



# ASEAN TOURISM OUTLOOK 2025



## **ASEAN Tourism Outlook 2025**

The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor-Leste, and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

### **Authors:**

Aladdin D. Rillo, Sandra Carvao, Javier Ruescas, Michel Julian, Pavnesh Kumar, Fernanda Rodak, Issa Torres, Cécilia Chopin, and Jérôme Conilleau.

For inquiries, contact:

The ASEAN Secretariat  
Community Relations Division (CRD)  
70A Jalan Sisingamangaraja  
Jakarta 12110, Indonesia  
Phone: (62 21) 724-3372, 726-2991  
Fax: (62 21) 739-8234, 724-3504  
Email: [public@asean.org](mailto:public@asean.org)

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# **ASEAN Tourism Outlook 2025**

**The ASEAN Secretariat  
2025**

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## Foreword

As Malaysia assumes the ASEAN Chairmanship in 2025, under the theme “Inclusivity and Sustainability,” it is my distinct honour to present the *ASEAN Tourism Outlook 2025*. This publication represents one of Malaysia’s Priority Economic Deliverables, reflecting our shared aspiration to advance a more resilient, inclusive, and forward-looking ASEAN tourism landscape.

Tourism remains a cornerstone of ASEAN’s economic and social fabric. It is not only a vital engine of growth but also a catalyst for regional integration, community empowerment, and cultural preservation. As the region’s tourism sector continues to recover from recent global disruptions, our efforts must move beyond restoration towards transformation, in building a tourism ecosystem that is more sustainable, inclusive, and resilient.

The *ASEAN Tourism Outlook 2025* provides timely insights and policy guidance to advance this transformation. The findings highlight three key priorities essential to shaping the future of ASEAN tourism—evolving consumer behaviour and market segmentation; digitalisation and innovation; and sustainable and resilient development.

Through collective commitment and the guiding recommendations outlined in this Outlook, ASEAN is well-positioned to emerge as a global leader in sustainable, inclusive, and digitally empowered tourism. Together, we can ensure that the region’s tourism development continues to generate shared prosperity, strengthen cultural ties, and contribute meaningfully to the ASEAN Community Vision 2045.

**Tiong King Sing**  
**Minister of Tourism, Arts & Culture of Malaysia**

## Foreword

Tourism stands as one of ASEAN's most dynamic and people-centred sectors, driving economic growth, creating millions of jobs, and strengthening regional integration. More than an industry, it serves as a bridge that connects our people, celebrates our shared heritage, and embodies the spirit of ASEAN unity.

As reflected in the *ASEAN Tourism Outlook 2025*, the region's tourism sector has demonstrated a strong and steady recovery. By mid-2025, international arrivals had rebounded to 92% of pre-pandemic levels, with several ASEAN Member States already surpassing their 2019 benchmarks. This remarkable progress underscores the collective resilience of our governments, the innovation of our tourism industry, and the enduring appeal of ASEAN as a destination of choice.

Southeast Asia continues to emerge as a powerhouse in global tourism. In 2024, travel and tourism contributed 9.7% to ASEAN's GDP—equivalent to US\$ 379 billion—and supported 42 million jobs. Looking ahead, the region is projected to welcome over 200 million international visitors within the next five years. Yet beyond these impressive figures, the *Tourism Outlook* reminds us that growth must go hand in hand with sustainability, inclusivity, and innovation.

Building on this momentum, we recognise that recovery is not the destination—it is the beginning. ASEAN tourism must continue to evolve to meet changing traveller expectations, embrace digitalisation, and champion sustainable practices that benefit local communities and preserve our natural environment. Through deeper regional cooperation and forward-looking strategies, we can forge a more resilient, competitive, and sustainable future for ASEAN tourism.

The *ASEAN Tourism Outlook 2025* offers valuable insights into our region's progress, emerging trends, and strategic directions as we shape the ASEAN Tourism Sectoral Plan 2026-2030. I commend Malaysia for its important leadership in this initiative and extend my sincere appreciation to all ASEAN Member States, the Economic Research Institute for ASEAN and East Asia (ERIA), and UN Tourism for their contributions to this milestone publication.



Dr. Kao Kim Hourn  
Secretary-General of ASEAN

## Foreword

As ASEAN charts its course beyond 2025, tourism remains a vital driver of the region's economic growth and social integration. More than a key industry, tourism reflects ASEAN's rich cultural diversity, natural beauty, and community spirit. The sector's recovery and revitalisation following the COVID-19 pandemic have demonstrated not only the resilience of people but also capacity to innovate and adapt.

The *ASEAN Tourism Outlook 2025* captures this momentum. As ASEAN prepares for its post-2025 agenda, tourism will advance three strategic priorities: sustainability, digital transformation, and inclusive growth. The future of ASEAN tourism will be measured by the number of arrivals, quality, resilience, and sustainability.

Sustainability will be crucial in shaping ASEAN's tourism. The region's commitment to green transition and low-carbon development opens pathways to reimagine tourism by protecting the environment, enhancing community livelihoods, and strengthening climate resilience. Achieving this requires policies that promote green investments, sustainable infrastructure, and responsible travel practices.

Digital transformation is emerging as a catalyst for revitalising the sector. From data-driven marketing and smart destinations to digital payments and online travel platforms, innovation is transforming how visitors experience ASEAN and how local businesses engage in global value chains. Empowering MSMEs with digital tools and skills will be essential to ensure that tourism's digital future is inclusive and accessible.

Equally important is the inclusive dimension of tourism. A people-centred approach – one that empowers local communities, youth, and women entrepreneurs – can turn tourism into an engine of shared prosperity. The future of ASEAN tourism must ensure that growth is equitable and that every community can benefit from the opportunities of a more connected and digitalised region.

ERIA is proud to support ASEAN in this journey. Through policy research, capacity building, and regional co-operation, ERIA remains committed to helping ASEAN identify pathways for innovation, sustainability, and inclusiveness in tourism. This Outlook provides timely insights into emerging trends, investment priorities, and policy directions to guide ASEAN's collective action toward a resilient, sustainable, and inclusive tourism future.

The *ASEAN Tourism Outlook 2025* invites us to work together toward a shared vision where ASEAN's tourism sector continues to connect people, cultures, and economies while advancing the broader goal of sustainable and inclusive regional development.



**Tetsuya Watanabe**

**President of ERIA (Economic Research Institute for ASEAN and East Asia)**

## Acknowledgements

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Finally, the Report acknowledged excellent contribution of Hilmy Prilliadi, Denise Ann Kamano, Rian Malik Tambangi, and Mayka Risayatul Asnawiyah from ERIA in preparing the Report.

## Executive Summary

ASEAN tourism is almost back to a full recovery. As of end-June 2025, international tourist arrivals in ASEAN reached 92% of pre-crisis levels, with Viet Nam and Lao PDR exceeding 2019 arrivals, while Malaysia and Indonesia had almost fully recovered. That number is estimated to reach 96% by end of this year. This positive trend reflects the resilience of the region's tourism sector and the continued attractiveness of ASEAN destinations.

As a result of a strong recovery in arrivals, domestic earnings and export revenues from the tourism sector also grew strongly in 2024, reaching US\$132 billion and US\$150 billion, respectively. Although tourism receipts and total revenues are still below their pre-pandemic levels, the economic impact of tourism to the region's economic growth, employment, and exports of goods and services remains significant. In 2024, intra-ASEAN travel also continued to dominate as tourism sub-markets such as cruise industry and MICE exceeded pre-pandemic levels.

While the capacity of ASEAN tourism to rebound is encouraging, downside risks will impact the recovery, including the effects of evolving global trade dynamics and geopolitical tensions on tourism's growth prospects. Therefore, given the complex landscape facing the region's tourism sector, recovery is not enough. To achieve resilience, ASEAN tourism must not only bounce back; it must transform.

Three issues are central to the structural transformation of the tourism sector. First is evolving consumer behaviour and market segmentation. ASEAN's post-pandemic tourism recovery is not a simple return to pre-pandemic levels. Unlike in the past, today's tourists are more value driven. Safety and hygiene are now baseline requirements. Sustainability and cultural respect are no longer options but are essential elements of tourism value. More importantly, personalised approaches are key considerations for the choice of destinations. At the same time, new market segments and types of tourists have emerged such as conscious travellers, wellness travellers, cultural enthusiasts, and digital nomads. They represent high potential markets that can impact the choice of more diversified destinations.

Digitalisation is another domain to transform the ASEAN tourism sector. From key technologies such as artificial intelligence (AI) and digital personalisation like contactless payments and e-visas, integrating digital solutions across the tourism value chain is crucial to re-define visitor experiences, manage destinations, and build smart tourism ecosystems. These elements are essential to enhance the ASEAN tourism sector's competitiveness and resilience.

Finally, despite signs of recovery, ASEAN tourism still faces deep vulnerabilities like climate change, disasters, pandemics, social inequities, and economic downturns. While ASEAN has the right building blocks in place for sustainable and inclusive tourism, outcomes are uneven. For example, implementation costs and capacity gaps limit the adoption of sustainable standards; climate risks already affect key destinations; financing for green tourism and community projects is limited; and binding code for ethical and responsible tourism is lacking. Therefore, to ensure a sustainable future, tourism must transform itself. More actions are urgently needed.

Moving forward, the ASEAN tourism sector is well positioned to enter a new phase of expansion this year and in the next five years, with a total of 201 million international arrivals projected in 2030. Nonetheless, the lessons from the pandemic four years ago, and the current global uncertainties faced by the region, are clear: ASEAN tourism must continue to navigate ongoing challenges and issues such as consumer behaviour shifts and market segmentation, the impact of digital technologies and innovation, and tourism sustainability constraints. The goal is not only to achieve a more resilient tourism sector, but a sector that is more inclusive and sustainable to meet the challenges of the future.

This is the key message of *ASEAN Tourism Outlook 2025*.



Chapter 1

# ASEAN Tourism Trends and Outlook

# Chapter 1

## ASEAN Tourism Trends and Outlook

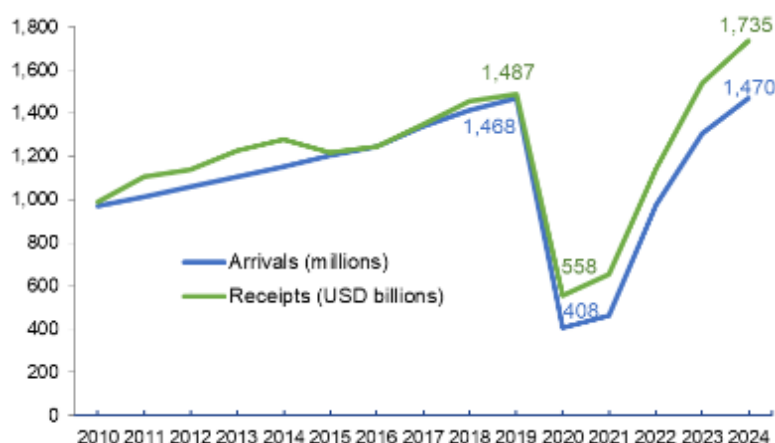
Tourism has long been a cornerstone of ASEAN’s economic growth and integration. Before the pandemic, the region attracted 138.5 million international arrivals and generated USD 146.9 billion in receipts in 2019.<sup>1</sup> After the sharp downturn of 2020–2021, the sector rebounded strongly, with 121 million arrivals and USD 132 billion in receipts recorded in 2024. Yet the recovery remains uneven: while some destinations have regained momentum, others continue to face structural constraints, from limited connectivity and workforce skills to climate vulnerability and fragmented governance. ASEAN stands at a transformative juncture in pursuing Vision 2025 under Malaysia’s Chairmanship theme of “inclusivity and sustainability.” Tourism is not only an engine of economic growth but also a catalyst for regional integration, social cohesion, and cultural preservation.

### 1.1. Global Tourism Market Trends

International tourism recovered pre-pandemic levels in 2024, with 1470 million international arrivals recorded globally, slightly above those in 2019, the year before the COVID-19 pandemic (Figure 1.1). By world regions, the Middle East experienced the strongest rebound, with arrivals in 2024 exceeding 2019 numbers by 41%, while Africa saw 7% more arrivals than in 2019. In Europe, international arrivals surpassed pre-pandemic levels by 2% in 2024, while the Americas (-0.5%) also practically recovered those levels. In contrast, Asia and the Pacific (-12%) was still rebounding from the crisis, due to slower re-opening and lifting of travel restrictions.

In the first half of 2025 over 690 million tourists travelled internationally, a 5% increase from the same period in 2024 and 4% above pre-pandemic year 2019. Data reflects strong travel demand from January to June, despite elevated tourism prices and mixed traveller confidence due to geopolitical and trade tensions. The recovery in Asia and the Pacific reached 92% in the first half of 2025 (-8% from the same period in 2019), while most regions continued to see sustained growth from 2024.

**Figure 1.1. International tourist arrivals and tourism receipts**



Source: World Tourism Organization (UN Tourism), September 2025

The September 2025 survey of the UN Panel of Tourism Experts points to high transport and accommodation costs and other economic factors as the main challenges impacting international

<sup>1</sup> ASEAN Secretariat (2023). Tourism: The Slow Path to Recovery. ASEAN Statistics Brief No. 11, November 2023.

tourism in 2025 (Figure 1.2). Tourism inflation is expected to ease from 8.0% in 2024 to 6.8% in 2025 (projections using tourism inflation proxy) but would remain well above the pre-pandemic value of 3.1% and above overall inflation (4.3%).

**Figure 1.2. Main factors weighing on international tourism in 2025 (% of experts mentioning each factor)**



Source: World Tourism Organization (UN Tourism), Panel of Tourism Experts Survey, September 2025

Globally, international tourism receipts reached a record USD 1.7 trillion in 2024, an 11% increase over 2023, and 14% over pre-pandemic year 2019 (adjusted for inflation and exchange rate fluctuations). Receipts recovered faster than international arrivals due to higher spending per trip during and after the pandemic. Travellers spent an average USD 1,160 per international trip in 2024 (in constant US dollars), above the pre-pandemic average of about USD 1,000 per trip.

Total export revenues from tourism, consisting of USD 1.7 trillion in international tourism receipts and USD 0.3 trillion in passenger transport fares, reached USD 2.0 trillion in 2024, the highest in the historical series. This represents 6% of the world's total exports and 23% of global exports of services, still slightly below the pre-pandemic 7% and 27% shares, respectively.

In terms of economic contribution, tourism directly accounted for 3% of global GDP in 2023, or USD 3.4 trillion, measured in tourism direct gross domestic product (TDGDP)<sup>2</sup> which includes both domestic and international tourism activities (data for 2024 still unavailable). This is below the 4% direct contribution in 2019, but roughly the same nominal value (current US dollars).

During the pandemic, tourism output declined to USD 1.6 trillion in 2020 and USD 1.8 trillion in 2021, about 2% of world GDP for both years. TDGDP has since recovered and estimated to have surpassed 2019 levels in 2024.

## 1.2. ASEAN Tourism Market Trends

In 2024, ASEAN destinations welcomed a combined 121 million international tourists (overnight visitors), which is 88% of the pre-pandemic value (-12% from 2019) as most destinations were still recovering from the 2020-2023 COVID-19 pandemic (Figure 1.3). Before the health crisis, ASEAN saw a record 138 million international arrivals (2019).

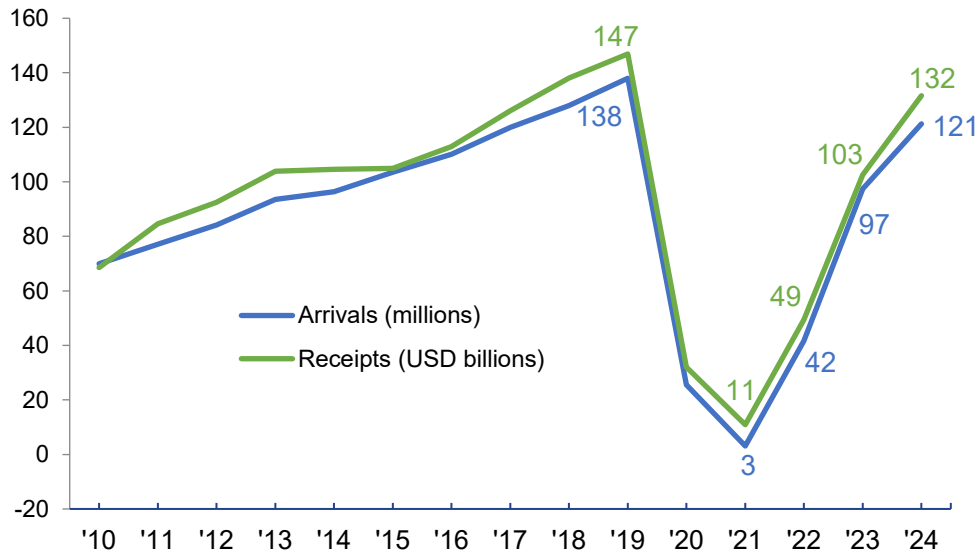
Due to travel restrictions and border shutdowns, arrivals in ASEAN dropped 81% in 2020 and remained 98% below pre-pandemic levels in 2021, meaning practically no international travel. A slow rebound

<sup>2</sup> See "Tourism Satellite Account: Recommended Methodological Framework, 2008" at: [www.e-unwto.org/doi/book/10.18111/9789211615203](http://www.e-unwto.org/doi/book/10.18111/9789211615203)

followed in 2022 with arrivals reaching 30% of pre-pandemic levels (-70% from 2019) and then 71% of those levels in 2023.

After an 88% recovery in 2024, international arrivals in ASEAN reached 92% of pre-crisis levels in the first half of 2025 (-8% compared to the same period of 2019). Globally, arrivals climbed 4% above 2019 levels those same months of 2025 due to stronger performance of other world regions.

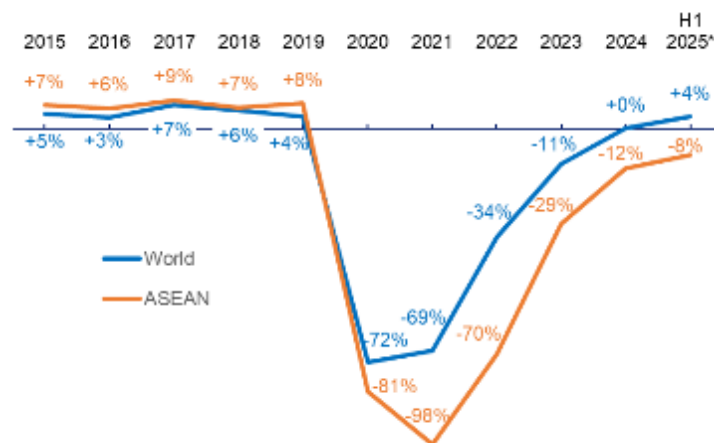
**Figure 1.3. ASEAN: International tourist arrivals and tourism receipts**



Source: World Tourism Organization (UN Tourism), September 2025

Historically, ASEAN destinations have grown faster than the world average, with international arrivals increasing an average 8% per year between 2009 and 2019, well above the global average of 5% per year during that decade (Figure 1.4). During the pandemic however, most Asia Pacific destinations have been slower to recover.

**Figure 1.4. International tourist arrivals, % change<sup>1</sup>**



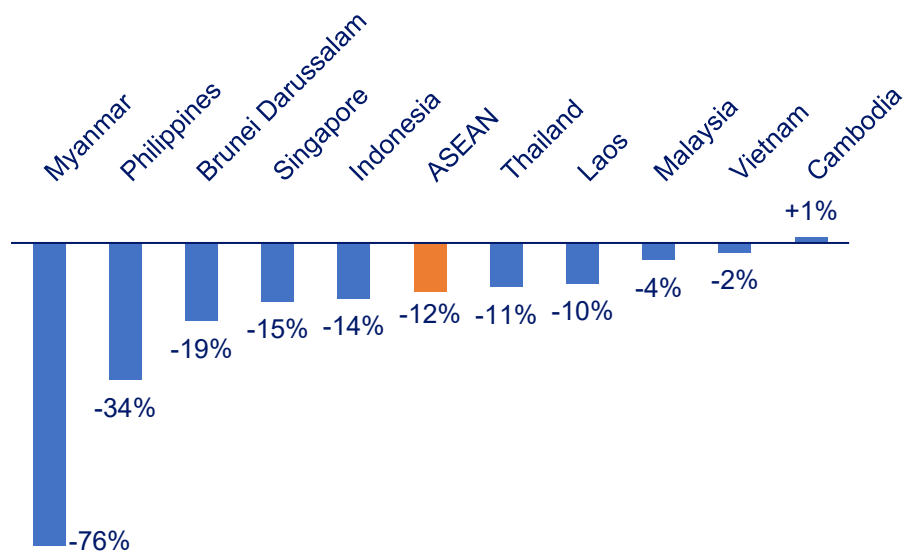
<sup>1</sup> Change for 2021 to H1 2025 is compared to 2019.

\* Data for H1 (first half of) 2025 is provisional.

Source: World Tourism Organization (UN Tourism), September 2025

Cambodia has been the fastest ASEAN destination to recover from the impacts of the pandemic, with arrivals climbing 1% above pre-pandemic levels in 2024, followed by Viet Nam and Malaysia where arrivals were 2% and 4% below 2019 levels, respectively, meaning a 98% and 96% recovery. Lao PDR and Thailand achieved a 90% and 89% recovery, also exceeding the 88% ASEAN average (Figure 1.5).

**Figure 1.5. International tourist arrivals, 2024 (% change from 2019)**



Source: World Tourism Organization (UN Tourism), September 2025

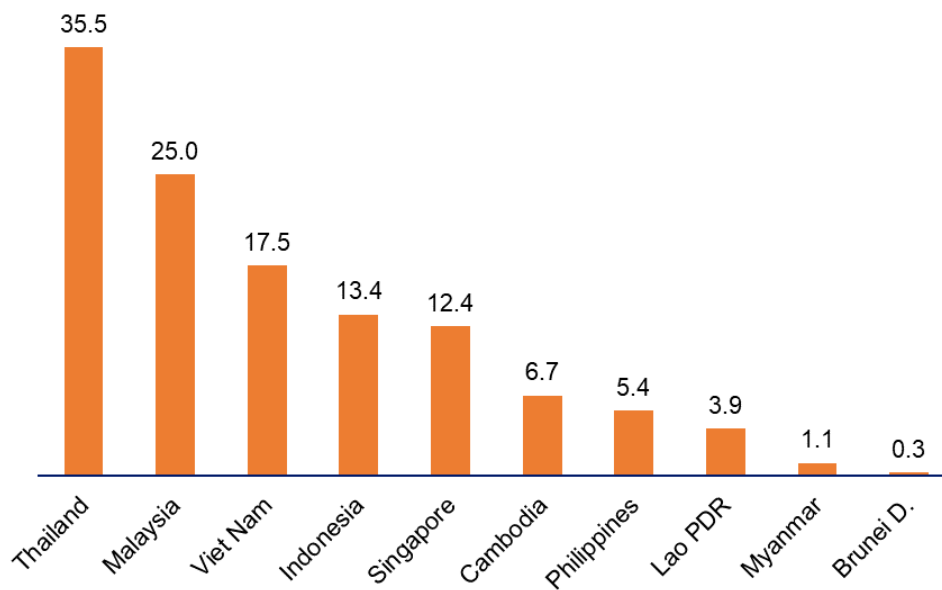
This faster pace of recovery is directly related to earlier dates of lifting of travel restrictions. In fact, the three countries with the highest rates of recovery in 2024 were also the first in ASEAN to remove all pandemic-related restrictions: Viet Nam (May 2022), Malaysia (August 2022) and Cambodia (October 2022).

