ENABLING PRIVATE SECTOR-LED TOURISM GROWTH

Digital Transformation for Tourism



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Digital touches every step of the visitor's journey



Digital isn't one project. It touches every step, and each step has a different owner. In Step 3 you'll walk your problem along this journey.

Adapted from ADB Brief 309 (2024), Table 4, drawing on ADB (2023), Promoting Smart Tourism in Asia and the Pacific Through Digital Cooperation.

Why we start with the problem

IED success ratings for 50 closed ADB tourism projects

63%
of tourism-led projects rated successful

61%
of tourism-linked projects rated successful

13%
of tourism-dependent projects rated successful (no dedicated tourism activities)

Two questions for today

1 **Where could digital help?**
2 **Can it work here?**

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The Next 90 Minutes

1. Warm-up: match problems to responses
2. The canvas
3. Stage 1: Can digital help?
4. Stage 2: Can it work for our situation?
5. Exchange between regions
6. Report back and close

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Warm-up: match each problem to a response

8 minutes at your table. One response is not a digital fix.

Problem cards

1. Nobody knows how many visitors come, how long they stay or what they spend
2. Local small businesses, many run by women, miss out on visitor spending
3. Tourism, transport and local government each keep their own information
4. A few sites are crowded while others nearby sit empty
5. A remote province or island has almost no tourism data or digital systems
6. A new visitor centre was built, but nobody agreed who runs it or pays for it

Response cards

- **A** Agencies sharing information
- **B** Not a digital fix: agree ownership and a budget
- **C** Better data
- **D** Simple foundations first
- **E** Managing visitor numbers at busy places
- **F** Being found and getting paid

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One suggested match: there is no single right answer

Problem	Suggested response
1 Nobody knows how many visitors come, how long they stay or what they spend	C Better data
2 Local small businesses, many run by women, miss out on visitor spending	F Being found and getting paid
3 Tourism, transport and local government each keep their own information	A Agencies sharing information
4 A few sites are crowded while others nearby sit empty	E Managing visitor numbers at busy places
5 A remote province or island has almost no tourism data or digital systems	D Simple foundations first
6 A new visitor centre was built, but nobody agreed who runs it or pays for it	B Not a digital fix: agree ownership and a budget

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Choose your problem

1. **Choose the problem closest to your region.**
   Two tables can take the same one.

2. **Name a writer and a timekeeper.**

3. **Write the problem in Step 1 of your canvas.**
   One sentence. A problem, not a solution.

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The canvas: two stages, nine steps

Stage 1 · Where could digital help? · 20 min

1. **Problem**
   What is the problem, and who does it hurt?
2. **Outcome and measure**
   What should change, and how would we know?
3. **Journey check**
   What do visitors, businesses and managers experience?
4. **Digital opportunity**
   How much of the problem could digital address?
5. **Function and users**
   What must digital do, and could people use it?

Stage 2 · Can it work here? · 15 min

6. **Index card**
   What stage is the country at? Is the destination different?
7. **Build on and gaps**
   What exists, and what is missing? Ownership first.
8. **First step**
   Go now, pilot small, foundations first, or not digital for now?
9. **Who to involve**
   Which bodies, when DIG helps, what neighbours could share

Summary strip Seven boxes along the bottom: your table's record and report-back

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For example: Cambodia, Stage 1

Problem card 2 · a provincial destination · illustrative project, real context

1 Problem	Visitor spending is rising, but most goes to tour operators based in the capital. Local guesthouses, boat operators and craft sellers, many run by women, see little of it.
2 Outcome	More visitor spending stays with local businesses. Indicator: share of visitor spending reaching them. Data today: no.
3 Journey	Visitors can’t find or book local providers and pay cash. Businesses aren’t online and rely on tour operators. The tourism office has no data on local spending.
4 Opportunity	Some of the problem, so complementary: digital helps alongside product development and links with tour operators. Added benefit: payment records could measure local spending.
5 Function	Let local small operators be found, booked and paid directly. Users need tools that are free, familiar and simple.

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Stage 1: Where could digital help?

1. **Problem**
   One sentence. A problem, not a solution.

2. **Outcome and measure**
   One indicator. Do we have the data today?

3. **Journey check**
   Visitor, business, destination manager.

4. **Digital opportunity**
   Most: central. Some: complementary. Little: not material.

5. **Function and users**
   A verb, not a product. Could they use it?

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Pulse check: hold up your rating

Central
If digital addresses most of the problem

Complementary
If it addresses some of it

Not material
If it addresses little of it

“Not material” is a good answer. Write what would fix the problem instead!

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Stage 2: Can it work here?

6 **Index card**
Find your country, read the three lines, say how your destination differs. Place yourself roughly, write why, move on.

7 **Build on and gaps**
Ownership and upkeep, and rules and trust, every time. Rate each row green, amber or red.

8 **First step**
Go now, pilot small, foundations first, or not digital for now. A red on ownership cannot be “go now”.

9 **Who to involve**
Tourism and digital bodies, when DIG would help most, and what neighbours could share.

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Worked example: Cambodia, Stage 2

7 Build on and gaps	Build on	Gap	
Ownership and upkeep	Techo Startup Center, with ADB technical assistance	No provincial budget after the project	Amber
Rules and trust	Central bank's KHQR payment scheme	Wider legal environment needs strengthening	Amber
Data and systems	National payment standard in place	None major	Green
Users and skills	Wide 4G coverage	Weaker rural internet and skills	Amber
Money and partners	Private platforms carry running costs	None major	Green

6 Index card

Early stage. National QR payments since July 2022, but rural internet and skills are weaker than the national picture.

8 First step

Pilot small, through technical assistance. Two ambers on ownership and rules make "go now" a stretch.

9 Who to involve

Provincial tourism department, Techo Startup Center, National Bank of Cambodia, booking platforms. DIG at concept stage. Regionally: share learning on legal and policy issues.

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Summary strip: your table's record

5 minutes. A line or two in each box: you will read it out.

Challenge
The problem, in one line

Digital opportunity
Your rating, and what digital must do

Main gaps
Your reds and ambers

First step
And where it would sit

Next steps
What, who, by when

Who is involved
Tourism and digital bodies

Regional or partner opportunity
What neighbours could share

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Exchange between regions

1. Two hosts stay with your canvas. Everyone else visits your partner table.
2. 4 minutes each way. Swap when I call it.
3. Hosts explain from the summary strip. Visitors ask the three questions.
4. Note any changes in the second colour.

Three questions to ask

1 Is that the problem, or a solution in disguise?

2 Who will run it and pay for it after the project ends?

3 Could the people who need it actually use it?

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Report back: one line per table

About 45 seconds each, from your summary strip.

Our problem was …

We rated digital …

Our first step is …

because …

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Five principles:

1. **Problem before platform.**
   Name the tourism problem and outcome before any technology.
2. **“Not material” is a good answer.**
   Many problems that sink tourism projects are about ownership, scope or money.
3. **Say what digital must do, and for whom.**
   “Let local operators be found and paid” leaves options open; “build an app” closes them.
4. **If they can’t use it, it won’t work.**
   Match the tool to its users, and give it an owner after the project ends.
5. **Build on what exists, and think regionally.**
   Start from existing systems; look at what neighbours share.

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What happens next

1. **Your canvases go into a short note for WUD and DIG,**
   and into the tool WUD is considering for its Sustainable Tourism Guidance Note.

2. **The handout is yours.**
   Run your own project through the same two stages.

3. **Need data, payments or shared systems?**
   Talk to ADB's Digital Sector Office while your project is still at concept stage.

Before you go: fill in the feedback line and the quote tick on your canvas.

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Thank you!

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