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SUSTAINABLE TOURISM INITIATIVES IN ASEAN

Introduction

UN World Tourism Organization (UNWTO) revealed¹ that 80% of countries are integrating contemporary culture alongside traditional heritage in cultural tourism which is projected² to generate US\$11.9 billion by 2029 globally. The³ ASEAN region, particularly in the aftermath of the COVID-19 pandemic, has embraced the integration of cultural tourism, alongside a focus on ecotourism⁴ that takes full account of economic, social, and environmental impacts by addressing the needs of visitors, industry, the environment, and host communities. Given Southeast Asia's unique position⁵ of housing some of the world's longest-standing ecosystems with over 50⁶ Heritage Parks and rich cultural communities, the pivot to sustainable, cultural, and ecotourism is especially applicable to the region.

According to data compiled by Nikkei from ASEAN governments statistics and publicly available sources, the total number of visitors to the region surpassed 100 million in 2023⁷, equivalent to 70% of the pre-pandemic level in 2019. This recovery was fueled by economic revitalization following the pandemic and the establishment of new transportation infrastructure. Regionally, the ASEAN Tourism Strategic Plan (ATSP) established a target of the tourism sector contributing up to 15% of ASEAN's regional GDP by 2025.



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Framework and Action Roadmap for Sustainable Tourism in ASEAN

The overarching objective of all ASEAN nations is to position the region as a quality sustainable tourism destination that promotes economic prosperity, and community welfare and engagement while safeguarding and nurturing its natural environment and cultural heritage. Central to this vision is delivering a top-tier experience to conscientious and sustainable-minded travelers. The ASEAN Sustainable Tourism Framework outlines⁸ essential pillars and strategies aimed at alleviating poverty, fostering peace and security, addressing climate change, and championing cultural values and diversity. A key focus of the framework is guiding ASEAN nations in safeguarding both tangible and intangible cultural heritage and fostering public-private-community partnerships to engage and empower local communities. While the framework aims to establish a long-term vision for sustainable tourism development in ASEAN, the action roadmap provides⁹ stakeholders with the necessary strategies, actions, and best practices to achieve key priorities.

The ASEAN Tourism Strategic Plan 2016-2025 anticipates¹⁰ a significant increase in the contribution of ASEAN tourism to GDP, employment, and per capita spending by international tourists by 2025. With ASEAN emerging as a dynamic region with a population of over 600 million, abundant natural resources, and a relatively stable environment, ASEAN nations are poised to become top tourism destinations. The vision for ASEAN tourism through 2025 is:



By 2025, ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, and will be committed to responsible, sustainable, inclusive and balanced tourism development, so as to contribute significantly to the socioeconomic well-being of ASEAN people.

According to the UN Tourism, sustainable tourism¹¹ takes full account of its current and future economic, social, and environmental impacts by addressing the needs of visitors, industry, the environment, and host communities. Ecotourism¹² is one of the sustainable forms of tourism that enables tourists to experience and understand the nature and rich biodiversity of the region while generating socio-economic benefits for the local communities living in harmony with nature, especially in the remote and rural areas within the ASEAN region.

Ecotourism à Cultural/Village Tourism

During the COVID-19 pandemic, tourism paused, yet cultural tourism generated a revenue of US\$5.3 billion globally in 2022 and is projected¹³ to generate US\$11.9 billion by 2029. UN Tourism that 80% of countries integrated contemporary culture alongside traditional heritage in cultural tourism.¹⁵ Southeast Asia, with its long-standing ecosystems and vibrant communities, serves as a prime ecotourism destination. Village tourism complements cultural tourism by showcasing the heritage and environment of ASEAN's rural heartlands. ASEAN's Sustainable Tourism Development Framework, pillars 2, 3, and 4, are underpinned by cultural/village tourism's promotion of socio-economic growth, environmental conservation, and cultural heritage. Cultural/village tourism spotlights ASEAN's culturally and environmentally rich regions that may often be overlooked by other industries, benefiting local economies.¹⁴ found¹⁴ that 80% of countries integrated contemporary culture alongside traditional heritage in cultural tourism. Southeast Asia¹⁵, with its long-standing ecosystems and vibrant communities, serves as a prime ecotourism destination. Village tourism complements cultural tourism by showcasing the heritage and environment of ASEAN's rural heartlands. ASEAN's Sustainable Tourism Development Framework, pillars 2, 3, and 4, are underpinned by cultural/village tourism's promotion of socio-economic growth, environmental conservation, and cultural heritage. Cultural/village tourism spotlights ASEAN's culturally and environmentally rich regions that may often be overlooked by other industries, benefiting local economies.

