Tourism Reimagined

Adapting to Change and Unlocking High-Value Experiences

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Current and future tourism trends

Southeast Asia, South Asia, and East Asia

Asia Pacific Key Data

	💲 **Total GDP contribution:**		👤 **Total Travel & Tourism jobs:**	
2019	**9.7%** USD **3.05TN** — Of Total Economy	Change in 2020: **-56.9%**	**183.69 MN** =10.1% (Share of Global Jobs)	Change in 2020: **-21.2%**
2023	**7.3%** USD **2.59TN**	Annual Change: **+71.2%** (-15.3% vs 2019) Economy Change: +4.4%	**181.73 MN** =9.6%	Annual Change: **+11.2%** (-1.1% vs 2019)
2025 (E)	**8.7%** USD **3.22TN**	Annual Change: **+24.5%** (5.5% vs 2019)	**190.59 MN** =10.0%	Annual Change: **+4.9%** (3.8% vs 2019)
2034 (F)	**11.2%** USD **5.83TN**	CAGR (2024 - 2034) **+6.1%** Economy CAGR (2024 - 2034): **+3.5%**	**254.77 MN** =12.5%	New Jobs (2034 vs 2024) **64.18 MN**

Growing tourism trends

Pre-pandemic	Present	Future
Rising Awareness on Sustainability	Digital Nomads & Bleisure	Shift to Domestic & Regional Travels
Digital Presence Fulfillment	Polycentric Lifestyle	Rise of Sustainable & Niche Tourism
Pursuit of Healthy Lifestyle	Rise of Technology & Personalisation	Reliance of Technology & Personalisation

Source: UN Tourism, ADB, McKinsey, Euromonitor, WTTC

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Tourism behavior post Covid 19