The rebound in ASEAN destinations is also the result of the pace of recovery in outbound travel from the group’s main source markets, especially China. While the group saw a 37% decline in Chinese arrivals between 2019 and 2024, some destinations were able to compensate for this by attracting more visitors from other countries.

For example, Cambodia saw a 64% drop in Chinese tourists from 2019 to 2024, but a 90% increase in tourists from other ASEAN countries, mostly Thailand (+360%) and Viet Nam (+48%), its top two markets. Similarly, Viet Nam reported a 36% decline in arrivals from China, but 15% more tourists from ASEAN markets and 12% more from other countries in Asia Pacific, mostly the Republic of Korea (+6%) its top source market.

As of 2024, Thailand was the largest ASEAN destination, with 35.5 million international arrivals, or 29% of the group total. Malaysia saw 25 million international tourists, or 21% of the total, and Viet Nam 17.5 million, or 14% of the total. Indonesia and Singapore were the fourth and fifth largest destinations in 2024, with 13 million and 12 million arrivals, respectively (Figure 1.6).

**Figure 1.6. International tourist arrivals in ASEAN destinations (millions), 2024**

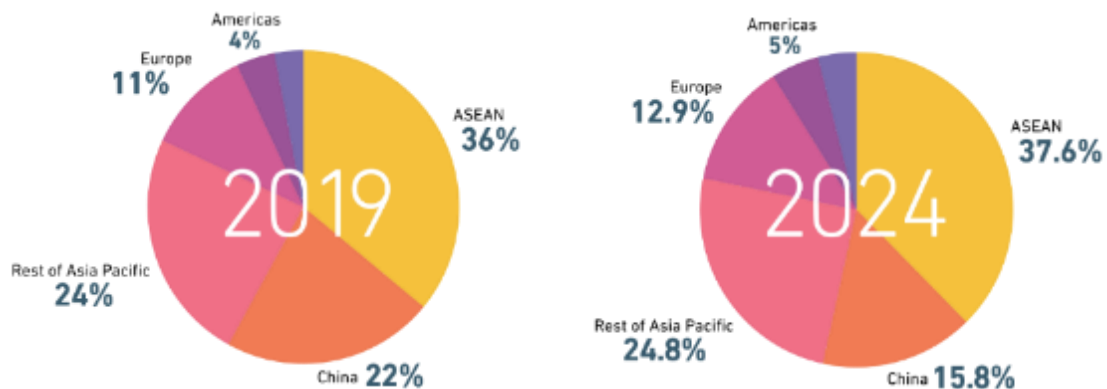


Source: World Tourism Organization (UN Tourism), September 2025

***Intra-ASEAN travel represents almost 40% of all international arrivals***

Before the COVID-19 crisis, 36% of all international arrivals in ASEAN destinations originated in ASEAN markets themselves, while 22% originated in China and 24% in other Asia Pacific markets. Thus, 82% of all international tourists visiting ASEAN destinations travelled from within Asia and the Pacific. Europe accounted for 11% of all arrivals in ASEAN, the Americas 5% and the Middle East and Africa 4%.

**Figure 1.7. Regional sources of international tourist arrivals in ASEAN destinations (%)**



Source: World Tourism Organization based on [ASEAN Stats Data Portal](#)

Data for 2024 shows slightly different proportions since international travel was still recovering in most countries and subject to lower connectivity. Still, ASEAN markets accounted for 38% of all arrivals in ASEAN destinations that year (Figure 1.7), China 16%, other Asian markets for 25%, Europe 13% and other regions 8% (Figure 1.8).

**Table 1.1. Top 15 sources of international tourist arrivals in ASEAN, 2019 and 2024**

2019				2024			
		(millions)	(%)			(millions)	(%)
1	China	32.3	22%	1	China	20.4	16%
2	Singapore	13.8	10%	2	Singapore	12.1	10%
3	Korea (ROK)	10.5	7%	3	Korea (ROK)	10.0	8%
4	Malaysia	9.6	7%	4	Malaysia	9.2	7%
5	Indonesia	8.4	6%	5	Indonesia	8.0	6%
6	Thailand	7.7	5%	6	Thailand	6.8	5%
7	Japan	5.7	4%	7	India	5.9	5%
8	India	5.3	4%	8	Australia	4.9	4%
9	United States	4.8	3%	9	United States	4.6	4%
10	Australia	4.5	3%	10	Viet Nam	4.3	3%
11	Viet Nam	4.1	3%	11	Taiwan (pr. of China)	3.7	3%
12	Taiwan (pr. of China)	3.2	2%	12	Japan	3.6	3%
13	United Kingdom	3.1	2%	13	Others	3.1	2%
14	Russia	2.6	2%	14	United Kingdom	2.9	2%
15	Philippines	2.4	2%	15	Russia	2.5	2%
16	Lao PDR	2.4	2%	16	Philippines	2.4	2%
	Other	23.4	16%		Other	22.7	18%

Source: World Tourism Organization (UN Tourism), September 2025 based on [ASEAN Stats Data Portal](#)

Note: the sum of arrivals in this table may not correspond to the totals for ASEAN mentioned in other parts of this report due to differences in the indicator used for each country (overnight visitors, versus overnight and same-day visitors, etc.).

Intra-ASEAN travel accounted for 38% of all arrivals in ASEAN destinations in 2024, that is 47.7 million international tourists. The main international travel corridors are land crossings between bordering ASEAN countries, though much travel also takes place by air and ferry.

**Table 1.2. Intra-ASEAN travel in 2024 (thousands of international tourist arrivals)**

Source: From	To											Total
		Brunei Darussalam	Cambodia	Indonesia	Lao PDR	Malaysia	Myanmar	Philippines	Singapore	Thailand	Viet Nam	
Brunei Darussalam		...	0.5	19.8	0.6	1,142	0.1	6.6	58	16	...	1,244
Cambodia		0.5	...	10	23	64	1.9	4.3	...	553	475	1,132
Indonesia		26	167	...	8.1	3,652	3.0	58	2,489	877	184	8,030
Lao PDR		0.2	334	3.0	...	19	0.7	1.2		1,124	149	1,631
Malaysia		74	94	2,271	22	...	6.1	100	1,185	4,952	495	9,199
Myanmar		1.6	37	49.2	19.9	115	...	9.2	149.3	547	...	927
Philippines		18	69	238	14	401	3.1	...	779	598	266	2,387
Singapore		20	46	1,405	8.6	9,100	7.4	198	...	1,010	347	12,142
Thailand		4.5	2,147	118	1,216	1,639	767	48	395	...	418	6,752
Viet Nam		4.6	1,341	105	1,054	330	9.4	59	393	984	...	4,280
<b>ASEAN Total</b>		<b>149</b>	<b>4,235</b>	<b>4,220</b>	<b>2,366</b>	<b>16,461</b>	<b>798</b>	<b>484</b>	<b>5,449</b>	<b>10,661</b>	<b>2,334</b>	<b>47,725</b>

Source: World Tourism Organization (UN Tourism), based on [ASEAN Stats Data Portal](#), September 2025. Data reported corresponds to either international tourists (overnight travellers), or visitors (overnight and same-day travellers).

The main ASEAN corridor is that of Singapore to Malaysia, which saw over 9 million crossings in 2024, mostly from Singapore to the Malaysian city of Johor Bahru. The second largest was Malaysia to Thailand, with almost 5 million international tourists, much of which from the Malaysian city of Padang Besar to the Thai city of Hat Yai (Figure 1.9).

The third largest travel corridor was Indonesia to Malaysia, with 3.7 million travellers in 2024, followed by Indonesia to Singapore (4th with 2.5 million), Malaysia to Indonesia (5th with 2.3 million) and Thailand to Cambodia (6th with 2.1 million). Other important corridors were Thailand to Malaysia (1.6 million travellers), Singapore to Indonesia (1.4 million), Viet Nam to Cambodia (1.3 million) and Thailand to Lao PDR (1.2 million).

Most international travel within ASEAN was still rebounding in 2024, with 60 out of 90 travel corridors (67%) below 2019 levels. Another 29% of these country pairs had recovered or exceeded pre-pandemic traveller numbers in 2024, indicating growing demand.

### ***Sectoral Performance: Air Transport, Cruise Tourism, MICE and Hospitality***

**Air passenger transport.** In Asia Pacific the recovery of international air capacity was also slower, reaching 71% of pre-crisis levels in 2023 (-29% from 2019) and 89% in 2024 (-11%). By the first semester of 2025 international air capacity reached 96% of pre-pandemic levels in the region (-4% from the same period of 2019).

In ASEAN, only a few countries had reported data on international air passenger traffic for 2024 (as of mid-September 2025), while the majority had done so for 2023 (See ASEAN Stats Data Portal).

The year 2023 saw a strong rebound in international air traffic, with passenger numbers more than doubling compared to 2022 in most ASEAN destinations. In 2023, Thailand reported the largest number of international passengers in ASEAN (61 million), followed by Singapore (59 million), Malaysia (39 million), Viet Nam (42 million) and Indonesia (37 million).

However, destinations reporting data for 2023 saw results below 2019 levels to varying degrees. While international air passenger traffic in the Philippines (-12% from 2019) and Singapore (-13%) came close to 90% of pre-pandemic levels, Thailand, Malaysia and Indonesia saw numbers 20% to 30% below 2019. The recovery was slower in Brunei Darussalam, Cambodia, Lao PDR and Myanmar (-50% to -65% from 2019 levels).

According to data available for 2024, international air passenger traffic in Lao PDR (96% of 2019 levels), Thailand (95%) and Malaysia (93%) approached pre-pandemic levels. In Lao PDR (+160%) international air traffic more than doubled in 2024 over 2023, while Malaysia and Thailand recorded an increase of 29% and 28% respectively.

Looking ahead, Indonesia will be the third top market by air passenger numbers in 2034 along with the United States and Canada, according to IATA's 20 Year Passenger Forecast Global Report. Other ASEAN countries are expected to be high ranked in the top 20 markets by passenger numbers: the Philippines 6<sup>th</sup>, Malaysia 8<sup>th</sup> and Singapore 14<sup>th</sup>.

**Airports.** According to the latest ranking by Airports Council International (ACI), Singapore and Bangkok (Thailand) and Kuala Lumpur (Malaysia) were among the world's top 20 busiest airports in 2024 by total passengers (enplaned and deplaned). Singapore (67.7 million passengers) ranked 15<sup>th</sup> and Bangkok 20<sup>th</sup> (62.2 million passengers)

By international passengers (enplaned and deplaned), Singapore ranked 4<sup>th</sup> with 67.0 million, and Kuala Lumpur (Malaysia) 14<sup>th</sup> with 41.9 million. In 2024, Singapore recorded 15% growth versus 2023 and virtually recovered pre-pandemic levels. Kuala Lumpur airport saw a strong 29% increase versus 2023 but remained 7% below 2019 numbers.

**Cruise tourism.** Data from CLIA shows that Singapore was the top cruise market in ASEAN, with 576,000 passengers in 2024. It was also the second largest in Asia, after China (931,000). Malaysia (86,000), Indonesia (38,000) and the Philippines (24,000) followed, while Thailand (10,000) and Viet Nam (5,000) represented a smaller share. All ASEAN markets exceeded pre-pandemic levels by 2023, a strong year for the cruise industry.

Cruise data reported by individual ASEAN destinations is still limited. According to available data, Singapore leads in terms of passengers, with more than 1.8 million cruise passengers in 2024 (2% above 2019 levels). Viet Nam received 248,000 cruise passengers in 2024, a number close to pre-pandemic levels (-6%). The Philippines welcomed 151,000 cruise passengers in 2024, also slightly below 2019 levels. Brunei Darussalam received 28,000 cruise passengers in 2024, twice as much as in 2019 and 2023.

**MICE.** ASEAN is a rapidly growing MICE hub, driven by major destinations like Singapore, Thailand, Malaysia and Indonesia, all investing significantly in event infrastructure and connectivity. Singapore is major player in the ASEAN region in terms of MICE capacity and innovation, offering world-class venues, seamless transport, and government incentives.

Incentives and regional cooperation through ASEAN's integration efforts boost cross-border business events, attracting more international associations and leveraging emerging markets like India and the Middle East.

According to ICCA Global Watch 2024 rankings, four ASEAN countries are featured in the Top 10 Country Rankings by association meetings for Asia: Thailand (5<sup>th</sup>), Singapore (6<sup>th</sup>), Malaysia (9<sup>th</sup>) and Indonesia (10<sup>th</sup>). Japan, China, the Republic of Korea and Australia took the top four spots.

Singapore ranked 3<sup>rd</sup> among the top 10 world cities hosting international association meetings after Vienna and Lisbon, with 144 international meetings. Kuala Lumpur (78 meetings) also saw a substantial improvement from 2023, jumping six places to 26<sup>th</sup> in the 2024 world ranking. Indonesia ranked 10<sup>th</sup> in Asia and 4<sup>th</sup> in ASEAN, with Bali as the highest-ranked city in the country.

**Hospitality.** Southeast Asia, the subregion including all ASEAN countries, saw lower occupancy rates in July 2025 compared to July 2019 (69% vs 74%). The subregion saw mixed results across destinations, partly due to economic uncertainty and softening demand, more room supply in some countries, or the search for alternative and budget accommodation by some segments.

Singapore and Thailand saw strong accommodation demand, with occupancy rates of 79% and 75% respectively in the first half of 2025 despite declining rates throughout this period.

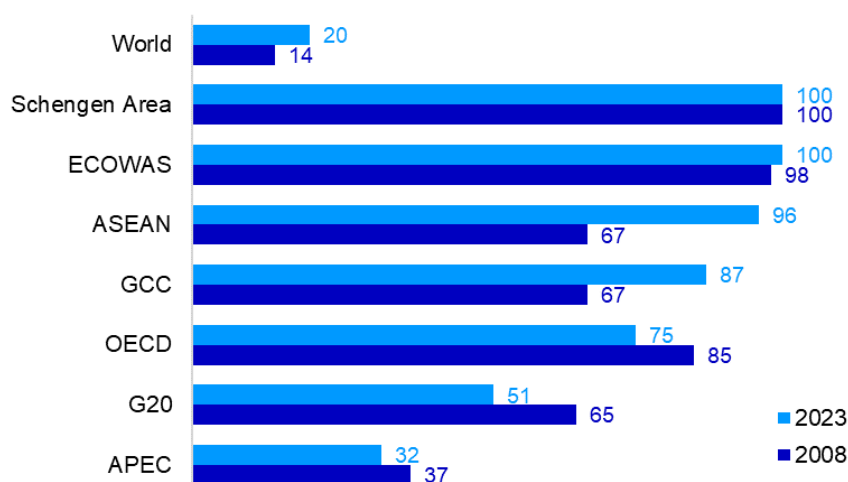
Viet Nam saw average occupancy rates of 70% in the first half of 2025, reflecting the strong increase in international arrivals in the same period.

**Visa Facilitation.** Simple visa procedures are one of the key drivers of tourism development. This is particularly relevant in recent years when travel decisions are often taken closer to the departure time and online offers can play a leading role in spurring last minute travel decisions.

A report by UN Tourism and the World Travel and Tourism Council for the G201 showed that visa facilitation has historically increased international tourist arrivals of affected markets by 5-25% following the implementation of policy changes. The actual gain depends largely on the specific visa facilitation actions taken and the markets affected.

For many countries, regional integration and policy reforms aimed at facilitating the free movement of people is ever more relevant within economic blocks. In terms of open visa policy reciprocity, ASEAN ranks third among economic blocks in 2023, after the Schengen Area and the Economic Community of West African States (ECOWAS), according to the Tourism Visa Openness Report 2023.

**Figure 1.8. Open visa policy reciprocity in selected economic and political blocs, 2008 and 2023 (%)**



Source: World Tourism Organization (2024)

While the OECD, G20 and APEC experienced slight decreases in open reciprocity between 2008 and 2023, ASEAN saw the most significant increase, with open reciprocity increasing from 67% in 2008 to 96% in 2023. Furthermore, ASEAN has a much higher level of open reciprocity among members than the world average of 20%.

At the country level, Malaysia, Singapore and Cambodia had the highest levels of openness in terms of tourism visas, with scores above 70 out of 100, according to the Tourism Visa Openness Report 2023 by UN Tourism (Figure 1.10).

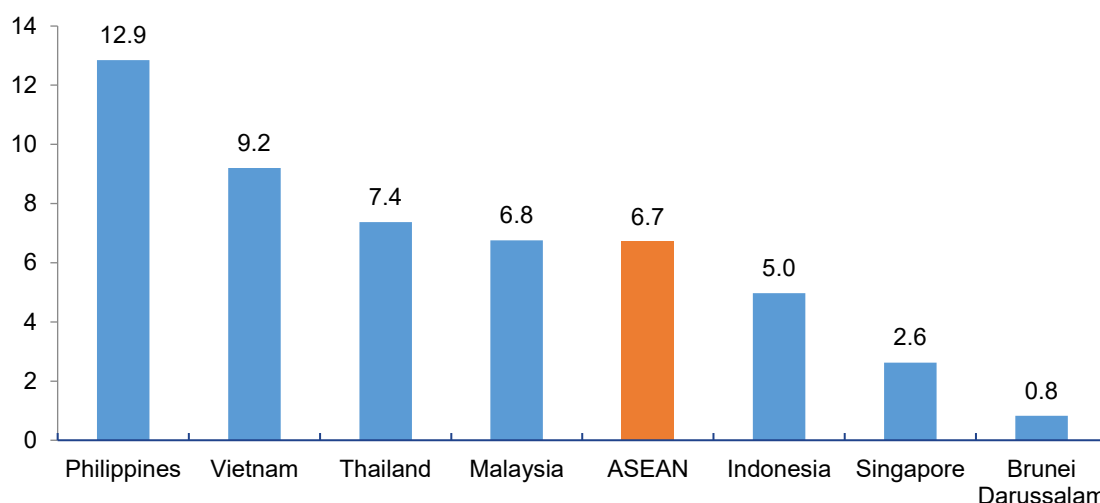
### 1.3. Tourism Economic Impact

The direct economic contribution of tourism is measured in tourism direct gross domestic product (TDGDP) which includes both domestic and international tourism output. The contribution can also be measured as an export of services, which includes international tourism receipts (visitor spending in destinations) and international passenger transport services.

The services or tertiary sector is the largest contributor to ASEAN economies making up 53.9% of the group’s combined GDP in 2023, consisting of wholesale and retail trade, transportation and accommodation, finance, and professional services, among others. The secondary sector (manufacturing, construction) contributes 30.3% to the group’s economy while the primary sector (agriculture and mining) makes up 15.8%.

Tourism Direct GDP. Before the pandemic, tourism directly account for 7% of ASEAN’s economic output, about USD 219 billion, based on available data on tourism direct gross domestic product (TDGDP) for 2019. The tourism contribution was highest in the Philippines, where tourism services accounted for 12.9% of the country’s economy in 2019, followed by Viet Nam (9.2%), Thailand (7.4%), Malaysia (6.8%) and Indonesia (5.0%). Available data for Singapore shows a 3% share of tourism output in 2015 and in Brunei Darussalam a 1% share in 2016 (Figure 1.11).

**Figure 1.9. Tourism direct GDP (TDGDP) as % of GDP (2019)\***

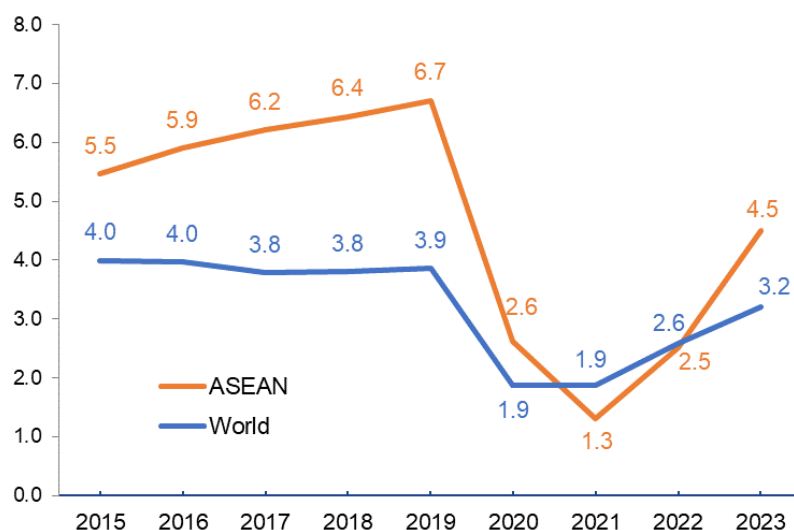


Source: World Tourism Organization (2023)  
 TDGDP data is not available for Cambodia, Lao PDR and Myanmar  
 \*All data is for 2019, except for Brunei Darussalam (2016) and Singapore (2015)

During the pandemic, aggregate TDGDP in ASEAN declined to USD 81 billion in 2020 and USD 44 billion in 2021, with the share also dropping to 3% and 1% of GDP, respectively, due to lockdowns and travel restrictions.

With a recovery of mostly domestic but also international tourism, TDGDP in ASEAN reached an estimated USD 171 billion in 2023, representing 4.5% of the group's combined GDP, though still below the 7% share in 2019. (Figure 1.12); data still unavailable for 2024).