Under the Brunei-Indonesia-Malaysia-Philippines East ASEAN Growth Area (BIMP-EAGA) several member countries increased their focus on rural¹⁶ tourism to capitalize on their cultural and natural offerings. Indonesia's Ministry of Tourism and Creative Economy is tapping into village funds to support tourism development, setting up village-owned tourism enterprises, capacity building for village tourism services, and improving village infrastructures. Malaysia's Sabah Tourism Board has set out to educate rural communities about tourism preparedness, develop public-private partnerships, and plan quality design tourism products. Brunei's Ministry of Tourism and Primary Resources has emphasized the need to have accessible tourism villages as well as the need for traveler and host security.



ASEAN member countries have begun to realize the potential of cultural/village tourism and have pushed initiatives that expand their respective destination offerings beyond central city locales. The ASEAN Center for Biodiversity has designated¹⁷ destinations across the region as ASEAN Heritage Parks (AHP). It was introduced in 1978 but has since grown to include over 55¹⁸ parks throughout ASEAN. AHP serves to protect and promote sites of rich natural heritage. In 2023, Thailand's Phu Khieo Wildlife Sanctuary-Nam Nao National Park and Phu Kradueng National Park joined the AHP list. ASEAN member countries have also turned to Community Based Tourism (CBT), to promote their rural heritages while ensuring preservation and community benefit. The ASEAN CBT Standard entered its second edition¹⁹ in 2022 and is aimed to coordinate community-operated tourism that contributes to sustainable livelihoods and protects heritage resources.

Potential Risks and Challenges of Ecotourism

Ecotourism provides²⁰ an invaluable opportunity for environmentalists and biologists to deepen their understanding of ecosystems, biology, and geology in a specific location. Additionally, it serves as a catalyst for job creation and the preservation of traditional practices. However, as ASEAN endeavors to position itself as a quality tourism destination, offering unique and diverse nature-based-tourism experiences, several challenges²¹ associated with ecotourism emerge:

■ Ecological Risk

Studies, conducted by life scientists have analyzed more than 100 research studies on the impact of ecotourism on wild animals, have concluded that such excursions can be harmful to wildlife. Additionally, ecotourism activities may compromise the ecological integrity of protected areas. When governments and businesses exploit the economic benefits of ecotourism without proper regulation, they risk damaging the environment and exacerbating hardships for local communities.

■ Risk to Local Communities

Travelers can inadvertently put local communities at risk by contributing to habitat degradation, introducing invasive species, causing pollution, and creating overcrowding. Moreover, the influx of ecotourism may impact the cost of rent and property values in these regions.

■ Health Risks

Nature-based tourism or ecotourism activities can pose risks to travelers due to participation in potentially risky activities in extreme or remote environments. The risks include exposure to infectious diseases arising from water contamination, for instance. Poor infrastructure also contributes to these risks.

Digital Tourism as a form of Sustainable Tourism



With the rise of Industry 4.0, where physical and virtual realities increasingly overlap, the concept termed "phygital"²² is defined as the blending of physical and digital experiences. Digitalization is transforming every sector of the economy, and tourism is no exception. Scholars have coined the term "Tourism 4.0" (T.4.0)²³ to describe the integration of digital technologies such as IoT, AI, augmented reality (AR), and virtual reality (VR) into the tourism sector. Beyond opportunities for tourism sector growth, this digital transformation offers significant benefits in the realm of sustainable development. These include but are not limited to reducing carbon footprints through e-commerce, online booking, and e-visas, to improving resource management while mitigating the risk of overtourism through big data and analytics²⁴.

