

ASEAN TOURISM MARKETING STRATEGY 2026–2030

Final Report

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Abbreviations

ADB	Asian Development Bank
AI	artificial intelligence
ASEAN	Association of Southeast Asian Nations
ATMS	ASEAN Tourism Marketing Strategy
ATSP	ASEAN Tourism Strategic Plan 2016–2025/ASEAN Tourism Sectoral Plan 2026–2030
BIMP-EAGA	Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area
GMS	Greater Mekong Subregion
IMT-GT	Indonesia-Malaysia-Thailand Growth Triangle
UNESCO	United Nations Educational, Scientific and Cultural Organization

Executive Summary

The ASEAN Tourism Marketing Strategy 2026–2030 (ATMS 2026–2030) provides a unified framework for promoting Southeast Asia as a competitive, responsible, and world-class tourism destination in consumer-facing media, such as social media, websites, news press, etc. Building on the core vision and objectives of the ASEAN Tourism Sectoral Plan 2026–2030 (ATSP 2026–2030), the ATMS 2026–2030 translates regional tourism development goals into actionable marketing strategies that reflect current traveler preferences, emerging global trends, and broader Association of Southeast Asian Nations (ASEAN) economic priorities.

Rooted in extensive stakeholder consultations, the ATMS 2026–2030 incorporates key lessons from past strategies, private sector input, and subregional cooperation frameworks such as the Greater Mekong Subregion, Indonesia–Malaysia–Thailand Growth Triangle, and Brunei Darussalam–Indonesia–Malaysia–Philippines East ASEAN Growth Area. It integrates shared insights, data-driven analysis, and practical experiences from across Member States to shape a cohesive, forward-looking marketing approach.

The strategy aligns particularly with Focus Area 4 of the ATSP—digital tourism, product and market diversification—ensuring connectivity between tourism development and brand promotion. From this perspective, the ATMS 2026–2030 serves as the communication arm of the ATSP 2026–2030, guiding how Southeast Asia’s diverse travel experiences are positioned, promoted, and perceived in global markets. By expressing shared regional goals through a targeted marketing lens, the ATMS empowers ASEAN to elevate its tourism brand, drive multicountry travel, and deliver more coordinated, impactful outreach across traditional and digital platforms.

Throughout the ATMS 2026–2030, the term Southeast Asia will be used to refer to the region as a travel destination, while ASEAN will be used specifically to reference the organization, its institutional framework, or the collective group of member states.

The New Strategy to Guide Southeast Asia’s Future in Tourism

The ATMS 2026–2030 aims to strengthen Southeast Asia’s position as a unified and attractive tourism destination by leveraging its diverse and unique offerings, enhancing digital engagement and marketing innovation to respond to evolving traveler preferences, and delivering a consistent message that travel within the region is seamless and interconnected.

The strategy was developed through a research-informed and consultative process to ensure marketing efforts are evidence-based, actionable, and aligned with regional priorities. This approach combined comprehensive market analysis, stakeholder consultations, and alignment with ASEAN frameworks to deliver a robust, coordinated, and future-ready marketing strategy.

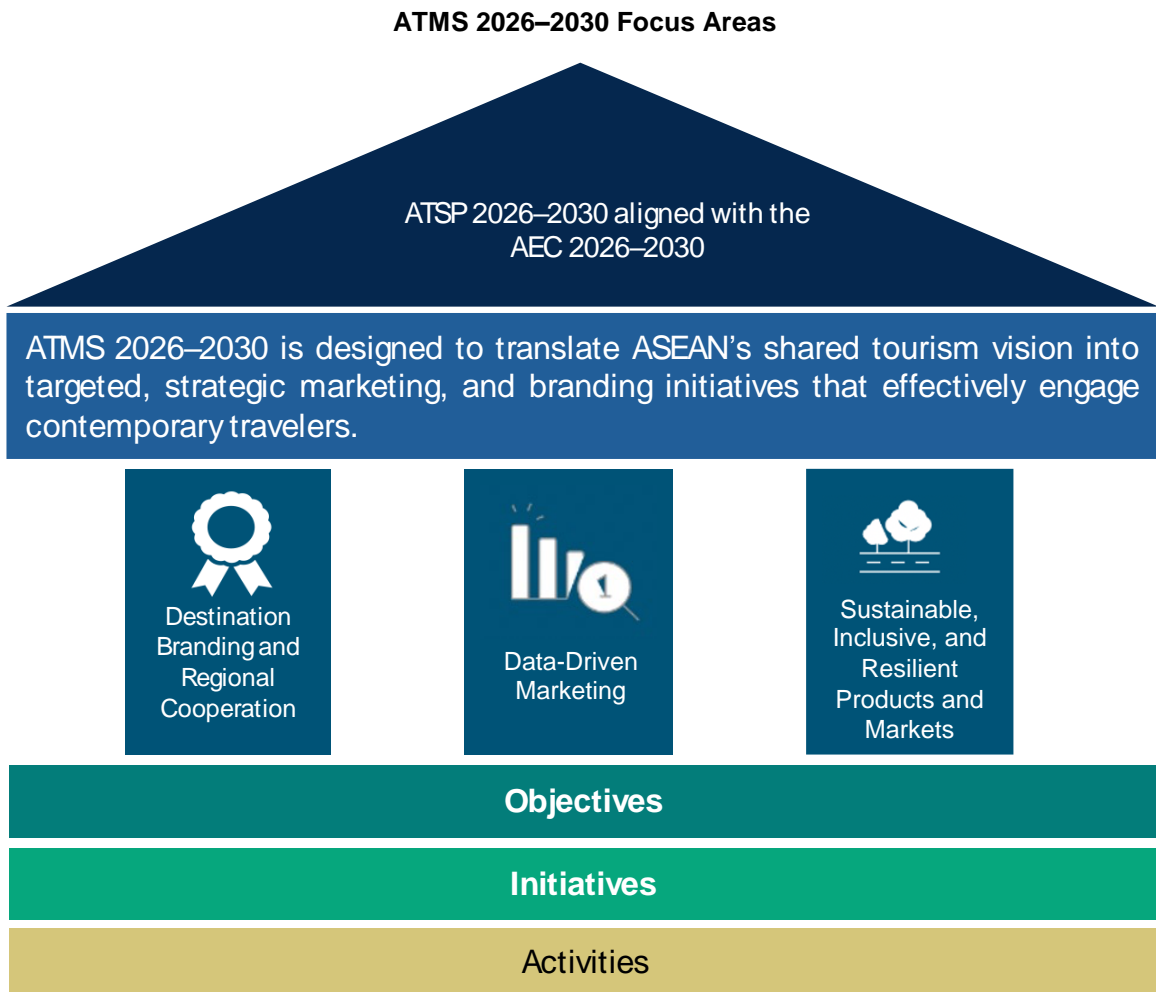
The ATMS 2026–2030 is structured around three interrelated focus areas (as indicated in the main text and described below):

- i. **Destination branding and regional cooperation.** This focus area aims to cultivate a compelling and unified tourism narrative, enhancing global awareness and positive perception of Southeast Asia as a diverse and high-quality destination. Key opportunities lie in leveraging the region’s collective cultural richness, natural wonders, and interconnectedness to create a brand identity that resonates with target audiences and encourages multicountry travel. The aspiration is to establish a strong, recognizable Southeast Asia brand that fosters a shared identity and encourages collaborative marketing initiatives among ASEAN Member States, subregions, industry associations, and media partners to create and distribute content promoting multicountry tour programs and experiences.
- ii. **Data-driven marketing.** By leveraging data analytics, ASEAN can understand traveler preferences and behaviors, enabling personalized marketing strategies. With 81% of travelers researching online and 57% preferring personalized recommendations, data-driven marketing is key to reaching

global audiences. The goal is to create a centralized digital platform for real-time data analysis, optimizing marketing spend and delivering customized visitor experiences. This approach can increase visibility, engagement, and repeat visits, driving long-term growth.

- iii. **Sustainable, inclusive, and resilient products and markets.** By prioritizing sustainability, Southeast Asia can protect its natural and cultural assets, which are the very foundation of its tourism appeal, while also appealing to a growing segment of environmentally conscious travelers. The objective is to position Southeast Asia as a globally recognized destination offering diverse, high-quality travel experiences, from culture and heritage to nature, wellness, and cuisine, to help shift beyond mass tourism. Inclusivity ensures that local communities are actively involved in and benefit from tourism development, fostering social equity, and enriching the visitor experience through authentic interactions. Building resilience is vital in a world facing climate change, pandemics, and economic uncertainties, safeguarding the industry's future and ensuring business continuity.

Each focus area outlined for ASEAN's tourism marketing strategy is underpinned by targeted strategic initiatives designed to drive meaningful outcomes. These initiatives are tailored to address specific priorities within the broader framework of ASEAN's goals, ensuring efforts are impactful and aligned with long-term regional objectives.



AEC = ASEAN Economic Community, ASEAN = Association of Southeast Asian Nations, ATMS = ASEAN Tourism Marketing Strategy, ATSP = ASEAN Tourism Sectoral Plan.

The institutional arrangements for the implementation of the ATMS 2026–2030 can be found in the ATSP 2026–2030.

Monitoring progress. The effectiveness of ATMS 2026–2030 can be assessed through a results-based monitoring framework that incorporates SMART key performance indicators (specific, measurable, achievable, relevant, and time-bound) to track progress and ensure accountability. It can also follow ASEAN Economic Community guidelines on monitoring and evaluation. This framework can include outcome indicators to measure long-term impact and output indicators to track the immediate results of strategic initiatives.

The ATMS 2026–2030 sets a clear and cohesive path for positioning Southeast Asia as a premier, sustainable, and unified tourism destination. Anchored in regional collaboration, data-driven innovation, and a strong commitment to inclusive and resilient tourism, the strategy builds on past achievements while responding to emerging global trends. With dedicated structures for implementation and monitoring, ATMS 2026–2030 provides a future-ready framework to elevate the region's brand, deepen market engagement, and drive long-term growth across the region.

1 INTRODUCTION: CHARTING SOUTHEAST ASIAN TOURISM

The ATMS 2026–2030 represents a critical step in advancing Southeast Asia’s shared tourism vision. Building on experience and responding to the changing global travel landscape, this strategy offers a clear, coordinated approach to strengthen the region’s position as a connected, competitive, and compelling destination. Developed in alignment with the ATSP 2026–2030, the ATMS 2030 addresses shifting traveler expectations shaped by the COVID-19 pandemic, rapid digital transformation, and rising demand for sustainability. It reflects ASEAN’s commitment to partnership, innovation, and quality-driven growth, supported by active engagement across public and private stakeholders.

1.1 Purpose and Value of a Regional Tourism Strategy

A unified regional marketing strategy offers ASEAN Member States significant advantages by amplifying global visibility through a consistent brand that showcases both diversity and shared appeal. Joint efforts foster competitiveness by promoting multi-destination travel, enhancing visitor experiences, reducing barriers to movement, and achieving economies of scale in marketing investments and partnerships—benefiting even lesser-known destinations. The ATMS 2026–2030 builds on these strengths, positioning Southeast Asia as a benchmark for quality, innovative, and responsible tourism. It emphasizes sustainability, collaboration, and digital engagement with key markets, while promoting high-quality visitor experiences and coordinated responses to evolving market conditions. More than a marketing plan, it is a strategic tool for advancing regional integration, sustainable growth, and long-term resilience.

1.2 Alignment with ATSP 2026–2030

The ATMS 2026–2030 was developed in close coordination with ASEAN Member States through consultations, workshops, and stakeholder feedback sessions to ensure strong alignment with the ATSP 2026–2030, particularly in how the region communicates its tourism offerings, experiences, and news updates across various public-facing platforms, including press, social media, websites, and others. The strategy’s research, analysis, and focus areas reflect ATSP’s goals, such as promoting quality and responsible tourism, enhancing connectivity through multi-destination travel, and strengthening ASEAN’s collective brand identity.

By aligning with these objectives, the ATMS 2026–2030 ensures marketing initiatives showcase Southeast Asia’s distinct tourism appeal and reinforce broader regional development priorities.