**Figure 1.10. Tourism direct GDP (TDGDP) as % of GDP**

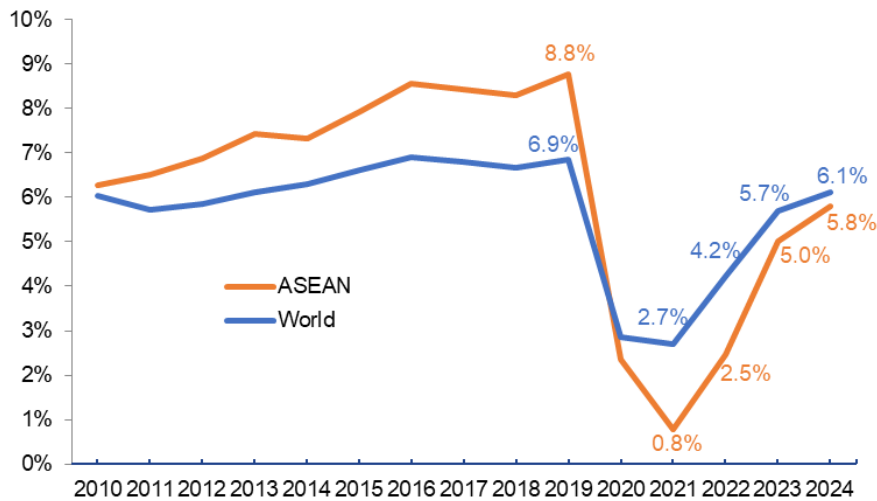


Source: World Tourism Organization (2024)

**International tourism as an export of services.** Total exports of goods and services in ASEAN reached USD 2.6 trillion in 2024, after recovering pre-pandemic levels in 2021 and growing continuously thereafter. Merchandise exports amounted to USD 1.9 trillion or 75% of total exports, mostly electrical machinery, mineral fuels and oils. Services exports reached USD 0.65 trillion or 25% of the group's total exports in 2024, much of which business services, transport and tourism.

As an export of services, tourism consists of international tourism receipts (visitor spending in destinations), which is recorded under the 'Travel' credit item in the Balance of payments of the destination country, and 'Passenger transport' services rendered to non-residents. It is often a major source of foreign currency earnings for destinations, creating much-needed employment and opportunities for development.

**Figure 1.11. International tourism revenues as a % of total exports of goods and services**



Source: World Tourism Organization (2024)

In 2024, ASEAN destinations earned a total USD 150 billion in export revenues from tourism, about 89% of the pre-pandemic value (-11% from 2019). This consisted of USD 132 billion in receipts and USD 18 billion in passenger transport services. Thus, tourism accounted for 6% of the group's total exports, slightly below the pre-pandemic 8% to 9% share (Figure 1.13). Tourism revenues also accounted for 23% of ASEAN's exports of services, below the 36% share in 2019.

**Figure 1.12. International tourism receipts, 2024 (real % change from 2019)**



Source: World Tourism Organization (2024)  
Data still unavailable for Lao PDR and Myanmar

In 2024 Malaysia (+16%), Singapore (+15%) and Viet Nam (+3%) had already surpassed 2019 values, while Brunei Darussalam (-41%), Cambodia (-23%) and Thailand (-19%) were still recovering (Figure 1.14).

The largest earners of tourism receipts in 2024 were Thailand, with USD 43 billion, about 32% of the ASEAN total, Singapore, with USD 24 billion (18% of the total), Malaysia USD, 21 billion (16%) and Indonesia, USD 17 billion (13%).

**Employment.** Data on tourism employment is limited due to the complex and cross-sectoral nature of the industry. Among ASEAN countries, Philippines reported 7.1 million persons employed in the tourism sector in 2019, about 17% of the country's workforce. Viet Nam had 3.9 million persons employed in tourism (7% of the country's total), Malaysia 3.6 million (24%) and Myanmar 1.4 million (6%). Data for Brunei Darussalam points to 27,000 workers attributed to the tourism sector, 12% of total employment according to ILO data.

Investing in data collection and statistical infrastructure in many countries would improve the comprehensiveness of tourism employment information to better analyse this important social and economic component of the tourism sector.

**Investment.** According to the 'fDi Tourism Investment report 2024 in collaboration with UN Tourism', the Asia-Pacific region ranked as the second-most attractive market for tourism projects, attracting 366 greenfield foreign direct investment (FDI) projects. This represented an estimated USD 36.2 billion in investment and over 65,000 new jobs.

The number of tourism-related FDI projects in the region grew from 42 to 67 between 2022 and 2023, with investment rising by 125%. However, the number of FDI projects remained below half those recorded in 2019. Although capital investment in Asia Pacific increased by 125% from 2022 to 2023, this is only 11% of pre-pandemic levels, indicating a somewhat cautious attitude by investors.

#### 1.4. ASEAN Tourism Outlook

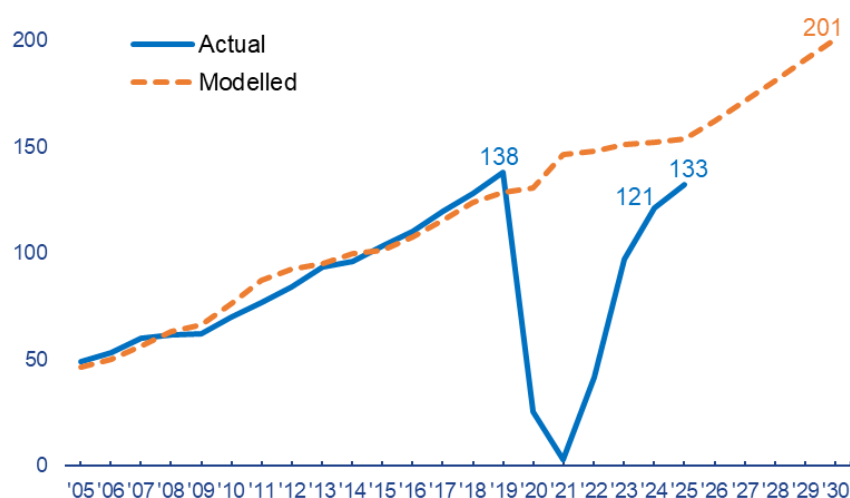
Based on the latest trends and available country data for January through June 2025, we estimate international tourist arrivals in ASEAN will reach 133 million by the end of 2025, which is a 96% recovery (-4% from 2019).

To forecast international arrivals in ASEAN through 2030, three econometric models were built using historical data for 1990 to 2019, and projections by the IMF on three indicators considered explanatory variables: Asia Pacific gross domestic product (GDP), Asia Pacific GDP per capita, and Asia Pacific population.

Asia Pacific's GDP and population are considered sound explanatory variables since roughly 80% of international tourist arrivals in ASEAN destinations originate in Asia Pacific markets and these variables are well correlated with arrivals in ASEAN. The coefficients of determination ( $R^2$ ) for the three models were: 0.97 (GDP model), 0.95 (GDP p. capita model) and 0.99 (population model).

Based on a combination of the three statistical models, a total of 201 million international arrivals is forecast for ASEAN in 2030. This represents a 51% increase in arrivals in five years, 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 (Figure 1.15).

**Figure 1.13. International tourist arrivals in ASEAN: actual\* and modelled (millions)**



Source: World Tourism Organization (2024)

\*Data for 2025 (133 million) is a projection based on monthly data for January-June

### Key Drivers and Risks to the Forecast

The 2030 forecast is explained by strong economic growth in the next five years and factors such as increased connectivity, improved infrastructure and visa relaxation across most destinations which will continue to boost travel at a slightly faster pace than in the years prior to the pandemic. The specific **drivers** of growth in international tourism up to 2030 in ASEAN include:

- Strong GDP growth of about 4% per year in Asia and the Pacific up to 2030.
- Rising affluence of travellers and urbanisation in key source markets.
- Increased connectivity within the ASEAN region and with other source markets.
- Increasing digitalisation and use of mobile travel apps.
- Visa-free arrangements and faster processes (see section on Visa policies).
- Investment in tourism infrastructure, including roads, ports and airports.
- Tourism promotion and development of new tourism products and attractions.

Economic growth is one of the main drivers of travel demand, and Asia Pacific output is expected to grow roughly 4% per year between 2025 and 2030 according to the IMF, exceeding the 3% growth of the world economy during that period. The ASEAN group itself is expected to grow 4.3% per year until 2030.

Among individual ASEAN economies, the Philippines (+6.1% per year), Viet Nam (+5.0%), Indonesia (+4.9%) and Cambodia (+4.6%) are projected to see the strongest growth in GDP until 2030, above the ASEAN average of 4.3%. China, ASEAN's top source of arrivals, is expected to grow 3.9% per year between 2025 and 2030.

These favourable projections, together with the rising affluence of explain the 2030 prospects for international travel. GDP per capita in Asia is expected to grow from USD 8,600 in 2025, to USD 11,300 in 2030, almost 20% growth in real terms.

Most countries responding to an ASEAN Tourism Outlook Questionnaire in August–September 2025 mentioned strategic plans to increase inbound tourism by building or expanding infrastructure to improve access by air, land or sea, increasing hotel capacity, strengthening or redeveloping existing local destinations and developing specific tourism products such as coastal, natural and community-based tourism.

The ongoing commitment to tourism promotion, product diversification and capacity-building in the context of sustainable practices, as well as to increased intra-ASEAN collaboration, underpins the sector's promising outlook.

However, a variety of **risks** could also impact international travel in the coming years and disrupt the forecast. These include geopolitical tensions in the region, economic uncertainty, the effects of climate change or health and safety challenges. The specific risks to growth in international tourism in ASEAN through 2030 include:

- Geopolitical tensions or conflicts, global or regional
- Political unrest and instability, safety-related issues
- Economic slowdowns or uncertainty
- Slower growth in outbound travel from source markets like China
- High inflation or currency volatility, impacting affordability of travel
- Climate change and natural disasters
- Health and safety risks, resulting in travel restrictions
- Competition from other destinations in Asia and the Pacific or beyond

Diplomatic tension among countries, including trade disputes or regional conflicts can impact international tourism as they can lead to restrictions or consumer reluctance to travel to or from those countries. Destinations perceived as problematic from an entry point of view, or as unsafe due to tensions or conflicts, are often avoided by travellers.

Economic downturns are also an important risk since lower disposable income makes travellers more cautious about spending. International travel is often seen as a discretionary expense, so consumers sometimes postpone or cancel travel plans when economic troubles arise.

Inflation in tourism services has been a major challenge for many countries around the world despite easing somewhat in 2025. Global tourism inflation (based on UN Tourism's inflation proxy) declined from 8.0% in 2024, to 6.8% in 2025 (projection) but could remain elevated well into 2026. Most ASEAN economies recorded moderate to low inflation in 2024 and 2025.

Individual destinations could face a range of difficulties such as a shortage of skilled workers, exchange rate volatility, or the reliance on a small number of source markets. Despite the scale and variety of challenges, the forecast assumes limited or no significant impact from the above risks to international travel in the period 2025–2030.

## 1.5. Conclusion and Policy Implications

In the context of the post-pandemic recovery and given the current tourism trends, the following tourism policy and strategy components can be considered by ASEAN countries to help achieve 2030 objectives in developing a more competitive, smarter and sustainable tourism sector.

**Continued policy support** will be critical to support the ongoing recovery of some ASEAN destinations. Adequate tourism policies, regulatory frameworks, investment, inclusive planning and governance are crucial to ensuring tourism benefits are shared by all community members, promoting social equity and inclusion.

**Product diversification:** ASEAN destinations can take advantage of their immense natural and cultural assets and world-class attractions to invest in innovative products and infrastructure, while leveraging on digital technology. These products can be linked to a more sustainable, authentic and responsible experience. Rural, mountain ecological and wellness tourism have emerged as popular traveller choices.

**Developing rural tourism:** As tourists look for lesser-known destinations and off-the-beaten track travel, tourism in rural areas offers important opportunities. The development of rural tourism can

represent an effective tool to stimulate local growth and spread the benefits generated by tourism beyond the urban areas. ASEAN countries can promote rural transformation and sustainable practices under the Best Tourism Villages Initiative by UN Tourism.

**Seasonality:** Important cultural, historical and natural resources are valuable assets which can help promote tourism all year round. Integrating sports, culture, events, cruise, medical, shopping and gastronomy tourism helps spread the tourism offer throughout the year, reducing seasonality, attracting visitors in shoulder seasons, and contributing to the regeneration of destinations.

**Infrastructure:** Public infrastructure such as highways, bridges, railways and airports can help unlock the full potential of revenue-generation and job creation through tourism, while serving other urban and regional development purposes.

**Targeting new markets:** ASEAN destinations can take advantage of their strategic geographical location to further diversify and attract leading Asian source markets, but also established and fast-growing markets in Europe or the Middle East. Improved land and air access harmonised safety and security protocols, as well as visa facilitation and digitalised travel procedures will help to reach this target.

**Market intelligence systems:** It is critical to enhance measurement to better manage tourism through data and research. Data-driven policies support effective decision-making. Strengthening data collection and analysis improves the understanding of international and domestic traveller preferences and helps to better target traditional and potential source markets and segments.

**Increasing cooperation:** ASEAN destinations can join efforts and learn from each other considering the post-pandemic era. Collaboration between countries, public-private partnerships and close cooperation with UN Tourism and other international bodies such as the Asian Development Bank can help attract green investments, foster the exchange of knowledge and best practices and strengthen capacity-building.

**Capacity building** to enhance human resources capabilities and professional skills, especially in the face of digitalisation and technological advancements such as artificial intelligence (AI) and deepen their knowledge.

**Digital marketing and promotion:** the effective use of digital marketing and data analysis can help destinations in ASEAN gain a competitive advantage and enhance visibility. Digital campaigns that can promote the region but also can target the domestic, regional and international traveller. Targeted marketing campaigns can help attract segments such as Gen Z, silver or luxury.

**Sustainability and accessibility** as key competitive factors: As travellers and investors become increasingly aware of environmental issues, supporting policies and products based on sustainability and accessibility can provide ASEAN destinations with a strong competitive advantage and a unique selling point. Collaborative work between destinations helps ensure the protection of heritage and biodiversity, better prepares for climate action and promotes accessibility. UN Tourism initiatives such as the International Network of Sustainable Tourism Observatories (INSTO) and Measuring Sustainable Tourism (MST) can also guide policies to promote sustainable tourism.

## Statistical Annex

International Tourist Arrivals								%share of:	
Series	(thousands)							Asia Pac.	ASEAN
	2018	2019	2020	2021	2022	2023	2024	2024	2024
<b>World</b>	<b>1,415 mn</b>	<b>1,468 mn</b>	<b>408 mn</b>	<b>461 mn</b>	<b>976 mn</b>	<b>1,307 mn</b>	<b>1,470 mn</b>	..	..
<b>Asia and the Pacific</b>	<b>348,049</b>	<b>362,115</b>	<b>59,025</b>	<b>26,523</b>	<b>92,678</b>	<b>237,784</b>	<b>317,830</b>	<b>100%</b>	..
<b>ASEAN</b>	<b>127,916</b>	<b>137,993</b>	<b>25,540</b>	<b>3,094</b>	<b>41,624</b>	<b>97,474</b>	<b>121,278</b>	<b>38%</b>	<b>100%</b>
Brunei Darussalam TF	278	333	62	4	36	134	268	0.1%	0.2%
Cambodia TF	6,201	6,611	1,306	196	2,277	5,453	6,700	2.1%	5.5%
Indonesia VF	15,810	16,107	4,053	1,558	5,889	11,678	13,887	4.4%	11.5%
Lao PDR TF	3,770	4,384	812	..	1,203	3,147	3,943	1.2%	3.3%
Malaysia TF	25,832	26,101	4,333	135	10,071	20,142	25,017	7.9%	20.6%
Myanmar TF	3,551	4,364	903	131	233	1,285	1,063	0.3%	0.9%
Philippines TF	7,168	8,261	1,483	164	2,654	5,003	5,439	1.7%	4.5%
Singapore TF	14,043	14,560	2,164	84	4,675	10,256	12,432	3.9%	10.3%
Thailand TF	38,178	39,916	6,725	511	11,065	28,150	35,546	11.2%	29.3%
Viet Nam VF	15,498	18,009	3,837	157	3,661	12,602	17,472	5.5%	14.4%

Source: World Tourism Organization (UN Tourism), September 2025

Note: Total arrivals for ASEAN may not correspond to sum of individual countries due to differences in indicator used for group estimate.

TF: International tourist arrivals at frontiers (overnight visitors, ie. excluding same-day visitors)

VF: International visitor arrivals at frontiers (overnight and same-day visitors)

International Tourist Arrivals														
Series	Annual change (%)						Monthly change (%)							
	over previous year						2025 over 2024*							
	'19/18	'20/19	'21/20	'22/21	'23/22	'24/23	YTD <sup>1</sup>	Jan.	Feb.	Mar.	Apr.	May	Jun.	
<b>World</b>	<b>3.7</b>	<b>-72.2</b>	<b>13.1</b>	<b>111</b>	<b>34.0</b>	<b>12.4</b>	<b>5.0</b>	<b>12.0</b>	<b>3.5</b>	<b>0.7</b>	<b>10.5</b>	<b>3.0</b>	<b>2.2</b>	
<b>Asia and the Pacific</b>	<b>4.0</b>	<b>-83.7</b>	<b>-55.1</b>	<b>249</b>	<b>157</b>	<b>33.7</b>	<b>10.7</b>	<b>25.5</b>	<b>5.6</b>	<b>8.8</b>	<b>12.8</b>	<b>10.2</b>	<b>2.2</b>	
<b>ASEAN</b>	<b>6.4</b>	<b>-81.5</b>	<b>-88.6</b>	<b>↑</b>	<b>134</b>	<b>24.6</b>	<b>5.5</b>	<b>24.0</b>	<b>1.2</b>	<b>0.1</b>	<b>3.8</b>	<b>3.7</b>	<b>0.5</b>	
Brunei Darussalam TF	19.8	-81.3	-94.3	908	274	101	TF	6.2	13.3	45.4	-3.3	5.9	4.4	-21.3
Cambodia TF	6.6	-80.2	-85.0	↑	140	22.9	TF	6.2	13.3	45.4	-3.3	5.9	4.4	-21.3
Indonesia VF	1.9	-74.8	-61.6	278	98	18.9	VF	9.4	24.6	-3.7	-5.5	9.1	14.0	18.2
Lao PDR TF	16.3	-81.5	..	..	162	25.3	VF	11.3	16.1	9.6	8.2			
Malaysia TF	1.0	-83.4	-96.9	↑	100	24.2	TF	8.8	38.8	-5.1	-1.6	13.8	10.7	1.7
Myanmar TF	22.9	-79.3	-85.5	78.3	450	-17.3	TF	-29.9	-31.7	-27.7				
Philippines TF	15.2	-82.1	-88.9	↑	89	8.7	TF	-2.8	6.7	-8.4	-5.9	-6.1	-1.5	-2.1
Singapore TF	3.7	-85.1	-96.1	↑	119	21.2	TF	-0.4	10.3	-2.4	-17.1	1.9	6.7	-0.2
Thailand TF	4.6	-83.2	-92.4	↑	154	26.3	TF	-4.7	22.2	-6.9	-8.8	-7.6	-13.9	-15.2
Viet Nam VF	16.2	-78.7	-95.9	↑	244	39.5	VF	20.7	36.9	23.7	28.5	6.3	10.5	17.1

Source: World Tourism Organization (UN Tourism), September 2025

\* Provisional data

<sup>1</sup>Year-to-date (YTD) is change in total arrivals for January to June 2025 (or months with available data) compared to same months in 2024.

TF: International tourist arrivals at frontiers (overnight visitors, ie. excluding same-day visitors)

VF: International visitor arrivals at frontiers (overnight and same-day visitors)

Arrows (↑) indicate percent change above 1000.

## International Tourist Arrivals

	Annual change (%)					Series	Monthly Change (%)						
	over 2019						2025 over 2019*						
	'20/19	'21/19	'22/19	'23/19	'24/19		YTD <sup>1</sup>	Jan.	Feb.	Mar.	Apr.	May	Jun.
<b>World</b>	<b>-72.2</b>	<b>-68.6</b>	<b>-33.5</b>	<b>-10.9</b>	<b>0.2</b>		<b>3.7</b>	<b>8.5</b>	<b>4.9</b>	<b>0.1</b>	<b>2.7</b>	<b>4.8</b>	<b>1.9</b>
<b>Asia and the Pacific</b>	<b>-83.7</b>	<b>-92.7</b>	<b>-74.4</b>	<b>-34.3</b>	<b>-12.2</b>		<b>-8.2</b>	<b>-0.9</b>	<b>-10.1</b>	<b>-10.5</b>	<b>-9.3</b>	<b>-7.2</b>	<b>-11.2</b>
<b>ASEAN</b>	<b>-81.5</b>	<b>-97.9</b>	<b>-69.9</b>	<b>-29.4</b>	<b>-12.1</b>		<b>-8.0</b>	<b>2.7</b>	<b>-10.6</b>	<b>-12.1</b>	<b>-11.4</b>	<b>-5.8</b>	<b>-11.2</b>
Brunei Darussalam	-81.3	-98.9	-89.3	-59.9	-19.5	TF							
Cambodia	-80.2	-97.0	-65.6	-17.5	1.4	TF	0.8	-5.5	9.1	-9.3	5.1	15.7	-8.1
Indonesia	-74.8	-90.3	-63.4	-27.5	-13.7	VF	-8.6	-3.8	-17.8	-24.9	-8.6	4.5	-1.3
Lao PDR	-81.5	..	-72.6	-28.2	-10.0	VF	18.6	32.3	19.3	6.5			
Malaysia	-83.4	-99.5	-61.4	-22.8	-4.2	TF	-3.8	12.0	-14.4	-12.0	-7.8	1.6	-1.6
Myanmar	-79.3	-97.0	-94.6	-70.6	-75.6	TF	-46.1	-41.3	-50.5				
Philippines	-82.1	-98.0	-67.9	-39.4	-34.2	TF	-33.9	-20.1	-34.1	-37.4	-39.1	-36.2	-37.8
Singapore	-85.1	-99.4	-67.9	-29.6	-14.6	TF	-13.8	-8.3	-8.6	-21.2	-12.6	-10.5	-22.0
Thailand	-83.2	-98.7	-72.3	-29.5	-10.9	TF	-15.7	-0.1	-13.4	-21.8	-20.8	-17.2	-24.0
Viet Nam	-78.7	-99.1	-79.7	-30.0	-2.4	VF	25.7	37.9	19.3	45.7	12.7	15.2	23.4

Source: World Tourism Organization (UN Tourism), September 2025

\* Provisional data

<sup>1</sup> Year-to-date (YTD) is change in total arrivals for January to June 2025 (or months with available data) compared to same months in 2024.