Tourism behaviour

Bleisure Travel

Personalization

Active Ecotourism

Wellness Travel

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Tourism behaviour

Staycation

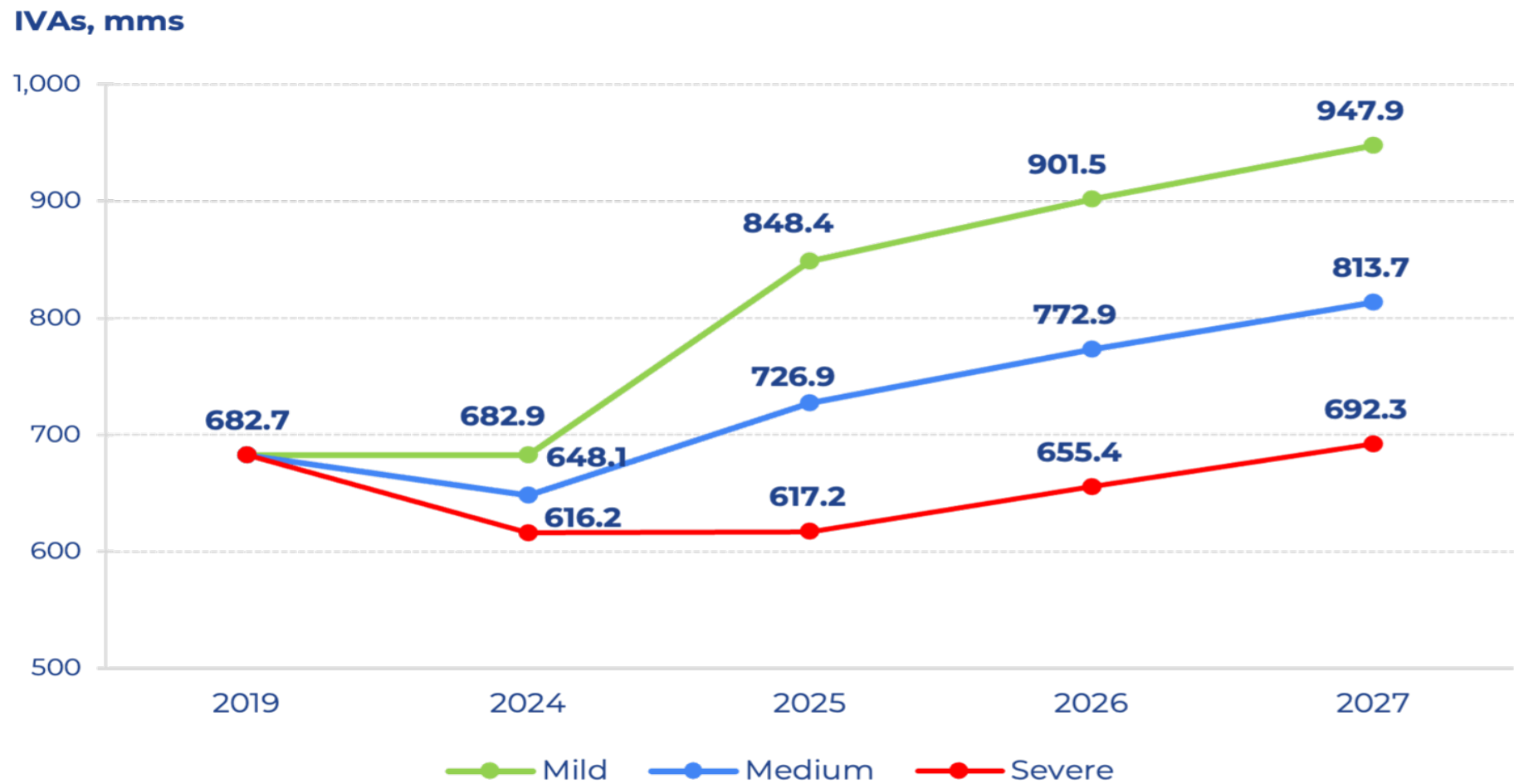Tech-Empowered Travel

Experience Tourism

Sustainable Tourism

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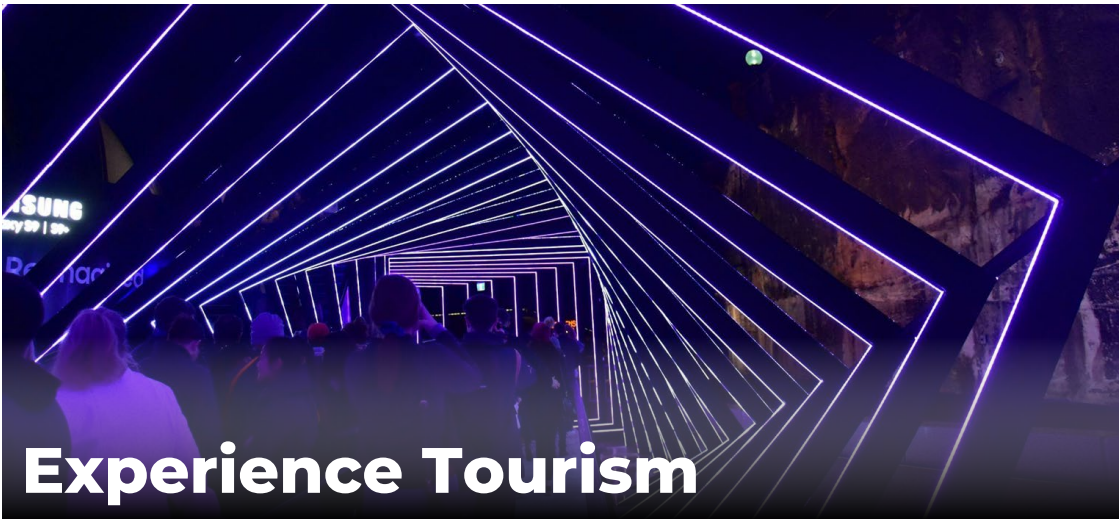
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Visitor Forecasts

A focus on ASEAN

Forecast of visitor arrivals into Asia Pacific 2025 - 2027, by Scenario

IVAs, mms

Mild: 682.7 (2019), 682.9 (2024), 848.4 (2025), 901.5 (2026), 947.9 (2027)

Medium: 648.1 (2024), 726.9 (2025), 772.9 (2026), 813.7 (2027)

Severe: 616.2 (2024), 617.2 (2025), 655.4 (2026), 692.3 (2027)

Legend: Mild — Medium — Severe

Source:
- National Tourist Offices/National Statistics Offices; compiled by PATA
- PATA Asia Pacific Visitor Forecasts 2025-2027

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Forecast of visitor arrivals into Southeast Asia 2025 - 2027, by Scenario

