TURNING TOURISM POTENTIAL INTO PROJECTS

Blue Track C: Measuring Tourism: Data, Statistics and Evidence for Better Decisions

Day 2 – 18 November 2026 | Auditorium 1



Facilitated By

Sanchita Basu Das
Senior Economist, ADB

TURNING TOURISM POTENTIAL INTO PROJECTS

Tourism statistics and indicators for policy design and project identification

Measuring Tourism: Data, Statistics and Evidence for Better Decisions



Presented by:

Maria Cherry Lyn Rodolfo

Consultant, Regional Cooperation and Integration, ERDI, ADB

Data turn tourism potential into projects

Statistics and indicators are needed at every step, from potential to project to results

Diagnose

Problem tree: what holds the potential back, and who benefits?

Design

Which markets, sites and investments fit?

Invest

What baseline, targets and safeguards?

Monitor and adjust

Are results on track? What must change?

What tourism data are used for

1 Policy design

Set priorities, budgets and rules on evidence

2 Project identification

Find, design and monitor bankable investments

3 Regional cooperation

Compare, coordinate and track shared goals

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Tourism data at three scales

Question: Why look at tourism data at three scales?

NATIONAL

How big is tourism, and why does it matter?

Data: arrivals, spending, GDP and jobs

Used for

- National strategies and plans
- Budget arguments
- National investment programs

Sources: Immigration, tourism ministries, statistics offices, central banks

INTERNATIONAL

How do countries compare?

Data: common indicators, benchmarks, regional trends

Used for

- Regional strategies and action plans
- Benchmarks for national plans
- Tracking shared goals

Sources: UN Tourism, World Bank, IMF, WTTC, OECD, ASEANstats, ADB

DESTINATION

What should we build or manage, and where?

Data: site visits, peak loads, fees, local businesses

Used for

- Local projects
- Priority tourism areas
- Site management and baselines

Sources: Local tourism and statistics offices, site managers

Answer: Each scale serves a different decision: national plans and budgets, regional strategies, local projects.

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Viet Nam: tourism as the project

Question: How did tourism data shape an ADB tourism project?

GMS Tourism Infrastructure for Inclusive Growth (completed 2021): 9 subprojects in Lao Cai, Dien Bien, Ha Tinh, Tay Ninh and Kien Giang

How data shaped the design

1 Where to invest
Secondary destinations in 5 provinces
Data: tourist numbers, length of stay and spending

2 What to value
Visitors × stay × daily spending
Data: site tourism demand analysis

3 What to measure
Targets
Data: provincial statistics and tourism offices

Results framework (Design and Monitoring Framework or DMF)

Level	Indicator	Baseline	Target	Achieved (2023)
Impact	Tourism jobs, 5 provinces	45,000 (2012)	130,000 by 2025, 60% women	201,420, 60% women
Outcome	Tourism receipts, 5 provinces	$190 million (2012)	$480 million by 2019	$1.75 billion
Outputs	Access roads, environmental services, destination management organizations	–	9 subprojects; 8 organizations (revised from 9)	Most achieved; 11 organizations formed

Answer: Data showed where tourism lagged, valued the benefits and set the targets the DMF tracked.

Source: ADB Completion Report 46293-005 (2023), Appendix 1; 2023 figures are estimates

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Luang Prabang: tourism and urban services

Question: Where does tourism enter a project that is not labelled tourism?

Urban Environment Improvement Investment Project (approved 2023, ongoing implementation): a World Heritage town of 97,000 residents

1 Diagnose

Data used
Visitor numbers, service data, institutional and gender assessments

Result
- Infrastructure: 69% of waste collected; <20% of homes with a working septic tank
- Weak service capacity: agencies lack urban planners and expertise
- Funding gaps
- Women: 17% of senior and mid-level managers

2 Design and invest

Data used
Service conditions, training needs assessments

Result
- Infrastructure: landfill, 1,020 septic tanks, roads, footpaths, underground power lines
- Capacity: master plan, institutional plan, tariff reform, training, scholarships

3 Monitor (DMF)

Data used
Service records, progress reports, surveys

Target Result
- Waste collection: 82 → 95 villages
- 500 urban services, public works and tourism officials trained
- 1,900 women in urban services and tourism training
- Women managers: 231 → 327

4 Benefits to tourism

Data used
Economic analysis, beneficiary estimates

Target Result
- Net visitor spending up 0.1–0.3%
- 1.3 million visitors a year benefit by 2031
- Tourism officials and workers gain skills: asset upkeep, guiding, Lao Safe standards

Answer: Visitors use the city's services, and the economic analysis counts the benefits to tourism.

