

Report and Policy Recommendations on ASEAN Health and Wellness Tourism



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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor-Leste, and Viet Nam.

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Report and Policy Recommendations on ASEAN Health and Wellness Tourism

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1. ASEAN – Tourism – Strategic Pillars
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This publication is based on data and consultations conducted prior to Timor-Leste’s admission to ASEAN. Accordingly, Timor-Leste is not included in relevant maps, tables, and infographics unless otherwise indicated. The use of the map is for illustrative purposes only.

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The ASEAN Secretariat
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Executive Summary

This document presents the *Report and Policy Recommendations on ASEAN Health and Wellness Tourism*. Developed through regional consultation and technical review, the report reflects inputs from the ASEAN Secretariat and Member States, including the ASEAN Coordinating Committee on Micro, Small and Medium Enterprises (ACCMSME) and the ASEAN National Tourism Organisations (NTOs).

It builds on the *Report on the Supply of Health and Wellness Tourism Services in ASEAN*, the *Report on the Demand of Health and Wellness Tourism Services in ASEAN*, and the *Report on Gap Assessment of Health and Wellness Tourism Services in ASEAN* to present a cohesive, practical, and inclusive regional strategy. The recommendation aims to enhance ASEAN's competitiveness in health and wellness tourism by promoting cluster-based development, aligning national and regional priorities, and strengthening quality standards, without prescribing a rigid, one-size-fits-all model.

In response to feedback from Member States during consultations, the recommendation adopts a flexible, action-oriented approach. It outlines non-binding policy recommendations and voluntary pilot initiatives that countries can adapt based on their national context and readiness. This design ensures alignment with existing ASEAN sectoral strategies, including the ASEAN Strategic Action Plan for Micro, Small, and Medium Enterprise Development (SAP MSMED) 2026–2030 and the ASEAN Tourism Strategic Plan (ATSP) 2026–2030, and promotes cross-sector cooperation.

The region's health and wellness tourism sector holds significant potential. Member States such as Thailand, Malaysia, and Singapore offer internationally recognised services, while others, including Cambodia, Lao PDR, and Viet Nam, are developing unique wellness offerings rooted in their cultural traditions. ASEAN's diversity enables it to cater to a wide range of health and wellness travellers. This opportunity is amplified by global shifts toward preventive care, digital health services, and sustainable, culturally authentic travel. However, significant challenges remain. Micro, small, and medium enterprises (MSMEs) face financing and capacity gaps, while differences in regulatory and accreditation systems hinder regional integration. Uneven infrastructure, under-regulated traditional wellness sectors, and rising global competition may further constrain growth.

To address these issues, the report promotes cluster-based development as a key enabler of integration and innovation. Several Member States have already demonstrated leadership in this area through national initiatives, wellness special economic zones, and inclusive MSME programmes. Building on this foundation, the report proposes five strategic pillars, each supported by realistic, coordinated actions at both national and regional levels: Quality and Accreditation, MSME Inclusion, Sustainability and Culture, Integration and Mobility, and Investment and Branding. To build momentum, the report also introduces early-stage pilot projects and quick wins, including a regional wellness digital platform, MSME-focused certification pilots, and cross-border wellness cluster initiatives. These efforts are intended to demonstrate feasibility and guide broader regional cooperation.

In summary, this report offers a practical and collaborative platform for ASEAN to advance health and wellness tourism as a strategic sector. By centring MSMEs, promoting regional coordination, and prioritising realistic implementation pathways, ASEAN can become a global wellness tourism hub, driving inclusive, sustainable, and resilient economic development in the post-2025 era.

1 Background

Health and wellness tourism has become a priority sector for ASEAN, offering a pathway to drive inclusive economic growth, deepen regional integration, and promote sustainable development. The region's unique combination of world-class medical facilities, rich traditional healing systems, diverse natural landscapes, and cultural heritage gives it a competitive advantage. ASEAN is perfectly positioned to meet the growing global demand for personalised, preventive, and holistic health experiences, as travellers increasingly seek cost-effective care in restorative environments and culturally grounded wellness experiences, all of which are core strengths of ASEAN.

Global market trends underscore this opportunity. According to the Global Wellness Institute, wellness tourism is projected to reach US\$1.4 trillion by 2027, growing at roughly 16% annually, significantly faster than overall global tourism.¹ This boom reflects a post-pandemic shift toward “more wellness” in travel, as people prioritise health, nature, and stress reduction on their trips.² Likewise, medical travel is rebounding strongly. International patient flows reportedly increased by over 14% in 2023, with particularly high demand for elective procedures, fertility treatments, diagnostics, and preventive health check-ups.