The COVID-19 pandemic, while having a devastating impact on the global tourism sector, also accelerated the shift to digitalization, opening new opportunities for countries to capitalize on this shift. In ASEAN, where approximately 70 percent of the population in Singapore, Malaysia, Indonesia, the Philippines, Vietnam and Thailand is now online²⁵, the member states are well-positioned to harness the benefits of digital tourism. In fact, ASEAN countries are already embracing these changes, integrating digital technologies to enhance tourists' experiences, such as implementing national QR payment system²⁶ and developing digital information centers for tourists. Beyond individual members' efforts, the ASEAN Declaration on Digital Tourism 2020²⁷, for example, outlines a regional commitment to advancing tourism through digital means, complementing the earlier ASEAN Declaration on Industrial Transformation to Industry 4.0. Moreover, With the recent adoption of the Global Digital Compact by the United Nations General Assembly, more opportunities are likely to come in way for ASEAN countries to improve their digital governance and infrastructure, which are all necessary components for sustainable digital tourism.

ASEAN countries are also building critical infrastructure to support digital tourism, such as digital payment systems, which are now widely used in countries like Indonesia, Singapore, the Philippines, and Malaysia. According to the 2023 report published between Google, Temasek, and Bain & Company, more than 50 percent of financial transactions in Southeast Asia are now digital. The report also projected the upward trajectory of the region's digital economy, hitting \$100 billion in 2023, and digital tourism—deeply integrated into the entire digital ecosystem—is set to contribute significantly to this growth.

The digitalization of tourism also presents growth opportunities for digital startups, particularly in countries like Indonesia, which leads Southeast Asia in producing unicorn companies, including tourism-heavy startups such as Traveloka and Tokopedia²⁸. Malaysia also has a dedicated digital tourism startup ecosystem, exemplified by initiatives like the Digital Tourism Innovation Lab²⁹. Other ASEAN countries are also implementing ambitious projects to boost digital tourism. Thailand introduced ThailandCONNEX³⁰, an online platform helping businesses in the tourism sector leverage digital tools and services, which has helped generate over 12 billion THB in revenue. Singapore, Malaysia and Vietnam also implemented the Tourism (Attractions) Industry Digital Plan (IDP)³¹, Smart Tourism 4.0 initiative³² and Application of Industry 4.0's technology³³ to develop smart tourism, respectively.

The emergence of augmented reality (AR) and virtual reality (VR) technologies has significantly influenced the sustainable tourism sector. Studies have shown³⁴ positive correlations between the adoption of VR technologies and shifts in tourist behavior that align with ecological sustainability. This year, to celebrate World Tourism Day, ASEAN launched the first of its kind "ImaginASEAN³⁵," a virtual tour of cultural landmarks powered by metaverse technology. Within member states, Vietnam, in particular, has embraced the metaverse in its tourism sector, introducing initiatives like the Metaverse Village.

However, challenges remain, particularly in developing required infrastructures, upskilling MSMEs—the backbone of the tourism industry—to integrate them into the digital economy, and in addressing the digital divide between urban and rural populations. In response to these challenges, ASEAN adopted the Framework for Developing Digital Readiness Among ASEAN Citizens³⁶ in March 2021. This framework focuses on three key areas to improve digital readiness: digital access, digital literacy, and digital participation. Countries like Singapore are also making good efforts to address digital access and skill gaps among SMEs by introducing plans to upskill small business owners with digital skills under the IDP. On the infrastructure front, countries like Malaysia have seen billions of dollars investment³⁷ in data centers during the past few years, developing capacity to meet increasing demands in data-driven tourism environments.

ASEAN Tourism Safety and Security Policy and Strategy



Safety and security are essential components of sustainable, competitive, and quality tourist destinations. Safety must be ensured in the use of tourism facilities and services, especially transportation, accommodation, and tour operations services, while security against crime, terrorism, and armed conflict remains integral to the growth of sustainable tourism in the region. The governments and organizations promoting ecotourism have a social responsibility to uphold such principles and have taken steps to do so.

