Deep Dive Session 2:

Strengthening Tourism Resilience through Regional Cooperation and Integration

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Strengthening Tourism Resilience through Regional Cooperation and Integration



Moderated By:

Jong Woo Kang,
Director of Regional Cooperation and Integration Division, Economic Research and Development Impact Department, ADB

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Regional Cooperation Matters for Resilient Tourism Flows:

Evidence from Asia and the Pacific



Presented by:

Sanchita Basu Das,
Senior Economist, Regional Cooperation and Integration, Economic Research and Development Impact Department

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Tourism Performance of Asia and the Pacific, 2005–2025

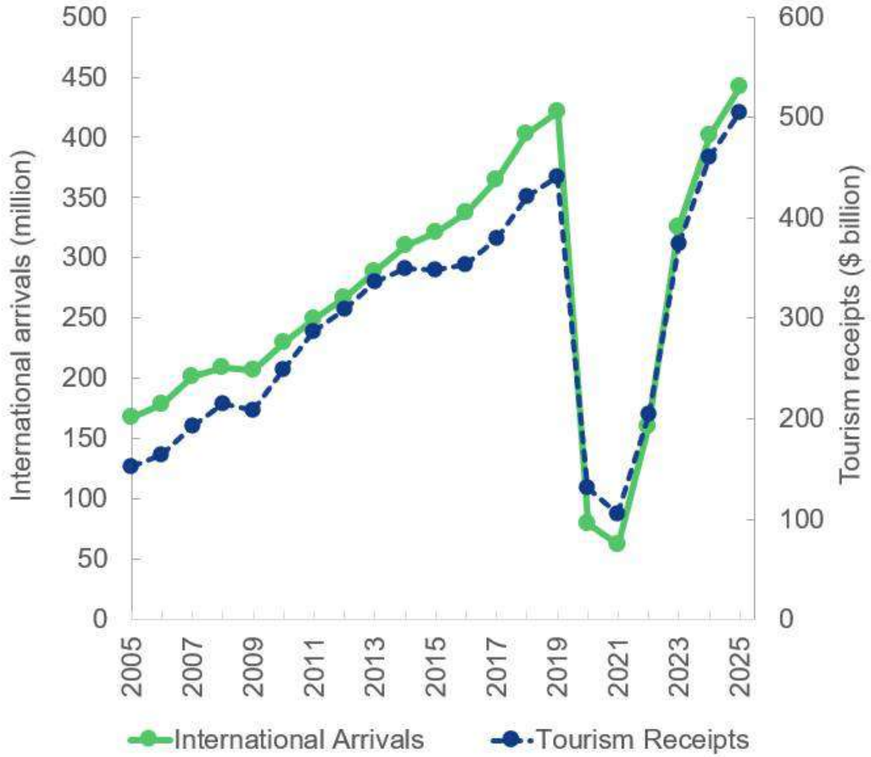
Asia's tourism sector has rebounded strongly from the pandemic, with international arrivals surpassing pre-pandemic levels and Central and West Asia gaining share.

- Strong post-pandemic recovery
  International arrivals fell by 81% in 2020 but recovered to 442 million in 2025 (4.9% above 2019 levels), while tourism receipts reached $504.7 billion (14.5% above 2019 levels).

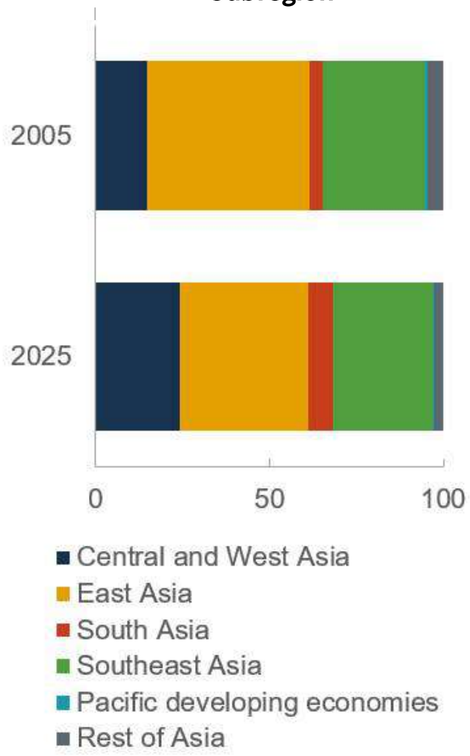
- Shifting regional tourism patterns
  East and Southeast Asia remained the leading destinations, while Central and West Asia increased their share of international arrivals.

Tourism Performance of Asia and the Pacific, 2005–2025

(a) International Arrivals and Receipts



(b) International Arrivals by Subregion



Source: ADB calculations using data from ASEAN Secretariat. https://www.aseanstats.org/ (accessed June 2026), CEIC Data Company (accessed July 2026), Euromonitor (accessed July 2026), UN Tourism. Compendium of Tourism Statistics data set. https://www.unwto.org/tourism-statistics/tourism-statistics-database (accessed July 2026), UN Tourism. World Tourism Barometer and Statistical Annex, September 2026 https://doi.org/10.18111/wtobarometereng (accessed October 2026).

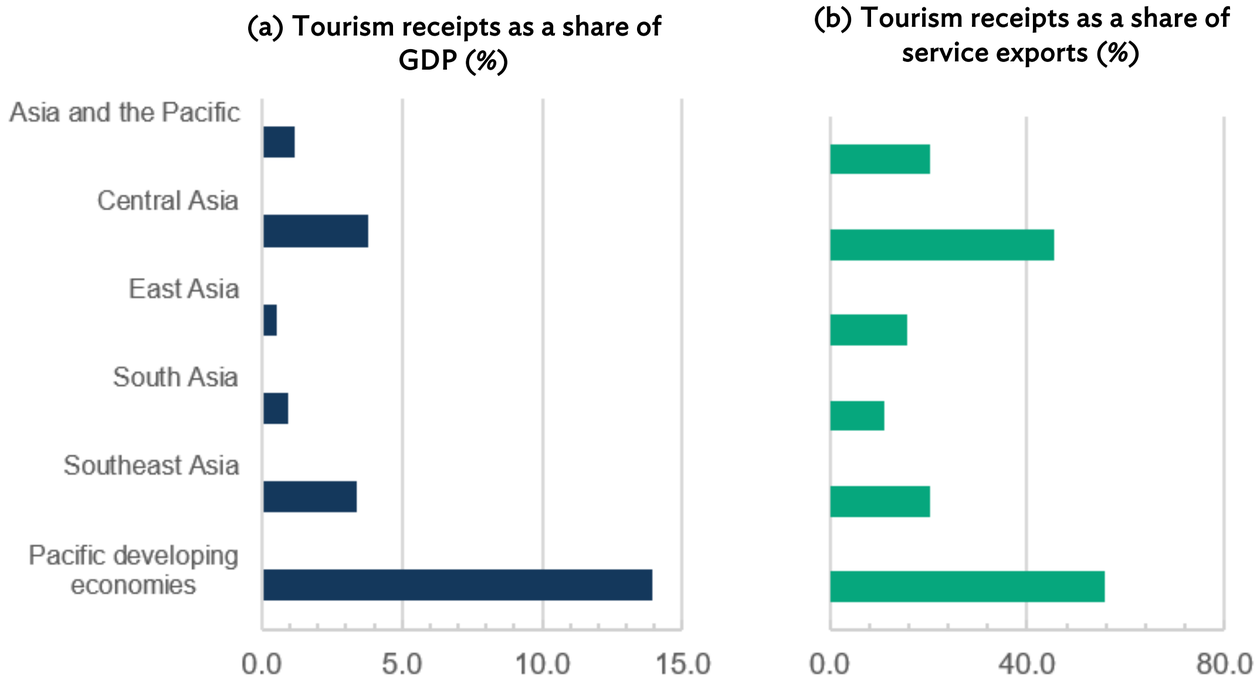
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Importance of Tourism in Asia and the Pacific, 2005–2025

Tourism is systemically vital to Pacific economies, making connectivity disruptions a major risk to exports, jobs, and essential transport services.

- Tourism accounts for 20%+ of Asia and the Pacific service exports, with wide subregional variations.
- Tourism receipts average 1.2% of regional GDP, rising to 13.9% in the Pacific.

Tourism Economic Dependence by Subregion, 2024



GDP = gross domestic product.
Source: Basu Das et al. 2026. Transport and Policy Connectivity for International Tourism in Asia and the Pacific: Guidance for Regional Cooperation. https://www.adb.org/publications/transport-policy-connectivity-tourism-asia-pacific.