Source: ADB Report and Recommendation of the President 53203-001 (2023), Appendix 1 and economic analysis.

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Visitors as daily population

Question: How do we count visitors as users of urban services?

1 Turn overnight visitors into a daily population

Million visitors
× nights

→

Million
visitor-nights

→

÷ 365
days

→

overnight visitors a day

2 Add everyone present on a typical day

Residents
census

+

Overnight visitors
accommodation, immigration, surveys

+

Same-day visitors
excursionists; tickets, fees, QR

+

Commuters, students
not visitors, but use services; census, labor surveys

3 Size for the peak month, not the annual average, then convert people into demand

Water | Waste | Sanitation | Transport

Answer: Plan services for everyone present on a peak day: residents, visitors and commuters.

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Lessons for project design

Question: Where tourism is part of a project's rationale, how can its results be measured?

In preparation, the problem tree maps to the DMF: effects → impact • core problem → outcome • causes → outputs

DMF level	Example tourism indicators	Typical data sources	Common local gap → option
Impact Long term, national or regional	Tourism share of output; tourism jobs; income in the project region	Tourism satellite account, national accounts, labour force survey	National data rarely cover the project area → provincial estimates, stated assumptions
Outcome End of project, at the destination	Visitor arrivals and spending at sites; visitors served by improved services	Local government registers and fees; visitor and establishment surveys	No local baseline; counts miss day visitors → baseline survey in preparation; fee, ticket or QR data
Outputs What the project delivers	Infrastructure built; people trained (share of women); destination plans; visitor monitoring system	Project progress reports	Data systems often left out → visitor monitoring as an output, owned by local governments

Answer: Tourism results become measurable when each indicator has a baseline, a source and an owner.

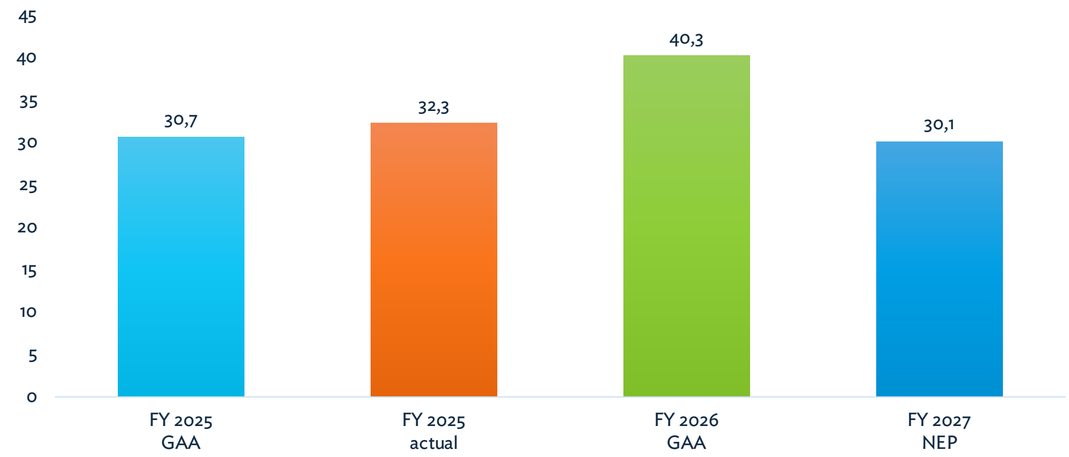
INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

The Philippines: data for convergence budgeting

Question: How do national tourism statistics win budget support?

Statistic → funding argument

6.48M arrivals, 2025	Access and connectivity, visas, product and market development
8.1% of GDP	Budget priority
7.70M tourism jobs	Workforce programs
82% domestic spending	Product development, Roads and connectivity



FY 2026: 20+ agencies; tourism agencies account for 12%, partners 88% of national convergence budget

Answer: Each statistic backs a different funding argument, bringing 20+ agencies into one tourism budget.

FY = Fiscal year
GAA = General Appropriations Act, NEP = National Expenditure Program (proposed budget)
Sources: Department of Budget and Management; Philippine Tourism Statistics Tourism Satellite Accounts 2025

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Palawan: El Nido and Coron

Question: How do site data set limits for a natural destination?