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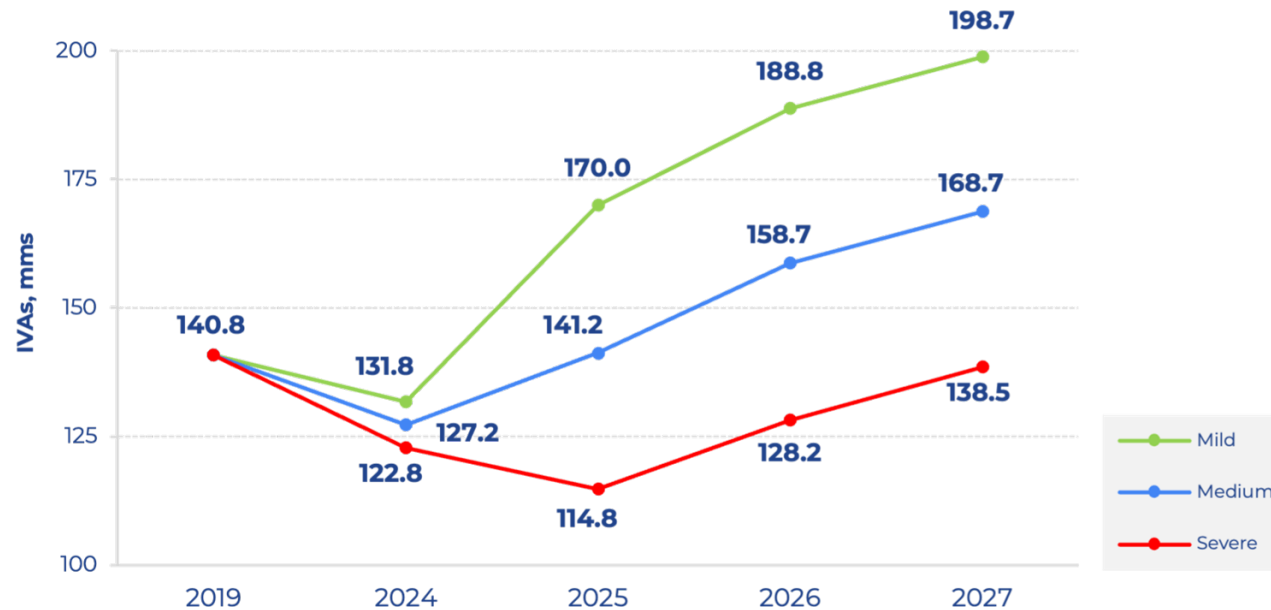
- Under Medium Scenario, Southeast Asia see a moderate recovery to 119.8% by 2027, suggesting consistent growth across the region.
- Even under challenging conditions, recovery reaches 98.41% of pre-pandemic levels by 2027, showcasing resilience.
- Thailand, Singapore, and Vietnam are driving Southeast Asia's recovery, with strong growth across all scenarios.
- Regional resilience is evident, with even the Severe scenario showing recovery nearing pre-pandemic levels by 2027.
- Domestic and intra-regional travel demand continues to be a key driver for countries like Indonesia and Malaysia.

Source:
- National Tourist Offices/National Statistics Offices; compiled by PATA
- PATA Asia Pacific Visitor Forecasts 2025-2027

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Forecast ranking into Southeast Asia Destination

2025 - 2026, by medium scenario

	2019	Estimated 2024	2025	2026	2027
Total	140.8	127.2	141.2	158.7	168.7

Destination	2019	Estimated 2024	2025	2026	2027
Thailand	39.9	35.5	37.2	46.9	49.9
Malaysia	26.1	25.6	28.1	29.2	30.3
Singapore	19.1	17.6	21.0	22.3	23.7
Vietnam	18.0	17.6	19.9	21.5	23.3
Indonesia	16.1	14.3	16.8	18.1	19.3
Cambodia	6.6	6.8	7.3	7.8	8.3
Philippines	8.2	5.4	6.2	7.5	8.1
Lao PDR	4.8	4.1	4.3	4.7	5.1
Myanmar	1.9	0.3	0.5	0.6	0.7

Data are in millions. Exclude arrivals into Brunei Darussalam.

