
**THE DYNAMIC OF ASEAN TOURISM DEVELOPMENT WITHIN THE
TRAVEL & TOURISM COMPETITIVENESS INDEX / TRAVEL &
TOURISM DEVELOPMENT INDEX (TTCI-TTD)
THROUGHOUT 1 2017-2023**

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There are numerous researches regarding tourism in the ASEAN region which generally merely observe the progress of tourism in this region based on the number of foreign tourist visits and foreign exchange income received by ASEAN countries that develop outbound tourism. Dissimilar to other research, this research seeks to observe the development of tourism from the perspectives of the Travel and Tourism Competitiveness Index (TTCI) and the Travel and Tourism Development Index (TTDI), which are immensely focused on featuring the competition/development of tourism from various aspects. By utilizing TTCI / TTDI, the advantages and disadvantages of several aspects in the development of tourism will be essentially visible. Thus, this research shall examine more deeply on the dynamics of ASEAN tourism, focusing more on countries such as Indonesia, Malaysia, Singapore and Vietnam and Thailand from several pillars established by the World Economic Forum (WEF) which are issued every two years. This research focuses on the 2017-2022 period as it would be able to answer the ASEAN tourism competition/development index for the five years, as in such five years span the world of international tourism collapsed due to COVID 19 in 2020-2021. Through this research, it was found that the dynamics of ASEAN tourism development during this period was significantly high, meaning that there were ASEAN countries that experienced declines and increases when viewed from the TTCI/TTDI, and there were countries experiencing stable dynamics. The main key to the success of a country in ASEAN in achieving tourism development lies in the government's ability to manage tourism with its stakeholders and is supported by the domestic political stability of each country.

Keywords: ASEAN, Tourism Dynamics, Tourism Development

Abstrak

Sudah banyak penelitian tentang Pariwisata di kawasan ASEAN yang pada umumnya hanya melihat kemajuan pariwisata di kawasan ini dari jumlah kunjungan wisatawan asing serta devisa yang diterima negara-negara ASEAN yang mengembangkan outbound tourism. Berbeda dengan yang lainnya, penelitian ini ingin melihat perkembangan pariwisata dari sudut (TTCI) dan TTDI yang sangat fokus melihat kompetitive/developmnet dari bermacam aspek. Dengan menggunakan TTCI /TTDI maka akan terlihat keunggulan dan kekurangan beberapa aspek yang ada dalam pengembangan paririsata, Dengan demikian penelitian ini akan mengkaji lebih dalam dinamika pariwisata ASEAN yang lebih banyak berfokus pada negara -negara seperti Indonesia, Malaysia , Singapura dan Vietnam serta Thailand dari beberapa pilar yang dibuat oleh World Economic Forum (WEF) yang dikeluarkan dua tahun sekali. Penelitian ini memfokuskan pada priode 2017 - 2022 karena akan bisa menjawab index kompetensi/pembangunan pariwisata ASEAN selama lima tahun yang mana di dalamnya lima tahun tersebut dunia pariwisata internasional ambruk disebabkan oleh COVID 19 pada tahun 2020 - tahun 2021.

Dari penelitian ini, mengasikan bahwa dinamika perkembangan pariwisata ASEAN selama priode tersebut sangat tinggi artinya ada negara ASEAN mengalami turun dan mengalami naikan kalau dilihat dari TTCI/TTDI serta ada negara yang mengalami dinamika yang stabil. Kunci utama keberhasilan suatu negara di ASEAN dalam pembangunan pariwisata terletak pada kemampuan pemerintah dalam mengelola pariwisata dengan stakeholdernya serta didukung oleh stabilitas politik dalam negeri masing-masing negara.

Kata Kunci: ASEAN, Tourism Dinamika, pembangunan Pariwisata

A. Introduction

Every nation in the world will pay attention to its tourism potential because tourism provides the distribution in the economy for its people. Hence, the leaders of countries around the globe will compete to fabricate strategies for developing their tourism so that foreign tourists will flock to visit. Besides delivering an income in foreign exchange, it also provides employment opportunities and equal distribution of development

in the country. Additionally, tourism development may pose positive and negative effects as well. Poor management will lead to an unavoidable negative impact.