903,000
arrivals in 2019, up from 77,000 in 2008

1,631
visits a day at crowded lagoons

70%+
lower real than physical capacity, 24 reef sites

Monitoring framework baselines from project preparation

Indicator	Baseline	Proposed result
Daily visits at lagoons	Up to 1,631 a day	Phased visitor limits
Kayangan Lake visitors a day	Physical capacity 267; real capacity 70	Daily limit based on real capacity
Reef condition, 24 sites	Carrying capacity assessed	Regular reef monitoring

Answer: Site counts, not town totals, set the recommended visitor limits and monitoring baselines.

Sources: ADB Brief 212 (2022); ADB project data sheet.

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

ASEAN: indicators for cooperation

Question: How do shared indicators support regional cooperation?

ASEAN Tourism Sectoral Plan 2026–2030: outcome measures, the region's results framework

VALUE	INTEGRATION	DIVERSIFICATION
Are visitors spending more?	Are more visitors (particularly ASEAN nationals) travelling within ASEAN?	Are source markets broadening?
Indicator: Receipts per arrival	Indicator: Intra-ASEAN and inter-ASEAN share of arrivals	Indicator: Arrivals from key markets

Initiative 7: Philippines leads, Malaysia co-leads; ADB supports the M&E framework and ASEAN Tourism Dashboard

Answer: Common indicators let countries track value, integration and diversification together.

Data: ASEANstats, ADB Tourism Dashboard. Check definitions first: tourists vs all visitors; nationality vs residence.

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

New data for destination decisions

Question: What can new data sources add to official statistics?



IMMIGRATION
e-arrival records, API/PNR

Where do visitors come from, and how long do they stay?



BOOKINGS
online platforms

What demand is coming, and when?



PAYMENTS
card transactions

How much do visitors spend, and on what?



QR REGISTRATION
at sites

How many visitors arrive at a site each day?



MOBILE DATA
phone location data

Where do visitors go during their trip?

Use with care: validate against official statistics • privacy • coverage • representativeness

Answer: Timelier and more local answers, once validated against official statistics.

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

The future of tourism data

Question: Where is tourism data in Asia and the Pacific heading?

VOLUME
How many arrived?

VALUE
What did tourism contribute?

PLACE
What happened at the destination?

Built on: official statistics + local data + new digital data

Answer: From counting visitors to understanding places, leaving net positive impacts, and regenerating tourism.

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

TURNING TOURISM POTENTIAL INTO PROJECTS

Experts' Views

Blue Track C: Measuring Tourism: Data, Statistics and Evidence for Better Decisions



Moderated By

Sanchita Basu Das
Senior Economist, ADB

SPEAKERS



Carla Budiarto
Senior Tourism Officer
ASEAN Secretariat



Bingxun Seng
Partner
EY-Parthenon

TURNING TOURISM POTENTIAL INTO PROJECTS

ADB Asia and the Pacific Tourism Dashboard: Walkthrough and Group Activity

Measuring Tourism: Data, Statistics and Evidence for Better Decisions
Day 2, 18 November 2026



Presented/Facilitated By

Mara Tayag
Senior Economics Officer
Economic Research and Development Impact Department, ADB