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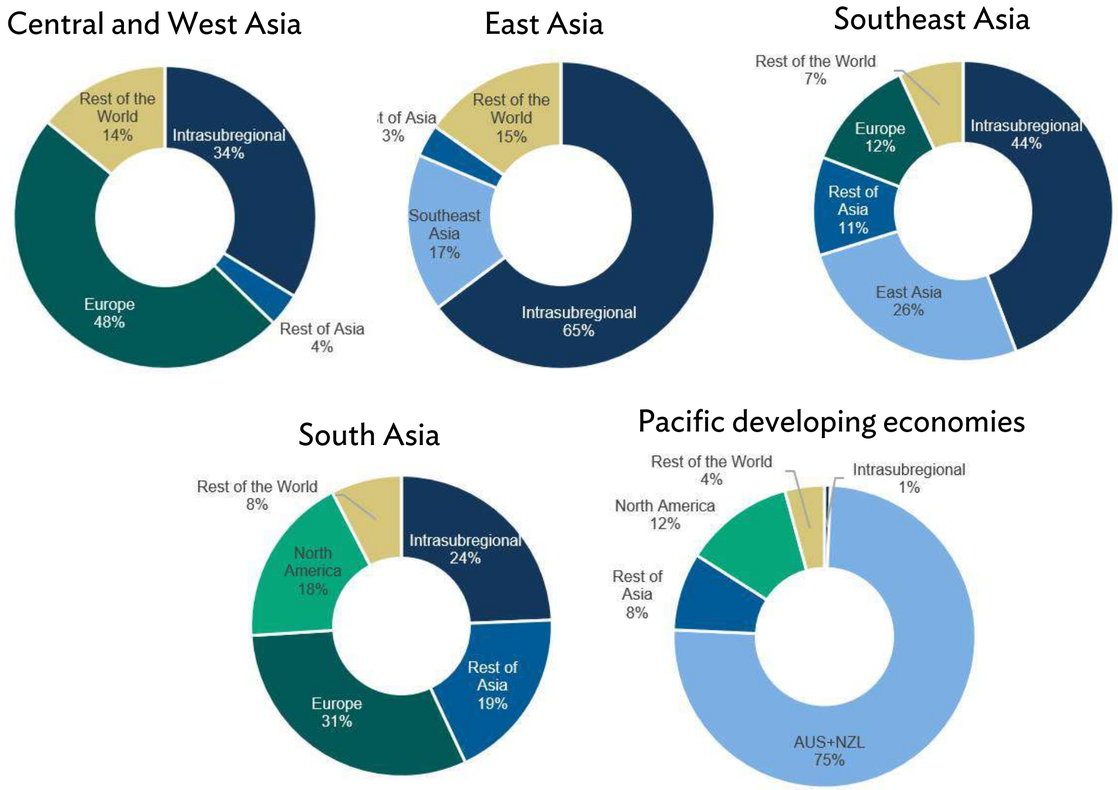
International Tourism: Source Countries, 2023

Intraregional travel remains the backbone of Asia's tourism. While Europe is gaining importance as a source market, East Asia is softening its dominance.

Within sub-regions, market composition differs, with some showing market concentration:

- Pacific economies depend heavily on their neighbours
- East Asia has significant share of intra-subregional flows
- Central and West Asia draw tourists from Europe
- Southeast Asia depend on both intra-subregional flows and tourists from East Asia
- South Asia relies more on markets outside of Asia

Tourism Flows to Asia and the Pacific by Subregion, 2023



AUS = Australia, NZL = New Zealand.
Note: East Asia excludes international arrivals to the People's Republic of China because complete and comparable source-market breakdowns for inbound arrivals to the PRC were not available for 2023 in the underlying series; including partial PRC data would distort intrasubregional shares for East Asia.
Source: Basu Das et al. 2026. Transport and Policy Connectivity for International Tourism in Asia and the Pacific: Guidance for Regional Cooperation. https://www.adb.org/publications/transport-policy-connectivity-tourism-asia-pacific.

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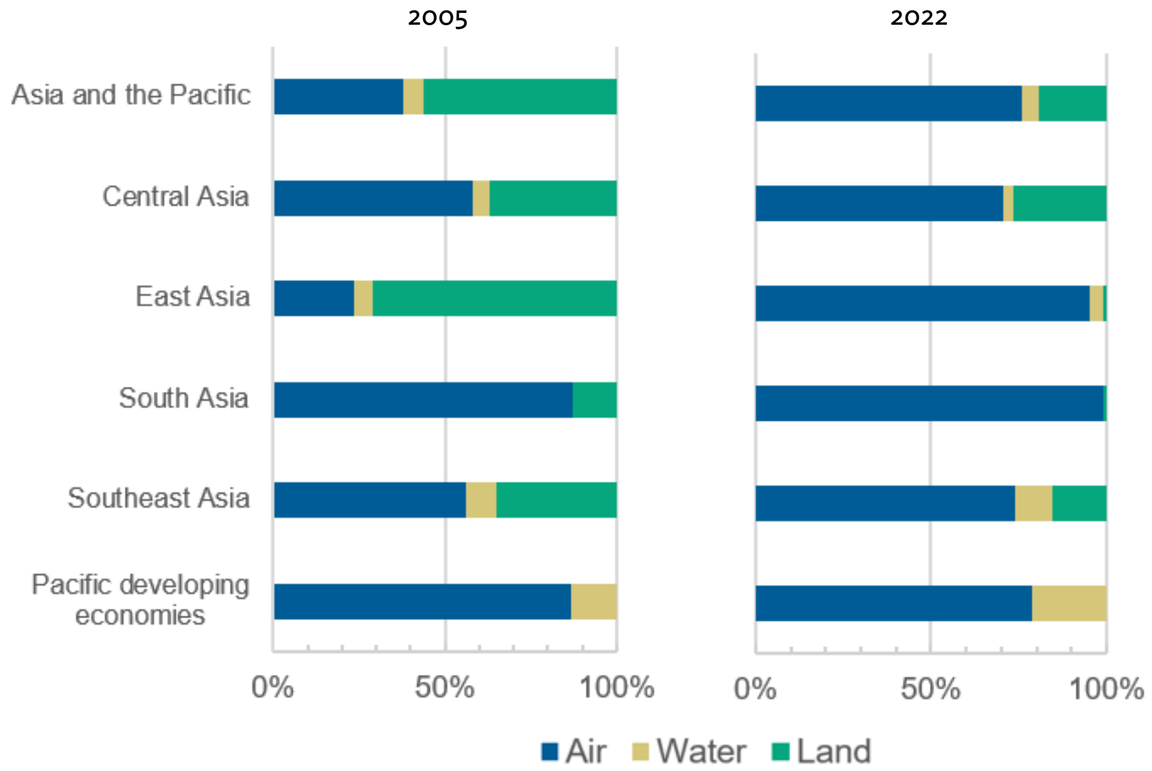
International Tourism: Mode of Travel

The regional trend shows an increase in the role of air travel.

Transport mode patterns in Asia and the Pacific differ across subregions

- Pacific: Highly dependent on air connectivity; maritime access mainly supports cruise tourism.
- South Asia: Consistently air-dependent, making aviation connectivity critical.
- East Asia: Shifting from land to air travel, partly reflecting delayed reopening of land borders.
- Central and West Asia: Strongest reliance on overland travel, with road and rail corridors supporting cross-border tourism circuits.
- Southeast Asia: Most multimodal subregion.

Share of Arrivals by Mode of Transport (%)



Note: 2022 data reflect partial post-COVID route restoration; East Asia land arrivals were particularly affected by residual border restrictions.
Source: Basu Das et al. 2026. Transport and Policy Connectivity for International Tourism in Asia and the Pacific: Guidance for Regional Cooperation. https://www.adb.org/publications/transport-policy-connectivity-tourism-asia-pacific.

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International Tourism: Institutional Connectivity Matters

Operationalizing cross-border agreements, harmonizing border procedures, and expanding digital travel facilitation can unlock tourism flows.

- Liberalizing air services expands tourism connectivity: Open skies, greater route flexibility, and expanded traffic rights can lower fares, increase passenger flows, and boost tourism-related economic gains.
- Visa facilitation is a high-return, low-cost policy tool: Simplifying entry requirements can increase tourism flows, reduce travel friction, and improve destination competitiveness.
- Align visa openness with regional tourism integration: Easier intra-Asian travel and cross-border visa arrangements can unlock multi-country itineraries, tourism circuits, and joint destination promotion.
- Regional frameworks support overland tourism connectivity: GMS, ASEAN, CAREC, and BBIN provide platforms for cross-border road and rail cooperation, but implementation remains uneven.