TF: International tourist arrivals at frontiers (overnight visitors, ie. excluding same-day visitors)

VF: International visitor arrivals at frontiers (overnight and same-day visitors)

## Total Export Revenues from International Tourism<sup>1</sup>

	USD billions						%share of tourism in:			
							Total Exports		Services Exports	
	2019	2020	2021	2022	2023	2024	2019	2024	2019	2024
<b>World</b>	<b>1,741</b>	<b>657</b>	<b>770</b>	<b>1,362</b>	<b>1,812</b>	<b>2,030</b>	<b>6.9%</b>	<b>6.1%</b>	<b>27.4%</b>	<b>23.1%</b>
<b>Asia and the Pacific</b>	<b>486.8</b>	<b>142.5</b>	<b>100.9</b>	<b>180.9</b>	<b>381.1</b>	<b>470.1</b>	<b>5.8%</b>	<b>4.2%</b>	<b>30.6%</b>	<b>21.5%</b>
<b>ASEAN</b>	<b>164.3</b>	<b>40.2</b>	<b>16.5</b>	<b>60.4</b>	<b>117.8</b>	<b>150.0</b>	<b>8.8%</b>	<b>5.8%</b>	<b>36.5%</b>	<b>23.3%</b>
Brunei Darussalam	..	..	..	..	..	0.3	..	3%	..	73%
Cambodia	5.3	1.1	0.2	1.5	3.3	3.9	25%	12%	87%	79%
Indonesia	18.4	3.6	0.5	7.1	14.6	17.7	9%	6%	58%	46%
Lao PDR	1.0	0.2	0.0	0.3	1.0	1.3	14%	12%	83%	..
Malaysia	22.2	3.4	0.1	8.0	18.0	24.4	9%	8%	54%	46%
Myanmar	2.5	..	..	..	..	..	14%	..	37%	..
Philippines	11.5	2.5	1.0	5.2	10.6	11.2	12%	10%	28%	22%
Singapore	..	..	..	..	..	..	..	..	..	..
Thailand	64.4	14.6	5.3	16.4	32.6	46.6	20%	13%	79%	65%
Viet Nam	..	..	..	..	..	..	..	..	..	..

Source: World Tourism Organization (UN Tourism), September 2025

<sup>1</sup> Export revenues from tourism consists of international tourism receipts and passenger transport earnings.

Missing data is due to no available data on international tourism receipts or on passenger transport.

## International Tourism Receipts

	USD billions							%share of:	
	2018	2019	2020	2021	2022	2023	2024	Asia Pac.	ASEAN
								2024	2024
<b>World</b>	<b>1,457.0</b>	<b>1,487.4</b>	<b>557.9</b>	<b>655.6</b>	<b>1,141.9</b>	<b>1,537.5</b>	<b>1,734.7</b>	..	..
<b>Asia and the Pacific</b>	<b>435.1</b>	<b>441.2</b>	<b>127.3</b>	<b>90.7</b>	<b>158.4</b>	<b>341.4</b>	<b>423.6</b>	<b>100%</b>	..
<b>ASEAN</b>	<b>138.0</b>	<b>146.9</b>	<b>32.0</b>	<b>10.9</b>	<b>49.4</b>	<b>102.6</b>	<b>131.6</b>	<b>31%</b>	<b>100%</b>
Brunei Darussalam	0.2	0.2	0.0	0.0	0.0	0.1	0.1	0.0%	0.1%
Cambodia	4.4	4.8	1.0	0.2	1.4	3.1	3.6	0.9%	2.8%
Indonesia	16.4	16.9	3.4	0.5	6.8	14.0	16.7	3.9%	12.7%
Lao PDR	0.8	0.9	0.2	0.0	0.3	1.0	1.3	0.3%	1.0%
Malaysia	19.6	19.8	3.0	0.1	6.5	14.9	20.8	4.9%	15.8%
Myanmar	1.7	2.5	..	..	..	..	..	..	..
Philippines	8.2	9.8	1.8	0.6	4.2	9.1	9.7	2.3%	7.4%
Singapore	20.3	20.3	5.5	4.0	11.4	20.8	23.8	5.6%	18.1%
Thailand	56.4	59.8	13.4	5.1	14.9	29.7	42.7	10.1%	32.5%
Viet Nam	10.1	11.8	3.2	0.1	3.8	9.2	12.2	2.9%	9.3%

Source: World Tourism Organization (UN Tourism), September 2025

## International Tourism Receipts

	Basis	% Change <sup>1</sup> over previous year					% Change <sup>1</sup> over 2019				
		'20/19	'21/20	'22/21	'23/22	'24/23	'20/19	'21/19	'22/19	'23/19	'24/19
		<b>World</b>	<b>-62.7</b>	<b>11.5</b>	<b>73.0</b>	<b>28.7</b>	<b>10.6</b>	<b>-62.7</b>	<b>-58.2</b>	<b>-23.8</b>	<b>-1.2</b>
<b>Asia and the Pacific</b>	<b>-71.3</b>	<b>-32.1</b>	<b>78.1</b>	<b>114.0</b>	<b>23.8</b>	<b>-71.3</b>	<b>-80.4</b>	<b>-63.4</b>	<b>-23.2</b>	<b>-4.2</b>	
<b>ASEAN</b>	<b>-78.1</b>	<b>-66.6</b>	<b>356</b>	<b>102</b>	<b>27.6</b>	<b>-78.1</b>	<b>-92.7</b>	<b>-66.2</b>	<b>-32.0</b>	<b>-10.9</b>	
Brunei Darussalam	\$	-82.6	-94.5	566	416	79.5	-82.6	-99.0	-93.7	-67.2	-41.2
Cambodia		-78.6	-81.8	671	118	16.9	-78.6	-96.1	-70.0	-34.6	-23.5
Indonesia	\$	-80.0	-84.6	↑	106	19.3	-80.0	-96.9	-59.9	-17.2	-1.2
Lao PDR	\$	-77.2	-99.4	↑	294	24.4	-77.2	-99.9	-71.7	11.6	38.8
Malaysia		-84.8	-97.4	↑	137	40.1	-84.8	-99.6	-65.1	-17.2	16.0
Myanmar	\$	..	..	..	..	..	..	..	..	..	..
Philippines	\$	-81.7	-66.5	595	118	6.5	-81.7	-93.9	-57.3	-6.8	-0.7
Singapore		-72.9	-28.3	191	77	14.3	-72.9	-80.5	-43.4	0.5	14.8
Thailand		-77.4	-60.9	218	98	45.9	-77.4	-91.2	-71.9	-44.4	-18.9
Viet Nam	\$	-72.7	-95.4	↑	138	33.1	-72.7	-98.7	-67.5	-22.6	3.0

Source: World Tourism Organization (UN Tourism), September 2025

<sup>1</sup> Change for countries is in local currencies unless "Basis" column indicates "\$" (in US dollars). Change for country groups is in constant prices.

## Gross Domestic Product (GDP)

	USD billions							% share of	
								Asia Pac.	ASEAN
	2018	2019	2020	2021	2022	2023	2024	2024	2024
<b>World</b>	<b>86,772</b>	<b>88,027</b>	<b>85,764</b>	<b>97,844</b>	<b>101,948</b>	<b>106,432</b>	<b>110,549</b>	..	..
<b>Asia and the Pacific</b>	<b>30,616</b>	<b>31,286</b>	<b>31,345</b>	<b>36,073</b>	<b>35,928</b>	<b>36,316</b>	<b>37,245</b>	<b>100%</b>	..
<b>ASEAN</b>	<b>3,068</b>	<b>3,265</b>	<b>3,085</b>	<b>3,395</b>	<b>3,680</b>	<b>3,797</b>	<b>3,951</b>	<b>11%</b>	<b>100%</b>
Brunei Darussalam	14	13	12	14	17	15	15	0.04%	0.4%
Cambodia	33	37	35	37	40	43	47	0.1%	1.2%
Indonesia	1,042	1,119	1,059	1,187	1,319	1,371	1,396	3.7%	35.3%
Lao PDR	18	19	19	19	15	15	16	0.0%	0.4%
Malaysia	359	365	337	374	408	400	420	1.1%	10.6%
Myanmar	67	83	66	58	62	61	61	0.2%	1.5%
Philippines	347	377	362	394	404	437	462	1.2%	11.7%
Singapore	377	376	349	437	509	505	547	1.5%	13.9%
Thailand	507	544	500	506	496	516	526	1.4%	13.3%
Viet Nam	304	332	346	370	411	433	459	1.2%	11.6%

Source: International Monetary Fund (IMF), April 2025 World Economic Outlook (WEO)

ASEAN: Association of South-East Asian Nations

## Population

	Millions							% share of	
								Asia Pac.	ASEAN
	2018	2019	2020	2021	2022	2023	2024	2024	2024
<b>World</b>	<b>7,728</b>	<b>7,809</b>	<b>7,885</b>	<b>7,952</b>	<b>8,019</b>	<b>8,090</b>	<b>8,160</b>	..	..
<b>Asia and the Pacific</b>	<b>4,248</b>	<b>4,283</b>	<b>4,315</b>	<b>4,340</b>	<b>4,364</b>	<b>4,390</b>	<b>4,373</b>	<b>12%</b>	..
<b>ASEAN</b>	<b>648</b>	<b>656</b>	<b>663</b>	<b>668</b>	<b>674</b>	<b>680</b>	<b>686</b>	<b>2%</b>	<b>17%</b>
Brunei Darussalam	0.4	0.5	0.4	0.4	0.4	0.5	0.5	0.0%	0.0%
Cambodia	16	16	16	17	17	17	17	0.0%	0.4%
Indonesia	264	267	270	273	276	279	282	0.8%	7.1%
Lao PDR	7	7	7	7	7	8	8	0.0%	0.2%
Malaysia	32	33	32	33	33	33	33	0.1%	0.8%
Myanmar	53	53	54	54	54	55	55	0.1%	1.4%
Philippines	106	107	109	110	111	112	113	0.3%	2.9%
Singapore	6	6	6	5	6	6	6	0.0%	0.2%
Thailand	69	70	70	70	70	70	70	0.2%	1.8%
Viet Nam	95	96	98	99	99	100	101	0.3%	2.6%

Source: International Monetary Fund (IMF), April 2025 WEO

ASEAN: Association of South-East Asian Nations



Chapter 2

# Evolving Consumer Behaviour and Market Segmentation

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# Evolving Consumer Behaviour and Market Segmentation

Tourist expectations in ASEAN have fundamentally shifted in the post-pandemic era, with safety, robust health protocols, and reduced crowding becoming central to destination choice, along with greater emphasis on sustainability, authenticity, and positive community impact. The rapid uptake of digital travel planning, driven by online platforms and social media, now enables tourists to make informed and personalised decisions while also shaping on-site behaviour. To ensure tourism growth aligns with evolving consumer values and sustainability priorities, ASEAN's regional strategies must adapt to these new realities and support responsible development.

### 2.1. Rationale: Importance of Consumer Behaviour and Segmentation

Businesses must tailor products and services to meet evolving client preferences and motivations. Understanding consumer behaviour helps to align tourism offerings with consumer expectations. Market segmentation breaks the broader market into smaller groups based on shared traits, enabling targeted marketing and personalised experiences to boost customer satisfaction and optimise resource use (Wasaya, Prentice, & Hsiao, 2024; Song et al., 2025; George, 2025).

Demographic segmentation offers a broad, static view assuming group homogeneity. While psychographic segmentation considers lifestyles, values, and psychological factors, allowing a deeper understanding of consumer needs and more precise targeting aligned with changing tourist demands. By identifying who travels, why, and how preferences evolve, stakeholders may make informed decisions about investments, workforce development, and sustainable practices. Integrating consumer insights also enhances community engagement, fostering mutual benefits that support sustainable tourism development fostering mutual benefits for both businesses and local communities, leading to sustainable development outcomes (Kumar et al., 2025; Ramesh, 2022).

An assessment of online travel agency (OTA) websites and ASEAN governments' tourism literature reveals a variety of reasons for tourism, as classified below:

*Cultural tourism:* Experiences in heritage, traditions, architecture, arts, and festivals, e.g., Angkor Wat (Cambodia), Borobudur (Indonesia), Hôi An (Viet Nam), the Omar Ali Saifuddien Mosque and The Royal Regalia Museum (Brunei Darussalam) etc.

*Heritage tourism:* Focuses on historic towns and UNESCO World Heritage Sites e.g., George Town and Melaka (Malaysia), Luang Prabang (Laos), Bagan (Myanmar) etc.

*Eco-tourism:* Promotes sustainable travel in natural environments that support conservation and community benefits, with highlights including Kinabalu Park and Taman Negara (Malaysia), Komodo National Park (Indonesia), Kulen Promtep Park (Cambodia) etc.

*Nature-based tourism:* Centres on natural landscapes and biodiversity, featuring locations like Halong Bay (Viet Nam), Inle Lake (Myanmar), Danum Valley (Malaysia), Ulu Temburong National Park (Brunei Darussalam) etc.

*Beach and marine tourism:* Provides leisure in coastal and island settings, with popular destinations such as Bali (Indonesia), Palawan (Philippines), Phuket (Thailand), Preah Sihanouk Province (Cambodia), etc.

*Adventure tourism:* Encompasses outdoor activities and sports like trekking Mt. Rinjani (Indonesia), rock climbing in Krabi (Thailand), diving in Sipadan (Malaysia), wreck diving (Brunei Darussalam) etc.

*Urban and MICE (Meetings, Incentives, Conferences, and Exhibitions) tourism:* Thrives in metropolitan centres e.g., Marina Bay Sands (Singapore), Bangkok's Convention Centre (Thailand), Kuala Lumpur (Malaysia).

*Health and wellness tourism:* Caters to relaxation and medical treatments through Thai spa resorts, Balinese yoga retreats, Singapore's wellness hubs etc.

*Medical tourism:* Offers specialized healthcare services e.g., Singapore, Bangkok, Penang, Kuala Lumpur etc.

*Community-based tourism:* Promotes culture and livelihoods via homestays in Lao PDR, hill tribe villages in Thailand, indigenous experiences in Malaysia, and community tourism in Banteay Chhmar, Cambodia.

*Culinary and gastronomy tourism:* Showcases food and drink traditions, featuring Penang street food, Vietnamese pho tours, Filipino food festivals, and Phnom Penh's Chaktomuk Walk Street.

*Creative tourism:* Encourages active participation in local arts, such as batik workshops in Indonesia, Thai cooking classes, and Vietnamese handicraft villages.

*Agri-tourism:* Links tourists to farming and rural life activities, including rice planting in Bali, durian farms in Malaysia, and cacao farms in the Philippines.

*Educational tourism:* involves study abroad, language programmes, and short-term courses offered in Singapore, the Philippines, Brunei Darussalam, Thailand, and Malaysia.

*Cruise tourism:* Develops coastal and river cruises, with Halong Bay cruises in Viet Nam, the Singapore cruise hub, and Mekong River cruises as prime examples.

*Experiential and thematic tourism:* Builds around themes like heritage trails, eco-village routes, and ASEAN tourism circuits, providing structured travel experiences that highlight regional culture and nature.

ASEAN member states have unique strengths, challenges, and consumer profiles. Singapore serves as a high-value business and leisure hub with world-class infrastructure (Mena-Navarro et al., 2022). Thailand balances mass-market, wellness, and cultural tourism, while Indonesia attracts both luxury and backpacker (Sangkakorn & Krajangchom, 2024; Chutimant, 2025; Nirmalasari et al., 2025; Syamsu & Nugroho, 2024). The Philippines focuses on beach and marine tourism, and Brunei Darussalam, Lao PDR, and Myanmar specialize in niche markets centred on cultural authenticity, nature, and adventure (Cabral et al., 2025). Lao PDR positions itself on nature-based and heritage tourism (e.g., Luang Prabang) (World Bank, 2020), Myanmar relies on iconic cultural landscapes such as Bagan and protected natural areas, albeit within a constrained volatile market context. Brunei Darussalam focuses on preserving its cultural, religious, and natural heritage while developing niche segments such as sustainable/eco-tourism, CBT etc. With vast rainforests, sites like Ulu Temburong National Park, and over 30 CBT initiatives, it is well positioned to expand sustainable, high-value tourism experience (AMRO, 2024; ASEAN & ERIA, 2024). Malaysia attracts large intra-regional tourist flows from Singapore and Indonesia while also strengthening long-haul markets like China (Tourism Malaysia, 2025; Reuters, 2025). Viet Nam combines strong demand from nearby South Korea and China with a rapidly growing appeal to intercontinental visitors, underscoring their dual reliance on regional and long-haul segments (Viet Nam National Authority of Tourism, 2025).

Consumer behaviour may be shaped by global trends as well as local supply conditions. Recognising the ASEAN diversity would enable development of tailored approaches to leverage their comparative advantages.

## 2.2. Key Shifts in Post-Pandemic Traveller Behaviour

The COVID-19 pandemic has fundamentally changed travel preferences and risk perceptions, leading to new priorities and expectations across the tourism landscape.

*Heightened Health, Safety, and Hygiene concerns:* ASEAN governments launched health certification schemes such as Thailand's (SHA+)<sup>3</sup> and Singapore's SG Clean<sup>4</sup>, which have since become central to branding strategies aimed at maintaining consumer confidence and signalling ongoing preparedness. Families and older tourists, vulnerable to health risks, look for destinations with reliable hospitals, emergency services, and transparent crisis communication (Vlot et al., 2021; Shafiee et al., 2023). This incurs greater demand for urban centres and resorts with robust infrastructure, while encouraging rural destinations demonstrating preparedness through trained staff, partnerships with local clinics, and clear hygiene protocols.

*Booking flexibility and insurance:* These were limited pre-pandemic, with non-refundable options and rare insurance purchases. Post-pandemic trends emphasise flexible, refundable bookings and "cancel for any reason" insurance e.g., Indonesia's Bali Booking Refund scheme, The Philippines' COVID-specific insurance bundles etc.

*Nature-based and wellness travel:* Once niche and associated with luxury, this has now become mainstream, focusing on mental health, nature immersion, and spiritual tourism, leading to the rise of eco-retreats and rural tourism in Viet Nam and northern Thailand, and Bali's status as a global wellness hub.

*Environmental and ethical concerns:* These were previously limited as the sector focused on volume and economic growth. Now, regenerative tourism and sustainability metrics like carbon and water usage matter greatly e.g., Boracay's pre-pandemic environmental closure inspired eco-zoning in Palawan and Komodo post-pandemic.

*Technology & Contactless Services:* This progressed from paper-based processes and in-person check-ins to contactless tech, biometric IDs, mobile health passports, and AI personalisation e.g. Malaysia's MySejahtera app, Viet Nam's QR health passes, Brunei Darussalam's E-Arrival Card and BruHealth app etc. exemplify this technological shift.

*Inclusive, female and solo travel:* The post-pandemic era has seen growth in solo, female, LGBTQ+, and inclusive travel, prioritizing safety and authenticity. Thai operators launched all-female spiritual packages, and Singapore promoted inclusive events like the SG Pride tourism initiative.

*Micro-Trips & Spontaneous Booking:* Travel bookings moved from longer lead times and structured tours favouring international travel to shorter booking windows and spontaneous trips. Weekend getaways, staycations, and local discovery have grown, with domestic tourism surging in Laos and Indonesia. Viet Nam's 'Rediscover Local' campaign encouraged urban dwellers to explore nearby provinces.

*Destination Resilience & Overtourism Management:* Pre-pandemic, tourism was seen as central to GDP with focus on international arrivals and little attention to capacity limits. The post-pandemic focus shifted to domestic markets, with measures such as park closures, visitor caps, and decentralization to second-tier cities. Indonesia imposed tourist limits on Komodo Island, and Thailand introduced closed-season schedules in national parks to promote regeneration.

### Sustainable and Responsible Tourism

Sustainability is a now mainstream concern and expectation in the ASEAN, translating into growth of eco-lodges, renewable energy initiatives, and products supporting conservation e.g., Borneo's

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<sup>3</sup> <https://www.thailandsha.com/en>

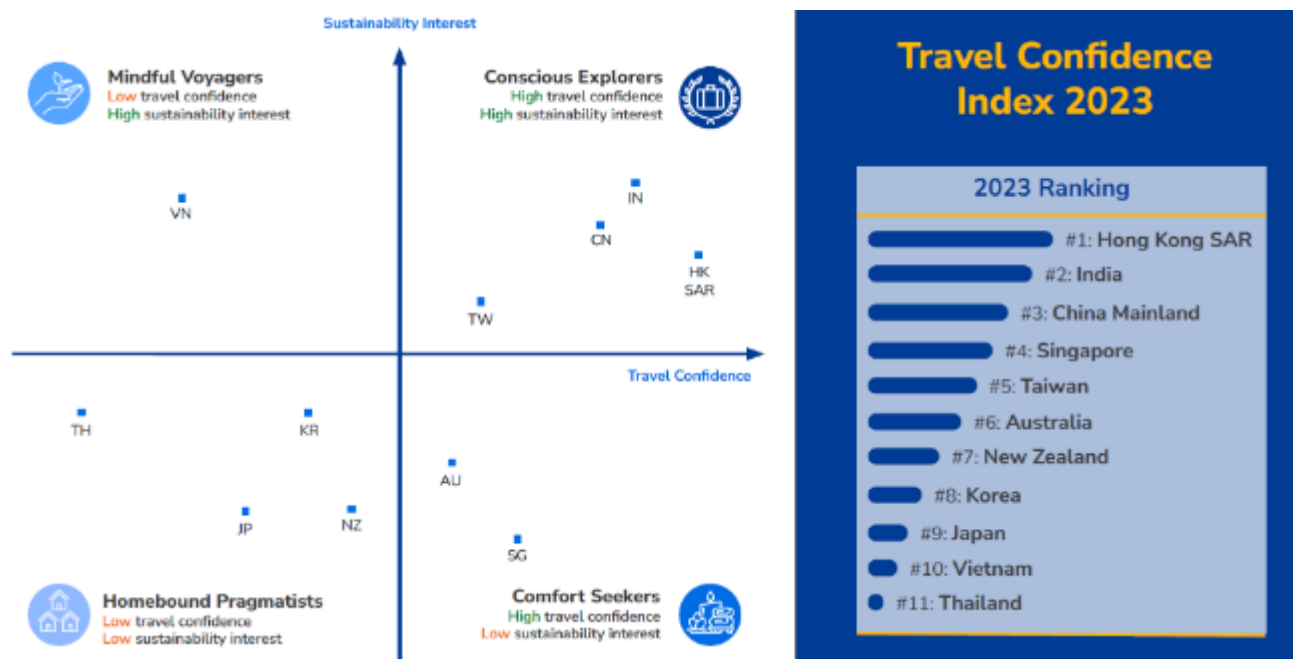
<sup>4</sup> <https://www.nea.gov.sg/media/news/news/index/sg-clean-campaign-launched-to-rally-public-and-businesses-to-work-together-to-keep-singapore-clean>

community-run wildlife sanctuaries which contribute directly to conservation and local welfare<sup>5</sup> (Kibtiah & Assgaf, 2024).

