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WAVES OF CHANGE

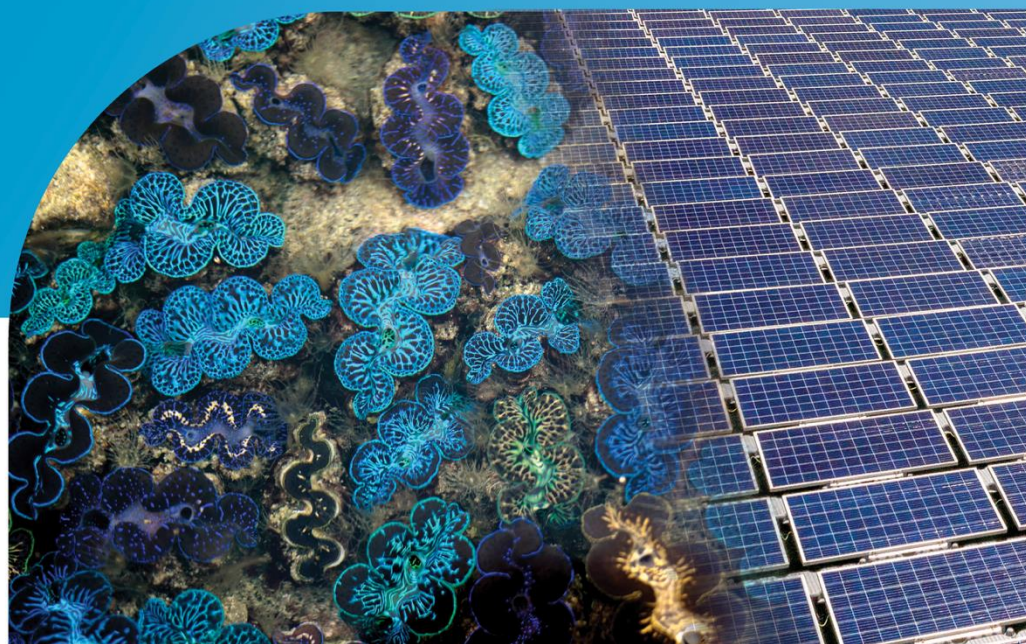
Harnessing Technology to Power the Sustainable Blue Economy

Workshop Two

25–28 May 2026 • Busan, Republic of Korea



Ministry of Oceans
and Fisheries



Tourism generated \$11.6 trillion in 2025,
contributing 9.8% to global GDP and
10.9% of jobs.

Tourism accounted for 1 in 3 new jobs
created globally.



Tourism's economic engine is helping to deliver ADB Strategy 2030

ADB

Alignment with ADB Strategy 2030



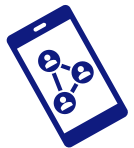
Climate Action: Conserves ecosystems, leverage nature-based solutions, and creates sustainable livelihoods



Private Sector Development: Creates jobs, stimulates entrepreneurship and drives private sector investment



Regional Cooperation and Public Goods: Relies on managed public assets and spurs regional trade



Digital Transformation: Early and extensive adopter of technology with new skills needed for the future