Institutional Connectivity by Subregion

Subregion	Air Service Agreements	Visa Regimes	Land Transport / Cross-Border Movement
Southeast Asia	ASEAN Open Skies in force; ASEAN–China operational; ASEAN–EU signed, extending liberalization.	ASEAN visa exemption in place; e-visa and visa-on-arrival deepening and digital facilitation for many non-ASEAN countries are underway.	GMS CBTFA and ASEAN CBTP provide the foundation, with work to strengthen coordination and uptake.
East Asia	Dense bilateral networks support strong connectivity and a base for broader cooperation.	Bilateral and unilateral measures support mobility, with scope for more coordinated approaches.	Bilateral road and rail protocols enable movement and a base for wider frameworks.
Central and West Asia	Extensive bilateral network provides a platform to advance regional cooperation.	Visa-free and e-visa access are expanding, with momentum toward harmonization.	CAREC corridors provide a strong platform, with work to deepen implementation.
South Asia	Bilateral agreements underpin connectivity; SAARC initiatives offer a path to expand cooperation.	Bilateral, category-based facilitation supports travel, with scope for broader coverage.	BBIN MVA provides an agreed framework, advancing through continued coordination.
Pacific developing economies	PIASA provides a dedicated regional framework, with work to expand reach.	Mix of exemptions, visa-on-arrival, and e-visa supports travel, with scope for greater consistency.	Not applicable (island geography).

ASEAN = Association of Southeast Asian Nations, ASEAN–EU = ASEAN–European Union Comprehensive Air Transport Agreement, ASEAN–PRC = ASEAN–People's Republic of China Air Transport Agreement, BBIN MVA = Bangladesh–Bhutan–India–Nepal Motor Vehicles Agreement, CAREC = Central Asia Regional Economic Cooperation, CBTP = cross-border transport of passengers, CBTFA = cross-border transport facilitation agreement, GMS = Greater Mekong Subregion, PIASA = Pacific Islands Air Services Agreement, SAARC = South Asian Association for Regional Cooperation.
Notes: Entries summarize the institutional arrangements currently in place across each subregion and the direction of ongoing cooperation, drawn from the sources listed below. No comparative rating is implied.
Source: Basu Das et al. 2026. Transport and Policy Connectivity for International Tourism in Asia and the Pacific: Guidance for Regional Cooperation. https://www.adb.org/publications/transport-policy-connectivity-tourism-asia-pacific.

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Analytical Findings – Drivers of international tourism flow

Visa openness remains uneven across Asia and the Pacific, with intra-subregional facilitation stronger than cross-subregional openness, despite geographic proximity.

Visa Openness Index by Destination Subregion and Source Region, 2025



Notes: Higher values indicate greater visa facilitation. Scores are scaled 0-100.
"Within subregion" refers to travelers from the same subregion as the destination; "Rest of Asia" refers to travelers from other Asian subregions. The Visa Openness Index measures how easily tourists from each source-market group can enter Asian Development Bank (ADB) destination subregions. Visa policies are scored from 0 to 1, where visa-free entry receives 1.0, visa on arrival or electronic travel authority (ETA)-type facilitated entry receives 0.7, eVisa receives 0.5, and traditional visa or non-admission receives 0.0. For each destination-source group, the score is computed as 100 times the sum of origin population share multiplied by visa score. Within-subregion scores exclude the destination economy itself from the origin denominator because domestic travel is outside the international visa-policy matrix. Destination scores are then aggregated to ADB destination subregions using the natural logarithm of destination population. This follows the UN-Tourism-style subregional aggregation approach and balances two concerns: giving very small and very large destinations equal weight would understate market size, while direct population weighting would allow the largest economies to dominate the result. Log-population weighting recognizes destination size while preserving a more balanced subregional score.
Source: Basu Das et al. 2026. Transport and Policy Connectivity for International Tourism in Asia and the Pacific: Guidance for Regional Cooperation. https://www.adb.org/publications/transport-policy-connectivity-tourism-asia-pacific.

- Connectivity stimulates tourism flows: a 1% increase in air transport investment leads to a 1.1% increase in intra-Asia tourism (Rodolfo, Basu Das, and Domingo 2025).
- Visa restrictions impose significant costs, with visa-requiring destinations attracting about 52% fewer visitors than comparable visa-free ones (Rodolfo, Basu Das, and Domingo 2025).
- Inbound tourism can boost merchandise exports: 1% increase in tourist flows is associated with a 0.17% rise in merchandise exports in Pacific island economies(Gupta et al. 2026)
- Source market concertation creates economic vulnerabilities : Southeast Asia recorded an estimated GDP loss of US$76 million, alongside significant declines in exports of accommodation, food and beverage services and recreational services (Narayanan, Domingo, Basu Das 2025).

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Conclusion: Implication for policy makers and ADB operations

Key Messages

- Connectivity strengthens tourism resilience: Reliable transport links and streamlined borders help diversify source markets, sustain demand, and accelerate recovery from external shocks.
- Subregional priorities differ: Tailored investments in aviation, maritime, road, rail, and border facilitation are essential to address distinct connectivity vulnerabilities.
- Regional cooperation unlocks resilience: Sequenced reforms—from visa facilitation to route development and infrastructure investment—can strengthen intraregional tourism and accelerate recovery.

Implication for Policy Makers

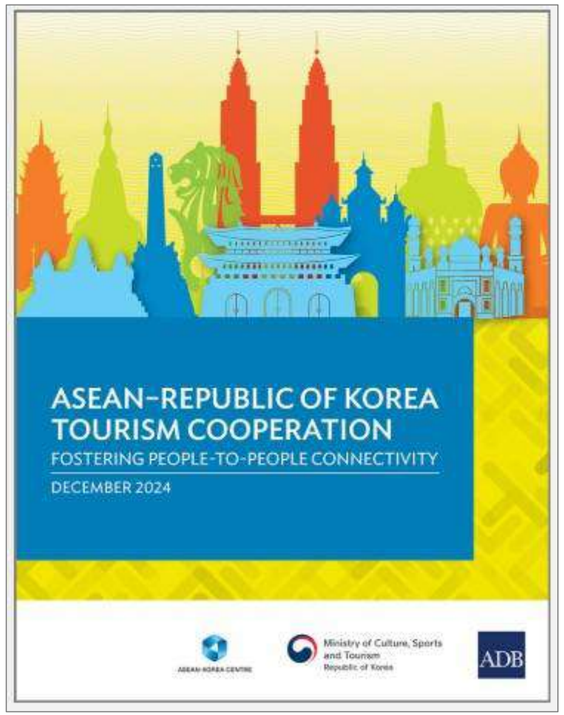
- Tourism should be considered as a regional public goods: The sector not only needs cross-border cooperation but also requires national readiness in several related sectors.
- Prioritize institutional connectivity alongside infrastructure: visa facilitation, digital travel systems are equally important as physical infrastructure
- Reduce vulnerability through market diversification: Expand the number of source markets and strengthen connectivity for intra-regional tourism.

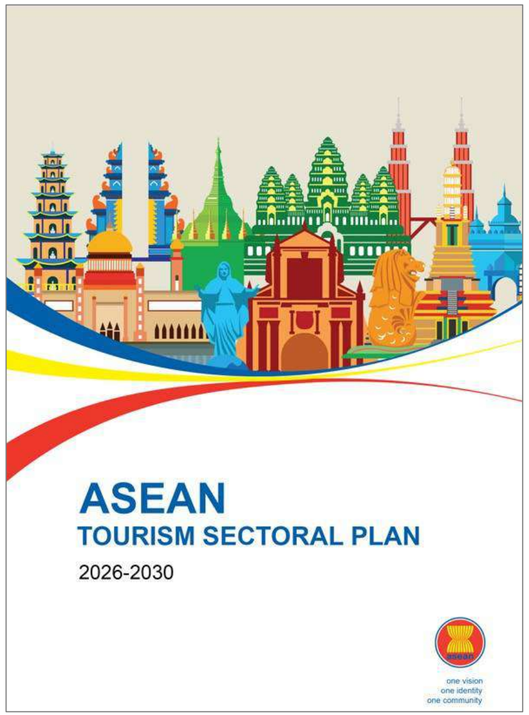
Implications for ADB Operations

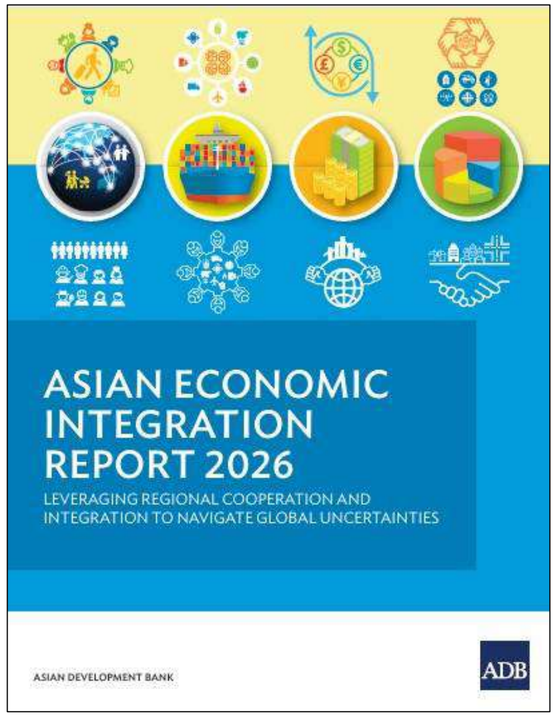
- Scale up regional tourism connectivity investments: Support multimodal transport corridors, improve travel facilitation and digital connectivity.
- Strengthen support for regional cooperation platforms: Leverage ASEAN, CAREC, GMS to initiate discussion with member governments to operationalise tourism initiatives.
- Use evidence-based tourism operations to build resilience: Integrate analytics into country RCI diagnostic while preparing country programs and tourism project design.