In tourism development, the number of tourists visiting and foreign exchange are the primary indicators of success for many countries. However, since 2001, the World Economic Forum (WEF) created a measure called the Travel Tourism Competency Index (TTCI), which in 2021 was changed to the Travel Tourism Development Index (TTDI). Therefore, the problem in question within this article is the dynamics of TTCI/TTDI for ASEAN tourism from 2017 to 2023 amidst the raging COVID-19. In the development of tourism industry, the role of government is paramount because governments has the power to make policies and attract tourism¹. For this reason, strong governance is needed because it is the only entity that can be trusted by the people to create political stability. There are many countries in the world whose political stability is not guaranteed, so the development of tourism experiences many obstacles such as the emergence of terrorism, rebellion, etc. Apart from requiring strong government support, synergy between stakeholders in tourism industry is also needed. Stakeholders who must participate in the tourism industry are entrepreneurs, local communities, tourism actors, etc. Apart from that, regional stability is also needed.

The transition from the Travel and Tourism Competitiveness Index (TTCI) to the Travel and Tourism

¹ James Elliot

Development Index (TTDI) aligns with the global movement in the tourism industry to focus more on sustainability and resilience. This shift is reflected in TTDI's inclusion of a travel and tourism sustainability index. According to the United Nations World Tourism Organization (UNWTO, 2013), sustainable tourism is defined as tourism that fully considers its current and future economic, social, and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities.

Government commitment towards fulfilling TTDI indicators can be understood from a compliance framework perspective. According to Guzman (2002), as rational and self-interested actors, states comply with certain norms, values, or agreements to maintain a good reputation, avoid economic or reputational sanctions, and leverage the coordinating roles of international institutions. In the case of TTDI, the World Economic Forum serves as an institution that establishes standards which countries strive to achieve to ensure their tourism sector becomes attractive to the market. Thus, efforts by countries to improve their TTDI indicators can be seen as endeavors to fulfill national interests, specifically promoting tourism as an economic development strategy.

B. Competitiveness in ASEAN Tourism

Like any other region in the world, ASEAN strives to develop tourism as part of its regional cooperation program. ASEAN has its ASEAN Tourism Forum, which also enhanced

the coordination of ASEAN leaders to run a committee on Trade on Tourism. This cooperation on tourism has been established since 1981 in order to engage with various stakeholders in promoting ASEAN as a single tourism destination. However, with the existence of the cooperation itself, ASEAN member states are likely to be competitive in improving their tourism sectors through several aspects: 1) world-class standards, 2) facilities, and 3) attractions. Not only that, the efficiency of international travel could bring greater market access under the ASEAN Framework Agreement on Services (AFAS) and develop proper human resources in the tourism and travel industry (ASEAN, n.d.).

With its competitiveness, member states of ASEAN as a whole formed the ASEAN Tourism Marketing Strategy (ATMS) 2021-2025. This strategy calculates the outlook of the tourism industry of ASEAN on the world's condition after recovering from the COVID-19 pandemic. A few variables that are being considered and calculated are regarding the public security for tourists, proper visa facilitation, competitiveness in promotional and collaboration efforts, and infrastructure that could enhance facilitation towards tourist connectivity. On a side note, through the The Travel & Tourism Competitiveness Report 2017-2019, the classification of the Travel & Tourism Competitiveness Index (TTCI) includes four categories; 1) enabling environment, 2) T&T policy and enabling conditions, 3) infrastructure, and 4) natural and cultural resources. In 2019, Singapore was on top of

any other ASEAN countries by standing on the 17th rank, followed by Malaysia (29th), Thailand (31st), Indonesia (40th), Vietnam (63rd), and more.