ASEAN's leading markets are already capitalising on these trends. For example, Thailand welcomed approximately 3.5 million international health and wellness tourists in 2023, making it one of the world's top destinations for affordable, high-quality care.³ Malaysia Healthcare Travel Council (MHTC) continues to promote its specialities, from halal-certified medical services to state-of-the-art cardiac care. Singapore remains a regional hub for advanced medical diagnostics and complex specialised treatments.

Meanwhile, other Member States are rapidly expanding their wellness offerings. Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Myanmar, the Philippines, Timor-Leste, and Viet Nam are investing in wellness infrastructure and developing community-based healing models. These countries offer culturally distinct therapies, such as *Jamu* herbal medicine in Indonesia, Vietnamese acupuncture and herbal baths, *Hilot* massage in the Philippines, and Khmer traditional healing in Cambodia, which are increasingly attractive to global travellers seeking authentic, eco-aligned wellness experiences. This diversification enhances the region's appeal as a comprehensive wellness destination.

Despite the bright outlook, a 2025 ASEAN-wide policy gap assessment (conducted by Kenan Foundation Asia) identified structural bottlenecks limiting the sector's potential:

- **Fragmented regulatory frameworks:** ASEAN lacks mutual recognition of many health and wellness standards, resulting in inconsistent service quality and difficulties in building cross-border trust.
- **Uneven digital readiness:** Many providers (especially MSMEs) have limited digital infrastructure, and there is no interoperable platform for health records or bookings, making cross-border patient journeys cumbersome.

¹ [Wellness Tourism Will Cross the \\$1 Trillion Mark in 2024](#)

² Ibid.

³ [Medical tourism in Thailand](#)

- **Low MSME participation:** Small enterprises—often led by women or indigenous communities—face barriers in accessing funding, training, and certification, which prevent truly inclusive growth.
- **Limited integration of traditional medicine:** Indigenous wellness practices (herbal remedies, traditional massage, etc.) are not well integrated into formal tourism packages or health systems, reducing product diversity.
- **Concentration of investment in primary cities:** Major hospitals and resorts cluster in capital cities or main hubs, while secondary cities and rural areas (which often have rich wellness resources) remain underdeveloped.

These challenges are set against a backdrop of post-pandemic changes in traveller behaviour. Consumers are now more attuned to preventive health, mental wellness, and stress management. According to UNWTO, wellness-focused travel is recovering faster than overall tourism in the Asia-Pacific, driven by a surge in demand for meaningful, healing journeys in nature-rich, culturally immersive settings.

At the same time, there is increased urgency to align tourism development with sustainability and climate goals. The WHO Global Strategy on Health, Environment, and Climate Change (2023) and UNEP's sustainable tourism framework both emphasise low-impact infrastructure, the conservation of medicinal biodiversity, and the ethical use of Indigenous knowledge. In other words, ASEAN's long-term competitiveness must be built on environmental stewardship, community empowerment, and cultural preservation—alongside affordability and service excellence.

In this context, ASEAN is uniquely positioned to emerge as a cohesive, high-value health and wellness destination, but only through coordinated policy action, investment in SMEs, and strategic regional collaboration. The following sections outline a shared vision, strategic pillars, and recommended actions to address these needs. This report moves away from prescribing a detailed roadmap. Instead, it provides practical recommendations that Member States and ASEAN bodies can pursue voluntarily, according to their national context and readiness. These are designed to be flexible and non-binding, allowing each country to progress at its own pace while still moving in the same overall direction.

Notably, the focus on clusters, SME support, and integration aligns this report closely with ASEAN strategic plans, in particular, the SAP MSMED 2026–2030 (which promotes competitive, innovative MSMEs and cluster development) and the ATSP 2026–2030 (which envisions ASEAN as a quality, sustainable, and integrated tourism destination).⁴

1.1 Purpose

This report sets out practical policy recommendations to strengthen ASEAN's competitiveness in the global wellness tourism landscape. While medical tourism remains a longer-term opportunity for select countries, the current focus is on wellness tourism encompassing traditional healing, preventive care, lifestyle therapies, and well-being retreats to promote inclusive growth, MSME engagement, and sustainable tourism-led recovery.

⁴[ASEAN Tourism Strategic Plan \(ATSP\) 2016-2025](#)

1.2 Methodology

This Report has been developed through an inclusive, evidence-informed process combining research, regional dialogue, and practical policy consultation. The methodology comprised four core components:

1. Research and Analysis: Extensive literature review, market analysis, and a 2024 regional gap assessment were conducted across ASEAN Member States. These studies examined global trends, supply-side readiness, and consumer demand patterns, drawing on international benchmarks from leading health and wellness tourism destinations. The findings helped identify priority policy gaps and opportunities across the ASEAN region.