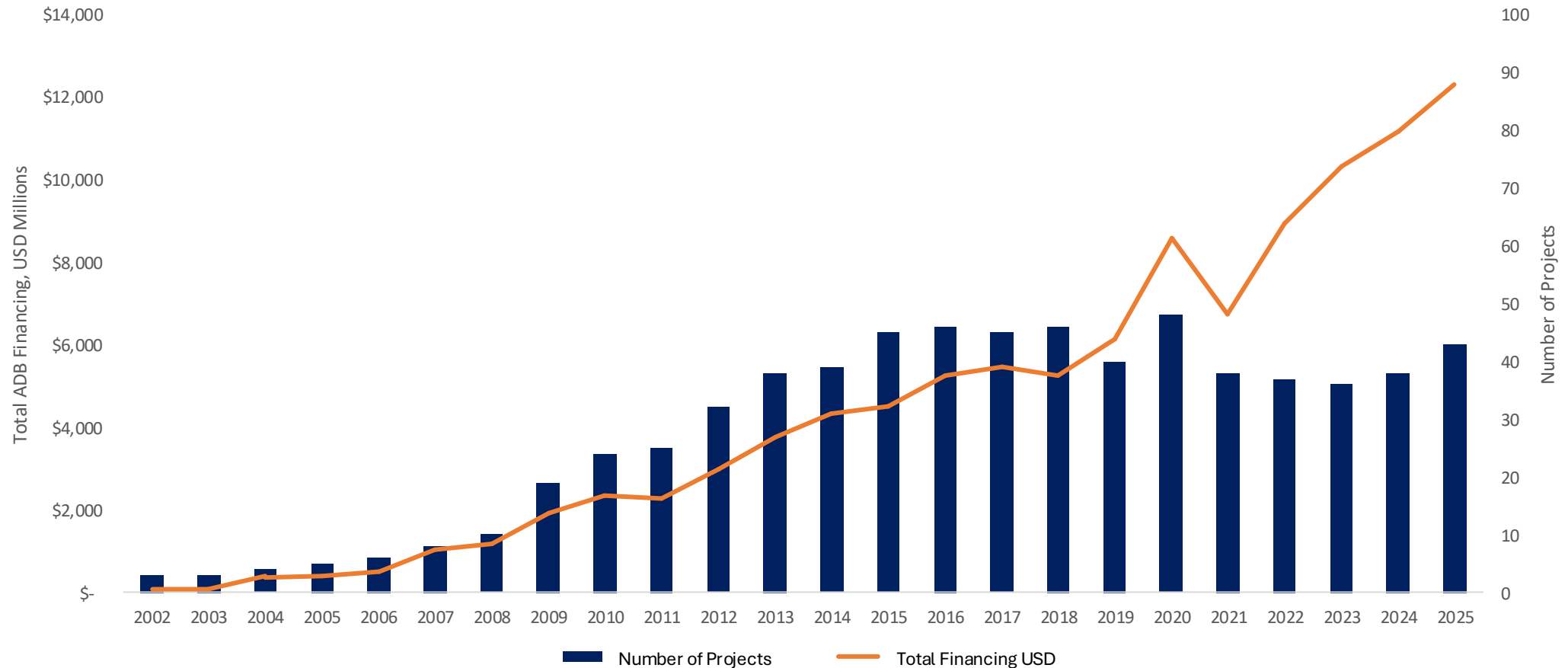


Resilience and Empowerment: Employment for women, youth, and minorities and provides an economic rationale for resilient infrastructure

ADB a strong history of investing in tourism and demand is growing

113 closed or active tourism and tourism-related projects worth \$12.3 billion ADB Financing and \$20.6 b in total financing. Active portfolio doubled between 2019 and 2025.