The competitiveness of ASEAN tourism also implies the notion of carrying out a technology-driven mechanism on pursuing sustainable tourism which could bring sustainable growth and skilled workforces (World Economic Forum, 2019). The goal of the competitiveness of tourism within countries is to portray the air transportation, international openness, and digital connectivity of the tourism industry through trade tensions. As ASEAN is trying to grow and implement the concept of single destination tourism, countries are competing on bringing the best qualities out of them. However, transition of terms on tourism affects how countries sustain their tourism industry, from competitive to development.

C. The Transition from TTCI to TTDI: Why?

The Travel and Tourism Development Index (TTDI) came as a next stage of the previous Travel and Tourism Competitiveness Index (TTCI) which has been established by the World Economic Forum for 15 consecutive years. The TTDI was first published in 2021. The change from the latter to the prior was due to the inclusion of concepts that the TTCI lacked, such as the expansion of “sustainability and resilience” in the growth of travel and tourism (World Economic Forum, 2022).

These added concepts are manifest in the substantial change of the index framework between the TTCI and TTDI. In total,

there are 4 subindexes which further includes 14 pillars within the TTCI, while the TTDI has 5 subindexes that contain 17 pillars. To illustrate the specific differences between the two, a comprehensive list of the index frameworks of both reports will be provided below. The last edition of the TTCI and the first edition of the TTDI published in 2019 and 2021 respectively will be used as the objects of comparison.

2019 Travel and Tourism Competitiveness Report	2021 Travel and Tourism Competitiveness Index
<p>Enabling environment:</p> <ul style="list-style-type: none"> - Business environment (12 indicators) - Safety and security (5 indicators) - Health and hygiene (6 indicators) - Human resources and labour market (9 indicators) - ICT readiness (8 indicators) 	<p>Enabling environment:</p> <ul style="list-style-type: none"> - Business environment (9 indicators) - Safety and security (6 indicators) - Health and hygiene (6 indicators) - Human resources and labour market (9 indicators) - ICT readiness (8 indicators)
<p>T&T Policy and enabling conditions:</p> <ul style="list-style-type: none"> - Prioritization of travel and tourism (6 indicators) - International openness (3 indicators) - Price competitiveness (4 indicators) - Environmental sustainability (10 indicators) 	<p>Travel and Tourism policy and enabling conditions:</p> <ul style="list-style-type: none"> - Prioritization of Travel and Tourism (5 indicators) - International Openness (4 indicators) - Price Competitiveness (5 indicators)

2019 Travel and Tourism Competitiveness Report	2021 Travel and Tourism Competitiveness Index
<p>Infrastructure:</p> <ul style="list-style-type: none"> - Air transport infrastructure (6 indicators) - Ground and port infrastructure (7 indicators) - Tourist service infrastructure (4 indicators) 	<p>Infrastructure:</p> <ul style="list-style-type: none"> - Air Transport Infrastructure (4 indicators) - Ground and Port Infrastructure (7 indicators) - Tourist Service Infrastructure (5 indicators)
<p>Natural Cultural Resources:</p> <ul style="list-style-type: none"> - Natural resources (5 indicators) - Cultural resources and business travel (5 indicators) 	<p>Travel and Tourism Demand Drivers:</p> <ul style="list-style-type: none"> - Natural Resources (5 indicators) - Cultural Resources (6 indicators) - Non-Leisure Resources (4 indicators)
	<p>Travel and Tourism Sustainability:</p> <ul style="list-style-type: none"> - Environmental Sustainability (15 indicators) - Socioeconomic Resilience and Conditions (7 indicators) - Travel and Tourism Demand Pressure and Impact (7 indicators)

Table 1.0 indicates the key differences between the subindexes contained within both the last edition of the TTCI and the first edition of the TTDI. The contents of the lists are taken directly from aforementioned editions of the TTCI and TTDI.

The official WEF introductory article to the 2021 edition of the TTDI (2022) stated two major reasons for the transition. These reasons are to “focus more attention on the sector’s role in broader economic and social development,” and to focus on the

much needed collaboration and integrated development strategies of Travel and Tourism stakeholders to mitigate the impact of the COVID-19 pandemic, foster recovery, and to face future challenges and risks.