2. Stakeholder Consultations: Between September and October 2025, the team engaged with over 40 stakeholders through surveys and semi-structured interviews. Inputs were received from national tourism organisations, ministries of health, SME agencies, and private-sector actors, including hospitals, wellness operators, and MSMEs. These consultations gathered national perspectives on feasibility, alignment with domestic priorities, and readiness to pilot regional initiatives.

3. Regional Consultations and Workshops: The drafting process was anchored by two workshops involving public and private sector representatives across sectors:

Bangkok In-Person Consultation (May 2025): Over 60 participants from ASEAN Member States attended a two-day dialogue in Thailand. Member States affirmed the shared vision, five strategic pillars, and core policy recommendations. This consultation also explored emerging mechanisms such as the ASEAN Wellness Certification Seal, Health Travel Visa, and regional branding.

Virtual Policy Workshop Series (July and October 2025): Two virtual sessions deepened consultation on the Report and Policy Recommendations. In Session 1 (July), ASEAN Member States reviewed the preliminary roadmap and recommended transitioning toward a non-binding set of priority recommendations. In Session 2 (October), Member States assessed the feasibility of proposed actions, discussed pilot nominations and quick wins, and identified ASEAN-level support needs (e.g. capacity building, coordination, funding).

4. Iterative Drafting and Refinement: Pre- and post-session questionnaires ensured inclusive participation and allowed ASEAN Member States to reflect national positions. This virtual format enhanced responsiveness and enabled real-time feedback integration. Successive drafts were refined in close collaboration with the ASEAN Secretariat, OSMEP, and Kenan Foundation Asia. Comments from Member States were integrated into a practical, action-oriented final version.

2 Regional Context

As a region, ASEAN benefits from tremendous diversity and complementary strengths in health and wellness tourism. Each Member State has its own niche, focus areas, and stage of development. Understanding these country contexts is important for tailoring implementation and fostering collaboration.

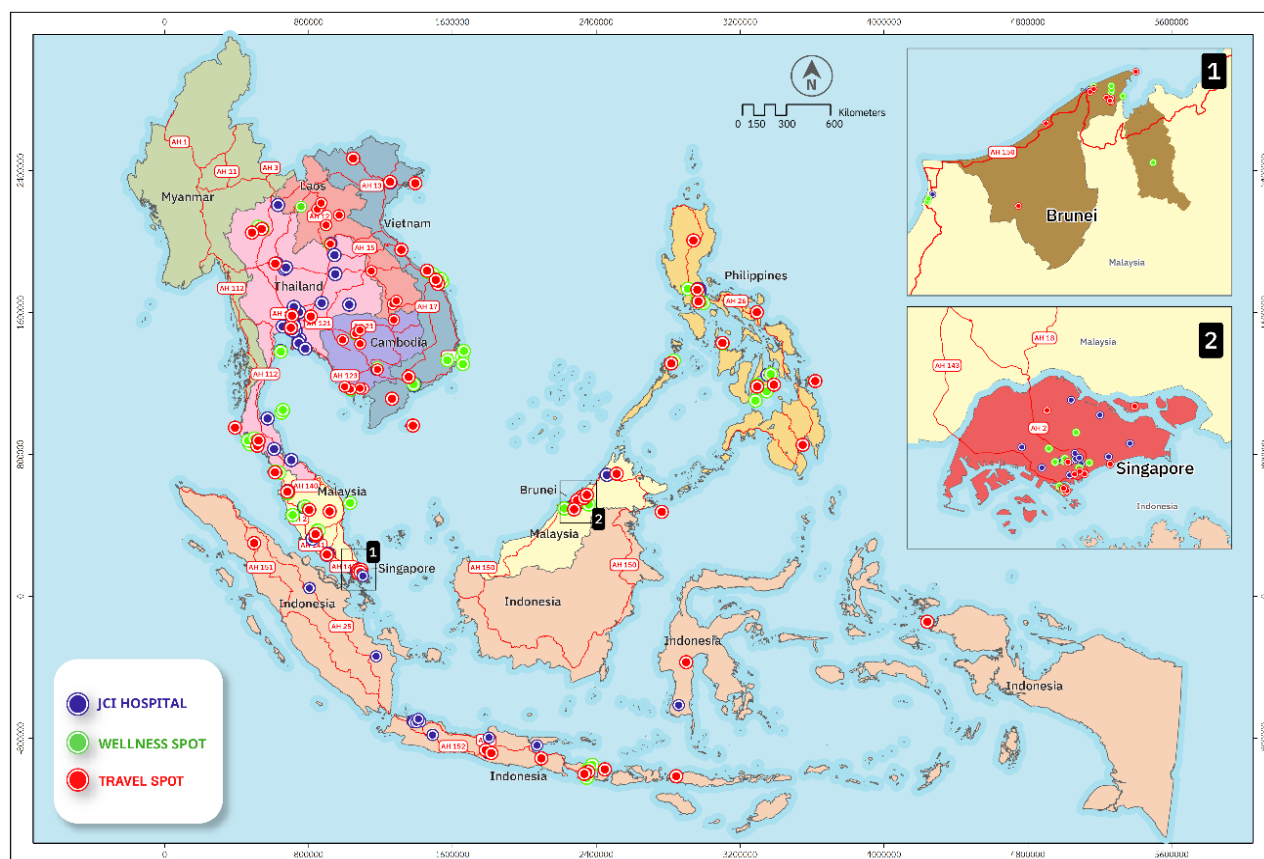
ASEAN is well-positioned to capitalise on global wellness trends. The region offers a blend of:

- *Affordability*: Medical costs are often significantly lower than in Western countries.
- *Quality*: The region features numerous internationally accredited hospitals and highly trained professionals.
- *Cultural richness*: It is home to indigenous wellness traditions and healing philosophies found nowhere else.
- *Natural beauty*: The diverse landscapes range from tropical beaches to highland retreats.

Geographically, Southeast Asia's connectivity, sitting between South Asia, East Asia, and Oceania, makes it a convenient hub for intra-Asian travel. Intra-ASEAN travel is growing, and a sizeable diaspora and expatriate community in the region also seeks health services and wellness retreats.

However, there are disparities in infrastructure and capacity across countries. To maximise the region's collective potential, less-developed destinations will need support in areas such as quality standards, workforce training, and marketing. Likewise, the more advanced markets must continue to innovate and help champion regional initiatives. Regional cooperation can enable cross-border wellness circuits (for example, a tourist might have a medical procedure in one country and a recovery retreat in another), shared marketing under an "ASEAN wellness" brand, and pooled resources for training and accreditation. The following snapshots highlight each country's current context and contributions.

3 Country Context



Note: This figure does not include Timor-Leste as the data were collected before its admission to ASEAN.

3.1 Brunei Darussalam

Brunei Darussalam is carving out a niche in Islamic wellness and nature-based eldercare, leveraging its pristine rainforests and quiet environment. Policy directions emphasise halal-certified spas, forest therapy trails, and long-stay retirement wellness communities. Brunei Darussalam's small size and high income level mean it focuses on specialised offerings rather than mass tourism.

Cross-border referral agreements with Malaysia are being developed to integrate Brunei Darussalam's healthcare services into a broader regional ecosystem. This partnership model allows Brunei Darussalam to offer outbound patients high-quality care while attracting niche wellness tourists seeking privacy, faith-aligned services, and unspoiled nature.

3.2 Cambodia

Cambodia is strategically positioning itself as ASEAN's lead destination for Spiritual-Eco Wellness, anchored in its Angkorian spiritual heritage and rich natural landscapes. The country integrates ancient Khmer healing traditions, meditation, and spiritual practices with modern eco-retreat concepts across emerging wellness clusters in Siem Reap (Angkor), Kep, Kampot, Preah Sihanouk, Koh Kong, and Monduliri. These destinations combine yoga, mindfulness, forest and coastal retreats, and traditional herbal therapies with sacred temples, heritage sites, and protected natural areas.

Under the national Tourism Master Plan, Cambodia is promoting targeted investment incentives to attract boutique, low-impact wellness resorts and community-based eco-retreats that respect cultural integrity and environmental sustainability. The country's comparative advantage lies in offering deeply authentic, spiritually grounded wellness journeys—such as meditation retreats near Angkorian temples, rainforest healing centres in Mondulkiri, and coastal mindfulness retreats in Kep and Kampot.

To strengthen this niche, Cambodia is prioritising improvements in service quality, workforce training, and MSME capacity building, particularly in traditional healing, eco-hospitality, and experience design. At the regional level, Cambodia seeks partnerships to enhance visibility, develop ASEAN wellness trails, and learn from more mature wellness markets, positioning itself as a distinctive anchor for spiritual, cultural, and nature-based wellness within the ASEAN health and wellness tourism ecosystem.

3.3 Indonesia

Indonesia has vast potential in health and wellness tourism, given its scale, biodiversity, and cultural depth, and aspires to position itself as a regional leader in eco-wellness and holistic health tourism. The country is capitalising on established and emerging destinations such as Bali, Yogyakarta, Lombok, Java, Sumatra, and Sulawesi, with a strong emphasis on spiritual, nature-based, and culturally rooted wellness experiences.