Cumulative Active Tourism Lending Portfolio ADB Financing USD Millions



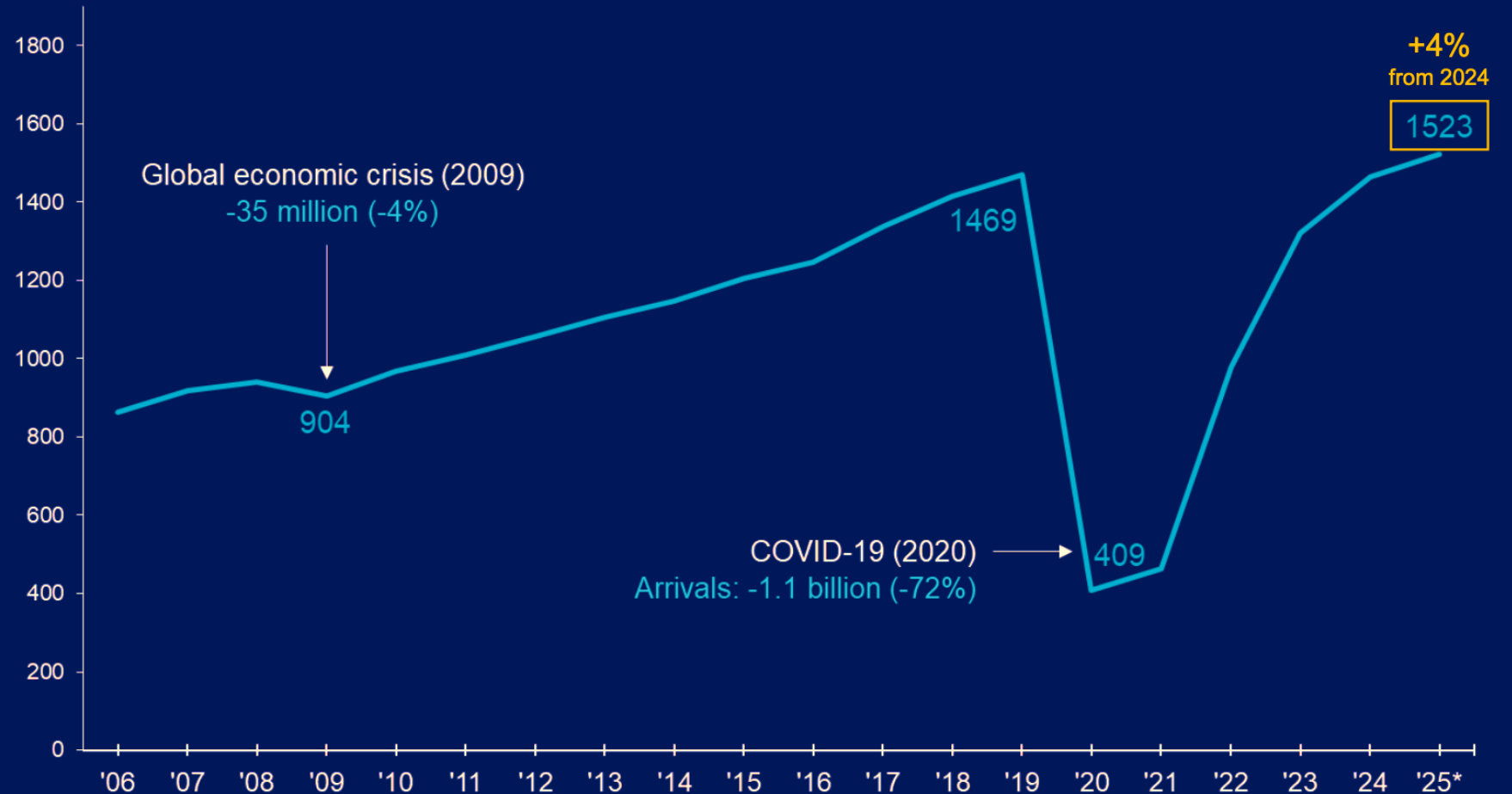
Tourism is an interplay of demand and supply within a destination



International tourist arrivals

Millions

Source: UN Tourism
(Data as of January 2026)