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Japan and Southeast Asia IVAs Forecasts

2025 - 2027, by medium scenario

From South East Asia to Japan

2019
3.8 mms

2024
Change vs 2019 +8.6%
4.2 mms

2025
Change vs 2019 +24.3%
4.8 mms

2026
Change vs 2019 +34.3%
5.1 mms

2027
Change vs 2019 +44.5%
5.5 mms
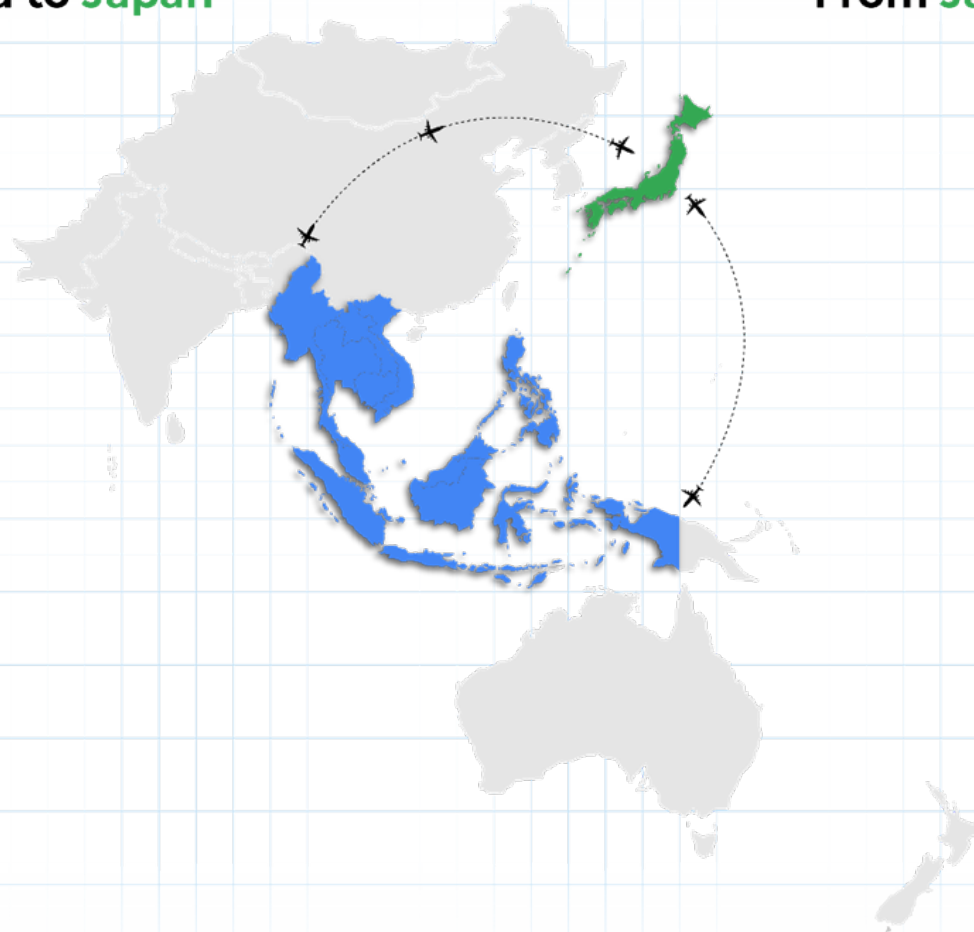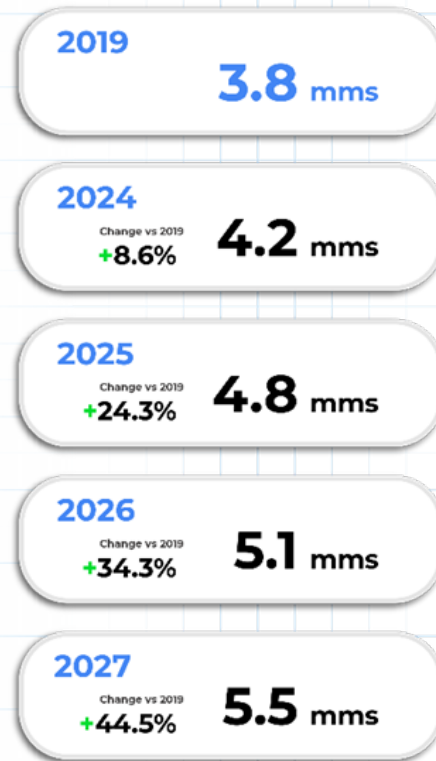
From Japan to South East Asia