1.3 Building on the Success of ATMS 2021–2025

The ATMS 2021–2025 was guided by a clear vision: to position Southeast Asia as a unified, multi-destination region offering diverse tourism experiences. Built on the pillars of audience growth, strategic partnerships, selective collaboration, and long-term relationship development, the strategy focused on enhancing ASEAN’s public visibility while navigating post-pandemic challenges and budget constraints, and the ATMS 2030 is building off the previous key learnings and successes, such as:

- i. **Comprehensive rebranding initiative:** ASEAN launched a new identity emphasizing unity and diversity based on ATMS 2020–2025 insights.
- ii. **Logo:** Featuring 10 “spokes” symbolizing the 10 ASEAN Member States, forming a harmonious sun to reflect regional cohesion.
- iii. **Tagline:** The tagline “A Destination for Every Dream” was selected for ASEAN’s tourism rebrand to reflect the region’s unique value proposition as a multicountry, culturally diverse, and highly adaptable travel destination. ASEAN comprises 10 distinct member states, each offering its own cultural heritage, natural landscapes, culinary traditions, and modern experiences. This diversity positions the region as capable of fulfilling a wide range of traveler aspirations, from luxury escapes and wellness retreats to cultural immersion, adventure tourism, and culinary exploration.

- iv. **Website/social brand:** The rebrand from ASEAN Tourism to Visit Southeast Asia Official for the Website and Social Media Channels (e.g., TikTok, Instagram, and Facebook) was implemented to create a clearer, more consumer-friendly identity. While “ASEAN” accurately represents the region, it is less familiar to global travelers and often requires additional explanation. “Visit Southeast Asia” is instantly recognizable, action-oriented, and aligns with best practices for tourism branding, while “Official” reinforces trust and credibility as the region’s authoritative voice. This shift reflects a broader strategy to make ASEAN’s tourism marketing more intuitive, accessible, and engaging for international audiences.
- v. **Messaging:** Focused on enticing travelers with seamless multicountry itineraries and authentic, unique experiences.
- vi. **Targeted market focus:** The strategic prioritization of high-potential English-speaking markets (Australia, India, the United Kingdom, and the United States) and limited outreach in other potential markets to stay resource-efficient reflects Southeast Asia’s careful planning and market understanding.
- vii. **Sharpen marketing delivery:** Social media and digital marketing emerged as the primary channels for Southeast Asia’s promotional efforts, given their cost efficiency and the restrictions on in-person events imposed by COVID-19. Marketing efforts fully embraced social and digital channels, exploring innovative tools such as Cluep, an AI-driven advertising platform, and interactive elements like Instagram filters and quizzes directing users to an interactive map on the Visit Southeast Asia website.
- viii. **Partnerships:** Partnerships with brands like Victorinox, Roblox, AirAsia, and Agoda have raised awareness of Southeast Asia among potential travelers, using micro-influencers to amplify the campaign’s message, and measured travel intent through sales (such as the Victorinox collaborations) and gameplay hours via the Roblox integration. The use of interactive tools such as Roblox highlights the creative efforts during the campaign.

1.3.1 ATMS 2021–2025 Key Performance Indicators Results (as of 1 June 2025)

As of 1 June 2025, ASEAN’s regional tourism marketing efforts have delivered strong results across all key performance indicators. Website traffic averages grew by 48% year-on-year (331,107 sessions in 2025 versus 223,630 in 2024), demonstrating sustained interest in Southeast Asia’s tourism offerings. Fan growth across social channels also reached 45%.

Cumulative social, digital, and partnership impressions totaled 289 million, exceeding the 273 million target and reflecting broad global visibility through coordinated campaigns and partnerships. Engagement remained robust, with an average rate of 45% across channels—driven by effective paid promotions and highly interactive content. Social and digital interactions reached 211,000, surpassing the milestone goal of 125,000 and underscoring consistent audience engagement.

Appendix 1 details key performance indicators.

1.3.2 ATMS 2021–2025 Campaign Initiatives and Results

Between 2021 and 2024, ASEAN’s tourism marketing initiatives delivered notable successes that strengthened Southeast Asia’s positioning as a unified, desirable destination. These efforts were carefully aligned with ATMS recommendations and mindful of budgetary constraints, demonstrating both strategic focus and efficient resource use.

Appendix 2 details results for the initiatives.

1.3.3 Challenges

Promoting Southeast Asia as a single tourism destination has faced challenges. Financial constraints and differing tourism priorities complicate the creation of cohesive and culturally relevant campaigns. Limited

marketing budgets stifle efforts to raise awareness in key markets, and delays in information sharing disrupt strategic planning. Tourism priorities, budgets, and capabilities vary in countries and regions, complicating efforts to craft cohesive campaigns and creating marketing content that resonates across diverse cultural and linguistic landscapes. The marketing budget is not sufficient to create high-impact awareness in identified markets.

Overall, the ATMS 2021–2025 marketing efforts have not only exceeded key performance indicators but also demonstrated the strategic value of coordinated regional campaigns. The results show strong awareness, engagement, and audience growth across multiple platforms while highlighting opportunities for refinement. To strengthen performance tracking and decision-making, future key performance indicator reporting should standardize metrics across campaigns, include conversion-oriented measures, segment results by market and audience type, distinguish organic versus paid engagement, and incorporate qualitative indicators such as user-generated content and brand sentiment. These improvements will ensure that key performance indicators not only reflect outputs but also measure contributions to tourism intent, bookings, and long-term destination competitiveness.

Sharing consistent and timely information, including tourism statistics, local trends, and key insights is another challenge. Currently, obtaining such data often requires multiple follow-ups, and responses can be incomplete or delayed. This inefficiency hinders strategic planning, disrupts timelines, and reduces effectiveness of collaborative marketing efforts. Despite these setbacks, the ATMS provides solutions to mitigate these challenges and advance Southeast Asia's marketing efforts.

2 GLOBAL TRENDS SHAPING ASEAN TOURISM: STRATEGIC IMPLICATIONS FOR THE MARKETING PLAN

To remain competitive and resilient in a rapidly evolving global tourism landscape, ASEAN's regional marketing strategy should both reflect and reinforce the national priorities of its member states. Across Southeast Asia, national tourism boards are aligning their strategy around key themes, including sustainable development, regional connectivity, market diversification, and digital innovation. These shared priorities underscore a collective commitment to building a future-ready tourism sector that is more inclusive, adaptive, and responsive to changing traveler behavior.¹

ASEAN's regional marketing approach complements national efforts, positioning Southeast Asia as a unified yet diverse destination brand. To remain globally competitive and resilient, the marketing plan should consider emerging trends and evolving traveler expectations, ensuring that messaging, segmentation, and product development respond to long-term shifts in demand.

Sustainable and responsible tourism: Travelers are increasingly seeking experiences that prioritize environmental stewardship, cultural authenticity, and meaningful engagement with local communities. Millennials and Gen Z are leading this shift, favoring destinations that demonstrate genuine sustainability commitments and offer immersive, low-impact experiences. Beyond environmental considerations, responsible tourism also encompasses cultural preservation, ethical wildlife interactions, and community-based activities.

Strategic implication: Marketing should communicate Southeast Asia's sustainability efforts clearly and credibly, highlighting low-impact travel, conservation initiatives, and cultural integrity. Messaging can be tailored according to market familiarity with responsible tourism, emphasizing aspirational, educational, or inspirational content as appropriate.

Growth in regional and multi-destination travel: The pandemic underscored the importance of flexibility, revealing strong growth in intra-regional and multi-destination itineraries. Travelers increasingly seek convenience, variety, and seamless movement across multiple countries within Southeast Asia. This trend supports experiential travel and longer stays where visitors can engage with diverse destinations in a single

¹ ADB. 2025. Unpublished. *Background Paper on ASEAN Tourism Cooperation Post-2025 Study*.

journey.

Strategic implication: Marketing efforts should highlight connectivity, itinerary flexibility, and integrated experiences that showcase Southeast Asia as a cohesive yet varied region. Communications should reinforce ease of movement, visa facilitation, and multicountry itineraries, demonstrating the region's ability to cater to complex, multi-destination travel plans.

Diversification of travel interests: Traveler preferences are becoming more segmented, with strong growth in wellness, experiential, and remote-work-oriented travel (digital nomads). Wellness experiences include holistic, health-focused activities such as meditation, spa retreats, and nature-based slow travel. Experiential tourism emphasizes immersive local engagement, cultural learning, and adventure-based experiences. Longer-stay and work-from-destination trends appeal to those seeking connectivity, lifestyle balance, and integration with local communities. These interests increasingly intersect with sustainability and multi-destination travel, shaping the overall experience expectations of travelers.

Strategic implication: ASEAN's marketing and product development should integrate these evolving interests, creating experiences and communications that resonate across multiple segments. By emphasizing wellness, immersive cultural activities, and adaptable long-stay options, the region can engage travelers in ways that align with their specific motivations, while reinforcing the region's diversity and authenticity.

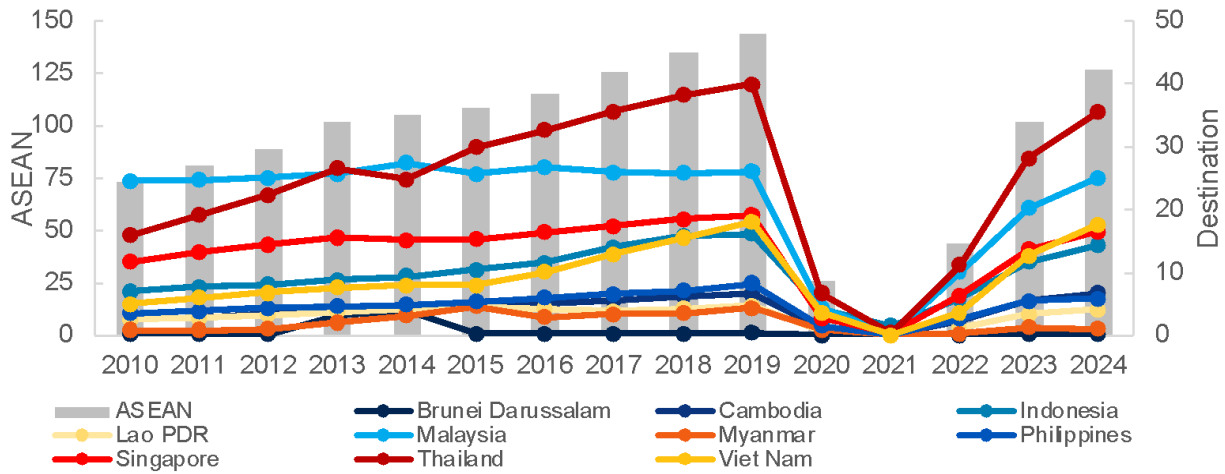
Digital engagement and personalization: Digital technology continues to transform how travelers discover, plan, and experience destinations. Millennials and Gen Z, as digital natives, expect mobile-first engagement, seamless booking, AI-enhanced recommendations, and opportunities to share experiences online. Social media, influencer marketing, and user-generated content have become essential tools for building trust and inspiring travel. Platforms such as TikTok, Instagram Reels, and YouTube Shorts offer interactive and visually engaging ways to reach travelers, while data-driven personalization enhances relevance and conversion potential.

Strategic implication: The marketing plan should leverage digital channels to deliver tailored, interactive, and platform-specific content. Emphasizing personalized storytelling, influencer collaborations, and user-generated content can enhance engagement, strengthen perception of the region's diversity, and encourage trial and visitation among digitally connected travelers.

3 ASEAN TOURISM MARKET

The latest data in 2024 show a strong recovery in visitor arrivals in Southeast Asia, 127.1 million visitors or 89% of pre-pandemic arrivals (Figure 1). This builds on rapid recovery rates in the region's core regional and long-haul source markets from 2021 to 2024, as market's regained confidence, regional connectivity improved, and tourism promotion strategies hit their marks.

Figure 1: International Arrivals to Southeast Asia



ASEAN = Association of Southeast Asian Nations, Lao PDR = Lao People’s Democratic Republic.
 Sources: ASEANStats Data Portal. Visitor Arrival to ASEAN Member States by Origin Countries (in person) (accessed 2 September 2025).