UN Tourism

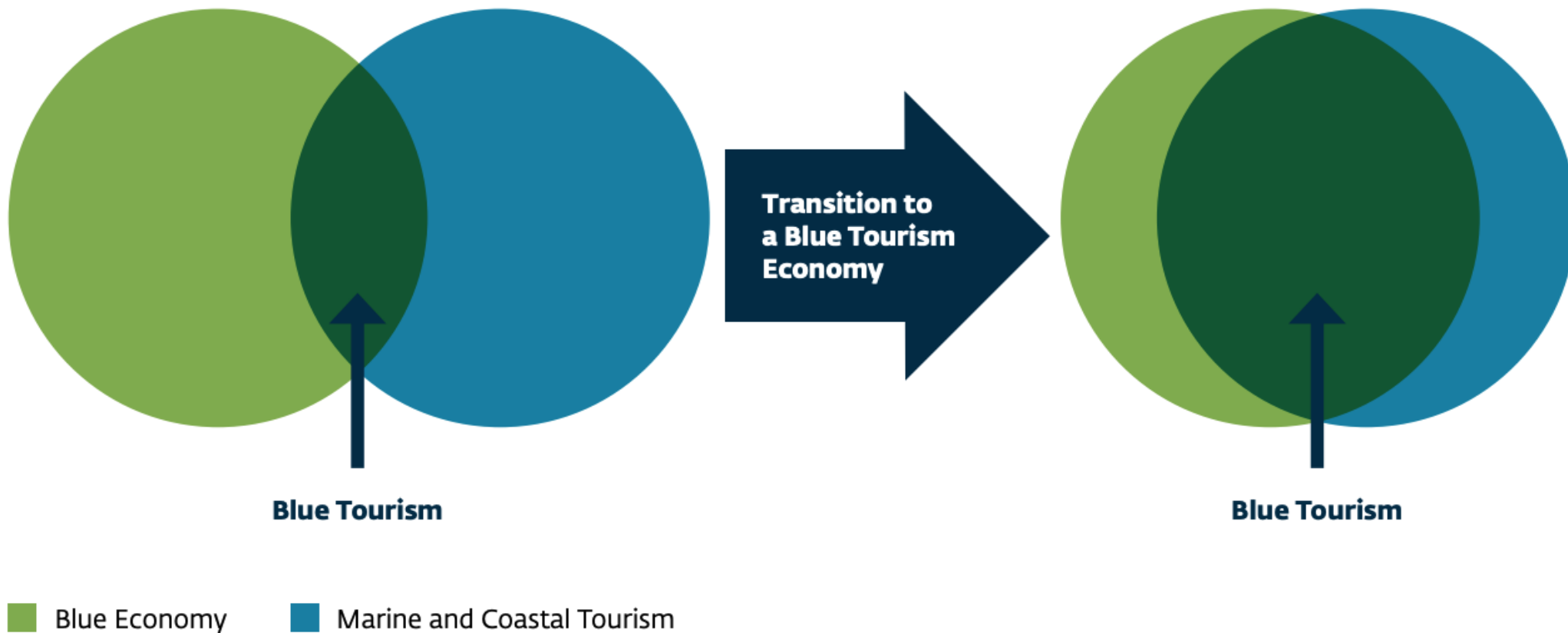
But market demand does not guarantee
local economic benefit and job
creation...