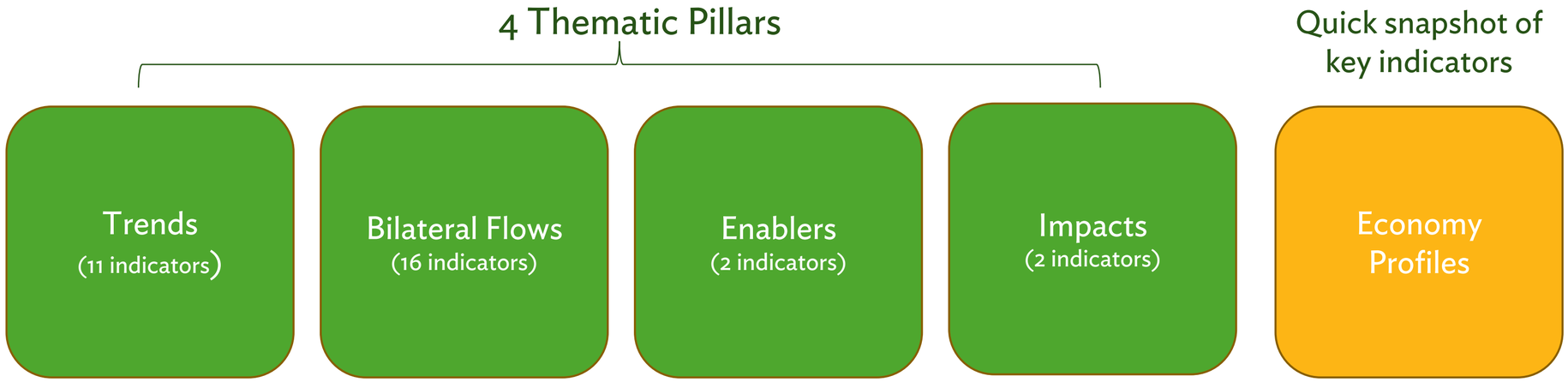
50 economies, 30 years, 31 indicators

50
economies

6
ADB subregions

30
years, 1995–2024

31
indicators



INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Built on global and national sources

UN Tourism
WORLD TRAVEL & TOURISM COUNCIL
WORLD ECONOMIC FORUM
OECD
INTERNATIONAL MONETARY FUND
CEIC
Euromonitor International
HAVER ANALYTICS®
AZSTAT
Cook Islands Government
Fiji Bureau of Statistics
GEOSTAT
BADAN PUSAT STATISTIK
BPS-STATISTICS INDONESIA
QAZSTAT
BUREAU OF NATIONAL STATISTICS
OF THE AGENCY FOR STRATEGIC PLANNING AND REFORMS OF THE REPUBLIC OF KAZAKHSTAN
kiribati for travellers
LAOS
ກົມພັດທະນາການທ່ອງທ່ຽວ
Tourism Development Department
Ministry of Tourism and Civil Aviation
Republic of Maldives
Pristine Paradise.
PALAU
Palau Visitors Authority
DEPARTMENT OF TOURISM PHILIPPINES
Papua New Guinea
Solomon Islands
National Statistics Office
TUVALU
Central Statistics Division
SIAT
Vietnam
Timeless Charm

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

What the dashboard offers

Comparable

Standardized ADB regional and subregional groupings, benchmarked against the world; 30+ years of consistent time series

Validated

Recent years reconciled with national sources where needed

Beyond arrivals

Bilateral flows, enablers such as connectivity, and economic impact

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Built for policy and research use

RESEARCH

Asian Economic Integration Report

How integrated is the region's tourism?

Intraregional share of arrivals and travel earnings; recovery of arrivals and receipts

Trends · Bilateral Flows

REGIONAL POLICY

ASEAN Tourism Sectoral Plan 2026–2030

Where does the region start, and is it moving?

Baselines for intra-ASEAN travel, connectivity, and tourism's share of GDP and jobs