The broadening of the subindexes within the framework is beneficial for the global community of Travel and Tourism, including for ASEAN. Through the aforementioned inclusion of sustainability concepts within the TTDI may provide relevant information for stakeholders of the Travel and Tourism sector—whether local, regional, or international—to enact upon the hoped integrated development strategies.

D. Development of Tourism in ASEAN State Members

The development of travel and tourism in ASEAN from the year 2019 to 2021 as taken from the 2021 edition of the TTDI shows varying results for each ASEAN member state. The 2021 TTDI lists eight out of ten ASEAN member states. To illustrate the development for each country within ASEAN as listed among the one hundred and seventeen countries inside the index, a table will be provided below. The table will begin in an order following the 2021 TTDI rank placement.

ASEAN Member States	2019 Results	2021 Results
Singapore	9th Place	9th Place
Indonesia	44th Place	32nd Place
Thailand	35th Place	36th Place

Malaysia	29th Place	38th Place
Vietnam	60th Place	52nd Place
Philippines	73rd Place	75th Place
Cambodia	82nd Place	79th Place
Lao PDR	94th Place	93rd Place

Table 2.0 shows the ranking of the eight out of ten ASEAN member states in the 2021 edition of the TTDI compared to the 2019 results. Singapore ranks first among other ASEAN countries whereas Lao PDR ranks the lowest. Indonesia saw the most increase of rank from 2019 to 2021.

The 2021 TTDI results show that the development between 2019 and 2021 for the travel and tourism industry within ASEAN countries are dynamic. On one hand, ranks of Indonesia and Vietnam significantly increased, whereas Lao PDR and Cambodia's rank increased, though not to the certain extent of Jakarta and Hanoi. On the other hand, Thailand, Malaysia, and Philippines' respective rank decreased from the 2019 index results. All while Singapore stays on top of other ASEAN member states with a stable rank of 9th place.

It needs to be noted that the reason for the lack of inclusion from editions of the TTCI prior to the 2019 edition is due to the significant differences of the frameworks used to analyze and determine countries' rank between the TTCI and the TTDI. The 2019 ranks as showcased in the 2021 TTDI results and in the

table above have been re-analyzed utilizing the improved TTDI frameworks (World Economic Forum, 2022).

E. Indonesia's Tourism Projection in Upcoming Years

Indonesia has been implementing various mechanisms to enhance the country's tourism industry. In President Joko Widodo's period, the so-called "10 Destinasi Super Prioritas" was launched by the Ministry of Tourism and Creative Economy of the Republic of Indonesia, these destinations includes; 1) Borobudur (Central Java), 2) Mandalika (West Nusa Tenggara), 3) Labuan Bajo (East Nusa Tenggara), 4) Kepulauan Seribu (Jakarta), 5) Bromo Tengger Semeru (East Java), 6) Lake Toba (North Sumatra), 7) Wakatobi (North Sulawesi), 8) Tanjung Lesung (Banten), 9) Morotai (North Maluku), and 10) Tanjung Kelayang (Bangka Belitung Islands) (KEMENPAREKRAF, 2023).

Other than the concept of '10 Destinasi Super Prioritas', several prestigious world events like the Asian Games 2018 have been opening opportunities to showcase Indonesian culture through sports diplomacy, which was then followed by the MotoGP championship that was held on the island of Lombok. Another possible chance to be a strong actor on sports diplomacy hosted the U20 World Cup; however the chance was stripped away due to certain circumstances that decided FIFA to remove Indonesia as a host. Tourism and sports diplomacy has been one of the ways to showcase soft power.

On the other hand, events that involved prominent state actors through the G20 Summit in Bali and ASEAN Summit 2023 in Labuan Bajo were extremely highlighted. Indonesia's success especially in the G20 Summit caught the attention of the world. The notion of a possible post-pandemic tourism in Bali opened a new door for Indonesia to launch a huge boost on the momentum of the rise of Indonesia's tourism industry. Additionally, the operation of the high-speed railway from Jakarta to Bandung, widely known as WHOOSH, will also contribute to the development of Indonesian tourism industry as it is the first operational high-speed rail in Southeast Asia. However, with a huge domestic politics occasion that will take place next year, which is the Presidential election and legislative elections, it is still vague to see what are the next moves that the Indonesian tourism industry could undertake. The question of the future of this "grand design" is still being predicted and debated whether it will be succeeded by the next leader, or will it break off?