For instance, following recent security incidents in Thailand, the Thai Ministry of Tourism and Sports has introduced the Thailand Traveler Safety (TTS) Scheme³⁸ for foreign tourists. The schemes cover up to ฿ 500,000 Baht for accidents, crimes, and other emergency cases. TTS further provides up to ฿1 million Baht in the unfortunate event of a traveler's death. Thailand has also increased its efforts³⁹ to tighten weapons screenings, police presence, surveillance technologies, and medical services around tourism hotspots. The Tourism Authority of Thailand has also set up communication⁴⁰ strategies to ease the safety and security concerns of travelers.

In 2024, ASEAN prioritized enhanced travel connectivity and infrastructure at the ASEAN Tourism Forum. The Self-Drive Tourism Manual for ASEAN was published⁴¹ in 2022, offering safety guidelines, emergency services, and secure land-border routes. Thailand proposed the Self-Drive Partnership Program among⁴² Cambodian, Laotian, Malaysian, and Vietnamese ministers to improve road infrastructures and promote cross-border tourism. In Air travel, ASEAN continues to work to establish the ASEAN Single Aviation Market (ASAM)⁴³ to bolster air connectivity⁴⁴ and harmonize consistent safety standards across the region while emphasizing safety standards and COVID-19 protocols.

In addition to the security risks posed to travelers and hosts are the safety risks to and from environments that ASEAN member countries must navigate. Consequently, ASEAN member countries are mandated⁴⁵ to adopt common approaches in environmental management, conservation, as well as restoration of natural ecosystems while providing tangible benefits to local communities.

ASEAN member countries have established tourism standards⁴⁶ to mitigate environmental risks to travelers, hosts, and the environment. In addition to the ASEAN tourism standard, the ASEAN Ecotourism Standard and ASEAN CBT Standard ensure quality and safety in sustainable tourism products. These standards cover various services, from accommodation practices to hygiene and sanitation standards, including measures against infectious diseases. Working groups under⁴⁷ ASEAN bodies like AMME, ASOEN, and the ASEAN Centre for Biodiversity continue efforts in environmental protection. They develop regional strategies and encourage cooperation with ASEAN entities, dialogue partners, global institutions, and stakeholders to promote environmental preservation and sustainable progress.

Sustainable Tourism Initiatives in each ASEAN Country

BRUNEI

Though Brunei Darussalam experiences lower volumes of tourists than its ASEAN neighbors, the country is looking to carve out its niche in the ecotourism space. Brunei is leveraging the country's nature reserves as a product unique to the kingdom. With 70% of Brunei comprising untouched rainforest ecosystems, the Ministry of Primary Resources and Tourism has zeroed in on ecotourism as a tool for recovery.



The Ministry of Primary Resources and Tourism has set a focus on regenerative tourism⁴⁸ which allows tourists to play a proactive role in preserving as well as developing the environments and cultures they visit. Brunei's Eco Ponies Garden has been involving tourists in sustainable farming and community garden growing initiatives. Through BIMP-EAGA, Brunei is engaging its ASEAN neighbors to renovate and enhance tourism facilities by focusing on product development at community-based ecotourism (CBET) sites⁴⁹ across the region. The Ministry is intensifying efforts⁵⁰ to promote Brunei as a leading ecotourism destination with locales like Sumbiling Eco Village, Freme Rainforest Lodge, Eco Ponies Garden, Ulu Temburong National Park and Kampong Ayer through CBET. Furthermore, the Sister Village program promises joint initiatives to facilitate sustainable practices amongst participating villages. Brunei's ecotourism efforts are highlighted by a focus on responsible travel and the preservation of its ecological environments.