Bilateral Flows · Enablers · Impacts

PROJECT SCREENING

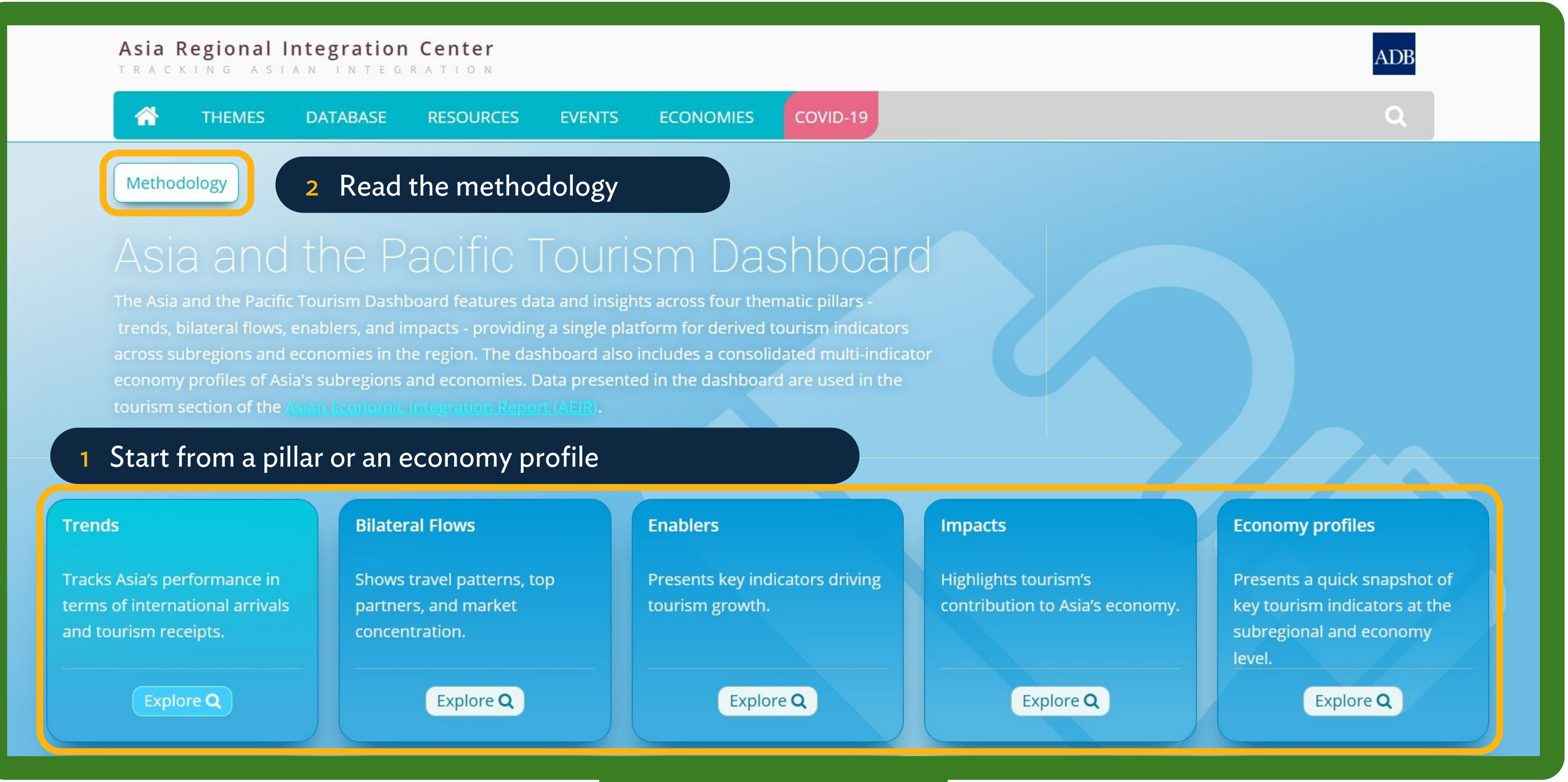
CAREC Tourism Strategy 2030