A key strategic focus is the modernisation of *Jamu*, Indonesia's ancient herbal medicine tradition. Through scientific validation, standardisation, and integration into formal wellness programmes, *Jamu* is being repositioned as a credible, contemporary wellness offering alongside yoga retreats, silent meditation programmes, jungle spa resorts, and holistic healing experiences. Bali remains ASEAN's most internationally recognised wellness destination, and Indonesia is deliberately building on this brand while decentralising wellness tourism development to other regions.

Government support plays a critical enabling role. Indonesia has designated five *Daerah Pariwisata Super Prioritas (DPSP)*, or Super Priority Tourism Areas: Lake Toba, Borobudur, Mandalika, Likupang, and Labuan Bajo. These destinations are supported by significant infrastructure investment, including the establishment of six hospitals to serve health tourism needs across medical and wellness services, reinforcing integrated health–tourism ecosystems.

In parallel, Indonesia has established three *Kawasan Ekonomi Khusus (KEK)*, or Special Economic Zones (SEZ), with a health and wellness focus:

- Sanur SEZ (Bali)—health and wellness tourism,
- Education, Technology, and International Health SEZ (Banten), and
- International Health Tourism SEZ (Batam).

These initiatives demonstrate the government's sustained commitment to developing integrated health, wellness, and tourism value chains, supported by targeted investment incentives, destination branding, and regulatory facilitation, including exploration of special visa arrangements for health tourists.

Key challenges remain, particularly in infrastructure development in remote areas, human resource readiness, and environmental and cultural sustainability as wellness tourism scales

up. Addressing these challenges will be critical for Indonesia to translate its strong policy intent and resource base into long-term, inclusive, and sustainable regional leadership in health and wellness tourism.

3.4 Lao PDR

Laos is a smaller player but offers unique products in low-carbon, heritage-based wellness tourism. Destinations such as Luang Prabang and Champasak offer tranquillity and cultural immersion, making them ideal for wellness retreats. Traditional Laotian therapies, such as herbal steam saunas and *ya boran* (herbal medicine), are being preserved through community initiatives.

The country's challenges include limited healthcare infrastructure and workforce shortages. To address this capacity gap, Laos is interested in ASEAN-supported training, scholarships, and exchanges to develop its pool of wellness practitioners. With its serene environment and cultural charms, Laos can attract tourists seeking off-the-beaten-path wellness experiences, especially when paired with visits to neighbouring countries (e.g. a Thailand–Laos dual-destination wellness trip).

3.5 Malaysia

Malaysia is a regional leader in several niche areas: it is recognised for Muslim-friendly medical tourism, fertility treatments, and cardiology services, driven by institutions such as the MHTC. Major hubs include Kuala Lumpur and Penang (world-class hospitals) and Langkawi and Sabah (upscale wellness resorts in nature). Malaysia actively promotes halal wellness tourism, integrating Islamic principles into spa treatments, detox programmes, and post-surgery care. This comprehensive approach includes halal food, prayer facilities, gender-segregated services, and family-oriented packages to meet the needs of Muslim patients and travellers.

Malaysia's strength lies in its dual focus on medical excellence and wellness experiences, all delivered in a culturally sensitive framework. Moving forward, Malaysia is focusing on digitalising patient services and strengthening its international branding, while also contributing to ASEAN initiatives on standards and marketing.

3.6 Myanmar

Myanmar has expressed a strong interest in contributing to ASEAN's health and wellness tourism agenda, particularly following the launch of its national wellness policy. Despite limitations in in-country assessments due to prevailing conditions, Myanmar has actively engaged in regional discussions and emphasised its commitment to collaborative development. The Ministry of Hotels and Tourism has identified opportunities in promoting traditional therapies, herbal medicine, and nature-based wellness experiences, especially in culturally and ecologically rich regions such as Shan State, Inle Lake, and Bagan.

Myanmar has expressed a strong desire to participate in ASEAN-level capacity building, digital learning tools, and regional certification pilots to improve service quality and workforce readiness. As it advances its domestic policy priorities, Myanmar views regional cooperation as essential for improving standards, increasing visibility, and ensuring inclusive participation aligned with ASEAN's strategic pillars.

3.7 Philippines

The Philippines is gaining attention for affordable cosmetic surgery, dental tourism, and rehabilitation therapies, especially among its diaspora and Asia-Pacific clients. Cebu, Manila, Bohol, and Palawan are highlighted as high-potential areas for medical and wellness tourism. The Philippines' wellness culture includes *Hilot* (an indigenous healing massage) and faith-based or spiritual healing practices, which are being integrated into new tourism offerings.

The government has shown interest in incentives for private investment in wellness resorts, particularly on its many islands that could host retreats. English-speaking staff and a hospitable culture are advantages for the Philippines. Challenges include infrastructure connectivity across islands and ensuring consistent quality standards. By aligning with ASEAN-wide accreditation and training standards, the Philippines can further enhance confidence in its services.