CAMBODIA

The Cardamom Mountains, the Mekong River, and the Tonle Sap Lake stand as natural wonders within Cambodia. One of the last areas of forest wilderness in mainland Southeast Asia, the Cardamon mountains⁵¹, is emerging as the center⁵² of eco-tours. Local operators curate a range of eco-tourism activities, including hiking, birdwatching, and wildlife safaris. To champion responsible tourism and safeguard Khmer antiques and culture, the Heritage Friendly logo⁵³ was commissioned by the Ministry of Environment⁵⁴. The logo aids tourists in identifying whether a business or organization has met certain standards that help protect Cambodian heritage. In late 2023, Cambodia's Ministry of Tourism introduced the "BUILD Plus 3Ds" action plan⁵⁵ to revive the country's post-COVID tourism. The Siem Reap Tourism Development Master Plan 2021-2035⁵⁶ is another long-term tourism initiative that the kingdom prioritizes. To attract environmentally conscious travelers, Cambodia can promote responsible tourism, which include eco-lodges and guided nature tours that educate visitors on local ecology and conservation efforts. Additionally, community-based ecotourism (CBET)⁵⁷ has gained traction as a model of responsible tourism organized and managed by local communities. Cambodia's revitalized⁵⁸ CBET acts as a mechanism for greater public-private partnerships in service of tourism development and recovery. Engaging in responsible tourism in Cambodia also means engaging in the nation's past to understand its present.





INDONESIA

As part of Indonesia's "Every Step Matters" movement⁵⁹, the Ministry of Tourism and Creative Economy has pledged to decarbonize the tourism sector and encourage travelers to preserve the environments and cultures they visit. The movement has targeted a 50% reduction of carbon emissions in the tourism industry by 2030 and a zero-emissions goal by 2045. In efforts to promote sustainable practices in the tourism industry, the Indonesia Sustainability Tourism Council (IST-Council)⁶⁰ has been certifying destinations in Indonesia that adhere to globally recognized standards by the Global Sustainable Tourism Council (GSTC) and UN Tourism. As part of Indonesia's Kampanye Sadar Wisata 5.0 (KSW), Tourism Awareness Campaign 5.0⁶¹, the Ministry of Tourism and Creative Economy initiated marketing programs to promote village tourism across its regions. KSW received US\$30 million in funding from the World Bank for 2024 to promote the unique natural environments, cultures, and experiences offered by the villages as distinct tourism products while increasing human development for the communities in such rural destinations. The Ministry has since expanded⁶² KWS benefits from 65 villages in 2022 to 90 villages in late 2023.

Indonesia Tourism and Creative Economy Minister Sandiaga Salahuddin Uno⁶³ noted that the country needs more investment for sustainable tourism development on June 5. Uno claimed that another 15-20 billion USD should be funneled into ecotourism to ensure sustainability standards. He is confident that investors can observe Indonesia's commitment to sustainable tourism, reflected in the initiatives his ministry has designed. Some of the programs he highlighted include the Cleanliness, Health, Safety, and Environment (CHSE)⁶⁴ program, the Indonesian Tourism Village Awards (ADWI), carbon footprint calculation, and waste handling assistance and guidance. Furthermore, at the United Nations General Assembly (UNGA)⁶⁵, Uno informed that Indonesia has planted mangrove trees at tourist destinations, implemented reef restoration programs, and aligned itself with regenerative tourism.

LAOS

Starting in 2023, local tourism businesses were introduced to the Lasting Laos certification⁶⁶. The certification program is designed to recognize local supplier businesses in the tourism industry that have demonstrated sustainable environmental, social, and economic practices. The training, assessments, and certification of businesses are administered locally by the Lao National Chamber of Commerce and Industry, with support from the SUSTOUR⁶⁷ Laos Project. The primary goal of this certification is to improve the overall sustainability of the tourism supply chain by providing benchmarks and guidance for local businesses to measure and improve their sustainability. Up to March 2024, the project has directly supported 378 MSMEs⁶⁸ and reached about 10 million potential tourists through its marketing campaigns.

Furthermore, Laos introduced various eco-tourism activities and responsible tourism initiatives, including the post-COVID-19 Eco Bungalows⁶⁹ initiative and bicycle tours, aiming to immerse tourists in village life and provide an eco-friendly exploration of the country. Laos recently hosted the 2024 ASEAN Tourism Forum (ATF) under the theme of “Quality and Responsible – Sustaining ASEAN’s Future”. Laos’s agenda for implementing sustainable tourism focuses⁷⁰ on four main sectors: transportation and logistics, food and beverages, handicrafts and souvenirs, and cultural tourism.