F. 2021 TTDI of ASEAN State Members

1. Singapore's Unshaken Throne

Based on the 2021 TTDI results and the 2019 results preceding it, it is apparent that Singapore's rank on the TTDI stays on the first place among other ASEAN member states listed. Another fact worth noting is that Singapore's rank when compared with Indonesia—the second highest

ASEAN state to rank in the TTDI—differs significantly, with the gap being filled with twenty three non-ASEAN countries. There are various reasons for Singapore's high ranking on the TTDI, and akin to Indonesia's case of travel and tourism growth spurt in the span of 3 years, domestic politics plays a huge role in the TTDI outcome for Singapore.

One of the notable steps Singapore has taken in the domestic level to improve the travel and tourism sector is the “Uniquely Singapore” marketing campaign launched in 2004 to 2010. “Uniquely Singapore” was used to promote the country as one where “ aspects of a modern living environment co-exist with the traditions and cultures of a multicultural society” (National Library Board, n.d.; pssat UGM, 2019). This promotion approach was done in realization of the fact that Singapore's economy heavily relies on labor, brainpower, and services due to the lack of natural resources (pssat UGM, 2019). This program was not the first, however.

Singapore's travel and tourism industry first started to boom after its independence when the country experienced an increase in the transportation and communication industry, which in turn positively affected Singapore's tourism industry (SOURCE). Despite the decline of tourists during the 1985 international recession, the Singaporean

government's response was one that improved the conditions of the travel and tourism sector.

2. Vietnam's Race to the Top

Vietnam's travel and tourism sector—like Indonesia—has also seen a rise from 2019 to 2021. This rise was seen since the 1980s, and within the span of 4 years, between 2015 and 2019, Vietnam welcomed an annual increase of 22% in foreign tourists. The COVID-19 pandemic, while slowing down incomes from international tourists, fostered domestic tourism (Choe, 2022). There are several contributing domestic policy factors to Hanoi's similar steady climb to Jakarta's.

The first one is the influx of Foreign Direct Investments as a result of Vietnam's economic reform in 1987, which fundamentally allowed for limited economic liberalization. This reform was a follow up of the country's multidimensional reforms known as the *Đổi Mới* (Schellhorn, 1992). The reform—which also affected the travel and tourism sector—has created a push ever since the early twenty first century which resulted in Vietnam becoming one of South East Asia's top tourist destinations (Choe, 2022). This status quo was relatively kept until the COVID-19 pandemic became a global threat, which forced Vietnam to lock itself down from foreign visitors.

During the pandemic, the global travel and tourism industry was hit with severe decline of income (Behsudi,

2020). Such is the case with Vietnam. According to Behsudi (2020), the pandemic forced all countries to come up with different solutions to still empower the travel and tourism industry. In Vietnam's case, the country decided to adapt to the restricted international travel by appealing to domestic tourism. Other than that, the pandemic made relevant the necessities of digital transformation in regards to Vietnamese business and destinations to foster innovation and ensure the wellbeing of travelers (Choe, 2022). One of the examples is the release of an online tourism app named *Du Lich Viet Nam An Toan* released in late 2020.

However, despite the adaptive approaches taken by Vietnam, these adaptations are not those that do not create flaws. One flaw that came from the aforementioned digital transformation is the ensuing obstacles faced by "small-scale tourism businesses in remote and rural villages" (Choe, 2022). Despite the obstacles, the 2021 TTDI results still showed that Vietnam ranked third among all ASEAN member states, climbing up 6 ranks from 2019.