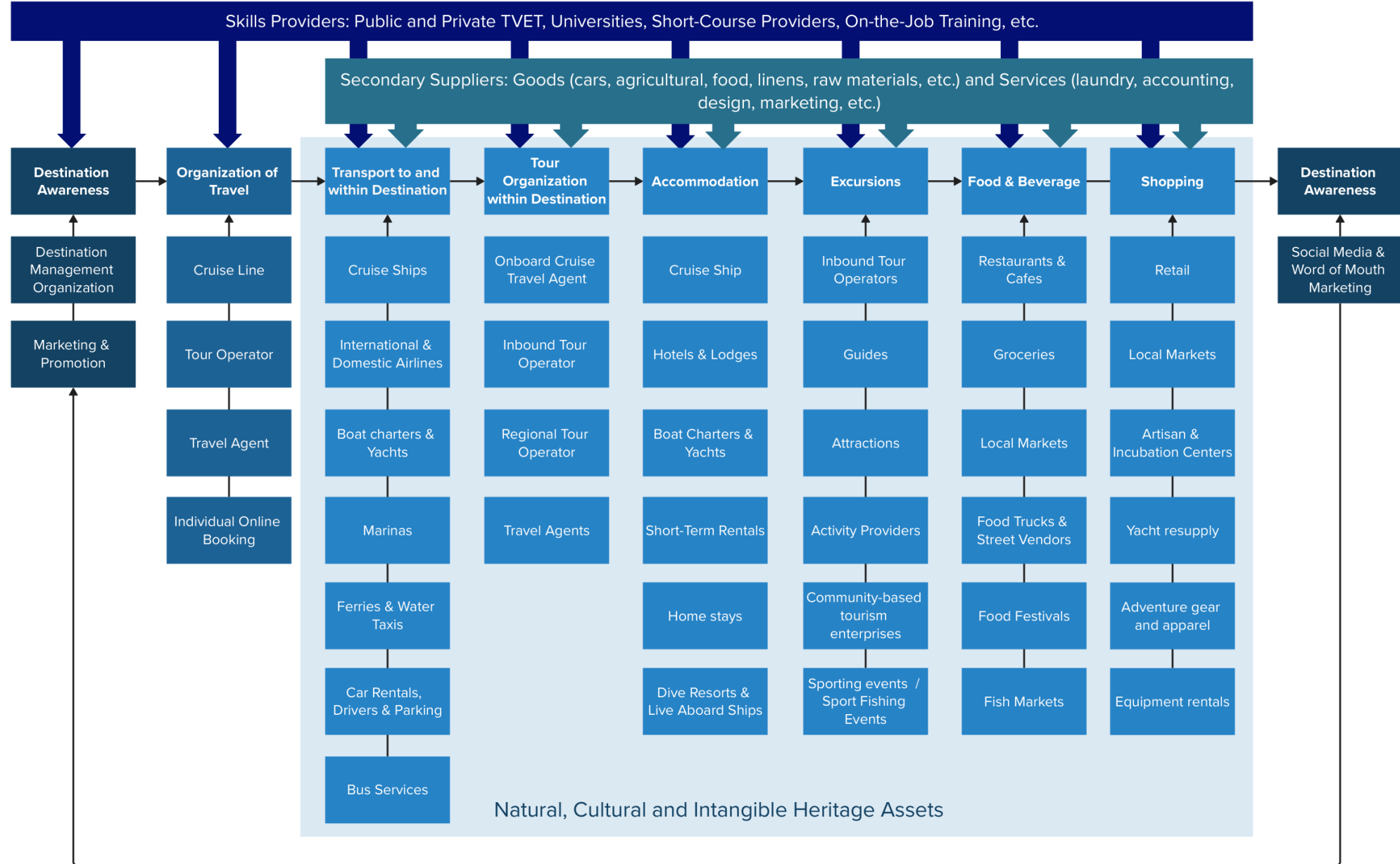
and tourism's negative externalities put pressure on destination resources.

Blue Tourism sits at the Intersection of Sustainability and Marine Tourism



Source: OECS Blue Economy Analytics, 2020, Internal report.