MALAYSIA

Malaysia's abundant natural resources and ancient rainforests make it an eco-tourist⁷¹ destination. Tourism Malaysia collaborates with seven (7) state tourism boards from Melaka, Negeri Sembilan, Pahang, Penang, Perlis, Sabah, Sarawak, and Terengganu to promote⁷² the country's rich biodiversity and local communities. The next Visit Malaysia Year (VMY) is scheduled for 2026, during which Malaysia will prioritize inclusivity, sustainability, innovation, and digitalization in transforming its tourism sector, as outlined in the Ministry of Tourism's National Tourism Policy (NTP)⁷³ 2020-2030. Furthermore, the National Energy Transition Roadmap 2023 (NETR 2023)⁷⁴ with clean energy initiatives enhances the overall attractiveness of destinations, reduces environmental footprint, and offers unique experiences for tourists. Tourism Malaysia's role, in alignment with the National Tourism Policy (NTP) and the United Nations Sustainable Development Goals (UNSDG), reinforces the role of tourism as a catalyst for sustainable, responsible, and inclusive economic development. This includes⁷⁵ advocating responsible tourism in fragile tourism destination areas, integrating the development of tourism islands with conservation efforts to position Malaysia as a premier marine ecotourism destination, and promoting inclusive tourism⁷⁶ development involving women, youth, and disadvantaged groups. Datuk Dr. Yasmin Mahmood⁷⁷, Chairman of the Malaysia Tourism Promotion Board, highlighted the importance of promoting and preserving indigenous cultures as part of Malaysia's ecotourism initiatives. For example, jungle schools offer visitors an educational experience about sustainable living practices as well as indigenous cultures. To promote its attractiveness as a marine ecotourism destination, the Malaysian government has created marine sustainability initiatives⁷⁸ for the recovery of marine ecosystems and protection of endangered sea animals.

PHILIPPINES

The Philippines is becoming an increasingly popular destination for tourists seeking sustainable tourism experiences. The Batanes⁷⁹ Islands, situated in the far north of the Philippine archipelago, exemplify sustainable tourism practices. Basco, the capital of Batanes, is home to the indigenous Ivatan⁸⁰ people. The islands are also home to some endemic biodiversity and a sanctuary for migratory birds. In June 2023, the Batanes Islands in the Philippines was granted⁸¹ membership in the International Network of Sustainable Tourism Observations (INSTO)⁸² of the UN Tourism. Batanes Islands in the Philippines is the latest region to join the UN Tourism's INSTO. The Batanes Tourism and Hospitality Monitoring Center (BTHMC), in collaboration with the province and its local stakeholders, is committed to supporting the sustainable development of tourism based on evidence and participatory approaches. A participatory process gathers⁸³ detailed insights into the key sustainability issues identified by indigenous Ivatans and expands measurement focus towards environmental social and areas in line with the INSTO Framework. By adopting this participatory approach, the Batanes Islands aims to manage tourism development responsibly and sustainably, by taking a holistic view and developing adequate, innovative strategies.