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Economic analysis to guide policymaking







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Thank you!

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CAREC Regional Tourism



Presented by:

Zulfia Karimova, Principal Regional Cooperation Specialist, CWRD, ADB

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ABEC corridor and sector portfolio
Tourism plans, standards and projects
Kyrgyz Republic perspectives
Kazakhstan perspectives
Lessons for CAREC and other regions



Azerbaijan



Georgia



Kazakhstan



Kyrgyz Republic



Mongolia



Pakistan



People's Republic of China



Tajikistan



Turkmenistan



Uzbekistan

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CAREC Regional Tourism



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CAREC: One Destination, Many Journeys

Each country brings its own strengths and complements the others, providing travelers with a diverse portfolio of unique experiences found nowhere else. Together, the CAREC Region offers the world one remarkable destination.

2019–2024 Foundation
CAREC Tourism Strategy 2030 endorsed. Visit Silk Road brand and portal, tourism asset mapping, demand analysis

Nov 2025 New Commitment
Memorandum of Understanding on Regional Tourism Development signed by all 10 countries

2026–2030 New ADB TA
Sustainable Tourism and Services Trade Technical Assistance, supports CAREC Tourism Strategy 2030

Sep 2026 Cooperation
Tourism Working Group reactivated with shared priorities and work plan

10 countries, one tourism destination

Azerbaijan · People's Republic of China · Georgia · Kazakhstan · Kyrgyz Republic · Mongolia · Pakistan · Tajikistan · Turkmenistan · Uzbekistan

CAREC Tourism Strategy 2030

Phase 2 (2024–2028): rapid market share growth in international markets

1. Connectivity and infrastructure
2. Quality and standards
3. Skills development
4. Marketing and branding
5. Market intelligence

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CAREC Regional Tourism: Focus and Outputs

Goal Expand, digitalize and promote smart, sustainable and inclusive trade in tourism and related services

Digital and AI
Integrated across the tourism ecosystem from discovery and booking to destination management, data and skills

Climate-Smart and Sustainable
Sustainability and resilience built into tourism development, destination management and investments.

Private Sector as Key Partner
Engage private sector as partners for regional tourism development, cross-border products and innovation.

OUTPUT 1
Knowledge

Digital Readiness Assessment (Q1 2027)
Azerbaijan, Georgia, Uzbekistan

Sustainability Benchmarking (Q1 2027)
Fergana Valley - Kyrgyz Republic, Tajikistan, Uzbekistan

OUTPUT 2
Projects

Regional tourism project pipeline (ongoing)
the top priority

Visit Silk Road portal upgrade

AI-Enabled or Digital Tools

Replicable pilot projects

OUTPUT 3
Capacity

Tourism Working Group
regional coordination and joint planning

CAREC Tourism Coordinating Office (CTCO)

Policy dialogue and training
public and private sector representatives

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Shared Priorities and Next Steps

Shared priorities agreed by the countries Tourism Working Group, Tashkent, Uzbekistan - September 2026

Seamless border crossings	Connectivity: air, rail, road	Common service standards	Tourism skills
Sustainable destinations	Seasonality, year-round	Regional visibility	Tourism data

Current activities

- ✓ Tourism Working Group reactivated, and annual meetings planned to 2030
- ✓ CTCO and Regional Tourism Investment Framework development – structure, governance, financing
- ✓ Ideas for regional project pipeline started from country proposals
- ✓ Visit Silk Road portal (phase 1) update under way
- ✓ Research for potential cross-border projects for the pipeline.

Coming in 2027+ → expected results

Q1

Digital Readiness and Sustainability findings
→ policy dialogue, pilots, training, and investments

Project pipeline missions (cross-border)
→ project ideas ready for ADB country programming

Visit Silk Road portal upgraded (phase 1)
→ improved UX and information for traveler and investment audiences, explore CAREC data dashboard

Q2- Q3

CTCO and Regional Tourism Investment Framework, for TWG approval
→ training on regional project proposals, GMS learning exchange, office set up, structured project proposals

2027

Training, standards, pilots, project pipeline
→ addressing regional challenges and priorities

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ABEC: two cities-region as one market

Two cities, 240 km apart

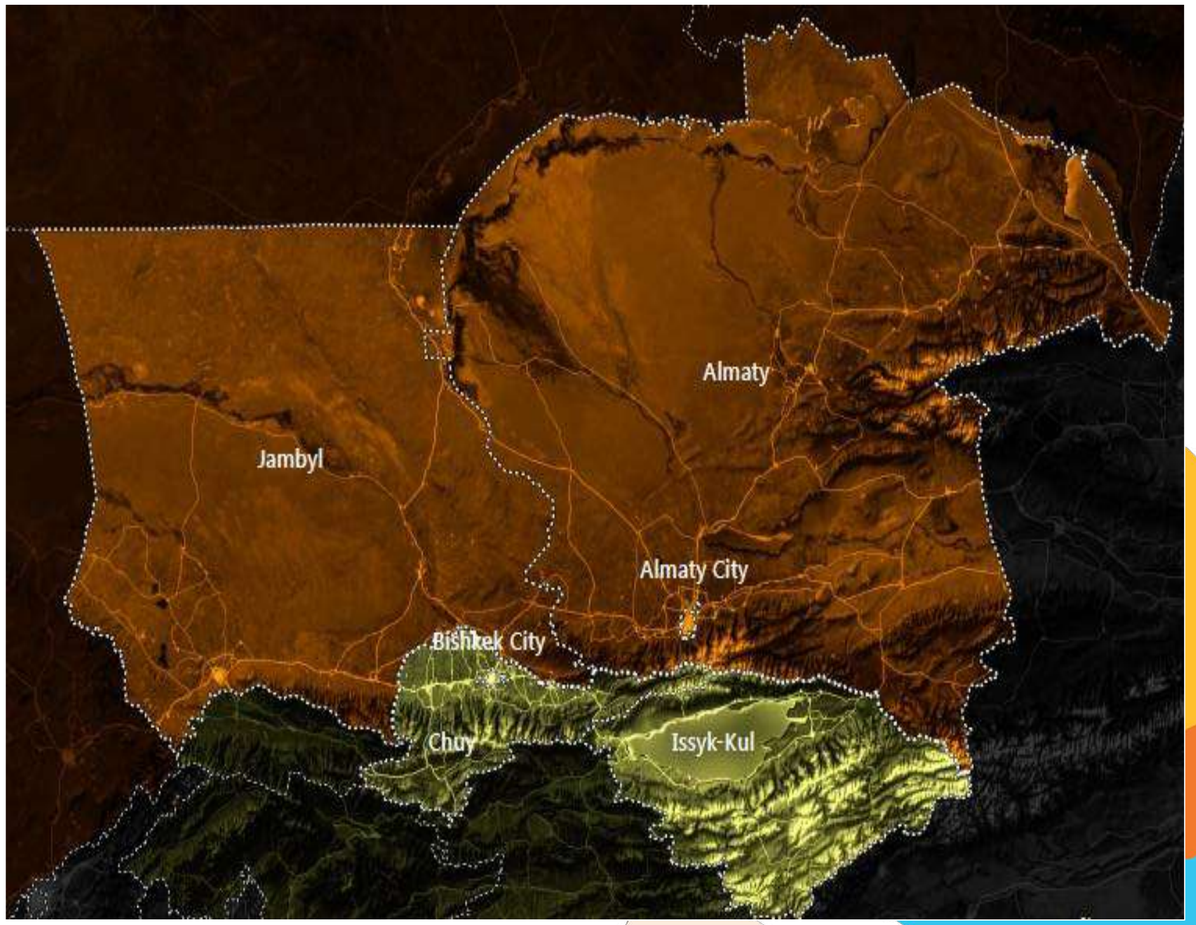
Almaty has the highest economic density in Central Asia. Bishkek is the Kyrgyz Republic's capital. An existing road connects the two cities.

A shared ambition since 2014

Kazakhstan and the Kyrgyz Republic, with ADB support, aim to develop the corridor and surrounding areas as one integrated economic market.