According to Booking.com’s research, in 2025 tourists’ priorities are shifting from purely eco-focused to community-centric, with 53% considering tourism’s impact on local communities as well as the environment. While 57% perceive tourism as beneficial, concerns remain over traffic (38%), littering (35%), overcrowding (30%), and rising living costs (29%). Rather than limiting visitor numbers (favoured by only 16%), most prioritise investment in transport (38%), waste management (37%), and conservation (32%) to balance growth and benefits for residents. Authenticity and economic reciprocity are increasing, as 73% want their spending to support local communities and 77% seek culturally authentic experiences, reflecting resident reports that visitors respect customs (53%) and support local businesses (54%). Sustainable travel is now mainstream with 84% believing it is important, 93% aiming to make sustainable choices, and behaviours like turning off HVAC (67% in 2023, up from 43% in 2020), off-peak travel (39%), and choosing alternative destinations (36%) becoming routine<sup>6</sup>.

In addition, Booking.com’s ‘Sustainability Interest vs Travel Confidence’ matrix (Figure 2.1) rankings show that Viet Nam and Thailand occupy the 10<sup>th</sup> and 11<sup>th</sup> places respectively, indicating travellers’ high sustainability interest and travel confidence<sup>7</sup>.

**Figure 2.1. Booking.com's 'Sustainability Matrix vs Travel Confidence' and Travel Confidence Index 2023**



Source: Booking.com’s ‘Travel Confidence Index, 2023

Tourists are prioritising social responsibility and cultural integrity, by evaluating whether tourism benefits host communities, ensures fair wages, and respects cultural traditions (Brajcich, 2024). This shift echoes global concerns about overtourism’s negative effects, including cultural commodification, and the growing demand for ethical cultural tourism that supports local businesses and preserves heritage (Sustainability Directory, 2025). Rising scepticism about greenwashing also underscores the need for credible third-party certifications and verification (Kjeldahl, 2024). Destinations that deliver measurable sustainability outcomes and uphold ethical standards are likely to gain favour with conscious tourists.

<sup>5</sup><https://justnature.travel/2024/05/03/community-based-ecotourism-success-stories-from-borneo/#:~:text=Located%20in%20Sabah%2C%20the%20Kinabatangan,monkey%20and%20Bornean%20pygmy%20elephant.>

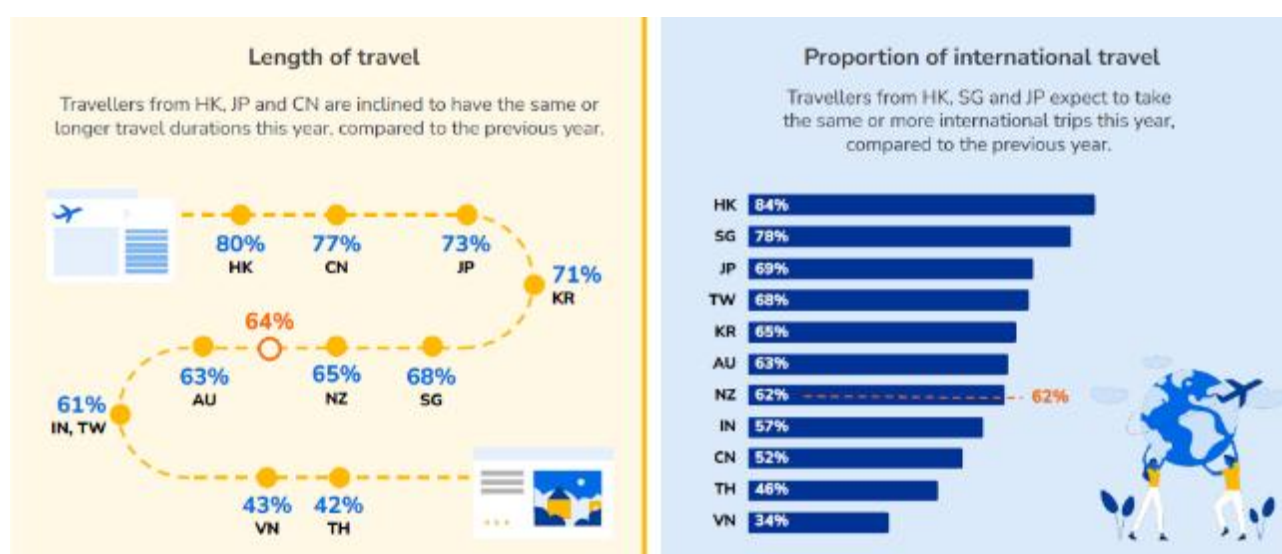
<sup>6</sup> <https://news.booking.com/bookingcoms-2025-research-reveals-growing-traveler-awareness-of-tourism-impact-on-communities-both-at-home-and-abroad/>

<sup>7</sup> <https://news.booking.com/wanderlust-over-wallets-travel-confidence-holds-up-for-over-half-of-apac-travellers-despite-economic-headwinds/>

**Change in Length of Stay (LoS) and Travel (LoT):** LoS<sup>8</sup> measures the number of nights spent at a destination or accommodation, calculated from check-in to check-out, and serves as a key metric in hospitality for analyzing occupancy, spending, and operational trends. While LoT<sup>9</sup> refers to the total duration of a trip from departure to return, which may span several destinations.

Changes in trip duration shape per-trip emissions, economic benefit distribution, and destination management. Longer stays dilute the fixed emissions of long-distance transport over more days, reduce daily impacts, and encourage a shift to low-carbon local activities. Strategic approaches that promote fewer, but longer, trips, supported by sustainable transport and certified accommodations, may reduce overall footprints while sustaining spending, in line with climate mitigation pathways in tourism research. For destination management, extended stays help spread demand across secondary areas, reduce overcrowding, stabilize seasonality, and boost local revenues, supporting both climate and socioeconomic goals<sup>10,11</sup>. Figure 2.2 illustrates expected trip durations and the likelihood of APAC travellers taking as many or more international trips compared to previous years.

**Figure 2.2. Change in length of travel**



Source: Booking.com's Travel Confidence Index 2023, p.6 of 125

The research<sup>12</sup> also highlights a divide in travel patterns across South and Southeast Asia, with some markets favouring longer, more international trips, while others prefer shorter, regional travel. Markets like Hong Kong, Singapore, and Japan show strong outbound momentum, where majorities anticipate the same or more international trips this year (HK 84%, SG 78%, JP 69%), and a tendency toward maintaining or extending trip length. These markets are well positioned for premium, long-stay products, certified accommodations, and public transport-friendly itineraries that support higher-value, lower-impact travel.

In contrast, Thailand and Viet Nam have fewer travellers planning longer trips (TH 42%, VN 43%) or more international travel (TH 46%, VN 34%). For these segments, appealing propositions centre on nearby destinations, efficient routes, and "sustainability by default" features e.g., rail-first options, local sourcing, and clear waste and water standards at midscale price points.

Middle-tier markets, like Australia, New Zealand, Taiwan, Korea, and India, show moderate outlooks with steady or slightly increased trip durations and mixed intent for international travel. Here, modular

<sup>8</sup> <https://chatlyn.com/en/glossary/length-of-stay-los/>

<sup>9</sup> [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Tourism\\_trip\\_length](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Tourism_trip_length)

<sup>10</sup> <https://pmc.ncbi.nlm.nih.gov/articles/PMC9859042/>

<sup>11</sup> <https://pmc.ncbi.nlm.nih.gov/articles/PMC7274965/>

<sup>12</sup> <https://www.tourismticker.com/wp-content/uploads/2023/07/Booking.com-Travel-Confidence-Index-2023-New-Zealand.pdf> (p.10 of 49)

products like flexible cancellations, off-peak incentives, and stay-longer discounts, encourage longer trips, helping to lower emissions per day and spread economic benefits locally.

These segmentation trends suggest strategies that combine premium offers in high-confidence hubs with convenience and value-driven, sustainable options in more cautious markets—aligning growth with practical levers like length of stay optimisation, off-peak travel, and measurable community benefits.

**“Bleisure” and Work-from-Anywhere Trends:** The expansion of remote work and “bleisure” travel has blurred business–leisure boundaries, driving longer stays and increased spending<sup>13</sup>. Bali, Chiang Mai, Penang, and Ho Chi Minh City have thriving digital nomad hubs, supported by remote work visas and flexible accommodation options<sup>14</sup><sup>15</sup><sup>16</sup>. The global bleisure travel market reached \$315.3 billion in 2025 and is projected to more than double by 2032, spurred by remote and hybrid work models<sup>17</sup><sup>18</sup>.

ASEAN may capitalize on this by improving digital infrastructure and offering amenities. However, rising demand may inflate housing costs, strain public services, and raise environmental concerns<sup>19</sup>. Sustainable policies are essential to balance economic gains with local community well-being and infrastructure sustainability.

**Flexible Booking Preferences:** Traveller uncertainty during the pandemic led to a strong preference for flexible booking, with most tourists valuing lenient cancellation, rebooking, and refund policies above pre-pandemic standards<sup>20</sup>. OTAs and airlines that adapted quickly won traveller loyalty by revising cancellation and refund policies<sup>21</sup>. For Small and Medium Enterprises (SME), flexibility is both a challenge and an opportunity, as those offering refundable deposits or rescheduling may stand out but face financial strain, emphasizing the need for resilient policy support<sup>22</sup>. Providing flexibility challenges providers relying on advance bookings, but also enables dynamic pricing and last-minute promotions. Hotels with flexible policies show improved OTA rankings and occupancy, indicating flexibility may enhance competitiveness<sup>23</sup>. The concept of value now extends beyond price and convenience to encompass safety, authenticity, sustainability, and personal enrichment, with tourists willing to pay more for meaningful experiences (Pulido-Fernández & López-Sánchez, 2016). For ASEAN destinations, success now means highlighting unique selling points and maintaining quality and safety standards to appeal to tourists seeking more than just low-cost options.

### 2.3. Key Market Segments

**Generational Segments:** As digital natives, Millennials (born 1980-1995) and Gen Z (born mid-1990s onwards), use online platforms for travel inspiration and bookings, preferring adventure-based, immersive experiences and destinations that prioritize cultural authenticity over crowds (Peek Pro, 2025; Digital Natives on the Move, 2024). To attract them, providers may emphasize affordability, digital convenience, flexible options, and credible sustainability.

Baby Boomers (born 1946-1964), traditionally drawn to cruises and packaged tours, are now adopting digital booking tools but still value personalised support (CBI, 2024; McKinsey & Company, 2024). Their priorities include cultural enrichment, wellness, safety, robust health infrastructure, and accessible amenities. ASEAN destinations like Viet Nam, Malaysia, and Myanmar are well-suited to catering to Boomers’ preferences in comfort and wellness offers strong returns for providers.

<sup>13</sup><https://www.forbes.com/sites/blakemorgan/2022/06/27/what-is-bleisure-travel-and-how-is-it-transforming-the-hospitality-industry/>

<sup>14</sup><https://bali.com/guide-to-moving-and-living-in-bali/digital-nomads-bali/>

<sup>15</sup><https://kr-asia.com/embracing-the-digital-nomad-lifestyle-southeast-asias-remote-work-revolution>

<sup>16</sup><https://www.thedigitalnomad.asia/inspiration/digital-nomads/digital-nomad-visa-in-asia/>

<sup>17</sup><https://www.alliedmarketresearch.com/bleisure-travel-market-A06357>

<sup>18</sup><https://www.americanexpress.com/en-us/business/trends-and-insights/articles/the-blurred-lines-of-bleisure-travel-demands-updated-policies/>

<sup>19</sup><https://www.netsuite.com/portal/resource/articles/erp/hospitality-industry-trends.shtml>

<sup>20</sup><https://www.phocuswright.com/Travel-Research/Research-Updates/2021/seven-in-ten-Travellers-prioritize-flexible-booking>

<sup>21</sup><https://medium.com/travel-marketing-insights/why-otas-are-still-here-to-stay-for-now-474fb16d6076>

<sup>22</sup>[https://www.oecd.org/en/publications/oecd-tourism-trends-and-policies-2022\\_a8dd3019-en/full-report/building-resilience-in-the-tourism-ecosystem\\_de7284f5.html](https://www.oecd.org/en/publications/oecd-tourism-trends-and-policies-2022_a8dd3019-en/full-report/building-resilience-in-the-tourism-ecosystem_de7284f5.html)

<sup>23</sup><https://www.protect.group/blog/the-rising-cost-of-booking-inflexibility>

Traditional segmentation based on age or geography is now shifting toward behaviour and motivation categories reflecting post-pandemic values. The 'APAC Travel Confidence Index 2023'<sup>24</sup>, classifies tourists into 4 types depending on motivations, priorities, and behaviour:

*Conscious Explorers:* They prefer low-impact travel options such as eco-certified accommodations and spending that supports local communities, reflecting a strong commitment to sustainability and a demand for transparent impact communication.

*Comfort Seekers:* They prioritize comfort, premium amenities, and personalised service, often above sustainability. Integrating "sustainability by default" into high-quality experiences may enhance environmental benefits without compromising perceived value.

*Mindful Voyagers:* They are motivated by environmental and community concerns but may feel anxious in unfamiliar settings. Clear pre-trip information, risk-minimizing itineraries, and step-by-step guides, including certified options and off-peak travel routes, may help convert intentions into sustainable actions.

*Homebound Pragmatists:* They prefer short, efficient trips close to home, focusing on optimising time and resources. Their efficiency-driven choices align with low-emission travel when sustainable options are accessible and affordable.

Despite macroeconomic headwinds, travel confidence in APAC has remained robust, thus reinforcing the need for localised persona-led design.

**Intra-ASEAN vs. Long-Haul Travellers:** In ASEAN, short-haul travel between neighbouring countries is common due to affordability, cultural ties, and visa-free policies; Malaysians frequently visit Thailand and Singapore, while Thai tourists often travel to Lao PDR and Cambodia<sup>25</sup>. Regional travellers make shorter, frequent trips, and help stabilize demand, but are sensitive to fuel prices, FDI, and currency changes—a 1% rise in FDI can boost tourism growth by 3.62%, while oil price increases have short- and long-term impacts<sup>26</sup>.

Long-haul visitors from Europe, North America, and Australia stay longer, spend more, and often explore multiple countries, yet are more affected by global economics and geopolitical instability<sup>27,28</sup>. Attracting this segment may require strong branding, reliable air connections, and authentic, sustainable offerings. Infrastructure improvements however, support growth across both market types.

**Accessibility Considerations:** Accessibility is essential for people with disabilities, mobility limitations, or other special needs. In the ASEAN, accessibility is relevant for both international arrivals and domestic tourism (ASEAN, 2023). Physical accessibility involves barrier-free infrastructure e.g., ramps, elevators, accessible transport etc., while information accessibility includes online communication about facilities, staff training, inclusive customer service etc. Some destinations have begun integrating these elements e.g., Singapore's Universal Design Index, Malaysia's Kinabalu Park, etc (Building and Construction Authority, 2022; Milligan et al., 2024).

**Seasonality and Travel Patterns:** ASEAN Tourism is significantly influenced by climatic and cultural seasonality, as outlined below:

*Climatic Seasonality:* Monsoon cycles influence peak and off-peak travel periods across the region e.g., Malaysia's west coast experiences increased rainfall from September to October, coinciding with the school holidays, leading to a surge in domestic travel during this period<sup>29</sup>. Similarly, Thailand's peak

<sup>24</sup><https://news.booking.com/wanderlust-over-wallets-travel-confidence-holds-up-for-over-half-of-apac-travellers-despite-economic-headwinds/>

<sup>25</sup> <https://data.aseanstats.org>

<sup>26</sup>[https://www.researchgate.net/publication/386886382\\_How\\_FDI\\_and\\_oil\\_prices\\_affect\\_sustainable\\_tourism\\_developments\\_evidence\\_from\\_24\\_Asia-pacific\\_countries](https://www.researchgate.net/publication/386886382_How_FDI_and_oil_prices_affect_sustainable_tourism_developments_evidence_from_24_Asia-pacific_countries)

<sup>27</sup> [https://etc-corporate.org/uploads/2024/10/ETC-Quarterly-Report-Q3-2024\\_public.pdf](https://etc-corporate.org/uploads/2024/10/ETC-Quarterly-Report-Q3-2024_public.pdf)

<sup>28</sup> [https://www.oecd.org/content/dam/oecd/en/publications/reports/2023/09/economic-outlook-for-southeast-asia-china-and-india-2023-update\\_434e72f2/cd94bcf6-en.pdf](https://www.oecd.org/content/dam/oecd/en/publications/reports/2023/09/economic-outlook-for-southeast-asia-china-and-india-2023-update_434e72f2/cd94bcf6-en.pdf)

<sup>29</sup><https://southeastasiabackpacker.com/southeast-asia-climate/>

tourist season spans from October to March, aligning with the cooler, dry weather, while the monsoon season from June to September sees a decline in visitor numbers<sup>30</sup>.

*Cultural Seasonality:* School holidays and public festivals drive demand patterns e.g., in Malaysia, July and August witness a rise in travel activities due to school vacations, leading to increased prices and occupancy rates<sup>31</sup>. Similarly, Thailand's peak season is influenced by cultural events such as the floating candle festival in Chiang Mai, which attracts both domestic and international tourists<sup>32</sup>.

Seasonality poses challenges for tourism as overcrowding during peak periods may strain infrastructure and degrade visitor experiences, while off-peak months may lead to underutilization of capacity. To mitigate these effects, businesses are diversifying offerings, promoting lesser-known destinations, and designing targeted off-season campaigns e.g., Viet Nam promotes trekking in its northern highlands during the cooler months to balance the demand for beach destinations<sup>33</sup>.

*Event-Based Tourism:* International events too are significant in shaping tourism patterns. Singapore's Formula 1 Grand Prix, since its debut in 2008, has attracted over 550,000 international visitors and generated approximately USD 2 billion in tourism revenue, boosting tourism during off-peak periods<sup>34</sup>. Similarly, Indonesia's cultural festivals, such as the Baliem Valley Festival<sup>35</sup> and the Java Jazz Festival<sup>36</sup>, attract both local and international tourists, contributing to the country's tourism growth<sup>37</sup>.

## 2.4. Implications for ASEAN Tourism

**Product and Service Adaptation:** ASEAN destinations may enhance resilience by competing on value rather than cost, through such measures as listed below:

*Sustainability integration:* Hotels, resorts, and tour operators may integrate sustainability by adopting eco-conscious practices such as renewable energy, waste reduction, and local sourcing. Transparency through certifications or storytelling that highlights community benefits is crucial. The Global Sustainable Tourism Council (GSTC) Standards provide recognized criteria and certifications that enhance credibility and align with the UN Sustainable Development Goals (SDGs).

*Authentic experiences:* Destinations may design authentic experiences connecting visitors to local communities, traditions, and cuisines. Examples include culinary tourism in Viet Nam or batik workshops in Indonesia, provided fairness and cultural preservation are maintained. GSTC destination and enterprise criteria emphasize protecting cultural heritage, community engagement, and fair benefit-sharing.

*Digital services:* To provide seamless digital journeys, providers need mobile-friendly websites, e-payment systems, and integration with OTAs and social media. SMEs may benefit from shared digital platforms or cooperative hubs supported by governments or industry groups. Industry reports highlight accelerated digitization and AI-enabled personalisation as essential for competitiveness.

*Flexible offerings:* These include adaptable cancellation and refund policies, have become popular among tourists. Hybrid approaches, like offering credits instead of refunds, balance resilience with competitiveness. Business travel trends show rising adoption of flexible terms, with the World Travel & Tourism Council (WTTTC) recognizing flexibility as a key competitiveness factor in 2025.

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<sup>30</sup><https://gowithguide.com/blog/thailand-tourism-statistics-2025-all-you-need-to-know-5250?srsId=AfmBOor5M4yBoZ1gjobUGAvnMYsv9gfsxj8WFEv5tXoJmuZY65paOJOQ&>

<sup>31</sup><https://southeastasiabackpacker.com/southeast-asia-climate/>

<sup>32</sup><https://gowithguide.com/blog/thailand-tourism-statistics-2025-all-you-need-to-know-5250?srsId=AfmBOor5M4yBoZ1gjobUGAvnMYsv9gfsxj8WFEv5tXoJmuZY65paOJOQ&>

<sup>33</sup><https://sungetawaystravel.com/northern-Viet-Nam-trekking/>

<sup>34</sup><https://www.usasean.org/article/thailand-and-singapore-drive-tourism-growth-formula-one-and-major-sporting-events>

<sup>35</sup> <https://baliemvalleytrekking.id/baliem-festival-2025/>

<sup>36</sup> <https://www.javajazzfestival.com/>

<sup>37</sup><https://viettonkinconsulting.com/tourism/indonesia-culture/>

Post-pandemic consumer behaviour reveals a growing willingness to pay for sustainability, driving demand for ethical tourism such as eco-certified accommodations. Travellers increasingly seek authentic cultural immersion, boosting community-based tourism initiatives. Digital integration plays a key role, with reliance on social media and apps facilitating innovations like AI-driven crowd management. Wellness tourism is rising, as focus on health and nature encourages offerings like wellness retreats and eco-tours.

Psychographic segmentation caters to value-driven travellers such as digital nomads and wellness seekers, enabling tailored experiences. Preference for short-haul journeys supports domestic and regional travel, incentivized through vouchers and promotions. Data-driven governance using real-time analytics and technologies like blockchain meets expectations for personalised services. Regenerative tourism, including coral restoration and reforestation, reflects rising support for environmental causes.

Economic adaptation is driven by traveller searches for value and authenticity, with flexible pricing and bundled deals gaining traction. Trust in certified brands underpins policy and certification opportunities, emphasizing the need for ASEAN-wide sustainability standards. Together, these opportunities signify evolving traveller priorities and the sector's response to them.

**Marketing Strategies:** Tourism marketing in the ASEAN region must adapt to the evolving digital landscape and shifting consumer values to remain effective. Traditional mass-market campaigns are increasingly less effective compared to personalised, digital-first strategies that resonate with contemporary travellers<sup>38</sup>.

**Digital Behaviours and Consumer Values:** Social media, influencer collaborations, and user-generated content (UGC) have become primary sources of inspiration for younger tourists. A study indicates that Generation Z values the credibility of UGC over that of social media influencers when considering travel destinations<sup>39</sup>. This demographic is particularly influenced by content that reflects authenticity, sustainability, and cultural diversity. In response, ASEAN destinations are increasingly investing in storytelling that emphasizes authentic experiences and sustainability initiatives. For instance, Thailand's "Value is the New Volume" strategy<sup>40</sup> focuses on quality over quantity, promoting cultural resonance and meaningful visitor engagement<sup>41</sup>.