3. Internal turmoil of Philippines, Myanmar, Laos, and Cambodia

Among the ASEAN countries listed in the TTDI, there are some member states that face failures in increasing their ranks. Such is the case with the Philippines and Myanmar. Whereas in the case of Vietnam and Indonesia their domestic policies became the driver of the travel and

tourism progress, in these two countries, the same factor led to the decline of the travel and tourism industry. Other than that, in countries such as Lao PDR and Cambodia, though rank increases were seen in the respective countries from 2019 to 2021, a major loss of revenue in the concerned field was still acknowledged. In some of these countries, the COVID-19 pandemic served as one of—if not the—major reasons for the loss in travel and tourism revenue and decrease in the TTDI rank.

a. The Philippines

In the Philippines, the pandemic became one of the huge factors of the decline in the discussed sector. 2020 saw a severe decline of income from the domestic tourism sector, going from P3.3 trillion in 2019 to P919,2 billion in 2020 (Caynila et al., 2022). The response from the Filipino government did not really help with the damage dealt by the tourism industry.

For example, in late 2020, when the Vietnamese government made a move to create a digital transformation through creating an online tourism application, the Philippines only made a plan about doing the same approach (Asian Development Bank, 2020). In another comparative case, the difference in regards to the utilization of resources available within the country differs when compared to other countries. The Philippines mainly prioritizes its human resources, with the country having a lead among other Southeast

Asian countries in terms of having “standalone HR units within its government ministries and agencies” (Harper, 2019). Compare this to Singapore’s imperative, which forced itself to focus on maximizing tourism as one of the main income of the nation.

In short, when it comes to the Philippines, at least two domestic factors define the tourism environment between 2019 and 2021: the overall late adaptive reaction to the pandemic that could minimize the detrimental effects to the travel and tourism industry and the approach the country takes that puts human resources in a higher priority than travel and tourism. These two decisions by the government resulted in the decline of ranking in the 2021 TTDI results.

b. Myanmar’s Tourism, Declining Year by Year

Unlike any other countries in ASEAN, Myanmar has been facing challenges in its tourism industry. In the year 2017, the World Travel and Tourism Council predicted that between the year 2016 and 2026, Myanmar, along with other countries like Thailand, Oman, Mozambique, Vietnam, and others will be experiencing an ultimate growth in tourism for leisure-travel spending (TTCI, 2017). However, the prediction seems to be under a pessimistic image of the recent social, political, and economic situation in Myanmar. On February 1st, 2021, Tatmadaw (the military of Myanmar) launched a coup d’etat led by Senior

General Min Aung Hlaing who then took over the government from the democratically elected government under Aung San Suu Kyi's leadership.

With this unfortunate event, the military junta responded to demonstrations by the people of Myanmar with brutality of violence, aggression, killings of innocent civilians which is considered as the abuse of human rights. The COVID-19 has brought a terrible impact towards tour guides and the tourism industry, and it was becoming worse due to the coup. The significance of peacebuilding and the enforcement of human rights in achieving a successful tourism sector is currently a challenge for Myanmar.

The military coup undeniably has affected the nation as well as their tourism and travel industry, the risk of tourist's safety and hospitality as the base of tourism has also been concerning. 2 years after the coup, locals of Myanmar that decided to leave home due to the concerning situation in their home country are starting to return back to Myanmar. In accordance with the complex political tensions and armed conflict that are still happening in several regions; which includes; Sagaing, Mandalay, Magway, etc., recovering the tourism industry is still a struggle.

c. Lao People's Democratic Republic (PDR)

Indifferent to the case of Vietnam, Laos' hit to the travel and tourism sector happened due to the

pandemic; the pandemic also did not spare Lao in decreasing the income from international tourists. And for Laos, it served as a heavy blow for the national economy, as travel and tourism acts as the third largest contributor to the nation's economy right after mining and electricity. Just before COVID-19, 2019 saw Lao acquiring the most amount of revenue from the travel and tourism sector. It accounted for 9.1% of the country's economy and granted 300,000 jobs, among many (UNDP, 2021). Things took a turn for worse after the world suffered from the effects of the pandemic.