Where could investment add most?

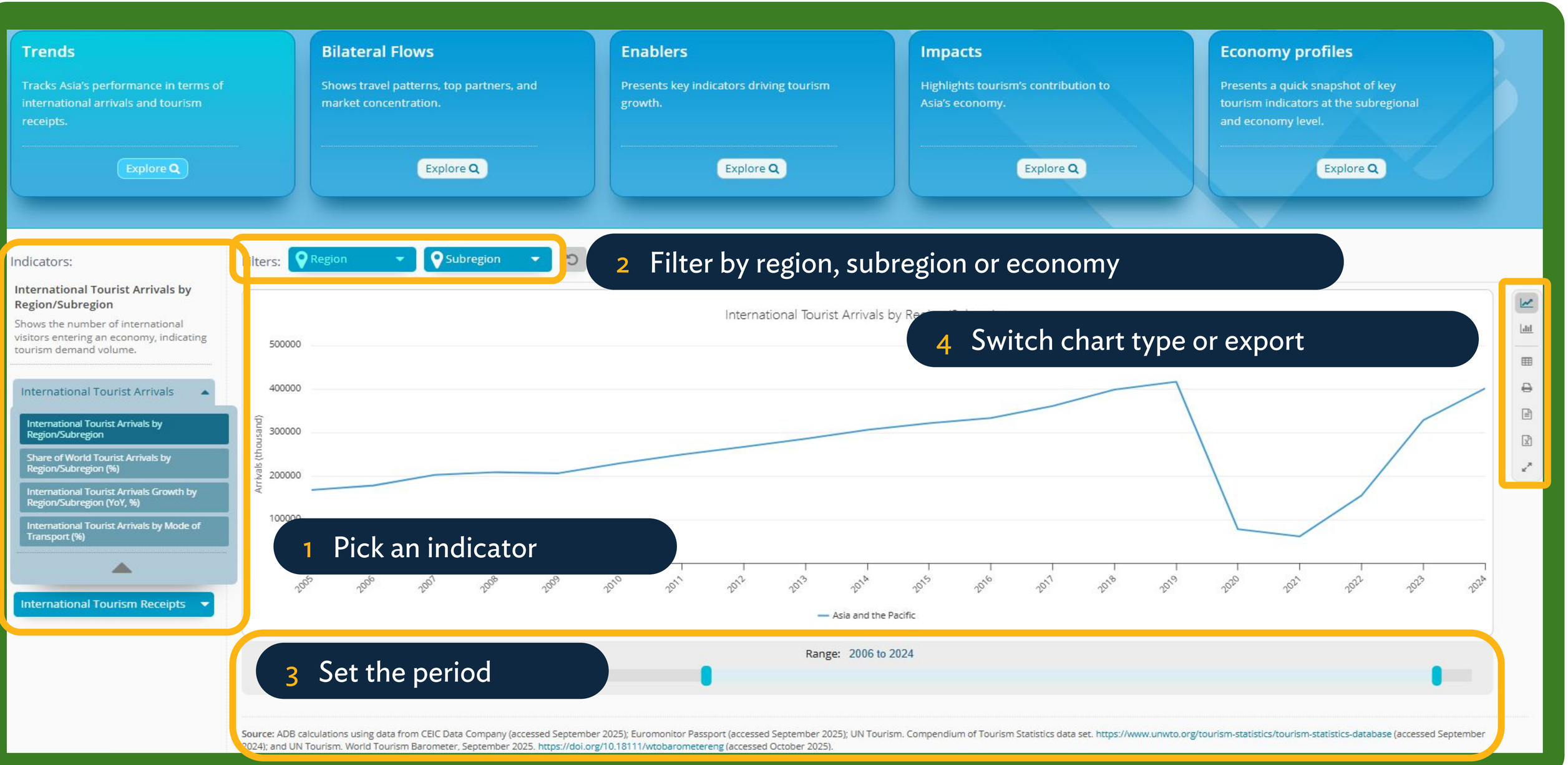
Compare demand growth, spending per visitor, market concentration and hotel capacity