2019
5.6 mms

2024
Change vs 2019 -34.5%
3.7 mms

2025
Change vs 2019 -11.8%
5.0 mms

2026
Change vs 2019 -1.5%
5.6 mms

2027
Change vs 2019 +3.0%
5.8 mms

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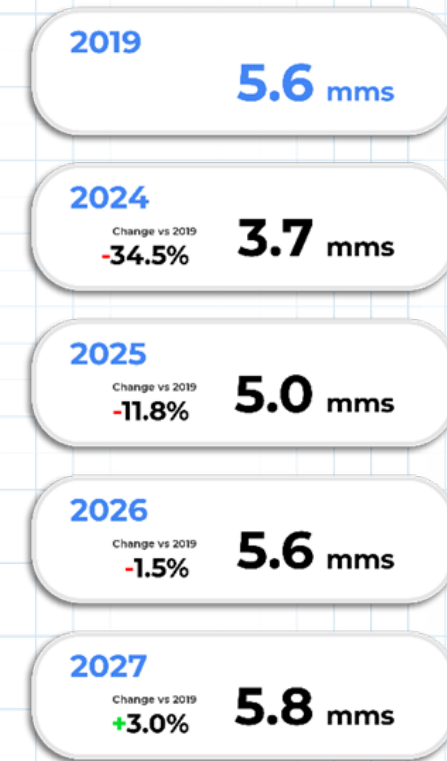
Forecast of visitor arrivals into Northeast Asia 2025 - 2027, by Scenario

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Chart — IVAs, mms

	2019	2024	2025	2026	2027
Mild	302.3	299.3	364.1	380.1	396.2
Medium	302.3	284.9	325.3	338.9	352.9
Severe	302.3	272.8	287.3	298.6	310.6
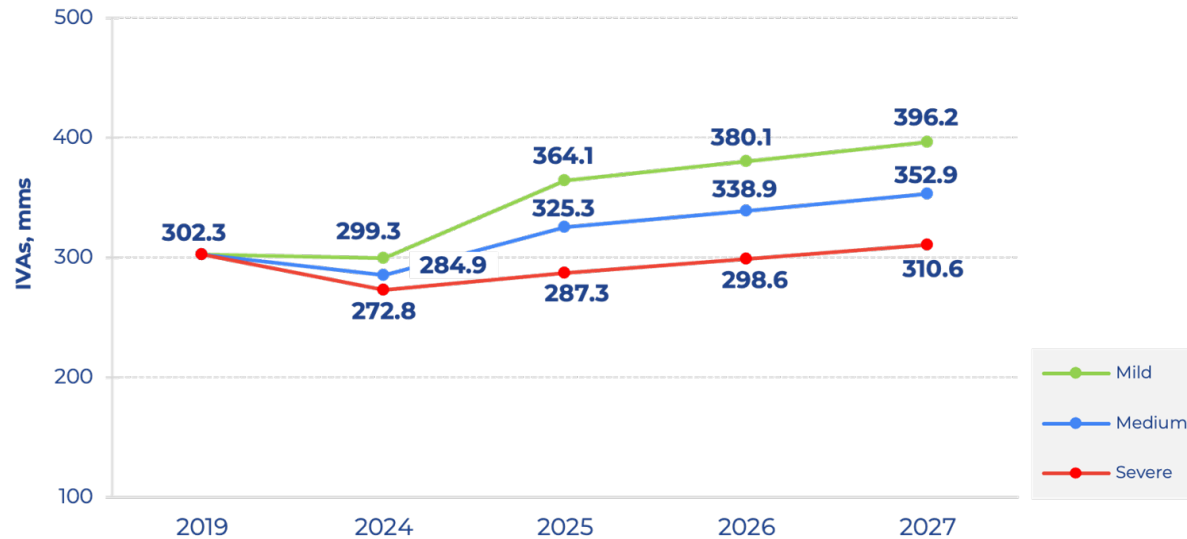
Destination, medium scenario	2019	2024 (estimated)	2025	2026	2027
China	145.3	141.6	146.5	151.3	155.5
Hong Kong SAR	55.9	45.9	65.6	67.2	69.8
Japan	31.9	36.3	42.7	45.7	48.8
Macao, China	39.4	35.3	39.9	41.9	44.1
Korea (ROK)	17.3	17.2	21	22.3	23.6
Chinese Taipei	11.9	7.7	8.6	9.2	9.8
Mongolia	0.6	0.9	1.1	1.2	1.3
Total	**302.3**	**284.9**	**325.3**	**338.9**	**352.9**