**Segment-Specific Marketing Strategies:** Tailoring marketing efforts to specific generational and niche segments is essential. For instance, tech-savvy Millennials and Gen Z may respond well to interactive digital campaigns, while the older Baby Boomers may seek reassurance through trusted intermediaries or detailed cultural narratives. Wellness tourists may be drawn to messaging around holistic health, while digital nomads may be attracted to lifestyle branding.

Thailand's emphasis on wellness tourism, integrating world-class preventive care with its cultural heritage, exemplifies how messaging can align with contemporary values<sup>42</sup>. The ASEAN medical and wellness tourism market, valued at USD 66.1 billion in 2024, is projected to grow to USD 218.4 billion by 2034, driven by increasing demand for wellness services<sup>43</sup>.

**Data Analytics and Consumer Insights:** Investing in data analytics and consumer insights is critical to fine-tune campaigns. The diversity of ASEAN markets necessitates a nuanced approach, as traditional strategies may not be effective across all segments. Utilizing data-driven marketing tailored to diverse traveller segments can amplify soft power and storytelling, promoting local identity and sustainable tourism practices<sup>44</sup>. ASEAN tourism marketing must embrace digital transformation, prioritize authenticity, and tailor strategies to the values and preferences of diverse traveller segments.

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<sup>38</sup> ASEAN Tourism Marketing Strategies (ATMS)

<sup>39</sup>[https://www.researchgate.net/publication/372437142\\_The\\_influence\\_of\\_user-generated\\_content\\_and\\_social\\_media\\_travel\\_influencers\\_credibility\\_on\\_the\\_visit\\_intention\\_of\\_Generation\\_Z](https://www.researchgate.net/publication/372437142_The_influence_of_user-generated_content_and_social_media_travel_influencers_credibility_on_the_visit_intention_of_Generation_Z)

<sup>40</sup><https://www.traveltrendstoday.in/thailands-value-is-the-new-volume-vision-to-define-its-tourism-landscape-global-appeal>

<sup>41</sup><https://ftnnews.com/travel-news/tours/thailands-2026-tourism-strategy-prioritizes-value-over-visitor-volume/>

<sup>42</sup><https://www.travelandtourworld.com/news/article/thailand-elevates-wellness-tourism-with-world-class-preventive-medicine-and-authentic-heritage-experiences/>

<sup>43</sup><https://www.gminsights.com/industry-analysis/asean-medical-and-wellness-tourism-market>

<sup>44</sup><https://ftnnews.com/travel-news/tours/thailands-2026-tourism-strategy-prioritizes-value-over-visitor-volume/>

By leveraging digital platforms, influencer partnerships, and data analytics, destinations may craft compelling narratives that resonate with modern travellers and foster sustainable tourism growth.

**Public-Private Partnerships (PPPs) in ASEAN Tourism:** PPPs can help bridge digital gaps for SMEs through shared booking platforms, training, and data analytics, as emphasized in the ASEAN Declaration on Digital Tourism<sup>4546</sup>.

PPPs may drive sustainability by enabling eco-certifications and community-based models with government support and business-led innovation, thus ensuring credibility and broad impact. The ASEAN Framework on Sustainable Tourism Development underscores the need for public–private–community partnerships to engage and empower local communities in sustainable tourism practices<sup>47</sup>. Data-sharing between private providers and policymakers may generate real-time insights for targeted tourism policy, as highlighted by Asian Development Bank’s work on smart tourism<sup>48</sup>.

Infrastructure growth is another area where PPPs are central - projects in Thailand and across Southeast Asia show PPPs delivering transport, logistics, and property improvements that bolster tourism. PPPs provide ASEAN with tools to overcome data fragmentation, SME skill gaps, and infrastructure deficits, supporting tourism growth that meets the needs of tomorrow’s travellers<sup>49</sup>.

## 2.5. Conclusion and Policy Implications

The post-pandemic tourism landscape in ASEAN reflects a structural shift rather than a return to pre-2020 norms. Key changes include safety and hygiene as baseline expectations; sustainability and cultural respect becoming core values; digitalisation shaping how travellers discover, plan, and experience destinations; and flexible, personalised decision-making becoming essential. These evolving consumer behaviours require updated policy frameworks to guide tourism development, ensuring recovery aligns with new expectations at both national and regional levels.

*Consumer protection:* Governments of ASEAN member states may ensure that tourists are protected in digital and flexible booking environments, particularly against unfair practices or opaque cancellation policies.

*Digital transformation of SMEs:* As many small operators lack the capacity to adopt new technologies, public programmes that provide training, subsidies, or digital platforms can prevent SMEs from being excluded from the digital economy.

*Sustainability standards:* ASEAN member states could strengthen regulatory frameworks for sustainable tourism, including scaling up and mainstreaming of certification schemes, environmental safeguards, and incentives for businesses that integrate sustainable practices, across borders.

*Regional coordination:* Given ASEAN’s interconnected tourism flows, harmonisation of visa policies, digital payment systems, and health protocols can reduce friction for travellers. Regional initiatives can also support joint marketing campaigns and data-sharing mechanisms.

Market segmentation presents both opportunities and challenges for ASEAN tourism. Tailored strategies are needed for digital natives, value-driven Millennials, and tech-savvy Baby Boomers. High-potential niche markets, such as wellness travellers, cultural enthusiasts, and digital nomads, require targeted infrastructure and products. While intra-ASEAN travel remains vital, long-haul visitors continue to influence brand prestige and foreign exchange. These shifts demand destinations and businesses embed sustainability, authenticity, and digital readiness into offerings. Marketing must evolve through value-driven storytelling and digital engagement, while policies focus on consumer protection, SME

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<sup>45</sup><https://www.mdpi.com/2078-2489/14/11/606#:~:text=This%20suggests%20that%20they%20require,Entrepreneurship%20Observatory%20project%20in%202022>

<sup>46</sup>[https://asean.org/wp-content/uploads/2021/09/8-ASEAN-Declaration-on-Digital-Tourism\\_FINAL.pdf](https://asean.org/wp-content/uploads/2021/09/8-ASEAN-Declaration-on-Digital-Tourism_FINAL.pdf)

<sup>47</sup>[https://asean.org/wp-content/uploads/2023/01/ASEAN-Framework-on-Sustainable-Tourism-Development\\_compressed.pdf](https://asean.org/wp-content/uploads/2023/01/ASEAN-Framework-on-Sustainable-Tourism-Development_compressed.pdf)

<sup>48</sup> <https://www.adb.org/sites/default/files/publication/921561/smart-tourism-asia-pacific-digital-cooperation.pdf>

<sup>49</sup><https://marketresearchsoutheastasia.com/insights/articles/public-private-partnerships-in-southeast-asia-unlocking-growth>

digital inclusion, and regional integration. PPPs may scale progress in sustainability, digital transformation, and data sharing.

The future of ASEAN tourism depends on agility in adapting to global disruptions, strong governance for coordinated policies, and closing knowledge gaps via data and analytics. Through national and regional cooperation, ASEAN could potentially transform into a global leader in sustainable, authentic, and digitally enabled tourism. Competitiveness will rest on delivering safety, sustainability, inclusivity, and meaningful experiences, securing ASEAN's resilience and dynamism for decades ahead.



Chapter 3

# Digitalisation and Innovation in ASEAN Tourism

## **Chapter 3**

# **Digitalisation and Innovation in ASEAN Tourism**

Digital transformation is essential for ASEAN tourism as it encourages member states to rethink tourism ecosystems using data-driven decision-making, improve resource management, and enhance collaboration among stakeholders (Leong et al., 2024a). Digitalisation has been a boon to the post-pandemic ASEAN tourism sector recovery, leading to sectoral modernisation through innovation. The adoption and implementation of contemporary technology-driven practices have enhanced the sector's resilience, thereby attracting global investments. These elements are essential for improving competitiveness, sustainability, and inclusivity as well. This chapter analyses key technologies and digital services to highlight their strategic importance in ASEAN tourism.

### **3.1. Role of Digitalisation in ASEAN Tourism Competitiveness and Resilience**

Before the COVID-19 pandemic, tourism contributed 12% to ASEAN's GDP and employed 42 million people, figures which dropped sharply during the pandemic, prompting ASEAN leaders to prioritise digital technologies for tourism recovery (The ASEAN Admin, 2024; SEADS, 2020). This commitment was formalised through the ASEAN Declaration on Digital Tourism at the 37th ASEAN Summit, highlighting tourism's importance in socioeconomic growth, cultural exchange, poverty alleviation, and regional prosperity. Travel restrictions and heightened health concerns accelerated the need for technology-driven responses, encouraging destinations to use digital tools to engage tourists, streamline operations, and enhance services.

Today, ASEAN's digital landscape reflects both opportunities and disparities. Advanced economies like Singapore contrast with emerging markets like Laos and Myanmar. High smartphone adoption, expanding mobile internet, and a thriving e-commerce culture provide fertile ground for digital innovation (ASEAN Secretariat, 2022). Yet, uneven infrastructure, limited digital literacy, and fragmented regulations continue to challenge adoption, especially among MSMEs and rural operators.

Guided by the ASEAN Digital Master Plan 2025 and the ASEAN Declaration on Digital Tourism, member states aim to integrate digital solutions across the tourism value chain (ASEAN Secretariat, 2021; ASEAN Secretariat, 2020). These efforts align with regional initiatives such as the ASEAN Digital Economy Framework Agreement (DEFA), launched in 2023 to harmonise digital standards, strengthen interoperability, and address regulatory fragmentation (Rohman et al., 2024). Drawing on GDPR-inspired principles of data minimisation and algorithmic accountability, DEFA supports cross-border data flows and builds digital trust, which is key to creating seamless and secure travel experiences. Together, these frameworks promote a resilient and adaptable tourism industry capable of meeting evolving traveller expectations.

Beyond efficiency, digitalisation strengthens ASEAN's capacity to respond to disruptions such as pandemics, natural disasters, or geopolitical events. Technologies enable flexible bookings, contactless interactions, and real-time information sharing. Data generated through digital platforms enhances understanding of traveller behaviour and supports sustainable visitor management. For instance, public Wi-Fi at Sri Chiang Mai Smart City is used to analyse tourist patterns, which may potentially be scaled up to manage congestion at popular sites while supporting environmentally responsible tourism (Wiangwiset et al., 2025).

Furthermore, the region has witnessed significant government-led initiatives to foster digital ecosystems. Thailand's Safety and Health Administration Plus (SHA+) app, Indonesia's QRIS digital payment system and Singapore's Smart Nation framework exemplify efforts to create integrated, user-friendly, and secure digital platforms for tourism. These initiatives highlight the potential for technology

to enhance both the tourist experience and the operational efficiency of tourism businesses, while also fostering regional collaboration in areas such as cross-border digital payments and unified marketing platforms (Tourism Authority of Thailand, n.d; Jakarta Globe, 2025; Ministry of Digital Development and Information, Singapore, 2024; Jakarta Investment Centre, 2025).

## 3.2. Impact of Digitalisation in ASEAN Tourism

Digital technologies are increasingly influencing how ASEAN destinations engage visitors, manage operations, and create value. Among these technologies, artificial intelligence (AI), big data analytics, and blockchain are particularly transformative. Their adoption has accelerated in response to shifting consumer expectations, pandemic-induced disruptions, and competitive pressures. This section examines their applications, benefits, and challenges, with a focus on ASEAN-specific contexts.

### 3.2.1. Key Technologies

**Artificial Intelligence (AI):** AI encompasses systems that perform tasks requiring human-like intelligence, such as learning, reasoning, and language processing. In tourism, AI drives personalisation, efficiency, and predictive analytics. By enabling dynamic and context-aware interactions, it enhances multilingual communication across ASEAN's diverse linguistic environment (Jakarta Investment Centre, 2025; Russell & Norvig, 2020; EY, 2025; García-Madurga & Grilló-Méndez, 2023; Ghifardi, 2024; Amazon Web Services, 2024).

AI allows destinations to offer customised experiences through recommendation systems, chatbots, and virtual assistants using data on preferences, browsing history, and booking patterns. Singapore Airlines, for instance, applies AI to boost efficiency, staff productivity, and customer engagement. The Cicero framework generates personalised travel suggestions by analysing Points of Interest (POIs) aligned with user interests while popular OTAs like Tripadvisor and Expedia deploy similar recommender systems (Leong et al., 2024; Singapore Airlines, 2025a; Singapore Airlines, 2025b; Binucci et al., 2017; Srisawatsakul & Boontarig, 2020). Such tools resonate with younger travellers, notably Millennials and Gen Z, who value meaningful, shareable experiences.

AI chatbots enhance service responsiveness by answering queries, managing bookings, and assisting with logistics. Hotels increasingly use chatbots for check-in, restaurant reservations, and activity planning, reducing workloads and maintaining service quality during peak demand. In Singapore, Sentosa Development Corporation's 'Summer AI' and 'WorkDayKaki' chatbots provides concierge services and real-time, data-driven recommendations. Similarly, Aiello's voice assistant, used across Millennium Hotels and Resorts in Singapore and Thailand, demonstrates AI's role in improving guest experiences and supporting inclusive communication. These initiatives align with DEFA's vision for inclusive digital integration that respects ASEAN's cultural and linguistic diversity (Summer AI, 2025; Sentosa Development Corporation, 2025; Aiello, 2024).

AI also drives predictive analytics, helping airlines and operators forecast demand and optimise pricing strategies. Singapore Airlines employs deep-learning systems to anticipate customer purchasing behaviour and manage seat inventory. Such innovations align with ASEAN's circular economy agenda, particularly within the "8R" framework supporting sustainable resource use (WNS, 2025; Kearney, 2020; Carrard et al., 2024).

However, AI adoption presents governance and ethical challenges. Data privacy remains a concern, as extensive personal data collection increases vulnerability to misuse. Biased training data can result in unequal or discriminatory service outcomes. To build consumer trust, policymakers and businesses must enforce robust data protection and ensure transparent, accountable AI systems. Existing frameworks, such as the APEC Privacy Framework's "Preventing Harm" principle, provide conceptual guidance but limited enforcement pathways (Jobin et al., 2019; APEC, 2015). The ASEAN Guide on AI Governance and Ethics proposes algorithmic impact assessments and third-party audits to promote fairness, though implementation remains largely voluntary and would benefit from greater regulatory clarity (ASEAN, 2024).

**Big Data Analytics (BDA):** Big data refers to large, complex, and rapidly generated datasets requiring advanced analytical tools for processing. In tourism, BDA may enhance understanding of traveller behaviour, support destination management, and foster sustainable tourism practices.

Across ASEAN, destinations increasingly use BDA to optimise resource management and reduce carbon emissions. In Thailand, the Phuket Smart City initiative (built around “Smart Economy” and “Smart Living Community” strategies) applies AI and BDA to monitor and assess carbon emissions in tourism zones. This approach is critical given that micro, small, and medium-sized enterprises (MSMEs) constitute 97–99% of ASEAN businesses, and their collective environmental impact is significant (Digital Economy Promotion Agency, 2023; Nanthaamornphong, 2023; Anderson et al., 2024).

BDA may leverage booking data, social media activity, online reviews, and geolocation to identify patterns in tourist preferences, spending, and movement. Location-based data may help track visitor flows and peak travel periods, enabling precise marketing, experience design, and resource allocation. Sentiment analysis of online reviews may allow businesses to adapt offerings in real time, improving satisfaction and loyalty while mitigating overtourism’s environmental and cultural effects.

At a broader scale, BDA supports sustainable tourism by offering real-time insights into visitor density and resource use. Such analytics help destinations plan capacity, enhance visitor experiences, and monitor sustainability indicators such as energy and water consumption. For ASEAN destinations adopting smart tourism frameworks, integrating these data tools aids in balancing economic growth with environmental preservation and cultural protection.

However, wider adoption of BDA faces persistent obstacles. Data quality and fragmentation across ASEAN limit analytical accuracy, requiring supplementation with private-sector data from travel platforms and payment systems, which complicates standardisation. Privacy and regulatory compliance pose additional challenges; personal data use must conform to national laws such as Singapore’s Personal Data Protection Act (PDPA). Noncompliance risks legal penalties and erodes consumer trust. Furthermore, many tourism operators, particularly SMEs, lack data analytics expertise. Without targeted investments in digital literacy and workforce upskilling, these businesses may remain excluded from the benefits of data-driven transformation.

**Blockchain Technology:** Blockchain is a decentralised digital ledger that records transactions securely and transparently. In tourism, it supports secure payments, loyalty programmes, supply chain transparency, and certification verification. These applications enhance efficiency, trust, and accountability across the tourism value chain.

Blockchain is increasingly used to build transparent and auditable tourism ecosystems that promote ethical and sustainable practices e.g., a study on Jakarta’s Seribu Islands highlights its role in improving transparency, traceability, and accountability in resource and service management—demonstrating growing interest in blockchain for sustainable tourism (Pranita et al., 2023).

In practice, blockchain enables secure, real-time payments for bookings and cross-border travel services, reducing reliance on intermediaries and lowering transaction costs. In Indonesia, pilot projects are testing blockchain-based hotel and tour payments to support seamless intra-ASEAN transactions. The technology can also underpin interoperable loyalty programmes, allowing travellers to earn and redeem points across different service providers, boosting engagement among digital-savvy Millennials and Gen Z. Moreover, blockchain can authenticate certifications such as eco-labels and health standards. Integrating it into Thailand’s SHA+ scheme, for instance, could ensure tamper-proof verification of hygiene compliance, strengthening consumer confidence and destination reputation.

Despite these advantages, several barriers hinder broader adoption. ASEAN countries remain at varied stages of blockchain regulation, complicating implementation and investment. Developing supportive legal frameworks is essential to foster innovation while safeguarding consumer interests. High infrastructure costs also limit accessibility for smaller operators, though collaborative platforms and government-backed initiatives can ease these constraints. Furthermore, limited awareness among tourism stakeholders and travellers hampers uptake. Demonstration projects and education campaigns can bridge this knowledge gap by showcasing tangible benefits.

Collectively, the integration of AI, big data analytics, and blockchain may enable ASEAN destinations to deliver smarter and more resilient tourism systems. Achieving it requires coordinated action among governments, industry, and technology partners, alongside investments in infrastructure, skills, and regulatory harmonisation.

### 3.2.2. Smart Tourism Ecosystems and Digital Marketing

Application of digital technologies in tourism extend far beyond individual technologies like AI or blockchain, as they increasingly operate as part of much larger smart tourism ecosystems. These integrated systems combine IoT devices, data analytics, mobile platforms, and digital services to enhance visitor experiences, improve operational efficiency, and support sustainable destination management. Complementing these ecosystems are digital marketing strategies, which leverage data-driven insights and emerging technologies to engage travellers effectively.

**Smart Tourism Ecosystems:** A smart tourism ecosystem refers to a digitally interconnected environment that enables real-time interaction among travellers, tourism businesses, and public authorities (Gretzel et al., 2015). Across ASEAN, these ecosystems are built from interlinked digital components that create seamless, efficient, and engaging travel experiences. The Internet of Things (IoT) forms the foundation, using sensors, wearables, and smart devices to collect data on visitor movements, environmental conditions, and infrastructure use. This enables destinations to monitor crowd density and environmental factors in real time, improving safety and sustainability.

Data analytics platforms complement these systems by aggregating information from mobile applications, online bookings, social media, and IoT devices. Centralised dashboards convert this data into actionable insights, allowing tourism operators, such as those in Thailand, to monitor hotel occupancy, track visitor trends, and forecast demand. Mobile applications serve as a primary interface for tourists, supporting itinerary planning, navigation, ticketing, and contactless payments, while integrated digital services link airlines, hotels, attractions, and local transport. The result is a connected travel experience where visitors can plan, book, and manage their entire journey through a single platform.

Smart tourism ecosystems also advance ASEAN's sustainable tourism goals by supporting heritage preservation, empowering local communities, and promoting low-carbon operations. When integrated with technologies such as artificial intelligence and location-aware services, these systems personalise travel experiences, manage visitor flows, and enhance operational efficiency. For businesses, especially MSMEs, smart tools improve staffing decisions, reduce overheads, and optimise service delivery, strengthening competitiveness in dynamic markets.

Despite their potential, several barriers hinder region-wide implementation. Interoperability remains a major challenge, as diverse platforms and systems often lack compatible standards. This fragmentation limits data sharing and coordinated service delivery, particularly in large urban destinations like Bangkok and Jakarta. High infrastructure costs also constrain adoption, with IoT networks and analytics platforms requiring investments beyond the reach of many MSMEs. In addition, digital literacy gaps persist among tourism operators and some travellers, reducing the effectiveness of technology adoption. Addressing these challenges through common digital standards, targeted funding, and skills development will be vital for ASEAN to harness smart tourism as a driver of resilience, inclusion, and long-term sustainability.

**Digital Marketing Strategies:** Digital marketing plays an essential role in ASEAN's smart tourism ecosystem, allowing destinations to connect with travellers through targeted, data-driven engagement. Platforms such as Instagram, Facebook, TikTok, and X are central to travel inspiration, booking, and advocacy. According to Meltwater, Southeast Asia is among the world's most dynamic social media markets, supported by high mobile penetration and deeply embedded online habits. Success in this space requires understanding both where audiences are—primarily on Facebook, Instagram, and TikTok—and why they engage, from seeking social connection to discovering and purchasing travel products.

Influencer marketing has become particularly impactful in shaping destination perceptions, especially among younger travellers. Collaborations with micro- and macro-influencers enable destinations to reach niche audiences, produce aspirational content, and amplify messages around sustainability and cultural authenticity. Simultaneously, destinations are enhancing their online visibility through search engine optimisation (SEO) and paid advertising across Google and social platforms, ensuring marketing budgets achieve maximum reach and relevance.

Digitalisation continues to reshape marketing practices across ASEAN's tourism sector amid changing consumer values and regional collaboration. A defining trend is the shift toward mobile-first marketing. With mobile devices dominating online access, destinations increasingly design websites, apps, and

content for mobile user experience. Features such as instant booking, real-time push notifications, and location-based promotions enhance convenience and engagement throughout the traveller journey.

Personalisation has also moved to the forefront of digital marketing strategies. By integrating big data and AI analytics, tourism businesses can tailor offers and messages based on traveller behaviour, preferences, and social media activity, creating content that resonates and increases conversion rates. Meanwhile, sustainability-oriented branding is gaining importance as consumers seek destinations reflecting their environmental and cultural values.

Finally, ASEAN is advancing toward greater regional digital integration. Shared platforms and cross-border marketing initiatives aim to position ASEAN as a unified, multi-destination tourism bloc. Efforts to harmonise digital tools and data-sharing mechanisms are helping reduce friction for international travellers while enabling more coordinated marketing, collaborative analytics, and informed policy planning across member states.