Trends · Bilateral Flows · Enablers

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.



Step 1 Navigate



Step 2 Explore

Indicators:

International Tourist Arrivals by Region/Subregion

Shows the number of international visitors entering an economy, indicating tourism demand volume.

International Tourist Arrivals

- International Tourist Arrivals by Region/Subregion
- Share of World Tourist Arrivals by Region/Subregion (%)
- International Tourist Arrivals Growth by Region/Subregion (YoY, %)
- International Tourist Arrivals by Mode of Transport (%)

International Tourism Receipts

Filters: Region Subregion

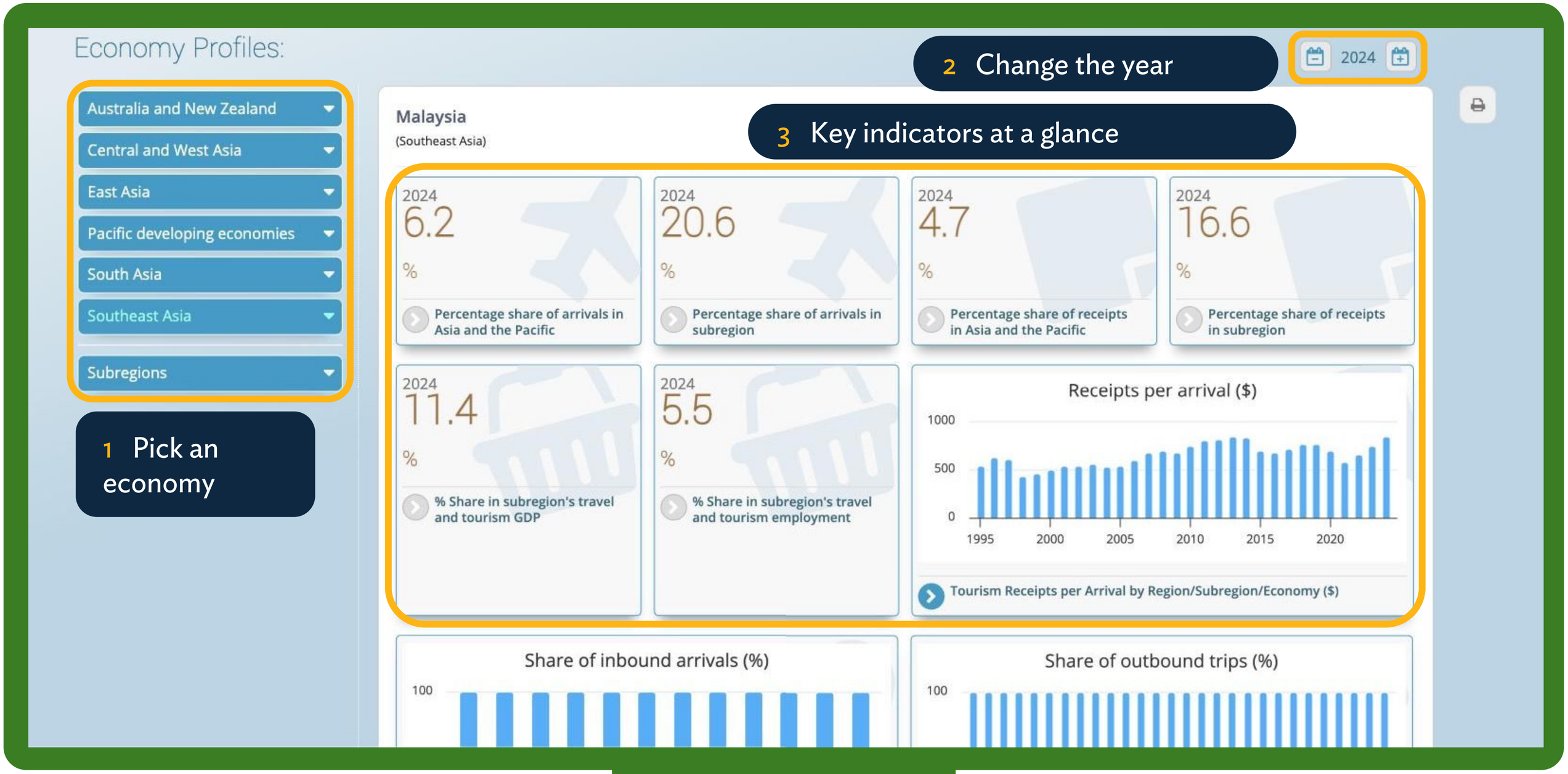


Range: 2005 to 2024

3 Get the data

Year	Asia and the Pacific [Arrivals (thousand)]	Central and West Asia [Arrivals (thousand)]
1995	82,868.3	7,187.0
1996	91,335.2	8,152.7
1997	92,854.0	10,025.1
1998	91,816.8	10,096.2
1999	97,750.6	7,590.5
2000	113,355.2	11,584.7
2001	120,042.0	13,300.2

Step 3 Compare



Step 4 Profile

Thank you!

Explore the dashboard
https://aric.adb.org/database/tourism

Activity 1: Speed quiz

What were the Philippines' tourism receipts per arrival in 2024?

Trends → Tourism Receipts per Arrival → Filter: Philippines → Table view

First correct answer wins. Tie-breaker: the 2019 value.

$1,785

per international arrival in 2024

Tie-breaker: $1,184 in 2019, so spending per visitor rose about 51%

Yet the Philippines' share of the region's arrivals fell from 2.0% to 1.4%

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.

Activity 2: What the data say

Economy	Receipts per arrival ($) 2019 → 2024	Receipts, % of GDP 2019 → 2024	Largest source of arrivals 2019 → 2023	Biggest shift since 2019	The story
Thailand	1,498 → 1,201	11.0 → 8.1	East Asia 40.9% → Southeast Asia 35.0%	East Asia −14.1 pts	Fewer East Asians; ASEAN fills the gap
Maldives	1,854 → 2,252*	55.2 → 68.2	Non-Asia 57.6% → 65.2%	East Asia −9.0 pts	Two-thirds of visitors from outside Asia
Georgia	643 → 869	18.5 → 13.1	Central & West Asia 58.1% → 48.5%	Non-Asia +8.2 pts	Shifting from **neighbours to long-haul**
Uzbekistan	224 → 416	2.3 → 2.8	Central & West Asia 86.2% → 93.0%	Central & West Asia +6.8 pts	Nearly all visitors from **neighbors**
Samoa	1,203 → 1,335	22.7 → 21.6	Australia & NZ 74.1% → 83.2%	Australia & NZ +9.1 pts	Even more reliant on Australia and NZ

* Maldives: latest receipts per arrival is 2023. Source: ADB Asia and the Pacific Tourism Dashboard, accessed 17 November 2026.

INTERNAL. This information is accessible to ADB Management and Staff. It may be shared outside ADB with appropriate permission.