Deriving benefit requires developing the whole marine tourism value chain



Leveraging Technology in the Tourism Value Chain is Complex

Technology is pervasive throughout the visitor journey

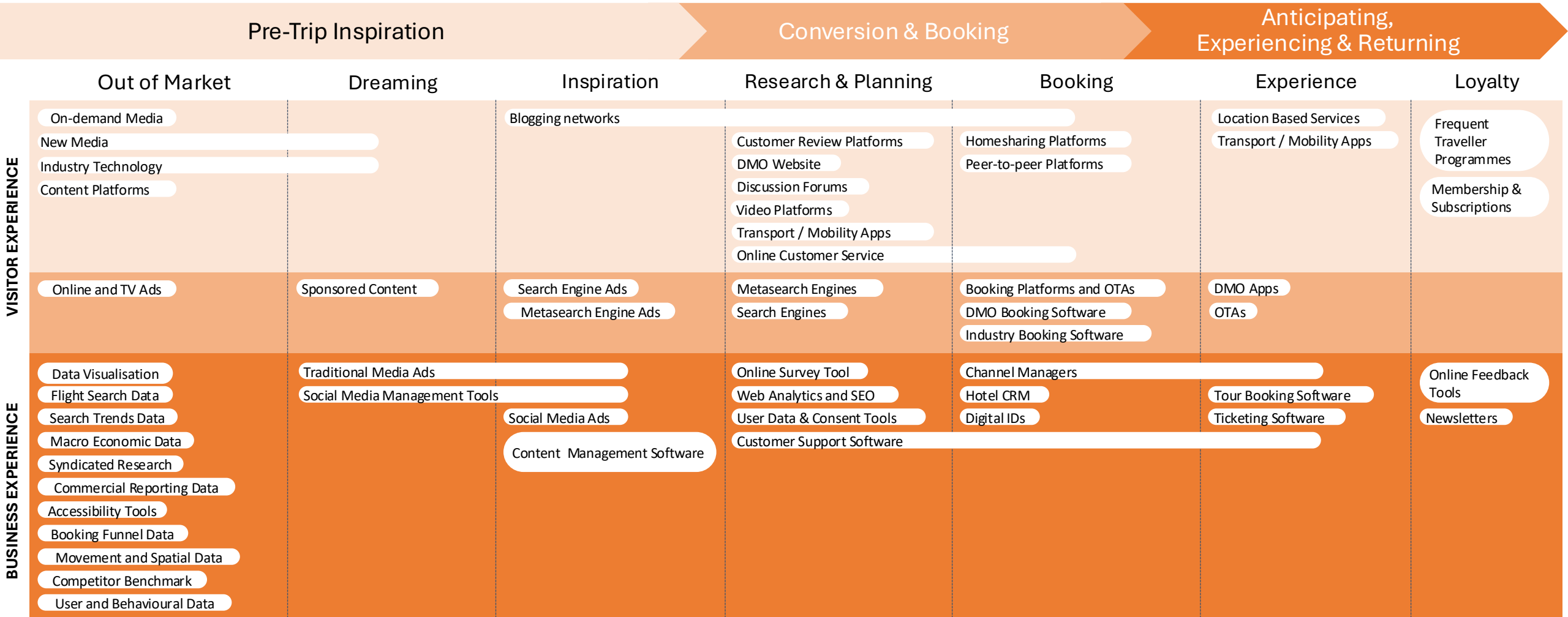
On the surface, visitors interact with thousands of digital touchpoints when planning, booking and experiencing their trips.

Below the surface, more digital services are used by tourism businesses and destinations.



Leveraging Technology in the Tourism Value Chain is Complex

At each stage of the visitor journey, digital technology tools and services exist at the visitor/consumer, business and destination levels.



Understanding the challenges in your value chain is the first step to identifying the right technology



**Promoting Smart Tourism in Asia and
the Pacific through Digital Cooperation**
Asian Development Bank



**Mapping of Digital Along the
Tourism Value Chain**
World Bank

Private Sector Showcase



INTREPID TRAVEL

BALANCING PURPOSE AND PROFIT





Key Questions



Where is Intrepid creating value (local supply chains, experiences vs infrastructure)?



How are they managing environmental impacts (carbon, community engagement)?



What constraints do they face (regulation, infrastructure gaps)?



What role does government play in enabling this model?

An aerial photograph of a beach. The top half shows the ocean with white foam from waves washing onto the shore. The bottom half shows a sandy beach with several rows of lounge chairs, each with a white cushion and a large, round, light-colored umbrella. A dark blue horizontal bar is overlaid across the middle of the image, containing the title text.

Blue Tourism Value Chain Game

Game Instructions

**Form groups of 4 people. Each group should have one deck of cards.
Each player should have a Value Chain Placemat.**

Objective is to build the highest-value, most sustainable tourism system

1. Dealer deals 5 value chain cards to each player and then shuffles the enabler and constraint cards into the deck of remaining value chain cards
2. Players show their cards on their placemat.
3. Player with the closest birthday to today goes first.
4. Each player takes a turn drawing a card from the pile and discarding one card. You can discard from your existing cards or the card you drew. You should have 5 value chain cards at all times.
 - If an enabler or constraint card is drawn. Follow the action.
 - Each time you draw a card read it aloud.
5. After all cards have been drawn, players add up their value chain scores. Be sure to add a point for each value chain slot you've filled.