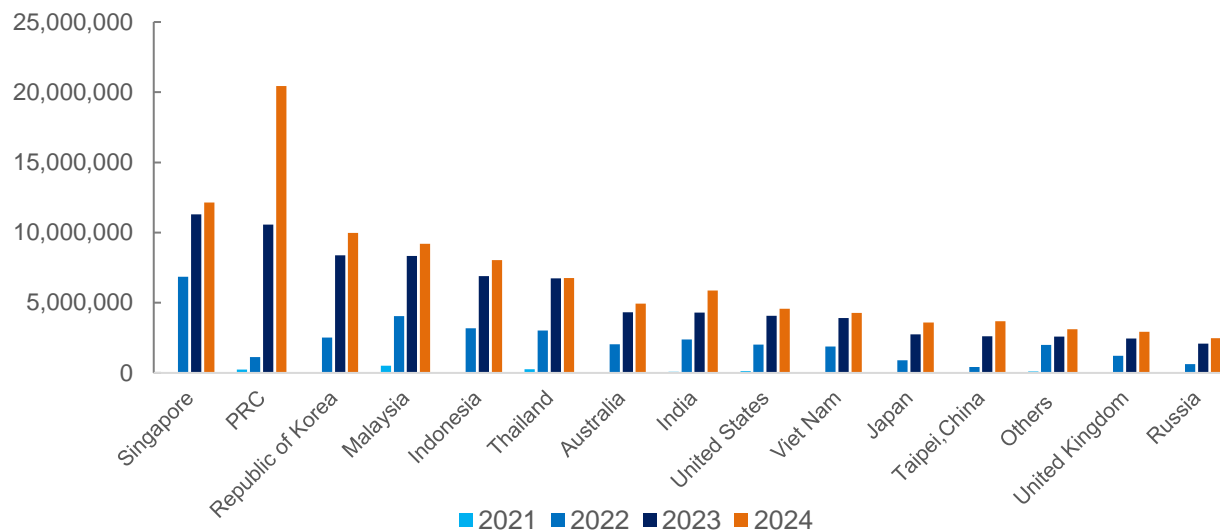
However, the broader Asia and Pacific region as a whole remained about 13% below 2019 levels, according to the UN Tourism Barometer (2025), indicating that the wider region has not yet fully rebounded. By contrast, Europe recorded 747.3 million international arrivals in 2024, surpassing 2019 figures by 1% and outperforming regional averages. This suggests that Europe’s tourism sector is recovering at a faster pace than Southeast Asia, although it is worth noting that the baseline predates the pandemic and therefore cannot fully capture the recovery dynamics.

3.1 Current Trends in Key ASEAN Source Markets

Analysis of the international source markets reveals diverse traveler profiles that reflect the evolving nature of global tourism. ASEAN’s key source markets divide into three important groups: dominant regional markets that drive growth, long-haul markets and high-value growth segments, and emerging and secondary markets. Understanding the opportunities and characteristics of each allows Southeast Asia to tailor marketing strategies that position the region as a diverse and welcoming destination.

Regional travel remains central to Southeast Asia’s tourism landscape, highlighting the need to improve connectivity and promote multicountry itineraries. In 2024, the region saw strong growth in arrivals from neighboring markets (Figure 2), with the People’s Republic of China (PRC) leading at 20.4 million, followed by the Singapore with 11.3 million visitors, and the Republic of Korea with 9.98 million arrivals. Malaysia, Indonesia, and Thailand also contributed significantly. PRC travelers tend to favor destinations within the region such as Thailand, Japan, the Republic of Korea, and Singapore, with interests focused on budget travel, family trips, cultural exploration, and shopping (Booker 2024). Enhancing seamless travel experiences within ASEAN is critical to maintaining this momentum and encouraging travelers to explore multi-destination routes.

Figure 2: Top 15 Source Markets of Southeast Asia, 2021–2024



PRC = People’s Republic of China.

Source: ASEANStats Data Portal. Visitor Arrival to ASEAN Member States by Origin (in person) (accessed 2 September 2025).

Growth from long-haul source markets was steady and high-value, reinforcing the impact of targeted promotional campaigns and enhanced air connectivity. Australia, India, and the United States (US) each sent over 4 million visitors in 2024, while the United Kingdom (UK) and Russia also contributed significantly with over 2 million arrivals. These markets demonstrate diverse motivations that ASEAN can tap into. Travelers from the US are drawn to immersive, sustainable experiences, and trends such as family vacations, solo trips, wellness, culinary tourism, and “roots travel” are gaining traction, encouraging longer, more meaningful stays (Business Insider 2024, Travel Perk 2024). Travelers from the UK similarly seek adventure, last-minute deals, wellness, and reconnecting with family, with over 86 million outbound trips in 2023, much of it to Europe and traditional long-haul destinations (UK Office for National Statistics, The Times 2025). Australians prioritize nature-based experiences, beach getaways, family reunions, adventure, and cultural exploration, with Indonesia, New Zealand, Japan, the US, and the UK among their top choices (Australian Bureau of Statistics, Karryon). Indian travelers, supported by a growing middle class, focus on family-oriented, cultural, culinary, and shopping experiences, often choosing destinations like Singapore, the United Arab Emirates, and the US (Statista, Skift 2024).

Secondary and emerging markets also offer promising potential for Southeast Asia. Travelers from Japan value safety, hospitality, cleanliness, and local culture. Japanese tourists often prefer culinary experiences and multi-destination itineraries, with senior travelers showing particular interest in wellness products and experiences (Travel Weekly Asia, Skift). Recognizing and responding to these nuanced market preferences enables ASEAN to craft compelling, differentiated marketing messages that resonate with specific traveler motivations, fostering deeper engagement and more sustainable growth across the region.

3.2 Trends in Tourism Supply and Destination Assets

Southeast Asia’s highly diverse and compelling range of tourism assets is the foundation of its global appeal.

- i. Natural landscapes—Thailand and the Philippines’ iconic beaches, Indonesia’s coral reefs,

Malaysia's rainforests, and the Mekong River's biodiversity—offer experiences from eco-tourism and adventure travel to multicountry itineraries. National parks, marine reserves, and community-based tourism initiatives enhance these offerings, balancing visitor engagement with environmental conservation. Investments in eco-lodges, green-certified hotels, wellness retreats, and spa facilities reflect the region's growing capacity to provide sustainable, health-oriented, and restorative experiences. Over 40 UNESCO World Heritage Sites highlight both cultural and natural heritage, strengthening opportunities for immersive cross-border travel (UNESCO 2023).

- ii. Cultural and heritage assets complement natural attractions. Historic temples, colonial-era architecture, traditional markets, and regional festivals provide authentic, immersive experiences, while Southeast Asian cuisines are globally recognized for their diversity and richness, reinforcing the region's culinary tourism appeal (Euromonitor International 2023).
- iii. Urban centers serve as major gateways and destinations. Cities such as Bangkok, Singapore, Kuala Lumpur, Jakarta, and Manila offer modern amenities, diverse accommodation, shopping, and dining, supported by dense aviation networks. In 2019, the region offered over 700 million air seats, 34% of which were operated by low-cost carriers, highlighting strong connectivity within ASEAN and to international markets (ADB 2024). These hubs also enable multi-destination itineraries that link natural and cultural experiences across the region.

3.3 Regional Tourism Sector Projections

In its report *Tourism Towards 2030: Global Overview*, UN Tourism projected Southeast Asia to welcome 187 million tourist arrivals by 2030, accounting for a 10.3% share of the global tourist arrival market (UN Tourism 2011). A more recent, ASEAN-specific *ASEAN Tourism Outlook 2030* prepared by Malaysia and the Economic Research Institute for ASEAN and East Asia estimates 201 million international arrivals to ASEAN by 2030, approximately 51% rise from 2025 (or 8.7% growth per year from 2025 to 2030), which slightly exceeds the 10-year pre-pandemic growth of 8.3% per year between 2009 and 2019. Taken together, these outlooks confirm strong momentum; the ASEAN forecast will anchor ATSP 2026–2030 targets and monitoring, with the focus on translating volume into quality, resilience, inclusion, and sustainability.

3.4 Strategic Tourism Product-Market Mix

Southeast Asia's diverse tourism offerings cater to a broad spectrum of global travelers, from adventure seekers to cultural enthusiasts and luxury wellness tourists. The region should align its tourism products—marine and beach, cultural and heritage, nature and ecotourism, adventure tourism, wellness and medical tourism, cruising, leisure and business—with key traveler segments and demand drivers shaping post-pandemic tourism trends.

Figure 3 outlines the comparative strengths of each Southeast Asian country, evaluated through a multi-faceted rating system. To assess the comparative strengths of each member state in tourism marketing, a multi-dimensional rating system was developed. Each country was classified as strong, moderate, emerging, or limited based on a comprehensive analysis of both quantitative and qualitative indicators. This assessment was guided by a structured methodology that combined data analysis, stakeholder consultation, and digital intelligence (Appendix 3).

Figure 3: Tourism Demand Strength by Category in Southeast Asia

Country	Marine and beach	Culture and heritage	Nature and eco-tourism	Adventure	Wellness and medical	Cruising	Leisure	Business
Thailand	4	4	4	3	4	4	4	4
Malaysia	3	3	3	3	3	4	3	4
Philippines	4	3	4	4	2	4	4	2
Viet Nam	4	4	3	3	2	4	3	3
Indonesia	4	3	4	4	3	3	3	3
Singapore	3	3	3	3	2	4	3	4
Cambodia	3	4	4	4	2	2	3	2
Lao PDR	2	4	3	3	1	3	2	1
Brunei Darussalam	2	4	3	3	1	3	2	3
Myanmar	2	4	3	2	1	2	2	1

Lao PDR = Lao People’s Democratic Republic.
 Note: For the methodology, refer to [Appendix 3](#).
 Source: Asian Development Bank study team.

Southeast Asia's diverse tourism offerings cater to a wide range of travelers, from adventure seekers to luxury tourists. Table 1 reviews key tourism categories, their primary demand drivers, strategic approaches for development, and the top destinations in each category. By aligning tourism strategies with consumer preferences, Southeast Asia can enhance its global competitiveness and attract high-value travelers. The product marketing mix table can be leveraged to develop content across ASEAN Member States websites, blogs, social media platforms, and influencer partnerships, ensuring tourism offerings are communicated in a traveler-friendly and engaging way.

3.5 Priority Tourism Market Segments

Priority market segments for Southeast Asia focus on high-value, experiential tourists with strong potential for regional, multi-destination holidays. They were identified based on a combined analysis of global and regional trends in source markets and market segments along an understanding of Southeast Asia’s tourism products, assets, and product-market mix. They take into consideration the changes in consumer behaviors driven by shifting economic conditions, digital transformation, sustainability consciousness, and post-pandemic lifestyle changes. Table 1 highlights the high-growth travel segments that ASEAN Member States can prioritize in content development and marketing efforts when promoting tourism to their destination and the Southeast Asia region. It provides a strategic overview of how Southeast Asia (ASEAN Member States) can position and promote their tourism offerings in conjunction with neighboring ASEAN Member States in digital, social media, website or PR outreach. It breaks down six major tourism product categories into clear action areas and sample destinations.

As guide, the tourism category refers to the main tourism “product” or experience that ASEAN destinations are known for based on the rating system. See Appendix 3 for the methodology. The key demand drivers represent the target audiences or traveler profiles most likely to be attracted to that category. The strategic alignment refers to specific marketing approaches ASEAN Member States can use to appeal to these

travelers. Finally, the concrete examples of ASEAN destinations that can be spotlighted to illustrate the category.

