the opportunity to travel. The largest number of tourists from the countries under consideration was recorded in the Philippines and Thailand, which is because the popularity of the destinations due to a good advertising campaign. An important role in the formation of the tourist flow from the American region is also played by the tendency to contrast, which is expressed in the choice of a more "exotic" destination for travel. It is also important to note that the Philippines is popular among Americans for historical reasons – it is a former US territory. The countries of America, as well as the number of tourists from them who visited Southeast Asia, are indicated in Table 5.

Table 5
The number of tourist arrivals to the ASEAN countries from America (in thousands), 2019

| Country | To ASEAN | To Brunei Darussalam | To Cambodia | To Indonesia | To Lao PDR | To Malaysia | To Myanmar | To Philippines | To Singapore | To Thailand | To Vietnam |
|----------------|----------|----------------------|-------------|--------------|------------|-------------|------------|----------------|--------------|-------------|------------|
| USA | 4816 | 4,4 | 248,9 | 457,8 | 61,2 | 269,9 | 66,8 | 1034 | 729,3 | 1167 | 746,2 |
| Canada | 1088 | 2,3 | 60,2 | 103,6 | 12,9 | 87,6 | 11,1 | 238,9 | 138,5 | 274,2 | 159,1 |
| Other Americas | 530,6 | - | 44,9 | 87,5 | 8,6 | - | 10,2 | 24,6 | 94,3 | 192 | 68,5 |

Source: ASEAN Stats (16.08.2021)

Speaking about Oceania, it is important to note that most of the states are island States and are at a low level of development. That is why, basically, only citizens of developed countries (Australia and New Zealand) can afford to travel, of which the largest number was recorded in Southeast Asia. The states of Oceania, as well as the number of tourists from them who visited Southeast Asia, are indicated in Table 6.

In many respects, the geographical location affects the tourist exchange between the selected regions – they are located at a close distance from each other. Also, the development of transport infrastructure, the emergence of more affordable air carriers allow to move between destinations at a higher speed and at a lower price.

Table 6
The number of tourist arrivals to the ASEAN countries from Australia and Oceania (in thousands), 2019

| Country | To ASEAN | To Brunei Darussalam | To Cambodia | To Indonesia | To Lao PDR | To Malaysia | To Myanmar | To Philippines | To Singapore | To Thailand | To Vietnam |
|---------------|----------|----------------------|-------------|--------------|------------|-------------|------------|----------------|--------------|-------------|------------|
| Australia | 4520 | 10,2 | 123,3 | 1386 | 24,8 | 368,3 | 25,9 | 286,2 | 1143 | 768,7 | 383,5 |
| New Zealand | 582,4 | 1,3 | 23,3 | 149 | 4 | 50,1 | 4 | 37,9 | 153 | 112,8 | 47,1 |
| Other Oceania | 140,9 | - | 0,5 | 81,4 | - | - | 0,2 | 28,8 | 23,6 | 4,7 | 1,8 |

Source: ASEAN Stats (16.08.2021)

4. Conclusions

The study showed that the tourism sector makes a significant contribution to the economy of Southeast Asia. According to the indicators of the share of tourism in GDP and the share of people employed in tourism, an assessment of the importance of this service sector for the economy of the countries of the region was carried out, from which it was revealed that a high importance can be traced in Cambodia, Philippines and Thailand, an average – in Malaysia and Singapore, a low – in Vietnam, Myanmar, Brunei, Indonesia and Laos. There are big differences between countries in the impact of tourism on their economies. They are determined by the influence of natural and recreational, economic, political, and environmental factors.

The share of Southeast Asian countries in world tourism revenues is 9.9%. (UNWTO, 2020) It is important to note such an indicator as the tourism balance, which shows whether the state is an exporter or importer of tourist

services. Based on the calculations, it was revealed that the first category includes such states as Thailand, Malaysia, Vietnam, Indonesia, Cambodia and Myanmar. Importers among the ASEAN countries are Laos, Brunei Darussalam, the Philippines and Singapore.

Speaking about the formation of tourist flows, it is important to note that the share of Southeast Asian countries in world tourist arrivals is 9.8%. (UNWTO, 2020) The leader in the number of tourist arrivals to the ASEAN countries is the Asia-Pacific region, from where the countries received 62.9 million people in 2019. (ASEAN, 2020) This fact was influenced by the increased exchange of tourists between neighboring states in the presence of normal relations between them and between countries with related languages and cultural and historical homogeneity, the tendency to "contrast" when choosing a destination, namely, from north to south. The main tourist flow originates in China, from where the ASEAN countries received 32.2 million tourists in 2019. (ASEAN, 2020) The European region is in second place with 16 million tourists, the American region is in third place (6.4 million people), Australia and Oceania are in fourth place (5.2 million people). (ASEAN, 2020)

Despite the rapid development, the tourism services sector of the ASEAN countries faces a large number of factors that hinder its success. For example, the world is faced the COVID-19 pandemic, which has had a significant impact on the tourism sector. Although the number of international tourist arrivals to the ASEAN countries in 2020 decreased by 80%, this helped them to become one of the most successful in the fight against the virus. (UNWTO, 2021)

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