



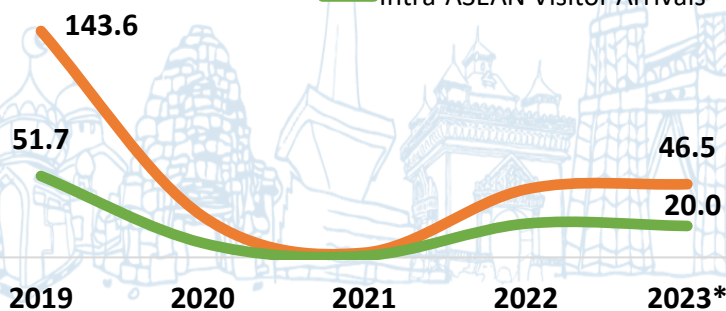
ASEAN Tourism: The Slow Path to Recovery

Ongoing challenges hamper the recovery in the region’s tourism sector, resulting in a modest 66% recovery in the first half of 2023, following a relatively lackluster 30% recovery in 2022.

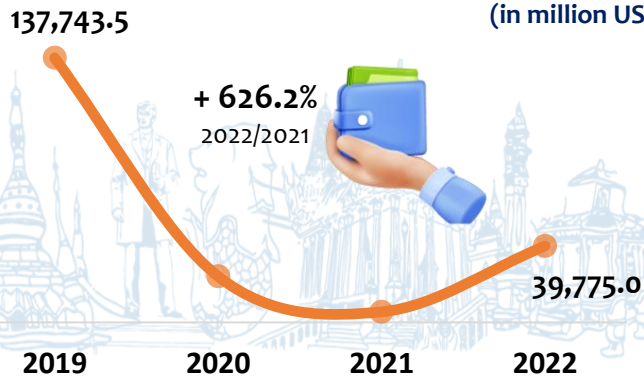
During the first half of 2023, approximately 46.5 million visitors travelled to ASEAN, with around 43% originating from the region, making it a challenging task to reach the pre-pandemic level of 143.6 million arrival by the end of the years. As for tourism receipts, they only reached US\$ 39.77 billion in 2022, compared to US\$ 137.7 billion recorded in 2019.

Visitor Arrivals (in million person)

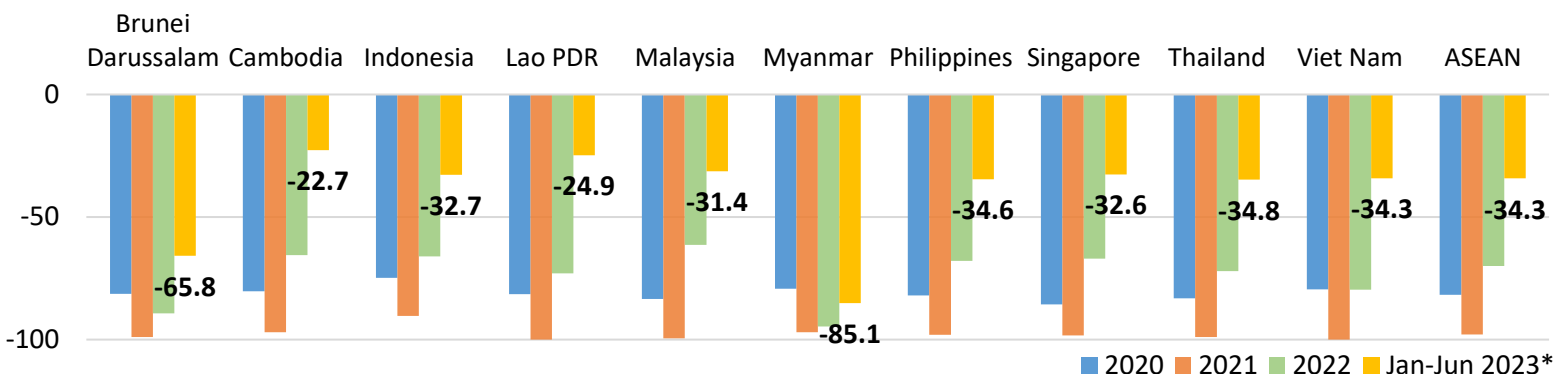
— Total Visitor Arrivals
— Intra-ASEAN Visitor Arrivals



Tourism Receipt (in million US\$)

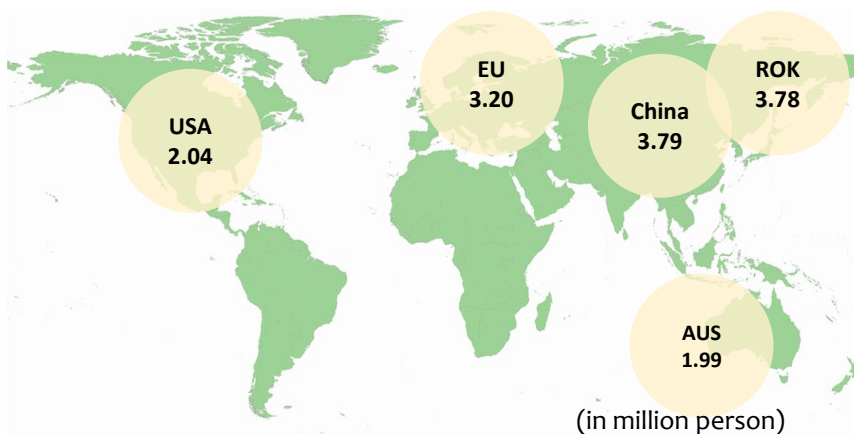


Visitor Arrivals by ASEAN Member States, % change over 2019



Cambodia and Lao PDR recorded the highest recovery at 77% and 75%, respectively. Meanwhile, Myanmar and Brunei Darussalam reported the lowest recoveries at 15% and 34%, respectively. The remaining ASEAN Member States posted recoveries ranging from 65 to 69%.

Who’s Visiting ASEAN in 2023?



The largest source of non-ASEAN visitors to the region in the first-half of 2023 was China, accounting for 8.2% of all arrivals, followed closely by the Republic of Korea and EU, contributing 8.1% and 6.9%, respectively.

Nevertheless, ASEAN tourism recovery is expected to continue in the second-half of the year. According to UNWTO’s projection, international tourist arrivals could reach 80% to 95% of pre-pandemic levels in 2023¹.

Notes:

• data is preliminary; 2023 data is only from Jan-June

¹ UNWTO, 2023. World Tourism Barometer, Volume 21, Issue 1.