3.8 Singapore

Singapore serves as ASEAN's premier medical hub, distinguished by advanced healthcare infrastructure integrating AI-enabled diagnostics, robotic surgical systems, and precision medicine for complex procedures. Internationally accredited institutions such as Mount Elizabeth Medical Centre attract affluent patients across Asia and the Middle East seeking specialised treatments in oncology, cardiology, and organ transplantation.

Singapore is establishing itself as the regional epicentre for healthtech innovation and medical data governance. Singapore hosts leading medical technology companies and research institutes, with robust regulatory frameworks and data protection standards.

Singapore is strategically expanding its wellness infrastructure to position itself as an urban wellness destination, offering diverse experiences from luxury spa retreats to traditional healing practices. Upcoming developments, including Therme Singapore, a new wellness attraction along Marina South Coast, reinforce Singapore's position as a wellness haven for residents and international visitors.

3.9 Thailand

Thailand remains ASEAN's flagship destination for both medical and wellness tourism, with an estimated 3.5+ million international health and wellness travellers annually. It boasts established hubs in Bangkok, Phuket, and Chiang Mai, offering comprehensive packages that combine medical treatment with spa therapies, yoga, and tourism activities. Thailand's strengths include many internationally accredited hospitals (JCI-accredited), a skilled and often multilingual health workforce, and a global reputation for hospitality and service quality.

Traditional Thai medicine and massage are renowned worldwide; the country seamlessly integrates these cultural assets into modern wellness Programmes. Thailand is well-positioned to pilot initiatives such as the proposed ASEAN Health Travel Visa, given its experience handling high volumes of medical tourists and its existing long-stay "retirement visas" and wellness visa Programmes. Additionally, northern Thailand's retreat centres and resorts make it a prime candidate for nature-based wellness clusters. Thailand's continued leadership and knowledge-sharing will be valuable for regional progress.

3.10 Timor-Leste

Timor-Leste, recently admitted as an ASEAN Member State, has shown growing interest in aligning with the regional Health and Wellness Tourism Framework. While still in the early stages of ecosystem development, Timor-Leste is exploring how its traditional medicine, rich biodiversity, and community-based ecotourism could serve as the foundation for a future wellness sector. Government stakeholders, including the Ministry of Tourism, Trade, and Industry, have expressed interest in participating in regional pilot activities such as skills development exchanges, ASEAN-led wellness certification frameworks, and low-impact tourism planning.

Timor-Leste is particularly well-positioned to offer nature-based, culturally rooted wellness experiences in areas such as Ataúro Island and the highland interior, which could complement broader ASEAN wellness circuits. With support for long-term capacity building and alignment with standards, Timor-Leste aims to gradually position itself as a niche destination for sustainable and inclusive wellness tourism.

3.11 Viet Nam

Viet Nam is a fast-rising player, with a focus on emerging wellness hubs such as Da Nang, Nha Trang, and Ho Chi Minh City. Significant investments are being made in modern medical facilities and telemedicine platforms, reflecting Viet Nam's tech-driven approach to healthcare. The government is also standardising certain herbal therapies and traditional medicine practices in partnership with academic institutions—for example, Vietnamese traditional massage, *cao gio* (coin rubbing therapy), and acupuncture are being packaged for international visitors with an emphasis on safety and quality.

As Viet Nam's tourism infrastructure expands, it is incorporating wellness zones into its plans (e.g. coastal resorts offering spa and meditation services, or highland areas for herbal retreats). Its diverse scenery and cultural richness strengthen Viet Nam's appeal. To integrate regionally, Viet Nam is interested in mutual recognition of standards and participating in multi-country tourism circuits. Language skills and brand recognition remain key areas for improvement, and regional cooperation can help address them.

4 Strategic Recommendation: Vision and Strategic Pillars (2026–2030)

4.1 Vision

“ASEAN: The World’s Holistic Wellness Sanctuary”

ASEAN is more than a collection of destinations; it is a sanctuary, a place where nature, culture, traditional wisdom, community well-being, and innovation converge to offer the world an authentic and transformative wellness experience. This proposed vision encapsulates the region’s unique value and expresses ASEAN’s aspiration to lead in shaping a more balanced, inclusive, and holistic future for global health and wellness tourism.

All Member States share this vision of a future ASEAN in which health and wellness tourism contributes to more balanced, inclusive, and people-centred regional growth. It aligns with ASEAN’s tourism vision of being a “quality destination” committed to responsible, sustainable, and inclusive development.⁵ This vision is meant to inspire collaborative action: by working together under this common banner, ASEAN countries can collectively promote the region as the world’s leading wellness tourism destination by 2030.