Key Questions



Which players had the strongest system and why?



What were the most valuable cards?



What role did the governance cards play?



How has this made you think differently about the blue tourism value chain in your country?



Blue Tourism makes up
33% of the \$2.5 trillion Blue Economy

Tourism is increasingly driven by AI, Sustainability, Authenticity, and Market Segments



Over 60% of active APAC travelers integrated AI into their trip planning and 63% likely to use AI prior to next trip.



67% of travelers prefer destinations with strong sustainability practices



Regional and multi-destination tourism is gaining momentum



87% of Gen Alpha and Gen Z in APAC actively shape family travel plans (98% in China and 93% in India).

Blue Tourism appeals to a range of market segments



Adventure tourism represents 67% of the global market



3.9 million cruisers to Asia Pacific in 2024



\$2.5 billion luxury yacht market in Asia Pacific, slated to grow at 11%



Up to \$20.4 billion annual economic impact from scuba diving

ADVENTURE TRAVEL IMPACT

Generating US\$10,000 in the local economy takes:



Cruise Tourists



Overnight Package Tourists



Adventure Travelers

Mass Tourism

14% of revenues remain in country

1.5 local jobs per US\$100,000

Adventure Tourism

76% of revenues remain in country

2.6 local jobs per SU\$100,000



ADVENTURE TRAVEL
TRADE ASSOCIATION™

**based on USAID (2017) research study comparing mass tourism with adventure tourism in Jordan;
based on World Bank (2015) Strengthening Tourism Competitiveness in the OECS countries: Market Analysis

Targeted investment is required to attract priority market segments



Tourism Assets

Natural, cultural, and intangible cultural heritage assets



Investment

Investment is needed to unlock and develop the destination

Infrastructure & Access
Facilities & Services
Marketing & Branding
Skills & Capacity
Sustainability & Conservation



Attractions

Enhanced, accessible and visitor ready attractions



Tour Operators

Designed, packaged and organized by private sector

Product Design
Package Tours
Route Development
Transport & Logistics
Bookings
Partner Networks



Tourism Products

Memorable experiences delivered to visitors



Driving Tourism Investment Requires Private and Public Sectors to Come Together

Tourism Investment Needs

- Integrated Resilience
- Data and Evidence
- Bankability
- Project Readiness
- Coordination and Sequencing
- Workforce Readiness



Government Enablers

- Planning and Zoning
- Infrastructure and Coordination
- Project Readiness
- Ease of Doing Business
- Entrepreneurship
- Workforce Development

Tourism development can involve trade offs



Government's role is to balance these trade offs with enabling policies that drive sustainable marine tourism growth

Green and blue infrastructure
Skills development
Value chain development
Tourism asset development
Private sector investment
Conservation
Digitalization
Regional coordination
Sustainability standards

Many Stakeholders. One Destination.

GOVERNMENT STAKEHOLDERS

- POLICY & REGULATION**
Policy, regulation & public investment
- PLANNING & DEVELOPMENT**
Land use, infrastructure, permits, local services
- TRANSPORT**
Air, ports, roads, rail connectivity
- ENVIRONMENT & OCEANS**
Conservation, protected areas, climate action, marine health
- SAFETY & SECURITY**
Police, health, emergency management
- EDUCATION & SKILLS**
Skills development, workforce readiness
- FINANCE**
DFIs, development banks, funding & guarantees



PRIVATE SECTOR STAKEHOLDERS

- ACCOMMODATION**
Hotels, resorts, lodges, homestays
- TRANSPORT & MOBILITY**
Airlines, airports, car rental, transfers, cruise lines
- ATTRACTIONS & ACTIVITIES**
Parks, museums, tours, activities, events
- FOOD & BEVERAGE**
Restaurants, cafes, local cuisine
- TRAVEL TRADE**
Tour operators, travel agents, OTAs, DMCs
- MARKETING & TECHNOLOGY**
DMO's, digital platforms, tech solutions
- INVESTORS & DEVELOPERS**
Real estate, infrastructure, private equity