Table 1: Southeast Asia Regional Tourism Marketing Initiatives

Tourism Category	Key Demand Drivers	Strategic Alignment	Sample Destinations
Marine and Beach Tourism	Millennials and Gen Z, eco-conscious travelers, luxury and wellness travelers	Develop Instagrammable marketing campaigns Expand luxury eco-tourism Strengthen marine conservation partnerships	Bali (Indonesia), Phu Quoc (Viet Nam), Siargao (Philippines)
Cultural and Heritage Tourism	Millennials and Gen Z, long-haul travelers (US, UK, Europe), slow travelers and wellness tourists	Promote storytelling-based digital content Bundle multicountry heritage circuits Develop immersive cultural tourism	Angkor Wat (Cambodia), Bagan (Myanmar), Bandar Seri Begawan (Brunei Darussalam), Intramuros (Manila), Hoi An (Viet Nam)
Nature and Ecotourism (Includes Adventure)	Gen Z and millennials, high-value adventure travelers (Europe and US), emerging digital nomads, eco conscious travelers	Expand community-based eco-tourism Strengthen wildlife conservation tourism Promote slow travel and nature wellness retreats	Inle Lake (Myanmar), Komodo National Park (Indonesia), Taman Negara (Malaysia), Temburong District (Brunei Darussalam)
Wellness and Medical Tourism	Post-pandemic wellness travelers, luxury tourists, medical travelers	Develop Southeast Asia as a premier wellness hub expand medical tourism partnerships Promote wellness-focused experiences	Hua Hin (Thailand), Luang Prabang (Lao People's Democratic Republic), Ubud (Indonesia)
Cruising	Retirees, high-net-worth travelers, multi-destination travelers	Expand regional cruise offerings Improve port infrastructure Enhance luxury cruise tourism options	Borneo (Malaysia), Halong Bay (Viet Nam), Marina Bay Cruise Centre (Singapore), Phuket (Thailand)

Business Tourism	Corporate travelers, MICE (meetings, incentives, conventions, exhibitions), high-value business clients	Expand business travel incentives Improve conference and expo facilities Strengthen Southeast Asia-wide MICE collaborations	Bangkok (Thailand), Ho Chi Minh City (Viet Nam), Jakarta (Indonesia), Kuala Lumpur (Malaysia), Singapore
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MICE = meetings, incentives, conventions and exhibitions; UK = United Kingdom; US = United States.

Please see Appendix 4 for the digital competitive positioning of ASEAN and Appendix 5 for the Strengths-Weaknesses-Opportunities-Challenges.

4 SHARED REGIONAL VISION, FOCUS AREAS, OBJECTIVES, AND INITIATIVES

This chapter sets out the shared regional vision for ASEAN tourism and identifies the key focus areas and objectives that can guide collaborative efforts to position ASEAN as a unified, attractive, and sustainable destination.

4.1 Shared Regional Vision

The ATMS 2026–2030 aligns with and complements the overarching vision and objectives outlined in the ATSP 2026–2030. While the ATSP provides a framework for sustainable, inclusive, and resilient tourism development across the region, the ATMS focuses specifically on communicating these objectives to the world in public-facing channels. It translates the shared vision of ASEAN as a competitive destination into targeted marketing and branding efforts that resonate with today’s travelers.

Marketing & Communications Goals

- i. Position Southeast Asia as a single and globally recognized tourism destination offering diverse travel experiences.
- ii. Increase awareness around ASEAN Member States’ diverse tourism products and experiences they develop.
- iii. Increase search volume and travel inquiries around multicountry itineraries in Southeast Asia.
- iv. Foster regional brand loyalty by developing content and campaigns that encourage repeat visitation and deeper exploration across multiple ASEAN destinations.

4.2 Focus Areas and Marketing Objectives

The ATMS 2026–2030 is anchored in three interrelated core focus areas that reflect a deliberate alignment of regional priorities, global tourism trends, and stakeholder insights.

These focus areas were identified through a consultative process with ASEAN Member States and industry partners, ensuring they are both forward-looking and responsive to market realities. Each focus area directly supports the overarching goals of the ATSP 2026–2030, while targeting the evolving behaviors, values, and expectations of today’s travelers. Collectively, they establish a cohesive strategic framework to strengthen ASEAN’s global positioning and tourism demand with marketing.

The following criteria were used to prioritize focus areas to support the vision statement:

- i. Vision alignment: Support Southeast Asia’s sustainable and inclusive goals through marketing key

tourism destinations.

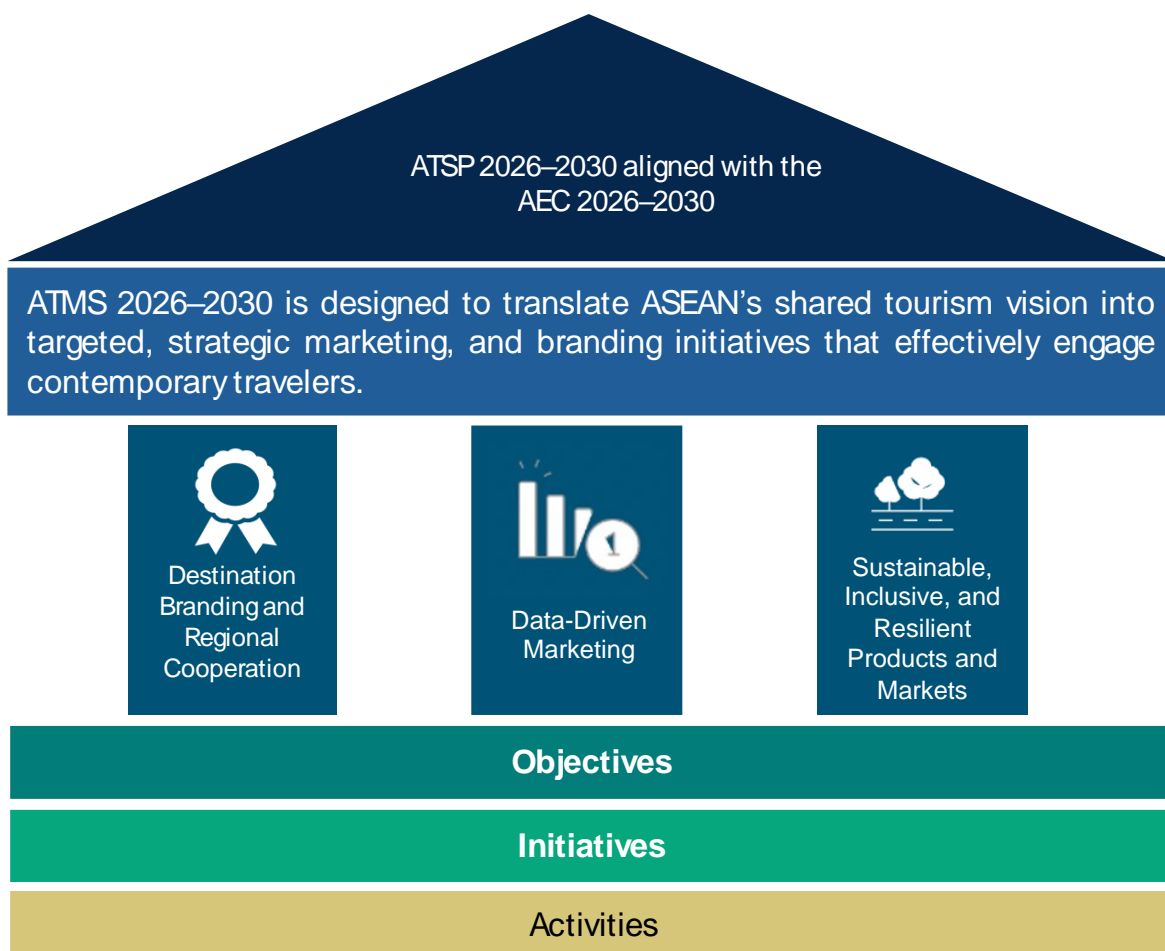
- ii. Marketing trends: Focus on nature, digital, and experiential travel; target wellness, adventure, and culture seekers.
- iii. Feasibility: Align campaigns with available infrastructure, resources, and local readiness.
- iv. Cross-border collaboration potential: Promote multicountry experiences to unify and simplify Southeast Asia travel.
- v. Sustainability, resilience, and competitiveness: Emphasize eco-tourism, cultural tourism assets, and responsible travel to boost appeal and highlight Southeast Asia's adaptability and long-term commitment to sustainable tourism.

Based on these criteria and consultations with government officials in ASEAN Member States, subregional groups, private sector representatives and other relevant stakeholders, the following three focus areas have been prioritized for ATMS 2026–2030 (Figure 4):

- i. destination branding and regional cooperation,
- ii. data-driven marketing, and
- iii. sustainable, inclusive, and resilient products and markets.

The ATMS 2026–2030 sets out 5 objectives, 6 initiatives, and the 12 activities under the 3 focus areas. The identified activities are non-exhaustive and subject to review by ASEAN Member States.

Figure 4: ATMS 2026–2030 Focus Areas



AEC = ASEAN Economic Community, ASEAN = Association of Southeast Asian Nations, ATMS = ASEAN Tourism Marketing Strategy, ATSP = ASEAN Tourism Sectoral Plan.

FOCUS AREA 1: Destination Branding and Regional Cooperation

ASEAN’s competitive advantage lies in its diversity and geographic proximity, making it ideal for multi-country travel. However, fragmented messaging and inconsistent promotion across Member States can dilute impact.

This focus area therefore aims to strengthen regional cooperation to build a unified, compelling Southeast Asia brand. Through coordinated marketing, consistent messaging, and shared resources, ASEAN can raise its global profile, attract more visitors, and deliver impactful, cost-effective promotion that supports Member States’ varied strategies. The growing interest in long-haul travel offers ASEAN an important opportunity to highlight its rich cultural diversity, natural beauty, and connected destinations through more targeted branding and strategic partnerships. By working together, ASEAN Member States can present Southeast Asia as a seamless, multicountry experience that appeals to both high-value and volume markets.

To make the most of this opportunity, ASEAN can enhance market-specific branding and tourism experiences tailored to the needs of diverse visitors, including those from non-English-speaking markets. Investing in appropriate language and culturally sensitive marketing materials can help improve targeting and engagement.

Under this focus area, four key initiatives are: (i) strengthening ASEAN's identity through unified branding and targeted marketing campaigns; (ii) sharing multimedia assets to support cross-promotional efforts among ASEAN Member States; (iii) leveraging public–private partnerships to invest in collaborative tourism marketing; and (iv) reinforcing subregional partnerships to coordinate effective multicountry tourism promotion (Table 2).

Table 2: Destination Branding and Regional Cooperation: Objectives, Initiatives, and Activities

Component	Description		
Objective	Strengthen ASEAN's unified identity and coordinated promotion as a premier tourism destination.		
Initiatives	1. Strengthen Southeast Asia's identity as a premier tourism destination through unified branding and targeted marketing campaigns.	2. Explore and assess the establishment of a shared platform for multimedia assets and campaign calendars to support cross-promotional efforts among ASEAN Member States	3. Leverage public–private partnerships and subregional collaborations to drive joint marketing campaigns, ensuring Southeast Asia remains a top global destination.
Activities	<p>1.1. Encourage the application of aligned ASEAN branding and messaging across ASEAN Member States'-owned, earned, paid, and shared media channels.</p> <p>1.2. Encourage ASEAN's participation in global and regional travel trade fairs (e.g., ITB, WTM, PATA) under a unified ASEAN branding pavilion.</p>	2.1. Explore and assess the sharing of multimedia assets and campaign information among ASEAN Member States via a cloud-based system or coordinated marketing calendar with ASEAN Secretariat/appointed marketing agency.	<p>3.1. Collaborate with subregional groupings (e.g., BIMP-EAGA, GMS, IMT-GT) and private sector partners to design and implement coordinated multicountry marketing campaigns including shared campaign calendar.</p> <p>3.2. Encourage co-investment with airlines, cruise operators, and online travel agents in joint regional promotions targeting long-haul and intra-ASEAN markets.</p>

ASEAN = Association of Southeast Asian Nations, BIMP-EAGA = Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area, GMS = Greater Mekong Subregion, IMT-GT= Indonesia-Malaysia-Thailand Growth Triangle, ITB = Internationale Tourismus-Borse, PATA = Pacific Asia Travel Association, and WTM = World Travel Mart.

Initiative 1: Strengthen Southeast Asia's identity as a premier tourism destination through unified branding and targeted marketing campaigns.

ASEAN Member States could take a coordinated and strategic approach to storytelling and brand alignment. A key step is for each to designate a marketing focal point responsible for collaborating directly with the ASEAN Secretariat. This coordination ensures consistent messaging and branding across all national campaigns, particularly in how Southeast Asia is positioned in relation to both intra-regional and neighboring destinations.