SINGAPORE

In 2023, Singapore became the first ASEAN country to be certified as a Sustainable Tourism Destination by the Global Sustainable Tourism Council⁸⁴. The Singapore Tourism Board (STB) initiated the Tourism Sustainability Program (TSP)⁸⁵ to facilitate innovation, capability development & growth, and education & awareness, starting in 2023. Under TSP, Singapore implemented a series of sustainability-centric programs, including Training Industry Professionals in Tourism (TIP-IT)⁸⁶ and Sustainable Tourism Jobs & Skills Roadmap aimed at supporting tourism companies in talent and leadership development. The Business Improvement Fund (BIF)⁸⁷ and the Singapore Tourism Accelerator⁸⁸ are poised to provide financial resources for green technology and sustainable business practice innovations. The Singapore MICE Sustainability Roadmap⁸⁹, Singapore Hotel Sustainability Roadmap⁹⁰, 3R Guidebook⁹¹ for Hotels, 3R Toolkit for the MICE Industry⁹², Guide on Food Waste⁹³ Segregation and Treatment, “Reduction Of Disposables” Checklist⁹⁴, and the Best Practice Guide for Organizing Environmentally Friendly Events⁹⁵ were also set to encourage sustainability best practices and guidelines across segments of the tourism industry. In May 2024, the STB unveiled the Legacy Toolkit⁹⁶, initiated the Singapore MICE Industry Carbon and Waste Baseline Study, and set carbon-neutral goals. Furthermore, Singapore’s Sentosa Island, managed by the Sentosa Development Corporation (SDC), has aligned its sustainable tourism commitment with the Singapore Green Plan 2030 through the Sustainable Sentosa Strategic Roadmap⁹⁷. The roadmap aims to make the island carbon-neutral by 2030⁹⁸. In service of net-zero efforts, SDC established⁹⁹ the Carbon Neutral Network¹⁰⁰ which aligned 25 businesses across the island to implement solarization and disposables management.

THAILAND

Thailand has experienced both positive and negative impacts from tourism. The Thai government views sustainable tourism not merely as a global trend, but as a movement¹⁰¹. In line with this commitment, the single-use plastic bags initiative was implemented¹⁰² across all 154 national and regional parks across the country, starting in 2018. The Tourism Authority of Thailand (TAT)¹⁰³ has introduced the concept of Secondary Cities¹⁰⁴, which are being promoted¹⁰⁵ and marketed for sustainable tourism. This concept is one of the strategic pillars under the Bio-Circular-Green Economic Model (BCG)¹⁰⁶, introduced by the Thai government in 2021 to facilitate responsible economic development. Moreover, the Thai government has facilitated various niche markets such as wellness¹⁰⁷ travel experiences and eco-tourism¹⁰⁸ activities through robust public-private partnerships (PPP). For instance, the EcoThailand Foundation¹⁰⁹ collaborates with TEATA (Thai Ecotourism and Adventure Travel Association) and several global travel companies to curate and promote Sustainable Tourism in Koh Phangan¹¹⁰ in 2024 and beyond. On a global scale, the Designated Areas for Sustainable Tourism Administration (DASTA) continues to collaborate¹¹¹ with the United Nations Educational, Scientific and Cultural Organization (UNESCO) to support sustainable tourism and local development for cultural and natural heritage sites, as well as for Creative Cities¹¹² in Thailand. This collaboration primarily focuses on capacity-building and the safeguarding of tangible and intangible heritage at selected pilot sites. To prevent overtourism, the TAT announced its intention to target long-haul travelers and prioritize sustainable practices in June 2024. Thailand's domestic initiatives to promote responsible travel practices are the Thailand Tourism Awards¹¹³ and the Sustainable Tourism Goals (STGs). In addition, TAT is collaborating with Tourism Cares, a US-based non-profit, to enhance sustainable tourism in Thailand.





VIETNAM

In 2023, the Ministry of Culture, Sports, and Tourism revealed¹¹⁴ Vietnam's Tourism Marketing Strategy until 2030 to position Vietnam as a premier destination in Southeast Asia, enhance brand competitiveness, and promote sustainable tourism development. In emphasizing digital marketing, the strategy targets high-spending long-stay visitors and aims to diversify the tourism market beyond high traveler volumes. The strategy also prioritizes maintaining stable, high growth in the tourism economy, promoting social progress and cultural preservation, and protecting natural resources. Furthermore, the Minister of Culture, Sports, and Tourism, Nguyen Van Hung, highlighted Vietnam's commitment to fostering long-term sustainable development by adopting a sustainable tourism ecosystem¹¹⁵ model that focuses on digital transformation and green initiatives, in alignment with the Government's Resolution No. 82/NQ-CP. In 2023, over 5,000 accommodation providers in 10 cities¹¹⁶ across Vietnam received sustainable tourism badges from Booking.com. These destinations include Ho Chi Minh City, Hanoi, Da Nang, Vung Tau, Da Lat, Nha Trang, Hoi An, Quy Nhon, Phu Quoc, and Ha Long. Moreover, Vietnam's Prime Minister directed the Ministry of Public Security to revise entry policies by expanding visa waivers to attract more international visitors to Vietnam and enhance connectivity. The Ministry of Foreign Affairs is evaluating unilateral visa exemptions for the citizens of 13 countries and is set to propose expanding visa exemptions. Vietnam has been issuing e-visas since mid-August 2023, extending temporary residence to 90 days with unlimited entries and extending temporary residence for visa-exempt foreigners to 45 days.