4.2 Five Strategic Pillars



To realise this vision, ASEAN’s strategy for 2026–2030 should be organised around five interrelated strategic pillars:

⁵ Ibid.

1. Quality and Accreditation

Objective: Raise standards and enhance global trust through attaining internationally recognised standards.

- Identify and promote the adoption of internationally recognised standards: Establish a framework to identify and promote standards such as Joint Commission International (JCI) and the International Organization for Standardization (ISO) for medical and wellness providers, including hospitals, spas, and traditional medicine centres.^{6 7} This framework will promote the upskilling of professionals in Member States to ensure international-level quality standards.
- Establish SEZs for health and wellness: Designate flagship wellness zones (e.g. in second-tier cities) to cluster accredited providers with dedicated infrastructure, investment incentives, and policy support. These zones can serve as testing grounds for cross-border care models and bundled service packages.
- Why it matters: Upskilling professionals to attain internationally recognised standards (such as JCI and ISO) will enhance confidence among international patients, insurers, and partners. This will position the region as a credible and high-quality destination.

Approach: Start with awareness, promotion, and adoption of internationally recognised health and wellness standards.

- Use Special Economic Zones/priority wellness areas as testing grounds for internationally recognised accreditation, bundled services, and cross-border care models.
- Provide technical assistance and cost-sharing mechanisms to help MSMEs gradually meet international standards.

Key Indicators

- Number of providers attaining internationally recognised standards for health and wellness
- Percentage of participating providers that are MSMEs
- Number of SEZs or priority wellness areas used as accreditation pilots
- Share of pilot providers achieving compliance with internationally recognised standards

⁶ Joint Commission International (JCI) standards define global, evidence-based benchmarks for healthcare quality and patient safety, covering patient-centered care and organisational management. They ensure safe, high-quality care through rigorous, measurable, and objective requirements. The standards apply to hospitals, laboratories, and ambulatory care, with the 8th Edition (2024) including new environmental sustainability standards.

⁷ International Organization for Standardization (ISO) develops voluntary, consensus-based international standards that provide specifications for products, services, and systems to ensure quality, safety, and efficiency. Covering sectors from IT to manufacturing, these standards facilitate trade, reduce environmental impact, and improve organisational performance worldwide.

2. MSME Inclusion

Objective: Empower MSMEs, especially those led by women and indigenous entrepreneurs, to participate actively in ASEAN's growing wellness economy.

- Launch targeted MSME support programme for women- and youth-led MSMEs: Provide tailored financial schemes, skills training, and product development assistance to scale inclusive wellness businesses. This may include dedicated grants or soft loans for women and youth entrepreneurs, mentorship programmes to strengthen business acumen, and flexible programme designs that recognise women's dual roles in business and family responsibilities. Practical measures may include modular or hybrid training formats, flexible scheduling, and support mechanisms to ease childcare or caregiving constraints during training and capacity-building activities, enabling women entrepreneurs to participate fully and consistently.
- Provide digital support tools: Help MSMEs adopt online booking platforms, telehealth consultations, and e-commerce channels to reach wider markets. This includes offering digital literacy training and user-friendly platforms that enable small providers to market services and products regionally.
- Why it matters: MSMEs are the backbone of ASEAN's wellness tourism sector, but they face significant barriers, including a lack of financing, limited access to certification, and weak digital capacity. Supporting them unlocks inclusive, bottom-up growth, spreading economic benefits to rural communities, women-owned businesses, and other underrepresented groups.

Approach: Build capacity first, then connect to markets.

- Sequence support from skills training → business development → market access.
- Use hybrid and modular delivery formats (online + in-person) to accommodate women entrepreneurs' care responsibilities.
- Monitor MSME participation (gender, location, size) and adjust support instruments accordingly.
- Leverage digital platforms for training, certification readiness, and business matching.

Key Indicators

- Number of MSMEs supported through training and business development
- Percentage of supported MSMEs that are women-led, youth-led or indigenous
- Completion rate of training programmes (by gender)
- Number of MSMEs onboarded to digital platforms (booking, e-commerce, telehealth)
- Number of MSMEs participating in business matching or supply-chain partnerships

3. Sustainability and Culture

Objective: Protect natural resources and traditional wellness heritage while aligning industry growth with global sustainability goals.