A report by the United Nations Development Programme (UNDP) in 2021 stated that Laos suffered a decline of up to 74% in foreign tourism, loss of revenue in between 70% and 80%, and impacts—both direct and indirect—towards “almost all workers in the tourism sector.” Furthermore, the border shut downs did not help at all with the declining conditions of the country's third largest contributor to the economy. Despite the fact that there were efforts to push domestic tourism to substitute for foreign ones, there are underlying factors that made even such a maneuver unrealistic.

The same report by UNDP stated three factors that can result in the success of a shift towards

emphasizing domestic tourism. These are when a country has an adequate system of domestic tourism prior to the COVID-19 pandemic, a substitute for air-travel options such as land travel, and a sufficient amount of money to support the ongoing of travel and tourism services and to spend for travel and tourism products. Based on these factors, it can be inferred that Laos lacks sufficiency in crossing all three checkmarks. For example, it was only in late 2021 that a railway crossing from China to Laos was put to operation, for which one of the reasons for such an operation was to foster domestic tourism (Xinhua, 2022). To add, within the aforementioned UNDP report is written that there were pessimistic responses from the Laotian private sector in regards to the focus shift from international tourist-centric to a domestic tourist-centric market. Such a lack of optimism raised from the acknowledgement that the revenue gained will not fulfill the sustainability of the business in times of crisis due to the “low population, low buying capacity, and lack of typical tourism behaviors amongst the domestic population” (UNDP, 2021).

The case of travel and tourism in Laos is not so different from the case of another ASEAN member country in terms of what drove down the revenue of tourism. In Laos’ case, due to COVID-19 that served

as the major factor of the country's declining revenue in travel and tourism, the sector saw massive damage due to the sudden decrease in foreign tourism. And the fact that there lies hardship in shifting the emphasis of tourism from a foreign one to a domestic one showed that the pandemic took a severe toll on the Laotian travel and tourism industries.

d. Cambodia

Cambodia's experience with COVID-19 was not so much different from the previously mentioned countries. The country saw a massive decrease in the number of foreign tourists in 2020 and 2021. This decrease was as fatal as it was in the case of Laos, for tourism is considered as one of the main sources of Cambodia's "socio-economic growth" (Open Development, 2023). To illustrate, the country that had visited Cambodia the most prior to the pandemic—China—contributed more than 2 million tourists annually in 2019. This number decreased to a mere rough estimate of 300,000 in 2020 and 45,000 in 2021. This obviously created a major negative impact on the revenue of foreign tourism, decreasing from 2019's 4,919 million USD to 2020's 1,023 million USD (Open Development, 2023).

Another challenge worth noting is that Cambodia lacks coherent infrastructure and transportations for areas beyond those usually visited by foreign tourists

(Open Development, 2023). This serves as a major challenge for the country, especially referring back to the UNDP's three factors determining the success of domestic tourism. Hence, though domestic demands of tourism were high during the COVID-19, these demands would not be met sufficiently by the poor infrastructure and transportation.

4. Brunei Darussalam's Peculiar Resilience

Unlike the previous countries, the COVID-19 pandemic gave Brunei a different outcome, though a successful one like Vietnam and Indonesia. And this is all due to the actions taken by the actors of all levels, from the government to local travel and tourism businesses. Obviously, Brunei also saw a massive decline in foreign tourist arrivals during the pandemic, going from roughly 300,000 in 2019 to 60,000 in 2020 (Trading Economics, n.d.). And akin to the case of Vietnam and Indonesia, one factor contributing to the success in retaliating the detriments COVID-19 could have is the domestic policy which fosters the travel and tourism industry.

During the COVID-19 pandemic, the Brunei government was quick to respond to prevent further spread of the virus. And this initiative was respected and followed by the people, including community-based tourism businesses (CBT). The CBT plays a grand role in the dynamic, quickly adapting to the government's policy and

the new normal by ‘resetting’ the business models after the COVID-19 pandemic. As a result, post-pandemic Brunei saw the CBT in the country flourishing to a better extent (Noorashid & Chin, 2021).