To ensure cohesive branding and maximize regional visibility, the ASEAN Member State marketing focal point can ensure all promotional efforts can strategically highlight neighboring countries or mention the ease of travel to other Southeast Asian countries. Examples include tagging the ASEAN Tourism Instagram, @VisitSoutheastAsiaOfficial, and incorporate the #ADestinationForEveryDream hashtag to reinforce the collective identity of Southeast Asia as a unified, desirable travel region. Additional recommendations for branding and messaging are in Table 3.

Table 3: Initial Recommendations for Stronger Alignment and Messaging

Activities	Description
Standardize digital branding	<p>ASEAN Member States should tag @VisitSoutheastAsiaOfficial in social media posts that highlight multicountry travel experiences. Including the regional hashtag #ADestinationForEveryDream in individual ASEAN Member State's posts will help reinforce Southeast Asia's positioning as a unified travel destination.</p> <p>In return, Visit SEA can strengthen cross-promotion by incorporating individual ASEAN Member State's hashtags when featuring specific countries.</p>
Leverage influencer, media, and content collaborations	<p>Collaborate between ASEAN Member States on influencer and media trips to highlight seamless travel experiences between the countries, and potentially share costs associated with influencer familiarization trips.</p>
Feature multicountry themes in social media	<p>Instead of following the traditional route of featuring each ASEAN Member State twice each month in the Visit SEA channels, group countries together in one post around a theme, such as festivals, top eateries, top rafting spots, and others.</p> <p>This will allow fans to see the region as a unified destination, instead of spotlighting one country in each post.</p>

SEA = Southeast Asia.

Initiative 2: Explore and assess the establishment of a shared platform and campaign calendars to support cross-promotional efforts among ASEAN Member States.

This initiative is designed to explore and assess the establishment of a centralized digital asset hub that enables ASEAN Member States to seamlessly share multimedia content, such as high-resolution photos, videos, and marketing materials. By facilitating easy access and exchange of assets, this platform can strengthen cross-promotional efforts, support cohesive regional storytelling, and enhance the visibility

of each ASEAN Member State within joint campaigns.

Key components include producing diverse multimedia content (videos, articles, podcasts, immersive experiences), launching a dedicated Southeast Asia marketing hub, partnering with influencers and media to amplify reach, and creating themed campaigns around heritage, cuisine, etc.

To successfully launch this initiative, each ASEAN Member State could designate a dedicated representative to collaborate closely with the ASEAN Secretariat and the appointed marketing agency. This collaboration can be critical in executing a phased rollout that ensures strategic alignment, long-term sustainability, and consistent engagement across all ASEAN Member States. Additionally, securing appropriate budget allocation is vital, notably to support the technological infrastructure required for hosting and maintaining a robust, cloud-based digital asset management system. Without committed personnel and adequate investment, the initiative risks falling short of its potential, especially in terms of long-term maintenance, scalability, and regional coordination.

For estimated costs for exploring a cloud-based server, costs vary on several factors that are unknown currently (Table 4). For budgeting, the team should assume a moderate use case as described below:

- 10 terabytes (TB) of hot multimedia files
- Monthly outbound transfer of ~5 TB (users streaming/downloading)
- Use of Content Delivery Network to serve content in multiple countries
- One origin server with moderate compute for dynamic tasks

Table 4: Cloud-Based Server Cost Estimates

Cost Component	Estimate	Notes
Storage (10 TB @ \$0.023/GB)	\$230/month	Hot storage class
Egress (5 TB @ \$0.09)	\$460	Without CDN/discounts
CDN Edge/caching overhead	\$100–\$300	Depends on CDN provider and traffic pattern
Server/compute costs	\$50–\$200	For origin node, transcoding, APIs
Redundancy/backup margin	+20%–50% buffer	For replication, failover, backup systems

API = application programming interface, CDN = Content Delivery Network, GB = gigabyte, TB = terabyte.
 Notes: Total estimate: \$840 to \$1,400+/month; If your scale is much bigger (50 TB+, 20 TB outbound, multiple origin nodes), the number could be several thousand dollars per month. As a lower cost alternative, ASEAN Member States could share their marketing calendars with the ASEAN Secretariat and marketing agency to identify cross-promotional opportunities to promote tourism to Southeast Asia.

Source: These cost estimates were derived from standard public pricing models used by major cloud service providers such as Amazon Web Services (AWS), Google Cloud Platform (GCP), and Microsoft Azure, combined with conservative assumptions about system size and data traffic.

Initiative 3: Leverage public–private partnerships and subregional collaborations to drive joint marketing campaigns, ensuring Southeast Asia remains a top global destination.

This initiative aims to foster strong collaborations between public and private sector stakeholders to co-

invest in tourism marketing campaigns. It seeks to combine resources, expertise, and networks from both sectors to increase Southeast Asia's global visibility, attract more international tourists, and strengthen its position as a leading tourism destination. By aligning shared goals, the initiative seeks to enhance Southeast Asia's appeal through impactful, innovative campaigns that drive sustained growth in tourism. Initial steps to implement this initiative could include some or all of the below:

- i. Conducting a comprehensive mapping of potential private sector partners (e.g., airlines, hotel groups, online travel agents, travel agencies, tourism tech companies) and aligning on their marketing priorities.
- ii. Hosting a regional forum or workshop to identify shared marketing goals and explore collaboration opportunities between public and private sectors.
- iii. Developing a clear framework for public–private partnerships, outlining roles, benefits, engagement processes, and key considerations such as intellectual property rights and potential revenue-sharing models.

ASEAN can work closely with subregional groups such as Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area (BIMP-EAGA), Greater Mekong Subregion (GMS), and Indonesia-Malaysia-Thailand Growth Triangle (IMT-GT) to deliver coordinated marketing campaigns that promote seamless, multicountry travel. These partnerships help align tourism promotion with regional development goals and make better use of shared resources.

By highlighting unique subregional experiences—like cultural heritage trails, adventure tourism, wellness retreats, and Muslim-friendly travel—ASEAN can present Southeast Asia as a connected, diverse destination that encourages visitors to explore multiple countries in one trip (Table 5).

ASEAN can deepen collaboration with subregional groupings such as BIMP-EAGA, GMS, and IMT-GT to design and deliver joint marketing campaigns that promote seamless, multicountry travel. These partnerships align tourism promotion with regional development goals while maximizing shared resources.

By highlighting unique subregional experiences, including cultural heritage trails, adventure tourism, wellness retreats, and Muslim-friendly travel, ASEAN can encourage visitors to explore multiple countries in a single trip, reinforcing its identity as a connected, diverse destination. Efforts can also emphasize sharing resources and amplifying reach through joint campaigns in key markets, working closely with ASEAN Centres in Japan, the PRC, and the Republic of Korea. Leveraging local expertise for language and cultural adaptation, targeted audience engagement, and on-the-ground promotions can ensure more effective, relevant marketing across diverse source markets.

Table 5: ASEAN Subregional Tourism Marketing Initiatives

Subregions	Tourism Product	Description
BIMP-EAGA	Coral Triangle Diving Circuit	Joint promotion of world-class dive sites like Sipadan (Malaysia), Raja Ampat (Indonesia), and Tubbataha Reefs (Philippines).
	Borneo Rainforest and Wildlife Experience	Sustainable eco-tourism packages featuring Ulu Temburong (Brunei Darussalam), Kinabalu Park (Malaysia), and Kalimantan (Indonesia).
	Sustainable Island Hopping and Cruises	Developing inter-island cruise networks covering Palawan (Philippines), Kota Kinabalu (Malaysia), and Muara (Brunei Darussalam).
	Cultural and Heritage Trails of Borneo and Mindanao	A cross-border cultural circuit showcasing indigenous cultures, tribal heritage, and historic sites.
GMS	Mekong River Expedition	Multicountry cruises along the Mekong, integrating riverfront cities like Luang Prabang (Lao PDR), Phnom Penh (Cambodia), and Can Tho (Viet Nam).
	UNESCO Heritage Trails	Connecting Angkor Wat (Cambodia), Bagan (Myanmar), Hue (Viet Nam), and Sukhothai (Thailand) in one cultural experience.
	Golden Triangle Adventure Tourism	Trekking, biking, and cultural exploration of the historic opium trade routes and minority villages.
	Eco and Wellness Tourism in the Mekong Region	Promoting spa resorts, slow travel, and retreats in Hoi An (Viet Nam), Siem Reap (Cambodia), and Luang Prabang (Lao PDR).
IMT-GT	Muslim-Friendly Travel and Halal Tourism Circuit	Promoting Islamic heritage, halal cuisine, and faith-based tourism experiences across the three nations.
	IMT-GT Wellness and Medical Tourism Hub	Highlighting Southern Thailand and Northern Malaysia for affordable world-class healthcare and wellness retreats.
	Cultural and Culinary Trail of the Malay Archipelago	Cross-border food tourism covering Nasi Lemak (Malaysia), Padang Cuisine (Indonesia), and Southern Thai Cuisine.
	Luxury and Business Travel	Strengthening high-end tourism and business events in major cities like Jakarta, Kuala Lumpur, and Bangkok.

BIMP-EAGA = Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area, GMS = Greater Mekong Subregion, IMT-GT= Indonesia-Malaysia-Thailand Growth Triangle, Lao PDR = Lao People's Democratic Republic, UNESCO = United Nations Educational, Scientific and Cultural Organization.

FOCUS AREA 2: Data-Driven Marketing

Post-pandemic travel behavior has shifted rapidly and understanding what drives traveler decisions is more critical than ever. By focusing on data collection, analysis, and performance tracking, including social listening, market segmentation, and real-time campaign metrics, ASEAN can develop more precise, responsive, and relevant marketing strategies. This approach allows Member States to better identify high-potential source markets, tailor content by audience preference, and allocate resources more strategically for greater return on investment.

Data-driven marketing aims to improve the effectiveness of ASEAN's marketing efforts by leveraging data analytics, consumer insights, and digital tools to inform targeted campaigns and optimize performance. As travelers increasingly seek personalized experiences, Southeast Asia should adapt its marketing to reflect

the diversity of its destinations. By leveraging data analytics, Southeast Asia can understand traveler preferences and behaviors, enabling personalized marketing strategies. With 81% of travelers researching online and 57% preferring personalized recommendations, data-driven marketing is key to reaching global audiences. ASEAN may wish to explore and assess the setting up a centralized digital platform. However, this is only if external funding support is able to be secured for this platform as the ASEAN NTOs Fund is likely insufficient to sustain this platform, due to the significant funding required in the long run.

This approach can increase visibility, engagement, and repeat visits, driving long-term growth. Leveraging data, AI, and virtual technologies such as augmented reality, Southeast Asia can offer tailored recommendations and virtual previews of its unique offerings. Influencer marketing can amplify these efforts by partnering with authentic voices that showcase Southeast Asia’s distinctiveness, inspiring wanderlust while presenting the region as a unified yet diverse destination (Table 6).

Table 6: Data-Driven Marketing: Objective, Initiative, and Activities

Component	Description
Objective	Strengthen Digital Readiness and Innovation
Initiative	4. Leverage AI and digital tools for data-driven analytics and immersive visitor experiences in innovative marketing campaigns for better messaging alignment and targeting.
Activity	4.1. Encourage the adoption of AI-driven analytics across ASEAN Member State to better understand traveler flows, preferences, and behaviors. 4.2. Support the development and promotion of virtual tourism experiences (e.g., virtual/augmented reality tours of iconic landmarks, heritage sites, and local cultural events) to strengthen Southeast Asia's appeal and convert visitors.

AI = Artificial Intelligence, ASEAN = Association of Southeast Asian Nations.

For additional context and a deeper breakdown, please refer to the Initiative 4 section of this document, which expands on Table 6 details.

Initiative 4: Leverage AI and digital tools for data-driven analytics and immersive visitor experiences in innovative marketing campaigns for better messaging alignment and targeting.

As traveler behavior continues to evolve rapidly in the post-pandemic era, traditional data sources alone are no longer sufficient for capturing real-time insights. Encouraging ASEAN Member States to adopt AI-driven analytics can empower them to monitor emerging travel patterns, identify high-potential source markets, and understand shifting preferences with greater speed and accuracy.