Joint governance

The bilateral Intergovernmental Council oversees ABEC. The ABEC Subcommittee, co-chaired by deputy or vice ministers of economy, leads implementation.



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One corridor, five sectors

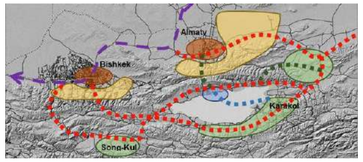
Connectivity

The main border crossing was modernized in 2021 and three other border crossings on the Kyrgyz side are being rebuilt with $30.7m ADB financing approved September 2025; Kazakhstan upgrading its side from national budget. Electric bus service and a more direct Almaty–Issyk-Kul road in preparation.



Tourism

Tourism Master Plan under green update; joint accommodation classification system agreed by both countries and adopted in the Kyrgyz Republic in March 2025 and coordinated by a bilateral advisory council; professional standards for tourism workers developed.



Environment

More than 100 low-cost air quality sensors gave both cities a shared baseline, informing the Bishkek clean heating project. ABEC STREAM targets climate-adjusted management of the cross-border Chu Talas river basin.



Health

Pre-feasibility work on shared medical and pharmaceutical testing built the case for the Kyrgyz Regional Health Security Project — one reference laboratory instead of duplicating costly facilities on both sides.



Agribusiness

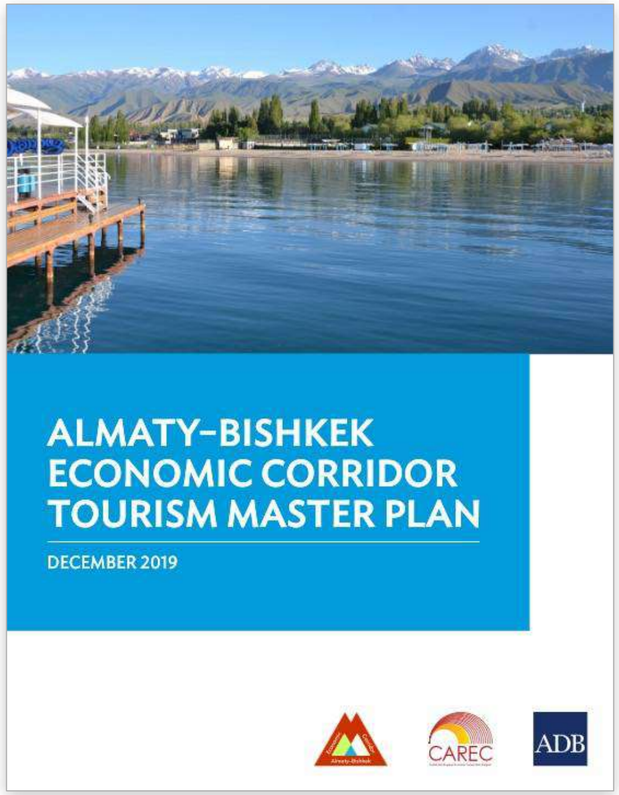
Wholesale market masterplans led to the Climate-Resilient Agricultural Value Chain Development Project; a trade and logistics centre is being designed to aggregate produce individual farms cannot move at scale.



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ABEC Tourism Master Plan and Action Plan

The 2027–2028 Action Plan is in preparation to implement the 2019 Master Plan and its 2026 Green Update.



1

2019
Tourism Master Plan

- 9 tourism clusters across Kazakhstan and the Kyrgyz Republic
- 10-year phased plan for growth, connectivity and mountain resorts

2

2026
Green Update

- Retains 9 clusters, with greater focus on green transition, climate resilience and community benefits
- 20 actions covering green finance, mobility, skills and branding

3

2027–2028
Tourism Action Plan

In preparation

- Joint plan under the Intergovernmental Council to implement the master plans
- 23 joint measures on accommodation classification, professional standards and the Green Master Plan

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Accommodation Classification System

A joint system for all accommodation types in Kazakhstan and the Kyrgyz Republic

Implementation through legislation, a joint advisory council and trained inspectors

Other CAREC countries could adopt the system



Hotels

Hotelstars Union star rating





Guest houses





Hostels, campsites, yurts



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Tourism Skills and Professional Standards

The 2019 ADB study estimated the tourism skills gap along the Almaty–Bishkek Economic Corridor

Recent work developed joint professional standards for tourism occupations

Skills gap: 2019 estimates

ADB: Improving Education, Skills, and Employment in Tourism: Almaty–Bishkek Economic Corridor

8,500

Estimated annual shortfall of skilled tourism workers

$30m+

Estimated annual opportunity cost of the skills gap

Professional standards

Joint standards for tourism occupations in Kazakhstan and the Kyrgyz Republic

Why they matter

- Align training with employers' needs
- Common basis to assess and certify workers
- Make qualifications portable across borders

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Issyk-Kul Environmental Management and Sustainable Tourism Project

$56 million project approved in June 2024

ABEC technical assistance and team supported the tourism components

PROJECT OBJECTIVES

Tourism infrastructure

Improve the quality and sustainability of tourism infrastructure in Cholpon-Ata

Wastewater

Improve wastewater treatment to protect environmental conditions in Issyk-Kul District

Tourism management

Strengthen tourism management

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Integrated CAREC Tourism Services Market

Regional cooperation helps reduce barriers, improve service quality, and strengthen the competitiveness of tourism destinations.

1 Harmonizing Standards

- Develop compatible accommodation classification systems (ACS)
- Harmonize tourism professional standards
- Scale up ABEC experience across the CAREC region

2 Integrating Tourism Services

- Common approaches to service quality
- Joint cross-border tourism products
- Expanded business opportunities

3 Tourist Mobility

- Improve transport connectivity
- Simplify border-crossing procedures
- Coordinate visa policies

Outcome: A more competitive tourism region, new business opportunities, and stronger economic growth.

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KYRGYZ REPUBLIC

Sustainable Tourism for Local Development

Growing regional tourist flows call for early investment in green infrastructure, protection of natural resources, and stronger local communities.

1 Green Tourism Infrastructure	• Plan ahead for growing tourist flows • Renewable energy, wastewater treatment, resource efficiency • Protect natural tourism assets
2 Local Communities and Employment	• Develop rural and community-based tourism • Create jobs and opportunities for SMEs • Strengthen skills, education, and cultural heritage
3 Investment and Implementation	• Translate the ABEC Tourism Master Plan into investment projects • Mobilize public and private financing • Strengthen regional cooperation and partnerships

Outcome: Resilient tourism destinations, new jobs, and higher incomes for local communities.

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Towards an Integrated Mountain Destination

Kazakhstan combine destination investment, service quality, skills and a cross-border visitor route.



From Turgen and Almaty to Issyk-Kul

A year-round mountain, skills and service-quality value chain

INVEST

Turgen Mountain Resort

Pre-feasibility work for a year-round tourism resort in Almaty Region; supports preparation of the mountain-cluster project pipeline.

QUALITY

Accommodation Classification

Common criteria, implementation arrangements, draft regulatory instruments, inspector guidance and training materials.

SKILLS

Competency Centre and Training

Tourism skills study plus institutional and business plan for an Almaty-based center; a platform for training students and strengthening the regional workforce.

REGION

Professional Standards and Route

Pilot tour-guide standard and mutual-recognition recommendations complement the Almaty–Issyk-Kul visitor route and a more consistent cross-border experience.

ABEC ACHIEVEMENTS

One connected tourism offer

Links investment, common quality systems, workforce development and cross-border products. The model can be adapted by other CAREC corridors seeking to connect national tourism priorities with regional destinations.

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ABEC Tourism Plans to Projects in Kazakhstan

ABEC experience informs CAREC applications, creating an investment-ready regional pipeline

1 ABEC Sustainable Destinations Model

- Turgen Mountain Resort: Pre-feasibility study for a potential anchor project within the Almaty-Bishkek tourism corridor
- Almaty Tourism Skills and Competence Centre
- Kazakhstan's first unique Accommodation Classification System
- Almaty-Issyk-Kul Tourism Route: Connecting destinations into a cross-border tourism product

2 Potential CAREC Applications

- Replicate cross-border destination-planning methodologies
- Prepare climate-smart tourism investment concepts
- Scale up tested ABEC approaches across CAREC
- Develop regional reference standards for selected tourism occupations
- Establish training-of-trainers and competency-center partnerships

3 Regional Effect

- ABEC pilot initiatives integrated into the CAREC regional tourism project pipeline
- Replicable investment concepts for climate-resilient and sustainable destinations
- Multi-country tourism routes linking national destinations into marketable regional products
- Structured proposals for CAREC country programming, project preparation, and financing consideration

Outcome: ABEC serves as a practical testing ground, turning cross-border tourism concepts into standards, institutions, and investment-ready projects for wider CAREC replication.

