

ASEAN FOR BUSINESS BULLETIN

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IN FOCUS

ASEAN Tourism Forum 2026: Navigating Our Tourism Future, Together



The ASEAN Tourism Forum (ATF) 2026, held in Cebu, the Philippines, marked a defining moment for ASEAN tourism as the region transitioned from recovery to long-term strategic growth. Bringing together Tourism Ministers, senior officials, private-sector leaders, and international partners, ATF 2026 reaffirmed tourism's role as a key engine of economic development, job creation, and regional integration, while setting out a clear roadmap for the sector's future.

Against the backdrop of rebounding global travel demand and intensifying competition, ATF 2026 sent a strong signal: ASEAN is advancing as a single, high-quality, and investment-ready tourism region, underpinned by deeper public-private collaboration. Discussions at ATF 2026 reaffirmed ASEAN's collective commitment to advancing quality tourism, in line with the ASEAN Leaders' Declaration on Quality Tourism adopted in 2025. Importantly, ASEAN Tourism Ministers expressed strong support for enhanced investments in tourism infrastructure, particularly in secondary and tertiary destinations.

About the Bulletin

ASEAN for Business is a bulletin published by the Enterprise and Stakeholders Engagement Division of the ASEAN Secretariat.

This monthly bulletin provides quick updates on specific topics related to the ASEAN Economic Community (AEC) for businesses operating in the region.

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This shared priority reflects a regional commitment to promote more balanced and inclusive tourism development, reduce pressure on primary gateways, and broaden the distribution of tourism benefits to local communities across ASEAN. Improved connectivity, visitor facilities, digital infrastructure, and climate-resilient assets in emerging destinations were highlighted as critical enablers of long-term growth and resilience. To this end, the Ministers welcomed the Philippines' initiative to develop an ASEAN Resilient and Sustainable Tourism Investment Outlook as a Priority Economic Deliverable in 2026 under its ASEAN Chairmanship. This forward-looking Outlook is expected to provide strategic insights, data-driven analysis, and scenario planning to guide policymaking, investment decisions, and private-sector engagement, particularly in the context of climate change, digital transformation, and evolving travel patterns.

In this context, the Ministers also highlighted the growing potential of cruise tourism as an important market segment for ASEAN. Ministers encouraged continued cooperation to enhance port connectivity, streamline travel facilitation, improve service quality and safety standards, strengthen the adoption of sustainable practices in cruise destinations, and promote multi-destination cruise itineraries across ASEAN seas and coastal areas.

A Sector Backed by Strong Recovery and Scale

ASEAN's tourism sector continues to demonstrate resilience and renewed momentum. Preliminary figures indicate that ASEAN welcomed around 147 million international visitors in 2025, reaffirming Southeast Asia's position as one of the world's most dynamic tourism regions.¹

This strong performance underscores tourism's role as a cornerstone of ASEAN's economy. In 2024, travel and tourism contributed an estimated 9.7% of ASEAN's GDP, equivalent to approximately USD 379 billion, and supported around 42 million jobs across the region.² Beyond headline figures, tourism continues to play a catalytic role in supporting micro, small and medium enterprises (MSMEs), enhancing connectivity, and generating cross-border investment opportunities.

At the same time, intra-ASEAN travel remains a key pillar of regional resilience. In 2025, intra-ASEAN travellers accounted for nearly 42% of all international arrivals³ in ASEAN destinations, highlighting the growing importance of regional mobility, short-haul travel, and multi-destination itineraries. These trends highlight areas where continued private-sector innovation and partnerships will be critical in sustaining growth and deepening regional integration.



Building on this momentum, ASEAN Tourism Ministers agreed to establish an ASEAN Tourism Ministers’ Retreat to enable more strategic, forward-looking dialogue on regional tourism priorities. The Retreat is intended to complement formal meetings by providing space for candid discussions on emerging trends, shared challenges, and long-term opportunities shaping ASEAN tourism.

ASEAN is also exploring closer collaboration between the tourism and sports sectors, as well as incremental engagement with Dialogue Partners through existing ASEAN-led mechanisms, including the ASEAN Plus Three, ASEAN–India, and ASEAN–Russia frameworks. Within this context, ASEAN is exploring ways to further engage partners such as China and Australia, with a focus on dialogue, experience sharing, and cooperation aligned with ASEAN modalities.