There was nothing guaranteeing the sparing of Brunei’s travel and tourism sector during the pandemic, and proof of decreasing foreign arrivals of tourists showed so. However, the effects of the pandemic were not detrimental to the nation, for mutual cooperation between the government that introduced policies and the people played a key role in minimizing such possibilities. Through this mutual cooperation, the CBTs in Brunei flourished right after the pandemic was not a great concern to the nation.

G. Conclusion

Each ASEAN member state has its priority when reacting to COVID-19. Economic activities that rely on tourism became sluggish. This fact awakens the World Economic Forum (WEF) that the indicator to measure a country's tourism is not yet comprehensive. It requires adjustments and additions in some parts. Thus, WEF upgraded TTCI into TTDI in 2021 with an additional focus on tourism resilience and sustainability. Based on the two reports, Singapore, Indonesia, Vietnam, and Brunei are among the striving countries in tourism. Lao PDR and Cambodia's tourism industry is surviving, while Thailand, Malaysia, Myanmar, and the Philippines struggle to get by.

Singapore, Indonesia, Vietnam, and Brunei share a similarity in government policy responsiveness. Strict health protocols within tourism destinations become the foundation of this success. Besides the health protocols, each nation also develops a genuine policy to promote its tourism. There are Community-based tourism in Brunei, Uniquely Singapore in Singapore, and 10 Destinasi Super Prioritas in Indonesia. These policies act as a promotional idea to sustain the tourism sector. Vietnam has a slightly different contributing policy. *Đổi Mới* in Vietnam does not aim solely for tourism but for its whole economic system. Despite that, this multidimensional policy is highly influencing the tourism industry. *Đổi Mới* flourishes Hanoi with Foreign Direct Investment, which later develops and sustains its tourism. The implementation of each policy successfully maintains tourism growth in their respective country.

On the other hand, Lao PDR and Cambodia's tourism industry remain relatively unchanging in their ranks. Improving tourism requires a comprehensive effort, and infrastructure is their biggest obstacle. Both countries rely heavily on international tourist destinations for revenue. Meanwhile, there is quite a gap in transportation development between destinations that serve international tourists and domestic tourists. At the same time, countries can only rely on domestic tourists during the pandemic. Unprepared infrastructure makes the transition sound unrealistic. Therefore, it is essential to maintain

connectivity between regions to allow domestic travel. Indonesia seems to have caught this challenge. The government under Jokowi puts a high priority on developing Indonesia's infrastructure. One substantial example is the launch of Woosh, the first-ever high-speed railway in Southeast Asia. (ASEAN briefing, 2023). Indonesia launched the train on October 2nd, 2023. This project will become an example to any other ASEAN member states.

Thailand, Malaysia, Myanmar, and the Philippines' tourism industry struggle to stay afloat during the crisis. Two clear examples are coming from the Philippines and Myanmar. Both seem reluctant to prioritize tourism. Instead of keeping the tourism industry in good shape, the Philippines prioritizes developing its human resources above travel and tourism. Based on the TTDI, an essential indicator of the success of tourism is a Prioritization of Travel and Tourism. Hence, it is clear to mention that Manila puts its priority somewhere else. On the other side, Myanmar has an unforeseeable ending of political instability. The domestic political tensions, armed conflict, and COVID-19 give a grim look at Myanmar's travel and tourism industry. It is nearly impossible for Nay Pyi Taw to prioritize its travel and tourism, while the complications of issues are concerning.

In conclusion, the TTDI indicators are crucial for the development of a country's tourism industry, though their influence varies. The different attitudes of states towards

fulfilling TTDI indicators can be understood through the compliance framework. States like Indonesia, which believe that tourism will drive economic prosperity, strive to improve their TTDI performance. Conversely, countries like Myanmar, facing political instability, struggle to comply with TTDI objectives due to domestic power struggles. Therefore, governments should prioritize the Travel and Tourism Policy and Enabling Conditions index, followed closely by the Infrastructure index. While other indices are also important, their influence is at different levels. In the future, TTDI will continue to significantly impact global tourism development. Thus, countries should use TTDI as a benchmark to develop strategies for enhancing their tourism industries.

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