To optimize resources and enhance data-driven decision-making, the ASEAN Secretariat and the appointed marketing agency can strategically leverage free AI-powered analytics tools as cost-effective solutions. By integrating these platforms into the broader marketing infrastructure, ASEAN can offset technology expenses while still gaining valuable insights into traveler behavior, content performance, and emerging trends. Examples include:

- i. Google Trends: Tracks search interest and keyword patterns over time by country or region. This is useful for identifying travel intent, seasonal trends, and content opportunities.
- ii. Meta Business Suite Insights (Facebook + Instagram): Tracks audience interaction, reach, and content performance across Meta platforms. Useful for understanding content resonance in target markets.

ASEAN Member States can also consider creating virtual tours in partnership with tour operators, hotels, local businesses, cultural institutions, and even local guides. These tours can serve as immersive previews of the destination, giving potential travelers a sense of what they'll experience, whether it's walking through a historic temple, exploring a food market, or enjoying a beachfront resort. Virtual tours not only pique interest but also extend reach to travelers who are researching destinations online before booking.

Free or Low-Cost Virtual Tools & Platforms for General Video Creation & Hosting

- **YouTube 360** (Free) – Upload immersive 360-degree videos to showcase landmarks, natural attractions, or hotel experiences.
- **Facebook Live / Instagram Live** (Free) – Partner with local businesses or tour operators to stream walking tours, cooking demos, or cultural performances.
- **TikTok** (Free) – Quick, authentic behind-the-scenes destination clips, using trending audio to boost reach.
- **Vimeo Basic** (Free) – A professional platform for hosting high-quality promotional videos without heavy ads.

Virtual Tour Platforms

- **Google Earth/Google Street View** (Free) – Add or update 360° imagery for iconic landmarks, walking streets, or nature trails.
- **Kuula** (Free and paid tiers) – Easy-to-use platform for uploading and sharing 360° photos and videos.
- **ThingLink** (Free and paid tiers) – Create interactive videos or photos with clickable hotspots (e.g., add info on hotels, local shops, or attractions).
- **Roundme** (Free and paid tiers) – Allows destinations to create virtual tours with navigation points and multimedia elements.

Low-Cost DIY Options

- **Smartphone 360 cameras** (e.g., Insta360, Ricoh Theta – affordable one-time cost) – Destinations can record their own immersive footage.
- **Canva Pro Video Templates** (Low-cost) – Easy editing of short promotional videos with branding and music.
- **CapCut / iMovie / DaVinci Resolve** (Free video editing apps) – Professional-looking edits without the expense.

FOCUS AREA 3: Sustainable, Inclusive, and Resilient Products and Markets

Today's travelers, especially Millennials and Gen Z, are increasingly drawn to destinations that reflect their values: environmental responsibility, cultural authenticity, and social impact. By highlighting sustainable and inclusive tourism-related experiences, ASEAN can attract this growing segment while contributing to long-term regional resilience. This focus area also supports recovery for lesser-known destinations and vulnerable communities by distributing tourism benefits more equitably and reducing dependence on traditional markets and urban hubs (Table 7).

With sustainability and responsible tourism rising, Southeast Asia's marketing strategy should emphasize its commitment to sustainable practices, local community engagement, and nature activities. By developing

and highlighting nature-based experiences and promoting social responsibility, Southeast Asia can attract travelers who prioritize these values.

Growing interest in health and wellness presents an opportunity to position the region as a holistic destination, offering experiences such as wellness retreats, yoga, and mindfulness escapes. Marketing should balance global appeal with respect for local cultures, ensuring Southeast Asia’s message resonates authentically across varied audiences. Southeast Asia can promote deeper connections with its diverse cultures through immersive experiences as experiential travel gains momentum. With the rise of remote work, Southeast Asian destinations can position themselves as ideal locations for digital nomads, offering coworking spaces and reliable internet. AI can be used to manage tourist flows and enhance the visitor experience, while innovative marketing on platforms like TikTok can attract a new generation of travelers, solidifying Southeast Asia as a dynamic, unified destination for both leisure and work.

Table 7: Sustainable, Inclusive, and Resilient Products and Markets: Objectives, Initiatives, and Activities

Component	Description	
Objectives	Diversify and promote ASEAN’s sustainable, high-quality, and niche tourism products that will attract targeted travelers.	
Initiatives	5. Create and distribute rich multimedia content across ASEAN Member States-owned and Visit SEA channels to highlight diverse tourism products and experiences, such as cultural heritage, and sustainable practices as integral parts of ASEAN tourism experiences.	6. Leverage public relations and influencer collaborations to build credibility, expand reach, and spotlight emerging Southeast Asia destinations and niche products.
Activities	5.1. Curate and share stories on how tourism supports cultural preservation, environmental protection, and community livelihoods, such as the creation of the ASEAN “Community Tourism Spotlights” highlighting Community-Based Tourism villages and experiences across ASEAN Member States as part of Visit SEA promotions. 5.2. Use multimedia content such as videos for IG Reels, TikTok, YouTube, etc. to generate awareness around this topic for greater “Search-ability” for travelers to discover your destination.	6.1. Partner with influencers, media, and niche travel content creators to co-create campaigns. 6.2. Organize ASEAN travel/trade media and influencer familiarization trips focusing on secondary destinations and niche products. 6.3. Develop partnerships with global sustainability and inclusivity platforms (e.g., Lonely Planet’s Best in Travel, Green Destinations Top 100) to feature Southeast Asia success stories.

ASEAN = Association of Southeast Asian Nations, IG = Instagram, SEA = Southeast Asia.

This activity has a dual approach in regard to storytelling around sustainability for impact and optimizing it for search visibility ensures ASEAN Member States destinations are not just doing the work to protect their environments but also gaining recognition as leaders in sustainable travel for search engine rankings. This builds both awareness and trust, helping the region appear in search results when travelers are discussing, sharing, or searching for information around destinations. Initiatives 5 and 6 detail the issues summarized in Table 7.

Initiative 5: Create and distribute rich multimedia content across ASEAN member-owned and Visit Southeast Asia channels to highlight diverse tourism products and experiences, such as cultural heritage and sustainable practices as integral parts of ASEAN tourism experiences.

This activity has a dual approach to storytelling around sustainability for impact and optimizing it for search visibility ensures ASEAN Member States' destinations are not just doing the work to protect their environments but also gaining recognition as leaders in sustainable travel for search engine rankings. Again, this builds both awareness and trust, helping the region appear in search results when travelers are discussing, sharing, or searching for information around destinations.

- i. The content about sustainability should be searchable and discoverable. Destinations should strategically write about specific eco-topics that align with how travelers search for responsible travel experiences on Google Search, YouTube, and social media platforms. Examples of Search Engine Optimization (SEO)-driven sustainability topics include: eco lodges, nature-based activities, sustainability programs that travelers can experience.
- ii. Tourism in Southeast Asia is deeply tied to heritage, nature, and people. To strengthen this connection, ASEAN should build a storytelling framework that highlights the positive impact of responsible travel. This can include short films, social content, case studies, and editorial features showcasing how visitor spending helps maintain cultural traditions, conserve natural environments, and sustain local livelihoods. These stories should be shared consistently across Visit Southeast Asia's digital channels, partner airline/hotel platforms, and through media/influencer collaborations. By doing so, ASEAN positions tourism not just as leisure, but as a driver of cultural pride and sustainability.
- iii. Community-based tourism offers visitors authentic experiences while ensuring that tourism benefits flow directly to local people. ASEAN can curate a rotating series of "Community Tourism Spotlights," each featuring a community-based tourism village, eco-lodge, or community-led tour from different ASEAN Member States. Content could include photography, mini-documentaries, and traveler testimonials, distributed under the Visit Southeast Asia (Visit SEA) brand. These spotlights can be integrated into thematic campaigns (e.g., food, nature, culture), packaged into itineraries, and promoted via travel trade partners. The goal is to inspire travelers to explore beyond capital cities and spread economic benefits to rural and emerging destinations.
- iv. Tourism and the creative economy can mutually reinforce each other. ASEAN should partner with local artists, designers, musicians, and performers to co-create content and activations that bring Southeast Asian culture to life in contemporary ways. This could include fashion collaborations (e.g., designers incorporating traditional textiles into modern collections), performances at international roadshows, or featuring artisan-made products in promotional campaigns. By weaving creative industries into tourism promotion, ASEAN highlights the vibrancy of local culture, generates income for artists and artisans, and positions the region as heritage-rich and forward-looking.

Use multimedia content to share these stories for search engine optimization and "find-ability" in search engines and social media. This activity focuses on strategically producing and distributing high-quality multimedia content across digital, social, and traditional channels to effectively communicate ASEAN's sustainable tourism message to global audiences. By packaging and promoting these stories in engaging, visually compelling formats, ASEAN can reach broader markets, inspire responsible travel choices, and build recognition of the region as a leader in sustainable, community-centered tourism.

By showcasing a wide range of voices and experiences, these campaigns can foster relatability, promote representation, and position Southeast Asia as a welcoming and inclusive region for all. Content can emphasize barrier-free attractions, multigenerational travel options, and community-based experiences that make travelers of all backgrounds feel seen, valued, and supported.

Initiative 6: Leverage public relations and influencer collaborations to build credibility, expand reach, and spotlight emerging Southeast Asia destinations and niche products.

Collaborate with travel influencers and traditional reporters that focus on accessible and inclusive travel to co-create content and promote lesser-known destinations, amplifying visibility among targeted traveler segments. Securing positive social media postings and media coverage on your destination will help your content get seen by more people. Evergreen topics that the media tend to cover include “Best eco-lodges in Southeast Asia”, “Carbon-neutral travel tips in [Destination]”, “Wildlife conservation tours in [Destination]”, “Plastic-free travel experiences in [Destination]”, “Sustainable food and farm-to-table dining in [Destination]”, etc. just to list a few examples.

Table 8 shows banner campaign programs that can be considered for launch in the next 4 years.

Table 8: Conceptual Thought-Starters, 2026–2030

Program	Description
<p>Southeast Asia Unlocked: Multi-Destination Challenge</p>	<p>Launch a gamified digital campaign that encourages travelers to explore multiple Southeast Asian countries. The campaign can offer incentives—such as discounts on flights, hotels, and experiences—for those who complete regional itineraries.</p> <p>Drive engagement through user-generated content and a dedicated challenge hashtag across social media platforms.</p> <p>Collaborate with airlines and national tourism boards to provide seamless travel experiences and amplify the campaign's reach.</p>
<p>Travel Green</p>	<p>Promote the region's eco-tourism and sustainability leadership through a multi-channel campaign leveraging influencers, familiarization trips with journalists and social media content.</p> <p>Collaborate with green-certified hotels, eco-tour operators, and conservation organizations to ensure authenticity and impact.</p>
<p>Southeast Asia Work and Wander: Digital Nomad Edition</p>	<p>Position Southeast Asia as the go-to destination for digital nomads and remote workers through a comprehensive marketing strategy. This could include collaborating with popular work-travel influencers.</p> <p>Key activities:</p> <ul style="list-style-type: none"> • Promote long-stay visa programs and their benefits for remote workers across Southeast Asian countries. • Partner with co-working spaces, local cafes, and businesses to build digital nomad-friendly ecosystems that offer convenience and community. • Create an online hub with essential resources for remote workers, including accommodation guides, legal information, and networking opportunities. • Collaborate with influencers to showcase real digital nomads thriving in Southeast Asia, sharing their experiences and lifestyle.

5 IMPLEMENTATION STRATEGY

With the vision and initiatives defined, the ATMS 2026–2030 will be implemented through key elements, institutional arrangements, and a monitoring framework.

5.1 Implementation Framework

Key elements of the implementation approach include:

- i. **Collaborative planning and coordination:** Strengthening coordination among ASEAN Member States, subregional partners, tourism boards, private sector stakeholders, and regional organizations to address shared marketing priorities and consistent messaging.
- ii. **Capacity building and resource sharing:** Strengthen marketing capabilities through training, shared digital assets, and best-practice exchanges to improve efficiency and impact across member states.
- iii. **Performance monitoring and adaptive strategy adjustments:** Track campaign results and audience engagement using shared metrics. Use insights to refine strategies, ensure accountability, and support continuous improvement.