- Mild Scenario projects the most robust growth, with arrivals reaching 396 million by 2027 (131% of 2019 levels).
- Medium Scenario suggests moderate recovery, reaching 352 million by 2027 (117% of 2019 levels).
- Northeast Asia is set for a strong rebound, particularly under the Mild and Medium Scenarios.
- China, Japan, and Korea (ROK) are key drivers of the region's recovery.
- In the Mild Scenario, arrivals skyrocket to 150% of pre-pandemic levels by 2027.
- Even in the Severe Scenario, Hong Kong still sees notable growth, reaching 98% of 2019 levels.

Source:
- National Tourist Offices/National Statistics Offices; compiled by PATA
- PATA Asia Pacific Visitor Forecasts 2025-2027

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Forecast of visitor arrivals into South Asia 2025 - 2027, by Scenario

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IVAs, mms

| 2019 | 2024 | 2025 | 2026 | 2027 |

Legend:
- Mild
- Medium
- Severe
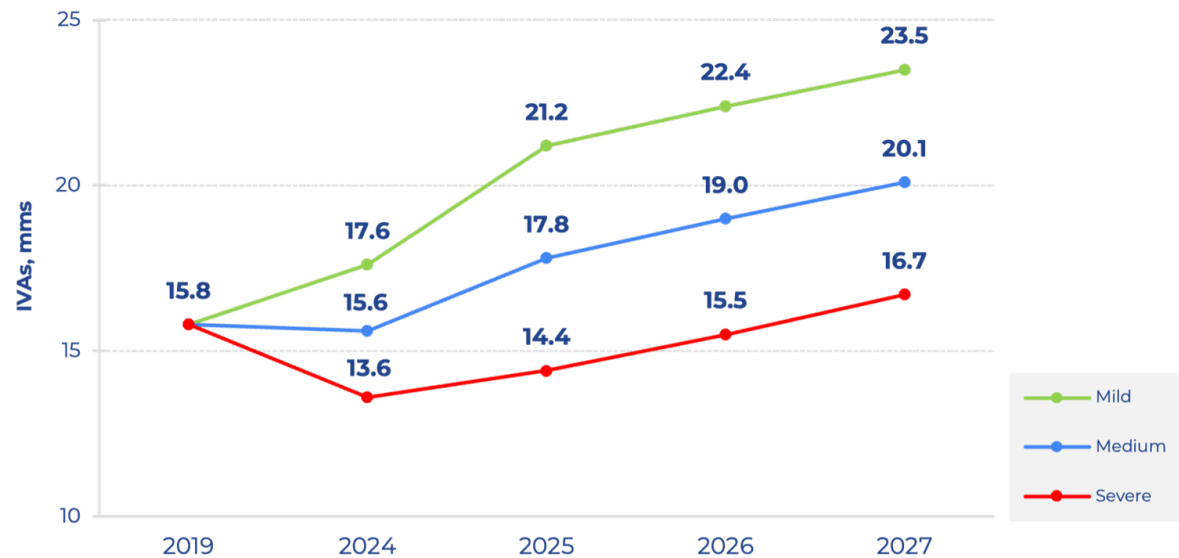
- Total arrivals grow from 15.8M in 2019 to 20.1M by 2027 (127.2% of 2019 levels).
- India dominates South Asia's tourism recovery, influencing regional trends.
- Maldives and Sri Lanka emerge as top performers, benefiting from strong leisure demand.
- Nepal and Bhutan show steady but slower growth, indicating reliance on niche travel segments.