In May 2024, Vu Quoc Tri¹¹⁷, General Secretary of the Vietnam Tourism Association, said that the country's tourism sector has designed a development strategy for 2030 for sustainable and inclusive tourism. Representatives of the Vietnam Tourism Association established the goal for tourist areas to be free of single-plastic use by 2025. To achieve this goal, the Vietnam Tourism Association has partnered with the Institute of Strategy and Policy on Natural Resources and Environment. With the sponsorship of the United Nations Development Program for the last 1.5 years, the project has promoted plastic waste reduction activities in tourism.

Bridging Gaps: Advancing Sustainable Tourism

As ASEAN nations make progress towards sustainable tourism, they must navigate the delicate balance between preserving the rich cultural heritage and accommodating the anticipated surge in travelers, both in 2024 and beyond. Hence, the advancement of ASEAN Sustainable Tourism is a joint endeavor¹¹⁸, treating the region as a single destination. To achieve this, ASEAN member countries need to focus on several key areas:



- To ensure authenticity and mitigate the risk of greenwashing, it is imperative for each nation to strategically brand and market its sustainable tourism endeavors through robust collaborations with local stakeholders, traveler education programs, and partnerships with hospitality providers and media outlets. Further progress also relies¹¹⁹ heavily on collaboration and cooperation among governments and the private sector.
- Connectivity is crucial for ASEAN, which comprises both archipelago and continental land countries. Efforts to enhance connectivity must extend beyond ASEAN borders to maintain the region as a preferred destination for both domestic and international travelers.
- Community-based tourism is integral to sustainable tourism initiatives. ASEAN has the potential to empower local communities, preserve cultural heritage, and protect the environment. By providing opportunities for active involvement of local communities, sustainable tourism can serve as a vehicle for income generation and poverty reduction.
- Embracing sustainable tourism also entails¹²⁰ leveraging digital transformations. Technology, particularly data analytics, can play a crucial role in this regard to engage travelers with evolving sustainable tourism trends. Moreover, recognizing the importance of startups and small and medium enterprises (SMEs) in job creation, innovation, and overall economic growth, ASEAN governments will need to focus on strengthening these entities and integrating them into the tourism value chain through technological advancement and skills-based education in the sustainable tourism sector.



ASEAN nations recognize¹²¹ the necessity for innovative approaches in marketing the region as a unified and sustainable tourism destination in the post-COVID era under the ASEAN Tourism Marketing Strategy (ATMS)¹²² 2021 – 2025. Refinements and increased collaboration efforts between governments and enterprises are deemed imperative for three key strategies outlined in the ATMS:

01

Enhancing narrative appeal through more compelling storytelling.

02

Tailoring marketing efforts towards specific segments, including Australia, Europe, India, the Middle East, the US, Korea, and Japan.

03

Improving marketing delivery by aligning with the consumer journey stages: Awareness, Consideration, Research, Booking, Experience, and Advocacy.



With robust implementation of strategic programs and projects, ASEAN has the potential to transform¹²³ challenges into opportunities by 2025:

- Elevating the GDP contribution of ASEAN tourism from 12% to 15%.
- Doubling tourism's share of total employment from 3.7% to 7%.
- Increasing per capita spending by international tourists from US\$ 877 to US\$ 1,500.
- Extending the average length of stay for international tourist arrivals from 6.3 nights to 8 nights.
- Raising the number of accommodation units from 0.51 units per 100 head of population in ASEAN to 0.60 units per 100 head of population.
- Expanding the roster of awardees for ASEAN tourism standards from 86 to 300.
- Scaling up community-based tourism value chain project interventions from 43 to over 300.

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