### 3.2.3. Emerging Technologies

The ASEAN tourism sector is increasingly adopting emerging technologies that directly impact traveller convenience, safety, and satisfaction. These include contactless services, e-visas, and digital payment systems. By reducing friction in the travel experience, enhancing operational efficiency, and supporting public health measures, these innovations are redefining the region's tourism landscape. This section explores applications, benefits, and challenges of these technologies.

**Contactless Services:** These address health concerns and consumer demand for convenience. In ASEAN, their adoption spans multiple tourism touchpoints such as:

*Mobile Check-In and Keyless Entry:* Some Southeast Asian Hotels provide mobile check-in and keyless room access through apps, reducing physical interactions and streamlining the guest experience (Srivastava, 2019). This is particularly valued by business travellers and digital nomads seeking efficiency and safety.

*QR Code-Based Menus and Ticketing:* These are ubiquitous in restaurants, attractions, and public transport, reducing physical contact, speeding up service, and integrating with loyalty programmes. In Bali and Phuket, QR code-based ticketing systems replace paper tickets, while dining establishments allow customers to browse menus, place orders, and pay electronically.

*Digital/Touchless Payments:* Integration of mobile wallets, credit cards, and NFC-enabled devices enables seamless transactions across hotels, attractions, and transport services, enhancing convenience for travellers while providing businesses with valuable digital transaction data<sup>50</sup>. Digital payment systems are transforming how tourists in ASEAN pay for services and accelerating the shift toward cashless economies. Common methods include mobile wallets, contactless cards, and QR codes. However, the region's payment landscape remains fragmented, as each country maintains its own QR code standards and e-wallet networks. For example, tourists using Thailand's PromptPay may be unable to complete transactions in the Philippines, where GCash prevails. This lack of harmonisation limits interoperability, inconveniences travellers, and constrains ASEAN's goal of building an integrated digital economy.

**E-Visas:** These are critical for facilitating cross-border travel and improving the efficiency of immigration processes. Such systems streamline entry procedures, improve border management, and enhance the attractiveness of destinations, particularly for long-haul travellers and business visitors. However, to be effective, barriers like harmonisation of visa policies across ASEAN, infrastructure and access, and security and fraud prevention, need to be addressed.

### 3.2.4. Digital and Personalised Experiences

Digital technologies enable tourism providers to meet these demands by integrating tailored services across all stages of travel, from planning and booking to on-site activities and post-trip engagement. Artificial intelligence analyses traveller data and social media interactions to offer relevant recommendations for destinations, accommodations, and activities. Integrated mobile platforms streamline research, booking, navigation, and payment within a single interface, while location-based

<sup>50</sup><https://www.weforum.org/stories/2023/11/asean-instant-cross-border-payments-paynow-promptpay/>

services enhance experiences through real-time, context-aware suggestions. Together, such innovations enable delivery of engaging, efficient, and authentic travel experiences, strengthening visitor satisfaction and regional competitiveness.

### 3.3. Challenges to Digitalisation of Tourism Sector

Digitalisation offers transformational opportunities for ASEAN tourism through enhanced competitiveness and destination branding, improved visitor experience, support for sustainable tourism, and empowering SMEs and local communities. Yet, challenges remain, that hinder the effective uptake of such technologies.

**Digital Divide:** Uneven distribution of digital infrastructure and connectivity restricts small operators and rural communities from participating in digital tourism ecosystems, thus limiting regional inclusivity and competitiveness. Advanced economies like Singapore and Malaysia enjoy high-speed internet, deep smartphone penetration, and sophisticated digital platforms, while rural or emerging destinations may face limited broadband access, low digital literacy, and minimal investment in ICT infrastructure.

**Skills Gaps:** Successful deployment of digital solutions requires technical expertise in AI, big data analytics, blockchain, cybersecurity, and digital marketing. Many tourism operators, particularly MSMEs, lack these skills. Upskilling initiatives are essential to empower the workforce and enable small businesses to leverage technology effectively. Training programmes may include AI application, mobile platform management, social media marketing, and cybersecurity awareness.

**Data Privacy and Cybersecurity:** Digital platforms expose tourism operators and travellers to cyber threats such as hacking, phishing, and identity theft. Compliance with national data protection laws is crucial to maintain trust and avoid penalties. Operators should adopt encryption, secure authentication, and continuous monitoring to protect personal and financial data. Interconnected systems like cloud-based property management, mobile check-in apps, centralised reservations, and IoT-enabled room controls increase vulnerability. Recent threat intelligence reports identify risks including ransomware attacks, supply chain exploits, and social engineering. Mitigation requires a layered defence strategy combining infrastructure hardening, incident response coordination, and workforce training.

**Equitable Access for MSMEs and Rural Communities:** Digital solutions favour large operators with financial resources and technical expertise. However, participation of MSMEs and rural tourism providers is critical for inclusive growth. Without equitable access, benefits like increased market reach, personalised customer engagement, and operational efficiency may be concentrated among a small subset of businesses. Public programmes and partnerships may help bridge this gap.

**Interoperability and Standardisation:** ASEAN's diversity in regulations, platforms, and technological adoption creates challenges in harmonising digital systems across member states. Issues such as cross-border payment compatibility, standardised e-visas, and integrated data-sharing platforms require regional coordination to maximise efficiency and visitor convenience.

### 3.4. Strategic Considerations

To capitalise on digitalisation opportunities, ASEAN must adopt a coordinated and inclusive approach that combines investments in infrastructure, workforce development, regulatory harmonisation, and community empowerment under a framework of strong regional cooperation.

Strengthening digital infrastructure is the first priority. Expanding affordable, high-speed broadband and mobile connectivity across both urban and rural areas is vital to closing the digital divide. Integrating IoT technologies and data analytics into tourism management can enhance operational efficiency, improve visitor experiences, and support evidence-based decision-making.

Upskilling the workforce is equally important. Training initiatives should focus on industry-relevant skills in artificial intelligence, big data, digital marketing, and cybersecurity, adapted to local contexts and delivered in culturally relevant formats. Linking training to real-world tourism challenges will maximise impact and promote practical learning outcomes.

Public-Private-Community Partnerships (PPCPs) offer a collaborative model to drive digital transformation efficiently and inclusively. Sarawak's RIGHT programme<sup>51</sup>, developed through cooperation among SAINS, Malaysian ministries, and local communities, illustrates how such partnerships can bridge rural and urban digital divides. Thailand's Net Pracharat mechanism<sup>52</sup> provides another replicable model for fostering multi-stakeholder collaboration in tourism digitalisation.

At the regional level, ASEAN should harmonise digital standards to create seamless visitor experiences. Shared frameworks for e-visas, digital payments, and data protection are essential to improving interoperability and traveller confidence. The ASEAN ICT Master Plan<sup>53</sup> and the ASEAN Digital Masterplan 2025<sup>54</sup> provide mandates for these initiatives, supporting both economic integration and enhanced quality of life across member states.

Inclusive access remains a key challenge, especially for small and medium-sized enterprises (SMEs) with limited financial and technical capacity. Targeted incentives such as subsidies, technical assistance, and tailored training can help these businesses adopt booking systems, e-commerce tools, and analytics platforms. Fiscal measures like tax breaks, matching grants, subsidised digital subscriptions etc. may further lower barriers. Thailand's incentive schemes, which offer up to 300% tax deductions on R&D and long-term corporate tax exemptions<sup>55</sup>, exemplify how governments could stimulate digital adoption.

Knowledge transfer across generations also plays a strategic role in sustaining digital transformation. Pairing digitally skilled youth with experienced tourism operators enables intergenerational learning that integrates innovation with cultural knowledge and service expertise. Thailand's Thailand 4.0 strategy<sup>56</sup> highlights human capital as a central measure of success, reinforcing the notion that skilled people are the foundation of digital progress.

These strategic considerations illustrate both the challenges and opportunities shaping ASEAN's digital trajectory. Infrastructure gaps, cybersecurity threats, and uneven digital capacity remain barriers, yet coordinated investment, inclusive policies, effective partnerships, and harmonised standards can transform ASEAN tourism into a more competitive, sustainable, and interconnected regional system. Strategic, collaborative action will ensure that digital innovation strengthens resilience, inclusivity, and long-term growth across ASEAN's tourism landscape.

### 3.5. Conclusion and Policy Implications

Digital transformation is rapidly reshaping the tourism sector across ASEAN, bringing both new opportunities and pressing challenges. From AI-powered personalisation to blockchain-secured transactions, emerging technologies are playing a pivotal role in how the region redefines visitor experiences, manages destinations, and promotes sustainable, inclusive growth.

At the forefront is the impact of advanced technologies. Artificial intelligence is enabling more personalised travel, predictive analytics, and streamlined operations—allowing destinations to offer smarter, more intuitive services. Big data has become an asset, helping tourism authorities track visitor flows, monitor sustainability indicators, and refine marketing strategies. Blockchain is also gaining traction, offering secure, transparent solutions for digital payments, loyalty programmes, and the verification of health and sustainability certifications—an important consideration in the post-pandemic era.

These innovations are converging to build smart tourism ecosystems. Across the region, integrated IoT devices, mobile apps, and real-time analytics platforms are working together to create seamless, visitor-centric journeys. In destinations like Singapore and Bali, digital tools are being used to manage tourist flows, optimise public transport, and monitor environmental impacts—making tourism not just more efficient, but also more sustainable.

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<sup>51</sup><http://www.right.sarawak.gov.my/rightv2/sub-about.shtml#:~:text=RiGHT%20Programme&text=The%20Rural%20ICT%20Guided%20Home,urban%20digital%20divide%20in%20Sarawak.>

<sup>52</sup>[https://apt.int/sites/default/files/file\\_tag/2024/02/APT\\_Report\\_on\\_the\\_Best\\_Practice\\_of\\_Connectivity\\_Netpracharat.pdf](https://apt.int/sites/default/files/file_tag/2024/02/APT_Report_on_the_Best_Practice_of_Connectivity_Netpracharat.pdf)

<sup>53</sup><https://asean.org/wp-content/uploads/2024/11/ASEAN-ICT-Masterplan-2020.pdf>

<sup>54</sup><https://asean.org/wp-content/uploads/2021/09/ASEAN-Digital-Masterplan-EDITED.pdf>

<sup>55</sup><https://www.nstda.or.th/en/industry-support/research-and-development-investment-promotion-measures.html>

<sup>56</sup>[https://www.industry.go.th/web-upload/1xff0d34e409a13ef56eea54c52a291126/m\\_magazine/12668/373/file\\_download/b29e16008a87c72b354efebef853a428.pdf](https://www.industry.go.th/web-upload/1xff0d34e409a13ef56eea54c52a291126/m_magazine/12668/373/file_download/b29e16008a87c72b354efebef853a428.pdf)

Emerging technologies such as contactless payments, e-visas, and digital wallets have become essential tools for improving safety, convenience, and accessibility—especially in a post-COVID context where hygiene and speed are priorities. However, for these tools to reach their full potential, regional cooperation is essential. Cross-border harmonisation of digital standards and continued investment in digital infrastructure will be key to supporting seamless travel across the ASEAN Economic Community.

Meanwhile, digital personalisation is transforming the way visitors engage with destinations. Tailored recommendations, real-time guidance, and user-specific experiences are boosting satisfaction and strengthening brand loyalty. Yet, as these experiences become increasingly data-driven, ASEAN countries must prioritise privacy protections and ethical data use to maintain consumer trust.

Despite this progress, several challenges persist. A significant digital divide remains, particularly for micro, small, and medium enterprises (MSMEs) and tourism operators in rural areas. Many still face limited access to digital tools, training, and infrastructure. Cybersecurity risks and inconsistent regulatory frameworks across Member States further complicate efforts to build a unified digital tourism environment.

Still, the opportunities are substantial. With the right investments and policies, digitalisation can enhance ASEAN's global competitiveness, support sustainable tourism models, empower local communities, and deepen regional integration. By embracing a balanced, inclusive, and strategic approach to digital innovation, ASEAN can position itself as a leader in the next generation of tourism—one that is smart, resilient, and built around the needs of both visitors and local stakeholders.



Chapter 4

# Sustainable and Resilient Tourism Development

## Chapter 4

# Sustainable and Resilient Tourism Development

Despite signs of recovery, ASEAN tourism still faces deep vulnerabilities. Climate change is already disrupting coastal and heritage sites, with sea-level rise, flooding, and ecosystem loss threatening both infrastructure and communities<sup>4</sup>. Community participation remains patchy, with many initiatives struggling to scale, gain visibility, or secure fair benefit-sharing. Standards and certification systems are unevenly applied, reducing market credibility and slowing progress toward harmonisation<sup>57</sup>. At the same time, demand for ethical and safe tourism is growing faster than regulatory and monitoring systems can adapt, leaving reputational and social risks around safety, child protection, and cultural respect. More broadly, weak data systems, fragmented governance, and inconsistent investment frameworks constrain long-term planning. These challenges underline the need for stronger coordination, finance, and innovation if ASEAN is to sustain its recovery and build resilience. This section therefore examines four interconnected levers through which ASEAN can steer its transition toward a more sustainable and resilient future:

**ASEAN Tourism Standards (ATS):** strengthening adoption, visibility, and integration with global benchmarks.

**Climate adaptation and green tourism:** promoting low-carbon pathways, nature-based solutions, and improved access to climate finance.

**Community-based and heritage tourism (CBT):** advancing equitable governance, digital inclusion, and sustainable business models.

**Conscious and responsible tourism:** embedding ethics, safety, and cultural respect in tourism policies, branding, and recognition systems.

Together, these levers provide a framework for ASEAN to accelerate its recovery while building long-term resilience, inclusivity, and competitiveness in the global tourism landscape.

### 4.1. ASEAN Tourism Standards

The ASEAN Tourism Standards (ATS) represent a pivotal mechanism for translating ASEAN's collective sustainability commitments into concrete, measurable actions across the tourism sector. Their purpose is twofold: to ensure consistent quality and sustainability benchmarks across diverse tourism segments in ASEAN Member States (AMS), and to support the long-term resilience, inclusivity, and competitiveness of the region's tourism industry. ATS embody a regional consensus on what constitutes sustainable tourism. They operate core regional goals by embedding sustainability principles across environmental, socio-cultural, and economic dimensions; aligning with global frameworks such as the UNWTO's VICE model (Visitors, Industry, Community, Environment) and the Global Sustainable Tourism Council (GSTC) Criteria; and providing a foundation for performance measurement, certification, and continuous improvement for tourism businesses and destinations.

In practice, the ATS encompass a family of segment-specific standards, each with a dedicated implementation guide, criteria set, and scoring system (Figure 4.1)

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<sup>57</sup> Think City Institute (2023). SEACAR Report – Charting a Climate-Resilient Southeast Asia.

**Figure 4.1. ASEAN tourism standards by segment**



Source: ASEAN (n.d.)

Beyond certification, the ATS also acts as a policy instrument to attract investment and access green finance. As noted in the ASEAN Tourism Framework and Toolkit, sustainability certification can serve as a qualifying criterion for infrastructure funding, climate adaptation support, or public–private partnership projects. Thus, the ATS are not merely compliance tools—they are central to ASEAN’s transition toward an integrated, climate-smart, and inclusive tourism economy, reinforcing governance, resilience, and accountability across the region.

### 4.1.1. Barriers to Adoption and Visibility

Although the ATS are formally endorsed regionally and integrated into several national frameworks, their implementation remains uneven. Some countries successfully link certification with promotion, investment incentives, and visibility through platforms like the ASEAN Sustainable Tourism Awards (ASTA). Certified operators in these contexts gain priority in tourism listings, trade missions, and international marketing.

However, survey findings from 2024 reveal persistent challenges limiting broader uptake. Many Member States lack clear institutional mandates or lead agencies, resulting in inconsistent implementation. Certification bodies are often under-resourced, with too few trained auditors, weak monitoring systems, and fragmented coordination among tourism-related ministries. While most ATS include detailed procedures, few AMS have developed national manuals, online application tools, or consolidated operator guidance. Consequently, certification processes remain fragmented, undermining transparency, data collection, and regional benchmarking.

The ASEAN Sustainable Measurement Toolkit emphasizes that such fragmentation weakens the role of certification as a regional quality assurance mechanism. Without more structured institutional frameworks and cross-border coordination, Member States risk underutilizing a system that could otherwise enhance regional branding, investment attraction, and sustainable transformation.

### 4.1.2. Consumer Awareness and Market Alignment

The ATS’ effectiveness depends not only on certified supply but also on consumer recognition and trust. According to Booking.com’s *2025 Travel & Sustainability Report*<sup>58</sup>, 84% of global Travellers consider sustainable travel important, and 69% want to leave destinations better than they found them. Over half (53%) consciously consider tourism’s impact on host communities, and many avoid overcrowded destinations by travelling off-peak or choosing lesser-known places.

These patterns align closely with ASEAN’s existing strengths—community-based, nature-focused, and heritage tourism—which already reflect ATS principles. Yet, despite this alignment, the lack of a recognizable ATS label and inconsistent promotion across booking platforms limit consumer awareness and reduce the market value of certification. With 67% of Travellers expressing a preference for clear, uniform sustainability credentials, ASEAN has a major opportunity to strengthen the visibility of its certification system globally.

<sup>58</sup> Booking.com (2025) Travel & Sustainability Report 2025 <https://news.booking.com/download/487ae9ae-97ef-4f66-b368-3b71787677b6/2025travelandsustainabilityreport-booking.com2.pdf>

To unlock this potential, stronger alignment between market demand and certified supply is needed. This means improving communication with travellers, expanding digital and trade promotion, and ensuring certified products embody the values today's tourists seek—authenticity, community benefit, and environmental responsibility.

### 4.1.3. Policy Directions: Advancing the Impact of ASEAN Tourism Standards

To maximize the ATS's contribution to sustainable, inclusive, and climate-smart tourism, ASEAN should prioritize the following strategic directions.

**Strengthen national implementation systems.** Establish clear mandates, adequate budgets, national manuals, and digital platforms under designated lead agencies to ensure consistent certification, monitoring, and promotion.

**Enhance visibility and consumer recognition.** Create a unified and recognisable ASEAN Tourism Standards mark, promoted through ASEAN channels, destination websites, and online travel agencies.

**Align with market demand and traveller expectations.** Expand certification to community-based, ecotourism, and cultural heritage initiatives that match current traveller values of authenticity and low-impact experiences.

**Gradually align with international standards.** Align the ATS with global frameworks such as the GSTC Criteria, while adapting to national contexts to enhance credibility and investor confidence.

**Support capacity building and certification access.** Provide training, financial incentives, and technical assistance to help MSMEs and community-led initiatives achieve certification. Institutionalize auditor training and peer-learning across ASEAN.

**Establish a regional performance and monitoring dashboard.** Create a shared platform to track certification uptake, destination coverage, and sustainability outcomes—fostering coordination, identifying gaps, and promoting accountability across Member States.

## 4.2. Climate Adaptation and Green Tourism

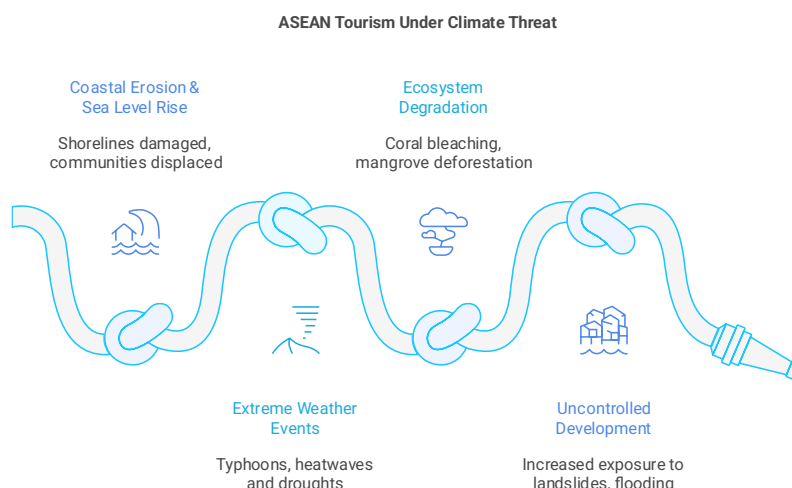
Climate adaptation and green tourism are central to the resilience and sustainability of ASEAN's tourism sector. The region faces escalating environmental risks—from sea level rise and biodiversity loss to extreme heat—that threaten destinations, infrastructure, and livelihoods. Climate-smart tourism involves development models that reduce environmental pressure, enhance adaptive capacity, and integrate low-carbon, nature-based solutions.

In the ASEAN context, green tourism focuses on decarbonising operations, restoring ecosystems, reducing waste, and investing in resilient infrastructure. Adaptation entails preparing tourism systems to cope with climate impacts through policy integration, risk-informed planning, and ecosystem-based defences. However, institutional readiness, private sector participation, and access to finance remain uneven, underscoring the need for coordinated regional mechanisms, technical assistance, and targeted investment.

### 4.2.1. Environmental Vulnerabilities and Exposure

Tourism destinations across ASEAN face diverse yet interconnected environmental vulnerabilities, intensified by climate change and unsustainable land use (Figure 4.2). These risks jeopardize natural attractions, infrastructure, and community livelihoods. Despite national variations, ASEAN's tourism sector is uniformly dependent on healthy ecosystems and climate stability. Without effective adaptation, degradation will erode competitiveness and sustainability.

**Figure 4.2. Climate vulnerabilities in tourism**



Source: Authors

#### 4.2.2. Institutional Integration and Governance for Climate Action and Resilience

While climate risks are well-recognised, integration of climate action into tourism governance remains uneven. Several AMS have incorporated sustainability into tourism and infrastructure policies, but few have fully mainstreamed climate risk management. Examples of progress include Singapore’s Green Plan 2030<sup>59</sup>, which links tourism to national decarbonisation goals through grants, digital tools, and industry playbooks. In addition, Thailand has mainstreamed climate change adaptation into tourism policy<sup>60</sup> and the National Adaptation Plan<sup>61</sup> explicitly identifies tourism as one of six priority sectors requiring resilience-building and policy integration; and the Philippines’ National Adaptation Plan (2023–2050)<sup>62</sup>, which embeds adaptation across all sectors, including tourism.

Yet, implementation remains fragmented. In many countries, tourism authorities operate independently from climate and environment ministries, with limited inter-agency coordination or technical capacity. Few have inter-ministerial platforms connecting tourism and climate stakeholders; others rely on donor-driven or ad hoc initiatives with limited continuity. Even where plans exist, monitoring systems are weak, and lessons rarely inform investment decisions.