5.2 Institutional Arrangements

The ASEAN Tourism Working Group will oversee the implementation of the ATMS 2026–2030. Its terms of reference are included in the ATSP 2026–2030.

5.3 Monitoring and Evaluation Plan

The effectiveness of ATMS 2026–2030 can be assessed through a results-based monitoring framework that incorporates so-called SMART key performance indicators (specific, measurable, achievable, relevant, and time-bound) to track progress and ensure accountability. It can also follow the ASEAN Economic Community guidelines on monitoring and evaluation. Appendix 6 provides the results framework for the ATMS.

Sample metrics include:

- i. Growth in Southeast Asia tourism arrivals compared year on year.
- ii. Engagement rates on digital channels (click-through rate, conversion rate).
- iii. Return on investment on digital and traditional marketing campaigns. AI spend report tracking to report on the money spent based on marketing campaigns. This requires a large financial investment of \$50,000+ to leverage the AI software.

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**Appendix 1:
Key Performance Indicator Tracker 2025**

	Website Traffic Average (Year-on-Year)	Fan Growth (Cumulative)	Social, Digital, Partnership Impressions (Cumulative)	Social Mentions Engagement Rate for the Channels (Cumulative)	Social, Digital Interactions (Cumulative)
Actual as of 1 June 2025	48% (331,107 versus 223,630) June 1, 2024 – June 1, 2025 vs. June 1, 2023 – June 1, 2024 NOTE: ELMNTL manually removed the results from the Intra-ASEAN campaign from 2023 because they were not included in the results.	45%	289 M (Page Impressions, #ADestinationforEve ryDream and #VisitSoutheastAsia IG hashtag impressions, Influencer Impressions) Does not include #ImaginASEAN impressions.	45% Combined Average FB Engagement Rate = 20% (boosted posts and paid ads helped increase ER) IG Engagement Rate = 65% Engagement rate surpassed 100% primarily due to the FB ads (non-fans' interactions are calculated into engagement rate).	211K

VS THE KPI TRACKER

	Website Traffic Average (Quarterly Comparison)	Fan Growth (Cumulative)	Social/ Digital/ Partnership Impressions (Cumulative)	Social Mentions Engagement Rate for the Channels (Cumulative)	Social/Digital Interactions (Cumulative)
Milestone 1 30 Sept 2024	30% SURPASSED	30% ACHIEVED	75M SURPASSED	30% SURPASSED	40K SURPASSED
Milestone 2 31 Jan 2025	40%	40%	189M	40%	75K
Milestone 3 1 Jun 2025	45%–50%	45%–50%	273M	45%	125K

ASEAN = Association of Southeast Asian Nations, ER = engagement rate, FB = Facebook, K = thousand, KPI = key performance indicator, M = million, IG = Instagram.

Source: Meltwater Analytics, Google Analytics.

Appendix 2: ATMS 2021–2025 Campaign Initiatives and Results

A core success was the Micro-Influencer Strategy, which leveraged the credibility and authenticity of smaller, highly engaged content creators to boost brand visibility. By partnering with micro-influencers who interacted frequently with ASEAN’s channels and produced original content, the region achieved stronger audience trust and sustained online engagement. This approach also allowed for more tailored, localized storytelling that resonated with diverse markets.

“Local tours influencer content” enhanced awareness of individual ASEAN Member States by collaborating with influencers who live within the region. These partnerships highlighted authentic, on-the-ground experiences, ensuring that promotion felt genuine and relevant. This regional collaboration helped showcase the full diversity of ASEAN while maintaining a unified brand message, reinforcing the idea of Southeast Asia as a seamless, multi-destination experience.

The #ImaginASEAN Campaign stands out as a flagship example of creative regional marketing. Jointly developed by the marketing agency and the Southeast Asia Secretariat, the campaign launched with a striking Instagram Reel teaser and a metaverse-inspired post that highlighted iconic regional landmarks in a modern, tech-savvy way. Strategic collaboration extended to posts featuring partners like AirAsia and Agoda, a Gamezebo Q&A, and innovative in-game renderings of destinations—demonstrating strong cross-sector coordination. This integrated approach delivered over 78,000 organic social impressions, 1.4 million impressions through blogs and press releases, and 3.3 million in-game interactions. It was even nominated for the 2025 Webby Awards in the AI category for “tourism and leisure”, underscoring its innovation and industry recognition.

To expand reach, the marketing team repurposed successful Instagram Reels content for TikTok, tapping into a broader, younger audience. This cross-platform strategy maximized the value of existing creative assets while extending engagement across key social media channels.

Collectively, these initiatives succeeded because of their strong alignment with ASEAN’s shared branding goals, effective use of partnerships with the private sector and regional influencers, and a commitment to authentic, innovative storytelling. Regional collaboration—both among Member States and with industry partners—was essential to creating cohesive, compelling campaigns that showcased Southeast Asia’s rich diversity while strengthening its position as a single tourism destination.

Table A2.1: Campaign Initiatives and Results

Initiative	Campaign Summary	Impact and Results	Industry Averages for Tourism Based on Campaigns ~ \$100K
CLUPEP AI Advertising	<p>The campaign aimed to elevate brand awareness for Southeast Asia and its 10 member nations, positioning the region as a premier tourism destination. By engaging target audiences at peak social media usage moments, we optimized reach and resonance across key digital channels.</p> <p>The primary market focus was the UK and Australia, ensuring that resources aligned with high-potential audiences to drive impactful engagement and influence travel intent.</p>	<p>507K Impressions 7.1K Clicks to the website 1.41% CTR NOTE: Budget was 20K</p>	<p>700K Digital Impressions 8M - 10M Social Impressions 4.68% Digital Ads CTR ~ 40,000 - 125,000 Social/Digital Interactions (Includes Digital Clicks)</p>

Initiative	Campaign Summary	Impact and Results	Industry Averages for Tourism Based on Campaigns ~ \$100K
SEA Travel Collective	To inspire travel to Southeast Asia, the campaign launched the Southeast Asia Travel Collective, a collaboration with top influencers and renowned luggage brand Victorinox, strategically targeting high-intent travelers across key markets. The team partnered with a mix of travel, lifestyle, and adventure influencers who had substantial followings in target regions and an authentic affinity for Southeast Asia. By combining the allure of Southeast Asia with Victorinox's strong brand equity, the campaign successfully established a powerful association with SEA travel, encouraging audiences to embark on their own Southeast Asian journeys.	3M Impressions 18K Interactions 16K Page visits to Southeast Asia page NOTE: Budget was \$40K	
ASEAN Tourism Recovery Intra-ASEAN Campaign	Digital and social media advertising campaign that featured faces and activities that can be experienced in the Southeast Asia region. Travel partners such as hotels, airlines, etc. were encouraged to promote the social media toolkit assets.	34M Impressions 455K Clicks 1.13 CTR% NOTE: Budget was \$20K	
#ImaginASEAN Video Contest	<p>The campaign engaged 10 local content creators, each representing an ASEAN Member State, to produce impactful Instagram Reels around the theme "A Destination for Every Dream." Each creator crafted video content highlighting the unique and diverse experiences available in their home country, seamlessly promoting both the regional allure and the user-generated #ImaginASEAN contest.</p> <p>The contest invited fans to participate by answering themed questions, with additional entry points awarded for submitting their own videos envisioning the activities they would pursue in any Southeast Asian country. This approach effectively amplified regional appeal while encouraging audience engagement through imaginative, user-generated content.</p>	1M Impressions 427K Clicks to the website 6M Total Views on the IG Reels 200 Video Submissions NOTE: Budget was \$20K	
#ImaginASEAN Great Metaverse Hunt	An interactive mini-game within the Roblox universe was developed to spotlight Southeast Asia's iconic landmarks and rich cultural heritage. Players where they were transported to a Roblox version of Southeast Asia. At the heart of the game was a scavenger hunt, inviting players to search for hidden treasures featuring renowned	3M+ In-Game Interactions 72,000+ Game Played Hours 112 M Impressions NOTE: Budget was \$50K	

Initiative	Campaign Summary	Impact and Results	Industry Averages for Tourism Based on Campaigns ~ \$100K
	<p>landmarks and scenic vistas from across Southeast Asia.</p> <p>Each object collected shared informative messaging about the destination, fostering awareness of the region's diverse cultural legacy.</p> <p>Players who completed the hunt unlocked exclusive in-game rewards, collectable virtual garments from each of the countries, or even a chance to win a trip to Southeast Asia.</p>		
SEA Challenge	<p>The Southeast Asia Challenge was an innovative, mock-reality adventure series designed for Instagram, showcasing the allure of Southeast Asian destinations through immersive, influencer-led exploration. Each participant journeyed across the 10 Southeast Asian countries, spending approximately 3-4 days per destination, where they had the unique opportunity to engage deeply with local culture, savor globally celebrated cuisines, and experience thrilling adventures—activities most viewers had only read about or seen online. Destination storytelling with social engagement, creating an exciting platform for audiences to engage with ASEAN's rich and diverse travel experiences.</p>	<p>14M Impressions 233K Interactions 20% Engagement Rate 14.8K visits to the SEA Website 5K News fans gained</p> <p>NOTE: Budget was \$50K with the bulk of the campaign spent on travel logistics, such as flights, hotels, etc., not advertising.</p>	
Southeast Asia Love Language	<p>Power couples extended beyond traditional celebrities in today's world, as influencer couples had become celebrities and aspirational figures in their own right. From The Bucket List Family and Marie Fe & Jake Snow to Jess & Luda and Alex and Olivia Bowen, these influencer couples commanded a large, loyal following.</p> <p>The "Southeast Asia Love Language" campaign aimed to leverage influential couples in long-term committed relationships, marriages, or those simply celebrating milestones together to promote the beauty and diversity of all 10 ASEAN countries. The core message encouraged power influencer couples to celebrate their love by traveling to all 10 countries.</p> <p>Through the lens of these influential couples, the campaign sought to inspire others to embark on their own romantic adventures while fostering a deeper</p>	<p>24.5 Million Impressions 10,351 Clicks to the Map 163,223 Interactions</p> <p>NOTE: Budget was \$50K with the bulk of the campaign spent on travel logistics, such as flights, hotels, etc., not advertising.</p>	

Initiative	Campaign Summary	Impact and Results	Industry Averages for Tourism Based on Campaigns ~ \$100K
	<p>appreciation for the cultural richness of Southeast Asia.</p> <p>In celebration of 2025 as the ASEAN-India Year of Tourism, we launched the #SoutheastAsiaLoveLanguage campaign. Teaming up with top romance influencers from Mumbai, we showcased why Southeast Asia is truly 'A Destination for Lovers'—from dreamy wedding venues to unforgettable honeymoon escapes. It was a celebration of romance, adventure, and inspiration across the region.</p>		

ASEAN = Association of Southeast Asian Nations, CTR = Click Through Rate, K = thousand, IG = Instagram, M = million, SEA = Southeast Asia.
Source: Meltwater Analytics.

Appendix 3: Methodology for Product Mix

Data collection and insight generation

To support a comprehensive evaluation of ASEAN the tourism market positioning in its Member States, a multi-source data collection approach was applied. This combined quantitative performance metrics with qualitative insights to ensure a holistic analysis of each destination's visibility, appeal, and strategic readiness.

Primary data sources included:

- **Official tourism statistics:** Sourced from national tourism boards and the ASEAN Secretariat, with a focus on international arrival figures and year-over-year growth trends.
- **Global tourism benchmarks:** Extracted from third-party indexes such as the World Economic Forum's Travel & Tourism Competitiveness Index, TripAdvisor's Travelers 'Choice Awards, and Euromonitor International rankings to contextualize ASEAN countries against global standards.
- **Social listening and sentiment analysis:** Leveraged platforms like Instagram, TikTok, Google Reviews, and travel blogs to assess traveler sentiment, tone, and recurring themes around each destination.
- **Traveler behavior and market segmentation trends:** Analyzed evolving behaviors, such as the rise of wellness travel, eco-tourism, and digital nomadism. Data was drawn from platforms such as Expedia, Skyscanner, and industry reports including Booking.com's Future of Travel.
- **Stakeholder consultations:** Conducted structured interviews and focus groups with the National Tourism Organizations, destination management organizations, and private sector stakeholders to gather insights on destination readiness, market challenges, and promotional priorities.
- **AI-powered monitoring tools:** Utilized systems like Awario and Meltwater to track online conversation volume, sentiment, and topic clusters related to ASEAN destinations across 2020–2025.
- **Media and influencer tracking:** Monitored earned media and influencer content to evaluate coverage by theme (e.g., food, culture, adventure), source credibility, and global reach.