Destination, medium scenario	2019	2024 (estimated)	2025	2026	2027
India	10.9	10.3	11.3	12.0	12.8
Sri Lanka	1.9	2.1	2.6	2.8	3.0
Maldives	1.7	2.1	2.3	2.5	2.6
Nepal	1.2	1.1	1.5	1.6	1.7
Bhutan	0.1	0.1	0.1	0.1	0.1
Total	**15.8**	**15.6**	**17.8**	**19.0**	**20.1**

Source:
- National Tourist Offices/National Statistics Offices; compiled by PATA
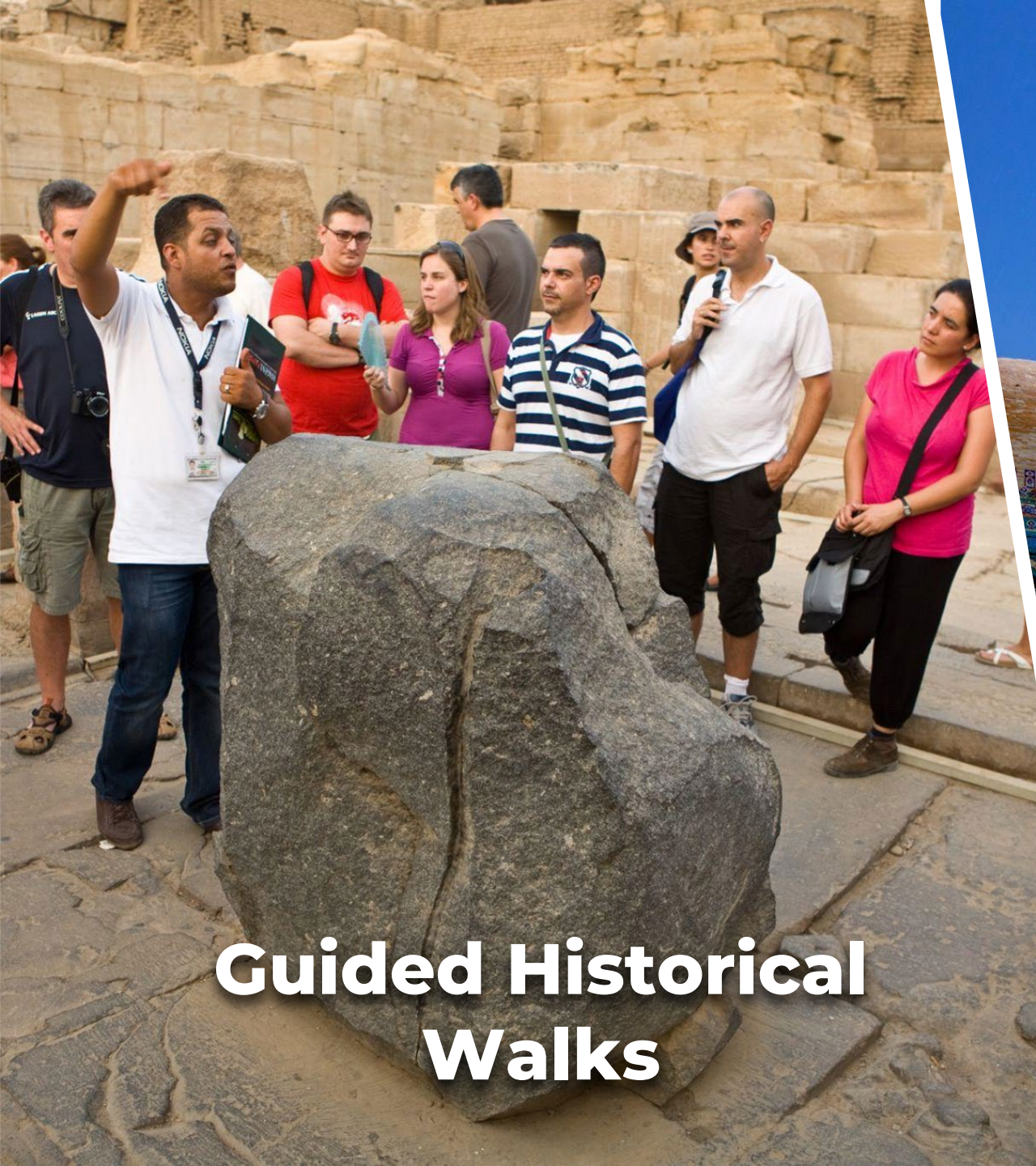- PATA Asia Pacific Visitor Forecasts 2025-2027

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High-added-value tourism

Art and Photography Workshops

Language and Culinary Classes

Guided Historical Walks

Heritage Trails

Eco-Friendly Outdoor Activities

Conservation Projects

Rural Homestays
Opportunities

Agritourism
Opportunities

Cultural and Music Festivals

Themed Community Events

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