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Lessons from ABEC for CAREC Tourism

As a pilot corridor, ABEC tests tourism reforms that can be rolled out across the wider CAREC region.

1 Compatibility, not uniformity

Countries move at different speeds: the Kyrgyz Republic legislated the system while Kazakhstan adapted it.

2 High-level institutional set-up

The Intergovernmental Council at prime minister level kept political will for reforms and projects.

3 Focus on projects

Defining concrete regional projects gives both countries a common goal to work towards.

4 Trust through regular cooperation

Frequent ABEC Tourism Working Group meetings built trust and showed that both countries benefit.

Options for CAREC: a regional accommodation classification system, harmonized professional standards, or a joint focus on sustainable tourism development.

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Thank you!

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ASEAN Tourism Cooperation Plan: Balancing Tourism Flows, Sustainability and Resilience

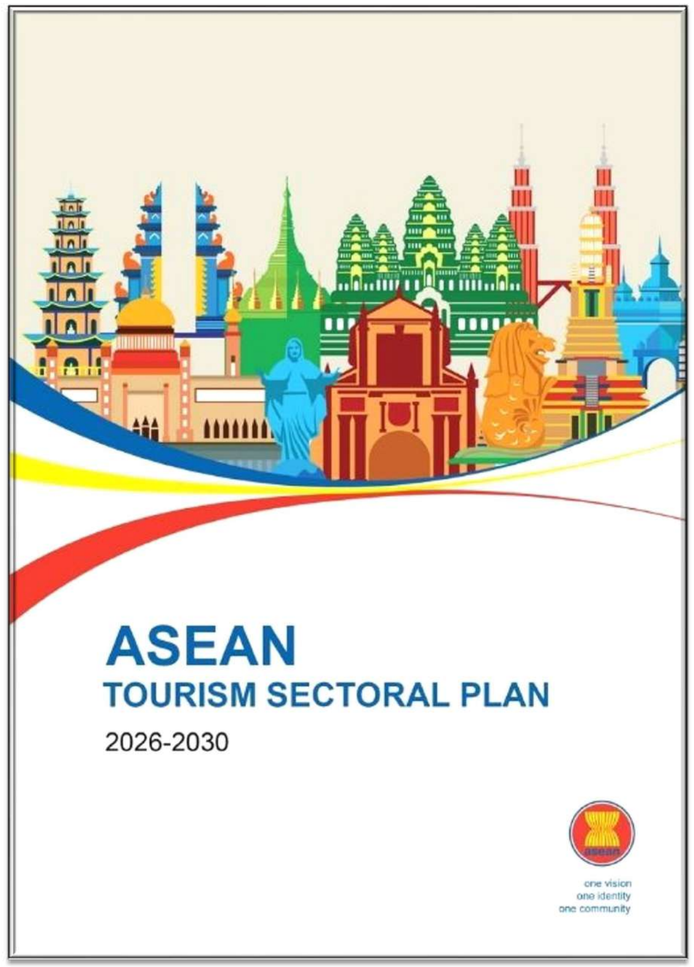


Presented by:

Verna C. Buensuceso,
Undersecretary for Data Analysis and Knowledge Management,
Philippine Department of Tourism (PDOT)

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ASEAN TOURISM SECTORAL PLAN 2026 - 2030



5 FOCUS AREAS

10 STRATEGIC INITIATIVES

28 TARGETED ACTIVITIES

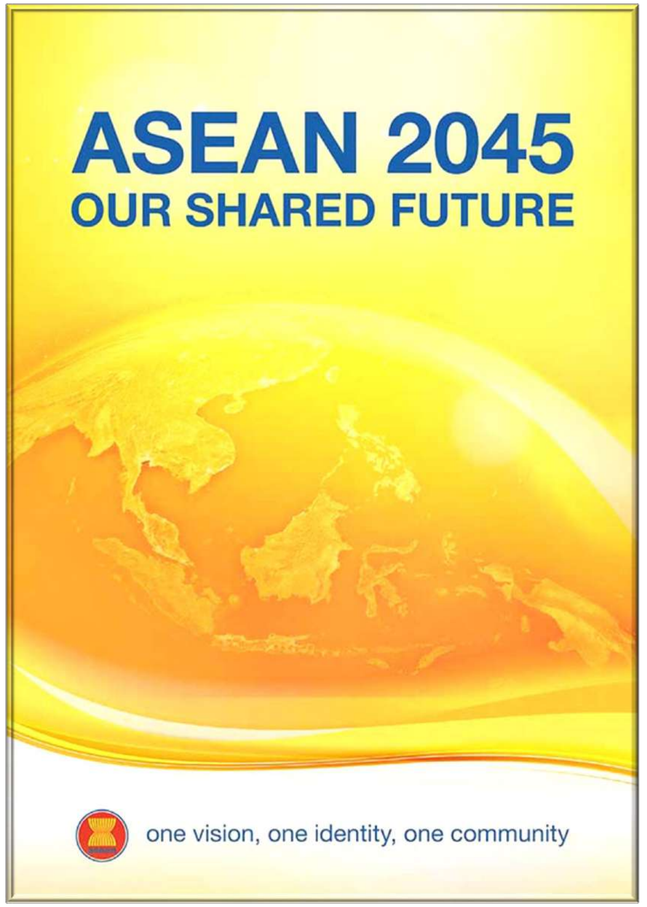
1 SHARED AGENDA

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ATSP 2026-2030 ALIGNS WITH TWO FOUNDATIONAL PILLARS

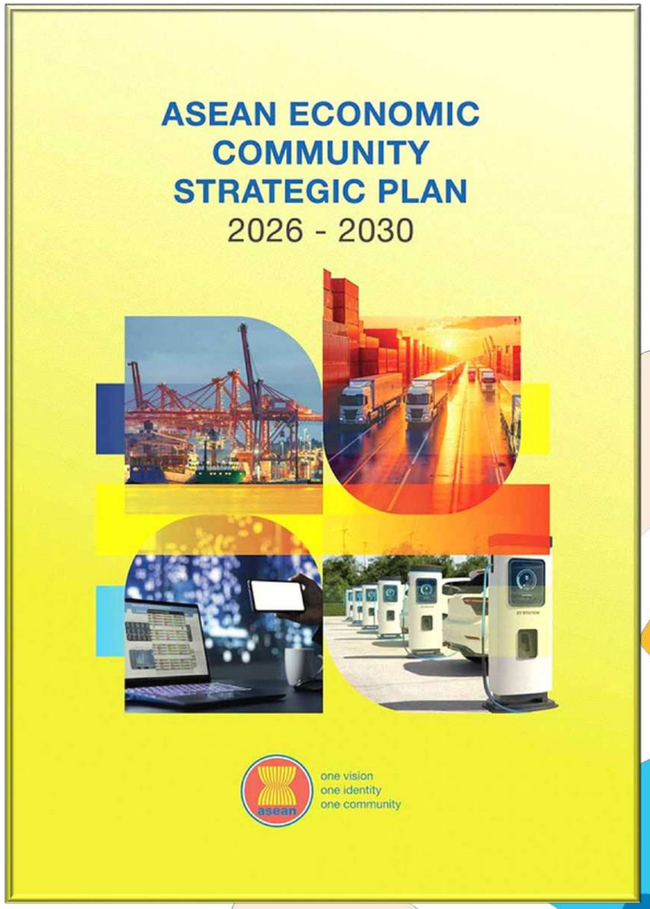
THE ASEAN VISION 2045

Anchoring our drive toward an ASEAN that is Resilient, Innovative, Dynamic, and People-Centered, aspiring to establish Southeast Asia as a global benchmark for high-value, sustainable tourism.



THE ASEAN ECONOMIC COMMUNITY (AEC) STRATEGIC PLAN 2026-2030

Synchronizing our sectoral key performance indicators directly with regional trade facilitation, cross-border investment flows, and seamless physical connectivity.



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DECLARATION ON THE IMPLEMENTATION OF ATSP 2026 - 2030

Through this Declaration, Member States committed to five institutional priorities:

1. Executing the ATSP through its core strategic focus areas;
2. Mobilizing targeted capital, technological innovation, and human capital development;
3. Activating public-private dialogue mechanisms with Dialogue Partners and corporate leaders;
4. Instituting rigorous, data-driven regional monitoring and evaluation; and
5. Championing a unified "whole-of-region" and "whole-of-government" execution model.



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THE FIVE FOCUS AREAS OF THE ATSP 2026 - 2030

R

RESILIENT TOURISM

Diversified markets, crisis preparedness, and continuity for tourism enterprises.

E

EMPOWERMENT OF TOURISM WORKFORCE

Skills development, professional recognition, and inclusive employment opportunities.

A

ACCESSIBLE & SEAMLESS TRAVEL

Better connectivity, streamlined travel arrangements, and cross-border mobility.