CROSS-CUTTING ENABLERS

- COMMUNITIES**
Local participation, benefit sharing
- CULTURE & HERITAGE**
Preservation, identity, creative industries
- DIGITAL CONNECTIVITY**
Infrastructure, data, innovation
- SUSTAINABILITY**
Environmental, social & governance
- LAWS & REGULATION**
Enabling laws, clear processes
- DATA & INTELLIGENCE**
Research, analytics, monitoring



Blue Tourism Trade Offs Activity

Tourism demand is growing and changing, driving a movement toward sustainability

Steps:

- Each Group Choses a Destination Type: Small island, coastal city, marine protected area)
- Each team member choses a roles (multiple people per role if the teams are large)
- Read the instructions for your role. This will provide you your priorities and development goals

Roles

1. Ministry of Tourism
2. Ministry of Fisheries
3. Ministry of Finance
4. Ministry of Environment
5. Ministry of Energy/ Ministry of Infrastructure
6. Private Sector Investor
7. Local Community

Goal: Negotiate amongst the team to decide on the following:

- 2 priority actions for tourism development
- 1 activity that should be limited, regulated, or not allowed
- 1 measure to ensure local benefit or conservation

Examples

- Accommodation incentives, product development, workforce development
- Large scale resorts, swimming with cetaceans, on-shore commercial fishing
- Environmental levy, marine protected area fee, tourism capacity building for local communities

Plot Twist

Group 1: A media outlet releases an expose on a resort in your country that has ignored their EIA and damaged 500 meters of coral reef.

Group 2: Natural Disaster destroys accommodation in main tourism destination

Group 3: Minister of Finance approved the development of a new mass tourism hotel that is not aligned with the approved master plan

Group 4: Ministry of Mining announces the opening of a new rock mining quarry next to a beach slotted for tourism development

Group 5: Ministry of Immigration announces new visa restrictions on citizens coming from your most important source market.

Group 6: Popular social media influencers highlights your destination and hotel occupancy rates are now at 95% increasing hotel rates and reducing value for money.

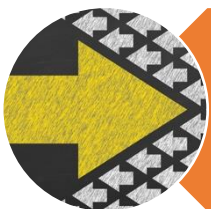
Group 7: A shortage of oil has caused a fuel price increase, impacting flight costs and tour operator costs.

Group 8: Ministry of Finance announces a fiscal crisis and a stop to all incentives and conservation projects

Key Questions



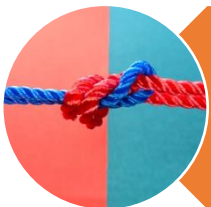
Which interests were easiest to align?



Which tensions were hardest to resolve?



Did groups prioritize short-term growth or long-term sustainability?



How did groups handle the plot twist.

Private Sector Showcase



Mengiauo Sasao - Researcher, PICRC

Key Questions



Why would Palau Pacific Resort investment in this project? What to they gain from it?



What do you think enabled the resort to implement this program?



What government actions could support the scaling of this initiative?

Wrap Up

Key Takeaways



Blue tourism is a system-level transformation



Private sector innovation requires an enabling environment



Value must be deliberately designed to stay local



Coordination within governments, within the private sector, and between the two is a primary constraint

An aerial photograph of a solar farm. The solar panels are arranged in neat, parallel rows on the right side of the image. The ground between the panels is covered with various types of vegetation, including several large, blue-green plants with intricate, lace-like patterns, and some darker, more solid-colored plants. The overall scene suggests a combination of solar energy production and agriculture.

Thank you!

Private Sector Showcase





Outcomes & Impacts for the Destinations

<p>Visitor Spending</p>	<p>Job Creation</p>	<p>Private Investment</p>	<p>MSME Development</p>	<p>Foreign Exchange</p>	<p>Fiscal Revenues</p>
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