#### 4.2.3. Green Infrastructure and Private Sector Engagement

Green infrastructure is key to reducing environmental impact and enhancing resilience. It encompasses low-carbon buildings, energy-efficient design, sustainable water use, and ecosystem-integrated planning across hotels, venues, attractions, and mobility systems.

While major innovations often concentrate in capital cities or luxury resorts, several AMS are incorporating sustainability principles in new developments. However, broader private-sector adoption—especially among MSMEs and rural operators—remains limited due to high costs, lack of expertise, and scarce incentives. Expanding technical support, fiscal instruments, and partnerships is essential to scale up green infrastructure investment.

<sup>59</sup> Singapore Green Plan <https://www.greenplan.gov.sg>

<sup>60</sup> Becken, S. Hess, J., Wisansing, J. (2019) Mainstreaming Climate Change Adaptation into Tourism Policy in Thailand [https://www.griffith.edu.au/\\_\\_data/assets/pdf\\_file/0025/1173580/GIZ-Policy-report.pdf](https://www.griffith.edu.au/__data/assets/pdf_file/0025/1173580/GIZ-Policy-report.pdf)

<sup>61</sup> Ministry of Natural Resources and Environment (2023) Thailand’s National Adaptation Plan [https://unfccc.int/sites/default/files/resource/NAP\\_THAILAND\\_2024.pdf](https://unfccc.int/sites/default/files/resource/NAP_THAILAND_2024.pdf)

<sup>62</sup> Climate Change Commission (CCC) and the Department of Environment and Natural Resources (2023) National Adaptation Plan of The Philippines [https://unfccc.int/sites/default/files/resource/NAP\\_Philippines\\_2024.pdf](https://unfccc.int/sites/default/files/resource/NAP_Philippines_2024.pdf)

#### 4.2.4. Climate Finance Access: Gaps and Opportunities

Access to climate finance is one of the most pressing challenges for tourism MSMEs. Many enterprises lack awareness of green finance options or the technical capacity to meet eligibility requirements such as emissions accounting or sustainability reporting. Limited financial literacy, small staffing, and complex procedures further deter participation<sup>63 64</sup>.

Financial institutions also perceive MSMEs as high-risk borrowers lacking collateral or track records, while banks often lack staff trained in evaluating small-scale green investments. Consequently, a mismatch persists between the supply and demand of climate-aligned finance<sup>65</sup>.

Although ASEAN's green finance landscape is expanding, tourism rarely features as a priority in national climate finance strategies. The UNFCCC's<sup>66</sup> regional assessment notes that concessional finance for tourism remains minimal, and adaptation investments are underrepresented despite high sectoral vulnerability. Greater integration of tourism into adaptation plans and financing frameworks is critical for destination-level resilience.

Nonetheless, promising models are emerging. Some AMS are piloting SME facilities for sustainable technologies, providing concessional loans, blended finance, and project preparation support. Such instruments can lower entry barriers and catalyse green transformation within tourism.

#### 4.2.5. Policy Directions and Strategic Options

To accelerate the uptake of climate adaptation and green tourism practices in ASEAN, coordinated and evidence-based policy responses are essential:

**Strengthen climate finance readiness for the tourism sector.** Integrate tourism explicitly into national adaptation and investment frameworks to ensure eligibility for targeted green funding.

**Promote inclusive access to climate funding.** Tailor financing schemes to MSME capacities through concessional loans, matching grants, and blended finance to stimulate low-carbon investment.

**Embed climate resilience in tourism planning and infrastructure.** Incorporate climate risk assessments into master plans, destination development, and public infrastructure, ensuring cross-sectoral coordination with environment, transport, and urban authorities.

**Introduce basic inclusivity and climate KPIs.** Expand regional monitoring frameworks to include indicators on MSME participation, gender inclusion, emission reduction, and nature-based adaptation. These metrics can guide policy and public investment.

**Support capacity building for tourism MSMEs and intermediaries.** Provide advisory services, digital tools, and training to help MSMEs access climate finance. Engage banks, consultants, and development partners as intermediaries to bridge finance and implementation.

**Foster Public–Private collaboration and regional knowledge exchange.** Strengthen ASEAN platforms for sharing best practices, pooling resources, and promoting cross-border learning on adaptation, carbon reduction, and sustainable infrastructure.

### 4.3. Community-based and Heritage Tourism (CBT)

Community-Based Tourism positions local people as stewards of their cultural and natural assets, linking visitor spending to livelihoods, conservation, and the transmission of living heritage. The ASEAN Community-Based Tourism Standard (2022) defines CBT as “tourism owned and managed by the community, for the community, enabling visitors to learn about local ways of life.”<sup>67</sup> This sits well with

<sup>63</sup> UNESCAP (2024) Advancing the green transition of SMEs <https://repository.unescap.org/server/api/core/bitstreams/9c291ed5-ace3-480b-8952-f17cb4c64beb/content>

<sup>64</sup> UNFCCC SME report Asia [https://unfccc.int/sites/default/files/resource/SME%20report\\_ASIA.pdf](https://unfccc.int/sites/default/files/resource/SME%20report_ASIA.pdf)

<sup>65</sup> OECD (2021) Facilitating the green transition for ASEAN SMEs [https://www.oecd.org/content/dam/oecd/en/publications/reports/2021/03/facilitating-the-green-transition-for-asean-smes\\_f38d4664/b82f5cba-en.pdf](https://www.oecd.org/content/dam/oecd/en/publications/reports/2021/03/facilitating-the-green-transition-for-asean-smes_f38d4664/b82f5cba-en.pdf)

<sup>66</sup> UNFCCC (2023) Guidebook on how to access climate finance for Member States of the ASEAN [https://www.undp.org/sites/g/files/zskgke326/files/2023-03/J0008\\_UNFCCC\\_NBF\\_ASEAN\\_Guidebook\\_FINAL\\_AW\\_digital.pdf](https://www.undp.org/sites/g/files/zskgke326/files/2023-03/J0008_UNFCCC_NBF_ASEAN_Guidebook_FINAL_AW_digital.pdf)

<sup>67</sup> ASEAN Secretariat (2022). ASEAN Community-Based Tourism Standard. Jakarta: ASEAN Secretariat.

ASEAN's *One Destination* vision<sup>68</sup>: a diverse set of local experiences presented through a coherent regional narrative. Properly implemented, CBT advances multiple SDGs—on poverty reduction, gender equality, decent work, sustainable cities, and safeguarding culture—while easing pressure on overcrowded sites by spreading demand more evenly.

Across the region, uptake of the voluntary ASEAN CBT Standard is growing but remains uneven<sup>69</sup>. Thailand's Designated Areas for Sustainable Tourism Administration (DASTA) aligns closely with the Standard and provides a structured path from readiness to recognition. Malaysia integrates CBT into the ASEAN Tourism Awards, giving certified sites visibility and market credibility. Other AMS—including Viet Nam, the Philippines, and Lao PDR—are piloting elements of the Standard. Yet most countries still face capacity constraints, fragmented mandates, and modest budgets for community upgrading, auditing, and promotion.

### 4.3.1. Landscape Dynamics and Core Barriers

Measuring CBT readiness is challenging because official statistics do not yet report CBT as a distinct category. In the absence of a regional registry, this chapter triangulates country documentation, expert interviews, and programme evidence to identify common patterns. **Figure 4.3** summarises four complementary dimensions used here to assess market readiness: demand and visibility, supply-side capabilities, the role of intermediaries, and access to innovative finance.

**Market demand and visibility.** ASEAN has regained scale, and interest in responsible, authentic, community-rooted experiences is strong. Traveller surveys consistently indicate willingness<sup>70</sup> to support local communities and to seek meaningful cultural engagement. However, discoverability remains a binding constraint: many CBT offers are not findable—or not bookable—on mainstream channels. Without a regional entry point or consistent tagging, “search costs” for travellers and buyers are high, depressing conversion even when products are compelling.

**Supply-side readiness.** Many communities possess rich stories and landscapes but lack basics that shape visitor confidence: all-weather access, clean sanitation, clear wayfinding, first-aid readiness, and basic waste management. Service quality is often uneven—product design, guiding, pricing, group handling, and interpretation vary widely—while digital presence is limited or outdated. Targeted infrastructure and service upgrades can shift offers from niche to market-ready without altering place character.

**Intermediaries and Value Chains.** NGOs, social enterprises, and responsible tour operators (TOs) curate experiences, broker contracts, manage quality (QA), and translate between community and market expectations. Where intermediaries aggregate multiple CBT sites under shared standards and storytelling, visibility and reliability improve markedly—yet coverage is frequently project-bound and under-financed.

**Finance and investability.** Pilots exist—village revolving funds, climate-linked grants, blended finance, and community crowdfunding—but few groups access structured finance beyond grants. Legal status may be informal; revenue-sharing rules are not always documented; financial literacy and bookkeeping vary; and proposals rarely match lender requirements.

**Table 4.1. CBT Market Readiness — Four Dimensions at a Glance**

Category	Key strengths	Challenges	Examples / Statistics
Supply-side readiness	Rich culture/nature; authentic stays	Basics missing (access, sanitation, signage); uneven service & pricing; weak online booking/marketing	Paths, sanitation, signage, first-aid; basic website/booking → higher buyer confidence
Intermediaries	NGOs, social enterprises, and responsible TOs link markets & communities	Communities can't meet standards consistently; support is project-bound	Cases in Viet Nam, Thailand, Philippines: curation, QA, contracts, mediation

<sup>68</sup> ASEAN Secretariat. ASEAN Tourism Marketing Strategy (ATMS) 2021–2025. Sections on “One ASEAN Destination” branding

<sup>69</sup> ASEAN Secretariat. ASEAN Sustainable Tourism Development Framework, 2022 — implementation of ASEAN Tourism Standards.

<sup>70</sup> Booking.com, Sustainable Travel Report 2025.

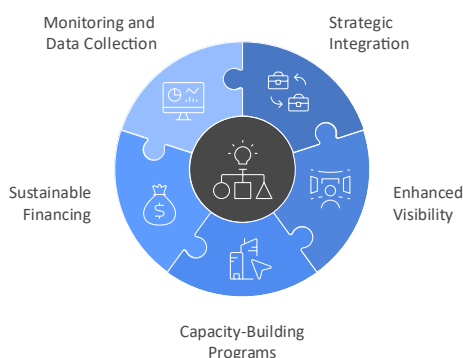
Category	Key strengths	Challenges	Examples / Statistics
Demand-side Perceptions	Strong interest in authentic, community-benefit trips	Trust gaps on reliability, safety, hygiene; informal booking lowers transparency	“Authentic and bookable, safe, smooth”; official listings help
Innovative finance	Pilots: revolving funds, climate-linked grants, blended finance, crowdfunding	Low bankability; limited financial skills; unclear legal form; unclear benefit-sharing; fragmented support	Pilots: Lao PDR/Malaysia (funds), Indonesia (climate), Philippines (blended); crowdfunding

Source: Authors

**Policy gaps behind the finance problem.** Four institutional gaps consistently undermine investability: (i) fragmented coordination among ministries and between national and local levels; (ii) unclear or cumbersome legal recognition for community groups, which complicates contracting and access to funds; (iii) ambiguous revenue-sharing arrangements, which deter partners and can trigger local conflict; and (iv) limited investment readiness (business planning, cash-flow management, and basic compliance), which keeps risk perceptions high.

**Digital inclusion as a competitiveness imperative.** Digital readiness strongly correlates with market access, yet most CBT operators and rural MSMEs remain at early stages—relying on social messaging rather than structured inventory, booking, payments, and reviews. This limits cross-border reach, reduces trust, and hinders performance tracking. Closing the digital gap—basic websites or landing pages, standardized product cards, online booking and payments, and consistent profiles on official and trade channels—is central to joining regional circuits and to measurable improvement over time.

**Figure 4.3. Five mutually reinforcing action areas needed to move from scattered pilots to a recognizable regional CBT**



Source: Authors

#### 4.3.2. Policy Directions: Turning Pilots into a Scalable, Investable Segment

- i. **Strategic integration into national frameworks.** Embed explicit CBT targets in tourism master plans—standard adoption, geographic spread, and inclusion outcomes (women, youth)—and assign clear mandates with small, ring-fenced budgets. Establish inter-ministerial coordination with culture, environment, MSMEs, and education so that conservation, enterprise support, and skills pipelines align with CBT priorities. Where feasible, link CBT upgrading to destination management plans and visitor-flow strategies.
- ii. **Enhanced visibility and access to the ASEAN CBT Standard.** Operationalize the Standard through a unified CBT entry point under ASEAN’s official portal, with verified profiles, storytelling guidance, and links to booking and payments. Provide communities with lightweight digital toolkits—templates for product cards, photo and consent guidelines, and simple analytics—under the *One ASEAN Destination* brand. Promote consistent tagging so buyers can find, compare, and bundle experiences.
- iii. **Structured capacity-building programme.** Establish ASEAN CBT learning hubs as practical, community-managed centers covering product design, guiding and interpretation, safety, pricing, and basic business operations. Launch a CBT fellowship focused on women and youth,

pairing pioneer sites with emerging communities for structured mentorship and exchange visits. Build a roster of trained auditors and coaches to accompany groups from pre-audit to improvement plan.

**iv. Sustainable financing and business models.** Create a small blended-finance window for CBT that combines grants, concessional loans, and technical assistance. Priorities include light infrastructure (access paths, sanitation, signage), safety kits and training, digital transformation, and governance strengthening. Simplify legal pathways so CBT groups can register, contract, invoice, and receive funds. At national level, issue model, transparent benefit-sharing guidelines to reduce conflict and encourage fair distribution.

**v. Monitoring, data, and knowledge sharing.** Develop an ASEAN-wide CBT monitoring framework aligned with existing tourism standards, focusing on a pragmatic set of indicators: local income retention, participation of women and youth, visitor satisfaction, conservation actions, and standard adoption. Host a regional CBT data dashboard to track progress and enable benchmarking. Partner with universities and think tanks to evaluate long-term effects and feed lessons into policy and programme design.

**Takeaway.** With better visibility, targeted capacity support, fair and transparent rules, fit-for-purpose finance, and light but consistent measurement, ASEAN can convert a rich but fragmented landscape into a credible regional CBT segment—one that preserves heritage, spreads benefits, and strengthens *One Destination* positioning.

## 4.4. Conscious and Responsible Tourism

Conscious and responsible tourism in ASEAN protects human dignity and embeds ethical conduct across the visitor economy. Beyond petty crime or accidents, “unsafe tourism” includes violence and harassment, labor exploitation, human trafficking, and the sexual exploitation of children—harms that affect visitors, workers, and host communities and erode destination trust. Even with limited statistics, the human and reputational costs justify clear ethical frameworks, effective enforcement, and shared accountability. ASEAN already provides anchors: the *ASEAN Declaration on the Rights of Children in the Context of Migration (2019)*, the *Regional Plan of Action on the Elimination of Violence Against Children (2016)*, and the *ASEAN Convention Against Trafficking in Persons, Especially Women and Children (ACTIP, 2015)*, aligned with UN definitions and centred on victims’ rights—forming the normative base for tourism policy and business conduct.

### 4.4.1. Strategic Relevance

The ethical agenda evolved from environmental concern to a broader, multi-stakeholder approach. Early action focused on visible environmental damage; by the 1990s, codes of ethics and voluntary standards broadened the lens to social and economic effects. Today, responsible practice is mainstreamed: businesses manage risk and reputation, communities seek protections and fair value, and travellers reward destinations that demonstrate credible safeguards. Figure 4.4 summarises current ASEAN initiatives linking frameworks and plans, environmental and professional standards, recognition systems, and community-based approaches under an ethical tourism umbrella.

**Figure 4.4. ASEAN's responsible & ethical tourism initiatives**



Source: Authors

#### 4.4.2. Trends and Market Signals

ASEAN's policy architecture already contains levers to advance responsible tourism:

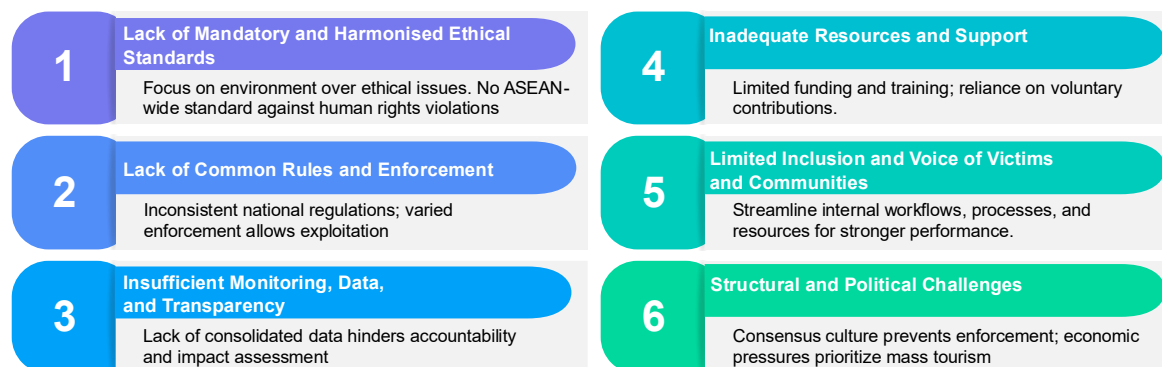
- **The ASEAN Tourism Strategic Plan 2016–2025** includes a monitoring framework for sustainability, inclusion, and service quality, reviewed by Member States.
- **The ASEAN Tourism Marketing Strategy** captures market perceptions and channels them back to national strategies.
- **The Mutual Recognition Arrangement on Tourism Professionals (MRA-TP)** strengthens quality assurance through common competencies, with oversight by the **ASEAN Tourism Professional Monitoring Committee (ATPMC)**.
- **Regional platforms and recognition**—the **ASEAN Tourism Forum (ATF)** and **ASEAN Sustainable Tourism Awards** promote good practice and peer learning.

Guidance materials complement these levers: the **ASEAN Guidelines for Responsible and Ethical Tourism (ASEAN-RET)** emphasise human rights, child protection, cultural respect, and responsible marketing; child-safe tourism manuals compile procedures for staff training, reporting, and traveller awareness; and regional cooperation addresses online exploitation and abuse. Market research by major platforms consistently indicates strong interest in environmental and ethical values, and industry lists and awards increasingly recognise destinations that manage social and environmental risks proactively. Taken together, these signals show that responsible conduct is now part of competitiveness, branding, and risk management.

### 4.4.3. Gaps and Constraints

Despite progress, several barriers persist (see Figure 4.5):

Figure 4.5. Challenges in ASEAN ethical tourism



Source: Authors

- **Lack of binding, harmonised ethical standards.** Regional guidance exists, but uptake is voluntary and uneven; environmental criteria often advance faster than protections for people (children, women, migrant workers).
- **Inconsistent rules and weak enforcement.** National regulations differ in scope; inspections and sanctions are limited; cross-border cooperation on investigations is uneven, enabling exploitation by mobile offenders.
- **Insufficient monitoring and data.** The absence of consolidated indicators and reporting channels hampers accountability and evidence-based action; incident data, referral outcomes, and training coverage are rarely tracked consistently.
- **Limited inclusion of victims and communities.** Policy design and implementation seldom include those most affected; voices are often mediated through NGOs with varying reach.
- **Inadequate resources and capacities.** Funding for prevention, training, and referral systems is modest and project-based; frontline staff turnover reduces retention of skills.
- **Structural and political constraints.** A consensus-based approach, combined with pressure to prioritize rapid tourism growth, can slow adoption of stronger safeguards.

### 4.4.4. Institutional and Private Sector Roles

Progress depends on complementary action by public authorities, industry, and civil society.

- **Industry codes and due diligence.** The Code of Conduct for the protection of children from sexual exploitation in travel and tourism” commits signatories to policies, staff training, traveller information, supplier clauses, and annual reporting.
- **Certification and standards.** Global schemes used by ASEAN operators—such as GSTC-aligned criteria and Travelife—embed social safeguards (non-discrimination, decent work, child protection) alongside environmental requirements and provide third-party verification.
- **Child-safe networks and awareness.** Regional initiatives (e.g., ChildSafe), train businesses and run public campaigns so staff and Travellers can recognise and report risks through hotlines and referral partners.
- **Transport, venues, and accommodation.** Airports, ports, bus terminals, hotels, and event venues are strategic nodes for visibility of hotlines, codes of conduct, steward training, and rapid response protocols. sector associations encourage members to implement awareness and training programmes.

#### 4.4.5. Strategic Policy and Market Recommendations

To make responsible tourism a foundational element of ASEAN's sustainability vision—while staying feasible for SMEs:

- **Embed indicators & incentives.** add a small set of ethical/safety indicators to the ATSP monitoring framework; use ASTA to reward destinations and firms that meet the baseline; publish simple dashboards for learning.
- **Strengthening skills.** Integrate child-safe and anti-harassment modules into ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) with refresher micro-learning; use the ATF as a recurring training/exchange platform.
- **Coordinate multi-stakeholder action.** Create a standing task force under ATCC (public, private, civil society, communities) to align guidance, share data templates, and coordinate referrals.
- **Improve monitoring & reporting.** Include social/ethical indicators in the State of Tourism in ASEAN and align with the regional SDG dashboard; standardise incident-reporting channels and minimum visibility (icons, multilingual hotlines) across nodes/venues.
- **Make it workable for SMEs.** Provide model clauses (supplier expectations, child-safe policy, reporting SOPs), simple induction packs, and a grace period when linking promotion/procurement/permits to the baseline.
- **Resource the baseline.** establish a modest fund via existing platforms (e.g., Japan-ASEAN Integration Fund (JAIF) to co-finance training, signage/hotlines, incident-response capacity, and initial certification support.

**Takeaway.** Responsible tourism is no longer a niche aspiration; it is core visitor infrastructure and brand protection. by using existing ASEAN instruments to set clear minimum expectations, signal protections to Travellers, equip SMEs with practical tools, and track progress transparently, member states can reduce harm, build trust, and strengthen the region's competitiveness—while ensuring that tourism growth is consistent with dignity and rights.

#### 4.5. Conclusion and Policy Implications

ASEAN is poised to turn today's momentum into a decade of resilient tourism growth. By scaling the ASEAN Tourism Standards, accelerating climate adaptation and green investment, empowering community-based and heritage tourism, and embedding ethics and safety across the visitor economy, the region can elevate both quality and trust. The playbook is practical: fund MSMEs, digitise and upskill the workforce, align agencies around shared indicators, and reward credible performance through ATF/ASTA visibility. Do this, and ASEAN doesn't just recover—it competes smarter, includes more people, safeguards culture and nature, and captures the traveller of tomorrow.

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