D

DIGITAL TOURISM, PRODUCT & MARKET DIVERSIFICATION

Tourism intelligence, digital solutions, and higher-value tourism products.

S

SUSTAINABLE TOURISM

Environmental stewardship, quality standards, and community-centered development.

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RESILIENT TOURISM

NEAR SHORE PIVOT

Stimulate intra-ASEAN travel and near-shore markets, including Southeast and North Asia.

PROTECT CONTINUITY

Operationalizing the updated ASEAN Tourism Crisis Communication Manual and risk frameworks to protect MSME supply chains during global disruptions.



PREPARE FOR SHOCKS BY DIVERSIFYING DEMAND

Geopolitical tensions, energy volatility and climate risk call for coordinated regional preparedness.

STRENGTHEN LOCAL CIRCUITS

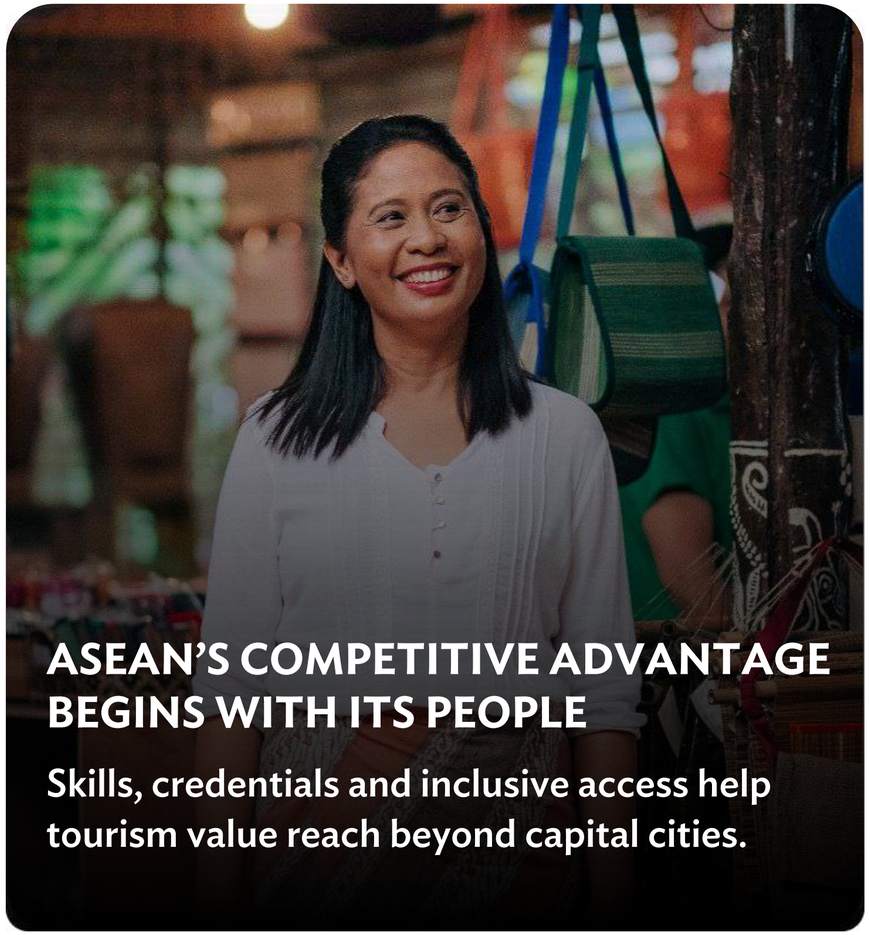
Expand domestic tourism and second- and third-tier routes to support communities during long-haul market downturns.

COORDINATE ACROSS SECTORS

Coordinating with AEC transport and energy bodies to cushion against Middle East geopolitical tensions and aviation fuel volatility.

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EMPOWERMENT OF TOURISM WORKFORCE



ASEAN'S COMPETITIVE ADVANTAGE BEGINS WITH ITS PEOPLE

Skills, credentials and inclusive access help tourism value reach beyond capital cities.

UPGRADE MRA-TP

Align the ASEAN Mutual Recognition Arrangement for Tourism Professionals with digital and green competencies.

EXTEND ACCREDITATION

Bring professional recognition and training into secondary and emerging destinations.

WIDEN INCLUSION

Expand opportunities for women, youth and informal workers to gain credentials and formal-market access. Direct skills integration and digital toolkits for local community operators.

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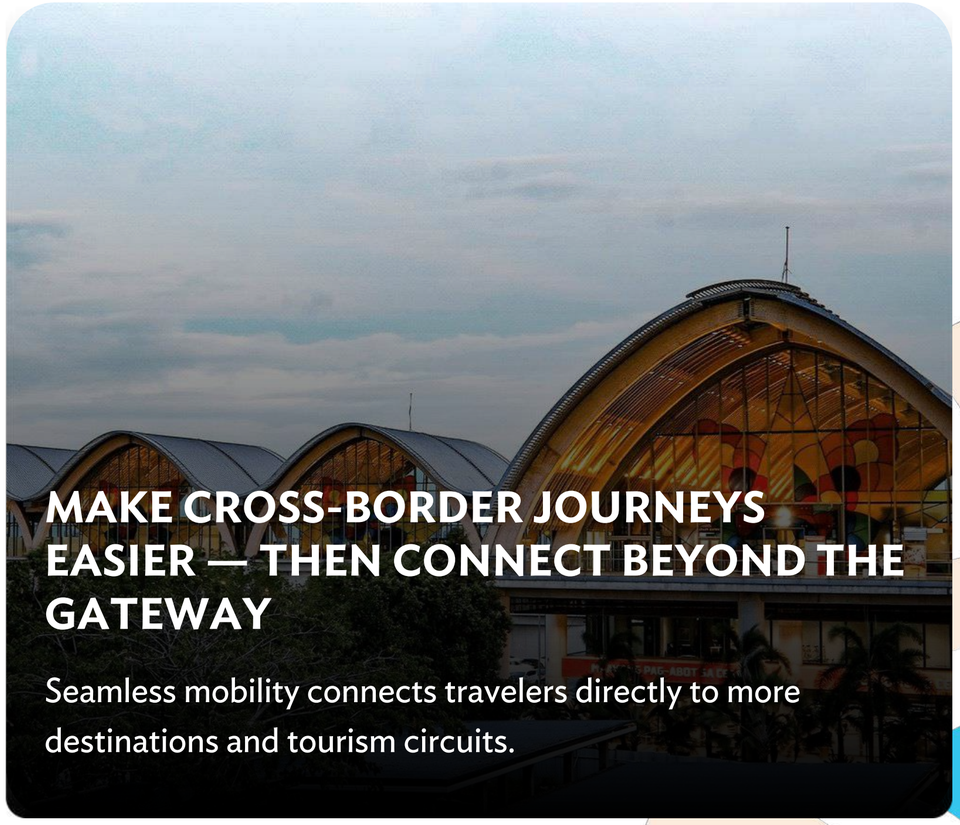
ACCESSIBLE AND SEAMLESS TRAVEL

AIR ACCESS
Expand air-service options and open-skies cooperation.

UNIFIED VISA FRAMEWORKS
Single-entry regional passes and streamlined e-visa processing across member states.

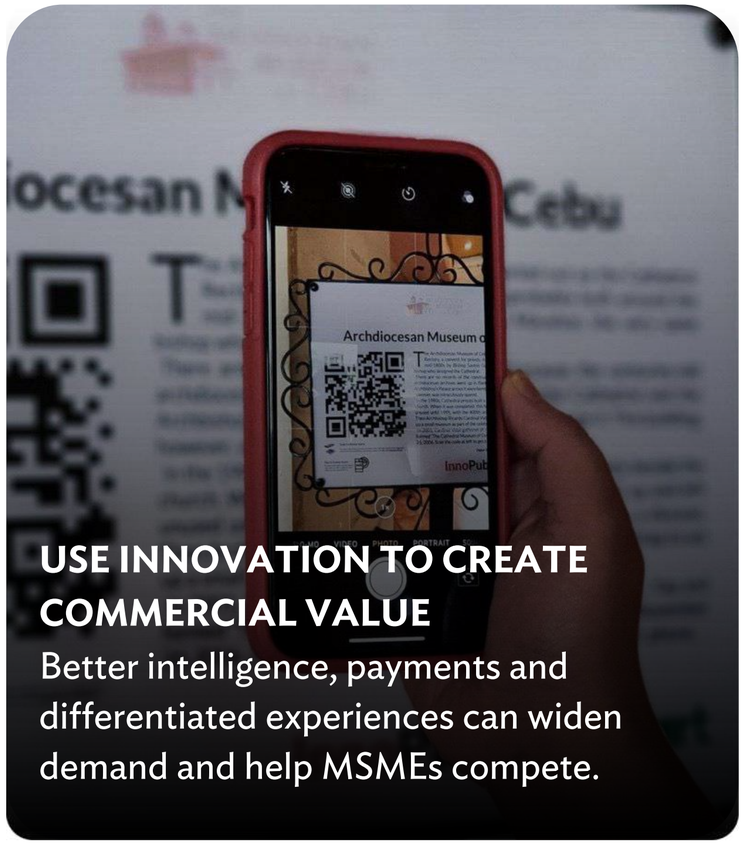
MULTI-MODAL CORRIDORS
Cross-border rail, maritime, and low-cost carrier transport route linkages. Connect gateways with second- and third-tier destinations.