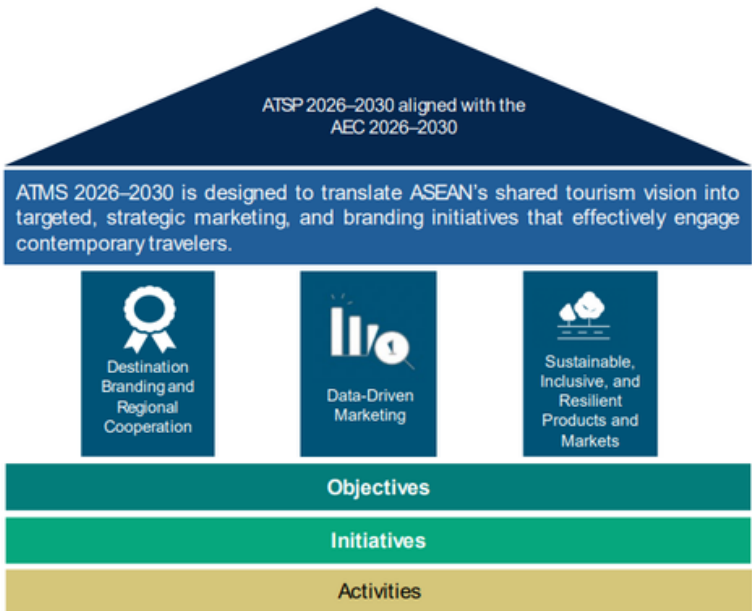
Launch of the ASEAN Tourism Sectoral Plan and Marketing Strategy 2026–2030



A central milestone of ATF 2026 was the official launch of the ASEAN Tourism Sectoral Plan (ATSP) 2026–2030 and the ASEAN Tourism Marketing Strategy (ATMS) 2026–2030. Together, these strategies form a coherent framework to guide ASEAN’s tourism cooperation over the next five years.

The ATSP 2026–2030 articulates ASEAN’s shared priorities across five focus areas (READS): Resilient tourism, Empowerment of the tourism workforce, Accessible and seamless travel, Digital tourism, product and market diversification, and Sustainable tourism. With a strong emphasis on implementation and outcomes, the ATSP aligns the tourism sector more closely with ASEAN’s broader economic integration agenda and sustainability commitments.

ASEAN Tourism Marketing Strategy 2026 - 2030 Focus Areas



Complementing this, the ATMS 2026–2030 sets out a refreshed approach to positioning Southeast Asia globally not as individual destinations competing in isolation, but as a single, seamless, and high-quality tourism region. The Strategy places strong emphasis on data-driven marketing, digital storytelling, and co-creation with the private sector to enhance visibility, diversify markets, and strengthen ASEAN's regional brand.

Private Sector as a Co-Implementer of ASEAN's Tourism Vision

The implementation of the ATSP and ATMS will depend on active engagement with the private sector. ASEAN recognises businesses as essential partners in translating regional strategies into market-ready initiatives, investments, and innovative tourism products.

The ASEAN Tourism Conference and the ASEAN Travel Exchange (TRAVEX), held alongside ATF 2026, demonstrated how public-private collaboration can translate strategy into tangible outcomes. TRAVEX, in particular, continued to serve as ASEAN's premier tourism marketplace, facilitating business-to-business engagement, expanding market access for MSMEs, and reinforcing confidence in ASEAN tourism.

What This Means for Business

For businesses, ATF 2026 and the launch of the ATSP and ATMS signal a clear invitation to engage through joint marketing, digital innovation, workforce development, and sustainable tourism investment across multiple ASEAN destinations. The forthcoming ASEAN Resilient and Sustainable Tourism Investment Outlook is expected to further support informed decision-making by providing insights into regional trends, risks, and opportunities.

Looking ahead, ASEAN's tourism outlook remains positive. The ASEAN Tourism Outlook[1] estimates that the region could welcome approximately 201 million international arrivals by 2030, representing a 51% increase from 2025, or average annual growth of about 8.7% over the period from 2025 to 2030. As ASEAN moves forward, tourism growth will continue to be guided by a strong regional vision anchored in quality, sustainability, and long-term value, captured in ASEAN's tourism tagline: "A Destination for Every Dream."

To learn more about ASEAN Tourism Sectoral Plan 2026-2030, click [here](#) or scan barcode below:



To learn more about ASEAN Tourism Marketing Strategy 2026-2030, click [here](#) or scan barcode below:



References:

- 1.ASEAN Statistics. Preliminary tourism data as of 12 February 2026. For 2025, data for Timor-Leste available up to Q2 only and Malaysia's data refer to total visitor arrivals, including both tourists and excursionists.
- 2.ASEAN Tourism Sectoral Plan 2026-2030
- 3.ASEAN Statistics. Preliminary tourism data as of 12 February 2026. For 2025, data for Timor-Leste available up to Q2 only. Brunei Darussalam's data by country of origin cover arrivals by air only, while Malaysia's data refer to total visitor arrivals, including both tourists and excursionists.