Evaluation Framework: Rating and Classification System

Using the aggregated data, each of ASEAN Member States was classified into one of four categories to assess overall tourism readiness and market strength. This framework captures performance across multiple dimensions, including digital visibility, destination appeal, infrastructure investment, and brand equity.

Table A3.1: Rating Scale

Classification	Score	Description
Strong	4	High visitor arrivals, strong media and influencer visibility, robust infrastructure, and a clearly defined brand identity. These destinations are regionally and globally recognized as top-tier travel experiences.
Moderate	3	Stable or recovering arrivals with periodic media exposure. Recognizable tourism products, but with opportunities to improve storytelling and digital engagement.
Emerging	2	Demonstrating positive growth trends and increasing investment. Visibility is inconsistent, but potential is evident with stronger
Limited	1	Low awareness and arrival numbers. Minimal media coverage or influencer activity. Requires foundational branding and promotional support.

Strategic considerations:

- i. Strong destinations consistently rank high across both performance data and traveler sentiment. These include countries that are heavily featured in influencer-led campaigns, digital travel guides, and global tourism rankings.
- ii. Moderate destinations maintain a steady presence but require renewed investment in brand narrative and cross-market targeting to remain competitive.
- iii. Emerging destinations show promising developments in infrastructure and niche tourism segments (e.g., community-based tourism, ecotourism) but lack sustained digital exposure.
- iv. Limited destinations are underrepresented in digital spaces and global travel discourse. They often have compelling experiences but need foundational support in branding, visibility, and stakeholder alignment.

Conclusion and strategic implication

This data-driven classification model ensures a nuanced understanding of each ASEAN Member State's market positioning, beyond arrival numbers alone. It incorporates real-time feedback, media visibility, and stakeholder perspectives to provide a full-spectrum view of destination competitiveness. By identifying where each member state currently stands, ASEAN can tailor its regional marketing strategies to elevate all destinations more equitably—ensuring a unified yet inclusive brand presence for Southeast Asia on the global stage.

Appendix 4: Digital Competitive Positioning

Evaluating ASEAN's current digital presence is crucial for refining brand positioning, optimizing campaign effectiveness, and ensuring the efficient use of limited budgets. This assessment can be benchmarked against digital performance standards of similarly sized National Tourism Organizations or similar "brands" to provide meaningful context and identify areas for improvement.

Key components can include real-time sentiment analysis of social media to monitor brand perception, alongside search trend and keyword analysis across major platforms, to understand how travelers engage with ASEAN content relative to competing global regions. These insights can inform data-driven decisions around content strategy, audience targeting, and messaging alignment.

To ensure sustained performance and adaptability, these digital analytics can continue to be embedded into the quarterly reporting process, allowing ASEAN to remain agile, competitive, and responsive to evolving market dynamics.

ASEAN's ability to compete as an integrated tourism region increasingly depends on advancing digital transformation. The World Economic Forum's Travel & Tourism Development Index offers a globally recognized framework for assessing competitiveness across key dimensions, including information and communications technology readiness, digital services, and enabling environments that are essential to the tourism sector's performance.

Analysis of the Travel & Tourism Development Index report (2024) highlights both opportunities and persistent disparities across ASEAN Member States. Markets such as Singapore, Malaysia, and Thailand consistently score highly on ICT adoption, digital infrastructure quality, and the delivery of seamless online visitor services. These examples demonstrate the benefits of sustained investment, effective regulation, and strong public-private partnerships in supporting a modern, technology-enabled tourism economy.

Conversely, other ASEAN Member States continue to face challenges related to infrastructure quality, affordability, and digital literacy. These gaps limit the ability to deliver consistent, high-quality visitor experiences across the region, constrain cross-border travel facilitation, and reduce the effectiveness of marketing initiatives that increasingly rely on digital channels.

By strengthening digital infrastructure through public-private partnerships and capacity-building, ASEAN can enhance its competitiveness, encourage multicountry travel, and appeal to the increasingly digitally-savvy traveler.

Moreover, this focused on the following points:

- Trends over time: Include temporal trends (growth in engagement, website visits, app downloads) to show whether digital presence is improving or declining.
- Benchmarking context: Include comparisons to other regional tourism organizations and global competitors, not just similarly sized National Tourism Organizations, to give perspective on ASEAN's relative digital performance. Evaluate search trends and keyword performance to see how ASEAN compares to competitor regions in online visibility.
- Granular member state assessment: Break down digital capacity and performance by member state to identify disparities in infrastructure, digital literacy, and online service delivery. Highlight which countries lead and which lag in ICT adoption, digital services, and online visitor engagement.
- Traveler engagement and perception: Integrate social media sentiment analysis and reviews to assess brand perception.

Appendix 5: SWOT Analysis

The Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis in Table 2 provides a strategic overview of Southeast Asia’s tourism sector by identifying its internal strengths and weaknesses, as well as external opportunities and threats. This assessment helps inform targeted marketing strategies, ensuring Southeast Asia can effectively position itself as a unified, competitive, and resilient destination in an evolving global travel landscape.

The SWOT analysis offers a strategic lens into ASEAN's current tourism marketing landscape, underscoring key strengths such as the unified "Visit Southeast Asia" brand, growing influencer collaborations, and rich storytelling potential across cultural, culinary, and natural themes. Combined with affordability and strong regional connectivity, these assets make Southeast Asia especially appealing to millennial and Gen Z travelers. Opportunities lie in scaling personalized digital campaigns powered by AI and big data, responding to increased demand for sustainable, experience-driven travel, and deepening partnerships with online travel agents, airlines, and regional tourism bodies. For example, eco-and nature-based storytelling can be elevated across ASEAN's marketing channels by featuring experiences like Singapore's MacRitchie Treetop Walk, Cambodia's Kulen Mountain National Park, and Brunei Darussalam's Ulu Temburong National Park, tapping into global trends that favor authentic and environmentally conscious travel.

At the same time, the analysis highlights ongoing challenges. Inconsistent messaging across ASEAN Member States, limited marketing budgets, and slow adoption of data-driven tools hinder regional cohesion. Disparities in infrastructure and reliance on seasonal tourism further limit the effectiveness of the campaign. Externally, global economic uncertainty, intensified competition from emerging destinations, climate-related disruptions, and shifting post-COVID-19 travel preferences all reinforce the urgency for ASEAN to adopt more agile, resilient, and sustainability-focused marketing strategies.

Table A5.1: SWOT Analysis

Strengths	Weakness
<p>Rich storytelling potential through diverse and authentic experiences: Southeast Asia’s cultural depth, natural beauty, and community-based tourism offerings provide compelling content for campaigns aimed at experience-driven, values-based travelers.</p> <p>Unified regional brand identity: The “Visit Southeast Asia” rebrand strengthens ASEAN’s collective voice in the global tourism market, enabling consistent messaging and cross-border promotions that elevate the region as a cohesive destination.</p> <p>Strong digital and influencer marketing momentum: Increased collaboration with travel influencers, content creators, and platform-specific campaigns (e.g., TikTok, Instagram Reels, YouTube Shorts) has amplified brand awareness and expanded reach among Gen Z and millennial audiences.</p> <p>Positioning Southeast Asia as a high-value and accessible destination: Marketing</p>	<p>Inconsistent regional messaging: Fragmented branding across ASEAN Member States weakens the impact of ASEAN-wide campaigns.</p> <p>Limited promotional budgets: Resource constraints hinder sustained global marketing efforts.</p> <p>Uneven destination readiness: Infrastructure gaps in certain areas impact brand perception and restrict storytelling opportunities.</p> <p>Seasonal demand volatility: Reliance on peak seasons reduces year-round campaign effectiveness.</p> <p>Lag in digital and data adoption: Underutilization of AI and analytics limits personalization and precision in targeting.</p>

messages that highlight affordability, quality experiences, and luxury at competitive prices resonate with both budget and premium segments, reinforcing the region's value proposition.

Effective communication of accessibility and regional connectivity: The strategic promotion of ASEAN's international gateways and low-cost carriers enhances the perception of ease and convenience, making multicountry travel more appealing through integrated marketing narratives.

Opportunities	Threats
<p>Rising demand for sustainable, immersive travel: Aligns with Southeast Asia's strength in eco and cultural storytelling.</p>	<p>Economic volatility: Shifts in global travel spending demand flexible pricing and value-focused messaging.</p>
<p>Growth of digital and personalized marketing: AI-driven targeting, dynamic content, and social storytelling can boost engagement and conversion.</p>	<p>Rising global competition: Other regions' aggressive marketing efforts challenge ASEAN's visibility and differentiation.</p>
<p>Appeal to Millennial and Gen Z travelers: Culturally rich, adventure-driven content resonates with younger, digitally native audiences.</p>	<p>Climate-related risks: Environmental threats may impact destination appeal, requiring stronger sustainability narratives.</p>
<p>Cross-sector partnerships for amplification: Collaborations with online travel agents, airlines, and regional tourism bodies can expand reach and co-create campaigns.</p>	<p>Geopolitical and policy barriers: Visa issues and regional tensions can disrupt marketing momentum and traveler confidence.</p>
<p>More innovative marketing through data and AI: Predictive insights and sentiment tracking can refine messaging and enhance return on investment.</p>	<p>Evolving post-COVID-19 expectations: Health-conscious travelers expect transparency and agility in safety-related communications.</p>

AI = artificial intelligence, ASEAN = Association of Southeast Asian Nations, COVID-19 = coronavirus disease. Sources: Nov 13 - Consultative Meeting ASEAN Tourism Strategic Plan Post-2025 documents from ASEAN Member States 2022 Survey Monkey results, and Awario Social Listening.

Appendix 6: ATMS 2026–2030 Key Performance Indicators

The effectiveness of ATMS 2026–2030 will be assessed through a results framework that incorporates SMART (specific, measurable, achievable, relevant, and time-bound) key performance indicators (KPIs) to track progress and ensure accountability.

This framework will include outcome indicators to measure long-term impact and output indicators to track the immediate results of strategic initiatives.

KPI 1: Increase Awareness of ASEAN as a Unified Tourism Destination

Outcome Indicator:

- Increase in regional brand recognition, measured as a percentage increase in awareness among target markets through surveys.

Output Indicators:

- Number of marketing campaigns executed across key markets (Target: 3 per year).
- Growth in social media reach and engagement (Target: 10%–15% annual increase in followers and engagement rate).
- Increase in earned media coverage (Target: 10% year-over-year increase in media mentions).
- Search volume of travel to Southeast Asia, or two or more ASEAN Member States mentioned in searches together (Target 3%–5% year over year increase).

KPI 2: Drive Tourist Arrivals and Revenue Growth

Outcome Indicator:

- Increase in ASEAN visitor arrivals, with a target of 5% year-over-year growth in both intra-ASEAN and international arrivals.

Output Indicators:

- Number of increased website visits.
- Number of increased users on the “plan your trip” section of the website.
- Number of tourism packages developed in collaboration with operators.
- Growth in direct online bookings via ASEAN promotional channels.
- Increase in average tourist spend per visit.

KPI 3: Strengthen Digital and Content Marketing Efforts

Outcome Indicator:

- Higher engagement rates on digital platforms, with a target click-through rate of 5% or more on paid campaigns and an engagement rate exceeding 8%.

Output Indicators:

- Number of destination-focused content pieces produced (Target: 50 high-quality content pieces per year).
- Growth in video views and watch time (Target: 250,000 or more views per quarter).
- Expansion of influencer collaborations (Target: 10 or more influencers engaged annually across ASEAN and global markets).

This framework ensures that ASEAN's tourism marketing efforts are measurable, strategic, and results-driven.