CRUISE NETWORKS
Develop vibrant cruise and island-hopping circuits.



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DIGITAL TOURISM, PRODUCT & MARKET DIVERSIFICATION



USE INNOVATION TO CREATE COMMERCIAL VALUE

Better intelligence, payments and differentiated experiences can widen demand and help MSMEs compete.

TOURISM INTELLIGENCE

Strengthen ASEAN's evidence-based tourism planning through regional outlooks and predictive analytics, harmonized data and research partnerships, and capacity-building for Member States.

DIGITAL ENABLEMENT

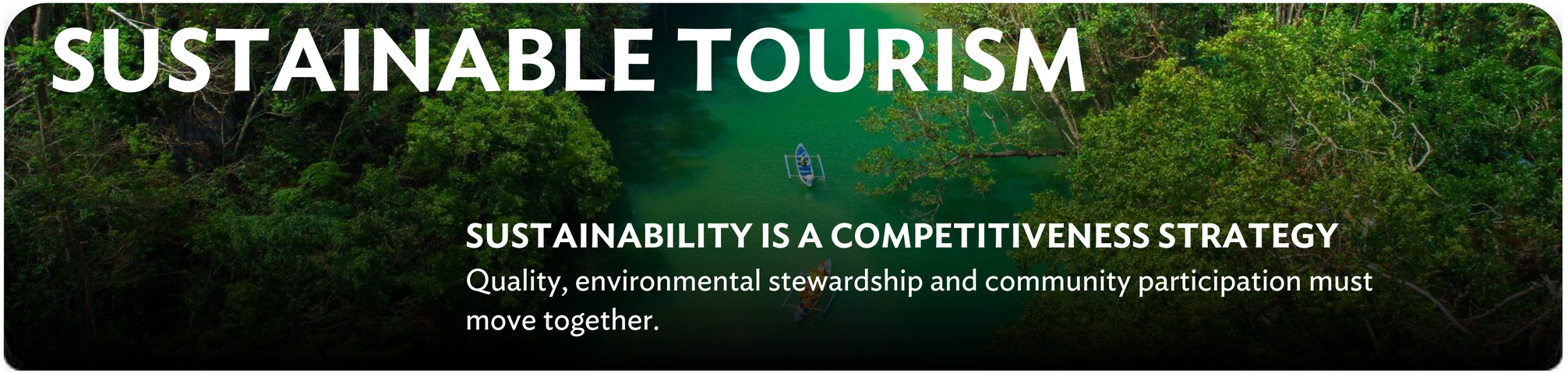
Accelerate ASEAN tourism's digital transformation by promoting interoperable cross-border digital payments, equipping tourism MSMEs with market intelligence and data analytics, and enhancing online visibility & digital accessibility.

PRODUCT DIVERSIFICATION

Develop and promote integrated, multi-destination tourism circuits across ASEAN that showcase the region's gastronomy, culture and heritage, nature-based attractions, wellness, cruise tourism, sports, creative industries, and MICE offerings to diversify tourism products.

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SUSTAINABLE TOURISM



SUSTAINABILITY IS A COMPETITIVENESS STRATEGY

Quality, environmental stewardship and community participation must move together.

GREEN HOSPITALITY

Promote sustainable hospitality practices through harmonized Green Hotel and Clean Tourist City certification benchmarks that encourage environmental responsibility, resource efficiency, waste reduction, and improved sustainability

COMMUNITY LODGING

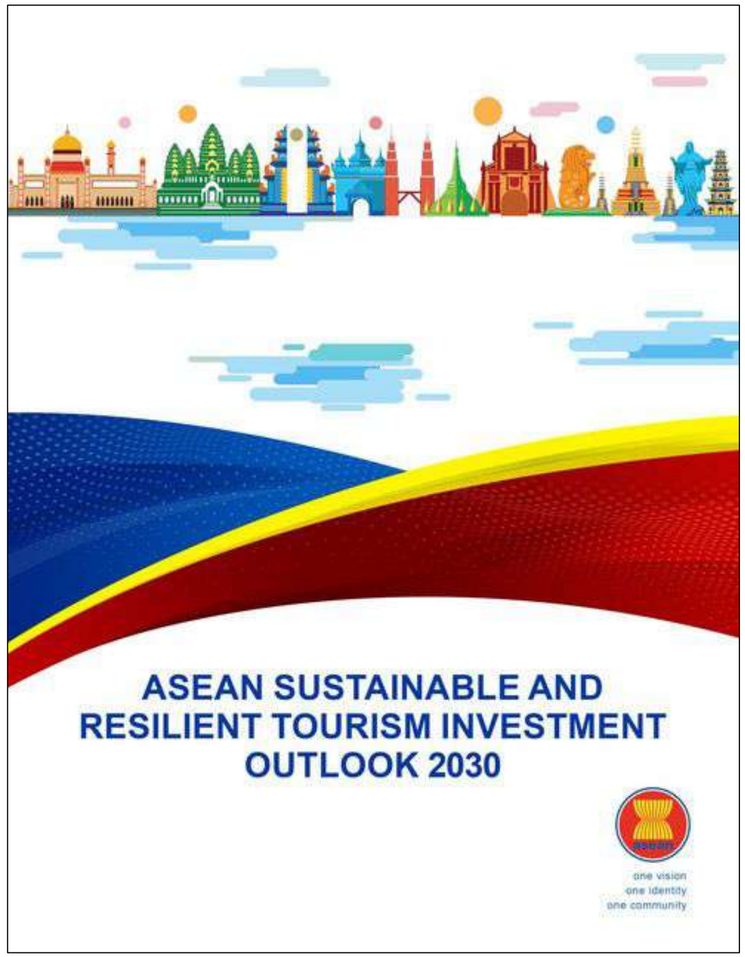
Strengthen quality assurance standards for homestays and community-based tourism (CBT) to ensure safe, authentic, and quality visitor experiences while empowering local communities, preserving cultural heritage, and generating inclusive livelihood opportunities.

MICE & EVENTS

Promote sustainable event management practices and harmonized venue standards across ASEAN to minimize environmental impacts, improve resource efficiency, and strengthen the region's competitiveness as a destination for MICE.

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ASEAN SUSTAINABLE AND RESILIENT TOURISM INVESTMENT OUTLOOK 2030



The ASEAN Sustainable and Resilient Tourism Investment Outlook 2030 provides a practical framework and decision-support tools to identify, prioritize, and promote high-impact tourism investments aligned with the ATSP 2026–2030.

<u>It has three parts:</u>

1. a core document presenting a conceptual framework, key findings and recommendations;
2. an investment pipeline containing priority AMS destination investment packages; and
3. a toolkit for implementing its recommendations.

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ASEAN TOURISM INVESTMENT SHOWCASE









Convened on 29 September 2026 at PICC, alongside the Second ASEAN Tourism Ministers' Retreat, to strengthen Member States' capacity to develop investment-ready tourism projects through the ASEAN Sustainable and Resilient Tourism Investment Outlook 2030 and its Destination Readiness Toolkit.

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ASEAN TOURISM INTELLIGENCE



The ASEAN Tourism Intelligence aims the following:

I. Establish a practical ASEAN tourism intelligence system that links regional tourism outlook with a shared dashboard;

II. Develop a monitoring and evaluation (M&E) guiding document to support implementation and reporting under the ASEAN Tourism Sectoral Plan (ATSP) 2026–2030; and

III. Promote tourism public policy research and dialogue and strengthen the capacity of ASEAN tourism officials in data submission and the effective use of big data and other emerging data sources for policy and planning.

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THANK YOU AND MABUHAY

GET IN TOUCH

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tourism.gov.ph

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Cooperation Across Borders: ABEC Tourism

MODERATOR



Jong Woo Kang

Director of Regional Cooperation and Integration Division, Economic Research and Development Impact Department, ADB

PANELISTS



Eduard Kubatov

Director of the State Agency for Tourism Development under the Cabinet of Ministers of the Kyrgyz Republic



Miras Tulebayev

Vice Minister of Tourism and Sports, Ministry of Tourism and Sports of the Republic of Kazakhstan

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Lunchbreak

Time: 12PM – 1:30 PM

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