

Revitalising tourism in Southeast Asia

Identifying opportunities for growth

Tourism is a critical sector for growth in Southeast Asia (SEA). With international and domestic travel heavily restricted as a result of the COVID-19 pandemic, the Asia Pacific is projected to be one of the most heavily hit regions in terms of tourism, facing potential losses of USD4.5 billion due to effects on the tourism sector.

While this is a major crisis, there are opportunities to reconfigure and reposition the tourism sector for sustainable growth and differentiation, including areas such as:

- Source market diversification (including a focus on domestic and regional tourism)
- Rebranding and marketing to new customer segments
- Linkages within domestic markets to build growth in other sectors
- Sustainable and eco-tourism

To rejuvenate tourism in SEA, governments will need to develop flexible policies to balance public health and economic needs in phases. PwC is in a unique position to support local tourism interests. With deep knowledge of the Southeast Asian markets, governments and cultures and experience in global tourism and source markets, our team can help you to tackle the fundamental challenges of reopening the tourism sector safely, to protect national populations.

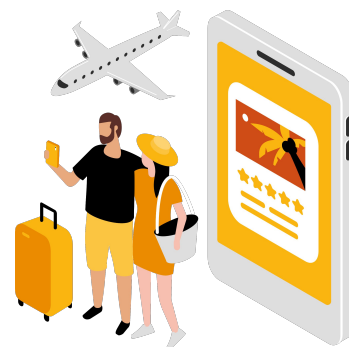
Recovery across tourism subsectors require differentiated approaches based on COVID-19 impact

Subsectors

- Aviation
- Hospitality (accommodation, F&B)
- Leisure (cruises, amusement parks)
- Meetings, incentives, conferencing, exhibitions
- Culture, heritage and religious travel (museums, monuments, pilgrimages)
- Luxury
- Wellness and eco-tourism
- Ground transportation and mass transit

Considerations to reopen subsectors

- Crowd exposure and density
- Typical activity duration
- Infrastructure constraints and high-touchpoint areas
- Average age of tourist
- Screening protocols
- Ability to utilise personal protective equipment



Our differentiator: industry-specific knowledge

Our clients work closely with us across each industry segment throughout their COVID-19 recovery efforts. You can expect us to provide a clear understanding of the unprecedented challenge and the urgent stabilisation requirements, as well as of longer-term strategies to support the industry whilst preserving public health needs. Gain insights on the unique opportunities for tourism destinations such as leveraging the potential of eco tourism and greater domestic tourism in SEA to emerge stronger.

PwC's Hospitality and Leisure practice provides strategic insights and expertise across all areas of the sector, including travel and tourism, gaming, lodging, marinas, sports facilities and teams, vacation ownership, franchise and management selection, lease structuring, lodging asset, valuation and appraisal. With our professionals located in all continents, you can gain insights into local and global knowledge and expertise.

Global footprint

With firms in over 155 countries and more than 284,000 people, our clients can look beyond traditional boundaries and embrace new horizons to **achieve long-term sustainable impact**.

Experience

PwC has supported the COVID-19 recovery work in the global tourism sector including:

- Dubai
- Mexico
- Jamaica
- United States
- Barbados

How we can support you

Strategy and planning

- Long-term national strategy
- Policy options and incentives evaluation
- Market segmentation, diversification and strategy
- Covid-19 health and safety protocols
- Public-private partnership models for recovery
- Consensus building

Market studies

- Feasibility studies for new tourism products
- Impact assessments for tourism subsectors
- Source market assessments and attractiveness surveys
- Revenue modelling and analytics
- Benchmarking against other tourism markets
- Communications advice for recovery campaigns

Transformation

- Pilots and proof of concepts for reopening
- Vaccination passport concepts
- Recovery phasing of tourism avenues and assets
- Digitisation for crowd and health management
- Change management
- Workforce planning and reskilling

Strategic project management and support for capital financing

Contact us



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