- Promote the adoption of internationally recognised sustainable tourism standards: Identify and engage industry stakeholders to advance sustainable tourism development in accordance with these standards. Recognise providers who meet internationally recognised standards in waste management, energy and water efficiency, and biodiversity conservation.
- Promote the integration of cultural and traditional medicine: Safeguard and elevate indigenous healing practices (e.g. *Jamu* in Indonesia, Thai massage, Vietnamese herbal baths, Khmer wellness rituals) by developing ethical guidelines, safety protocols, and scientific validation for traditional remedies. This should include measures to protect traditional knowledge, respect the rights of local and indigenous communities, and encourage fair and equitable benefit-sharing arising from the use of cultural and healing practices. Encourage their responsible inclusion in modern and sustainable wellness offerings.
- Why it matters: Today's travellers demand eco-friendly, culturally authentic experiences. This pillar ensures ASEAN's offerings are sustainable and respectful, preserving the region's unique natural and cultural capital for future generations while meeting market demand.

Approach: Incentivise adoption, not just compliance.

- Introduce and promote internationally recognised standards as a voluntary, incentive-based scheme linked to branding and market access.
- Develop ethical integration guidelines for traditional medicine with involvement from practitioners, communities, and regulators.
- Support documentation, validation, and storytelling of traditional wellness practices as part of destination branding.

Key Indicators

- Number of providers adopting internationally recognised standards
- Percentage of certified providers integrating resource-efficiency measures
- Number of destinations promoting culturally rooted wellness products

4. Integration and Mobility

Objective: Enable seamless cross-border health and wellness journeys through streamlined, interoperable systems.

- *Develop shared digital platforms:* Develop interoperable, multilingual digital tools to support cross-border care, for example, an online referral system and a standardised patient records summary that can travel with the tourist. These tools would allow healthcare providers in different ASEAN Member States to coordinate care, schedule e-consultations, and access necessary medical information (with patient consent).
- *Why it matters:* Travellers face friction when pursuing multi-country wellness itineraries under current systems. Streamlined digital integration will enable ASEAN to market itself as “One Healing Journey,” thereby enhancing visitors’ overall wellness experience (e.g. surgery in one country, rehab or retreat in another).

Approach: Start small, be interoperable, and be scalable.

- Begin with light-touch digital tools (standardised wellness profiles, referral summaries) before full system integration.
- Pilot multi-country wellness itineraries with a limited number of ASEAN Member States to demonstrate feasibility.
- Align with existing regional and internationally recognised digital, health, and tourism initiatives to avoid duplication.

Key Indicators

- Number of ASEAN Member States participating in digital referral or wellness profile pilots
- Number of e-consultations or referrals facilitated across ASEAN Member States (pilot-level)
- Traveller satisfaction or usability feedback from pilot journeys
- Alignment with existing regional and internationally recognised digital or health platforms (qualitative)

5. Investment and Branding

Objective: Attract investment and build ASEAN's collective identity as a trusted, world-class wellness tourism region.

- *Develop Public–Private Partnership (PPP) incentives:* Encourage private investment in wellness tourism infrastructure (such as wellness resorts, hospitals, training institutes) by offering fiscal and regulatory incentives. This could include tax breaks, fast-track licensing, or land-use concessions for projects in priority wellness zones, particularly those involving local MSMEs.
- *Promote rich and diverse wellness offerings within ASEAN:* Showcase ASEAN's unique blend of modern healthcare excellence and traditional wellness heritage through targeted campaigns such as themed 'Wellness Trails' that highlight wellness destinations across Member States.
- *Why it matters:* ASEAN currently lacks a strong unified presence in the highly competitive global wellness tourism market. Greater awareness of ASEAN's adoption of internationally recognised standards will attract international travellers and boost investor confidence. Through regional marketing campaigns, ASEAN can achieve greater visibility and differentiation, attracting new traveller segments to Southeast Asia.

Approach: Investment and Branding.

- Link PPP incentives to quality, sustainability, and MSME inclusion criteria.
- Promote ASEAN's Wellness offerings through thematic showcases (e.g. Wellness Trails, Spiritual-Eco Wellness, Herbal and Traditional Healing).

Key Indicators

- Number of PPP projects aligned with wellness tourism priorities
- Value or count of investments mobilised in priority wellness zones
- Number of MSMEs integrated into PPP-supported projects
- Reach or engagement of regional branding campaigns (digital or event-based)

5 Policy Recommendations (2026–2030)

To accelerate the development of ASEAN's health and wellness tourism sector and empower MSME participation over the 2026–2030 period, a set of policy recommendations has been identified. These recommendations are grounded in the 2024 regional gap assessment findings and aligned with global best practices, while also reinforcing ASEAN's broader strategic agendas—notably the SAP MSMED 2030 and ATSP 2026–2030.⁸ In line with these strategies, the focus is on practical, high-impact steps that empower MSMEs and leverage ASEAN-level cooperation to achieve maximum impact. Key actions to be pursued include:

1. Strengthen ASEAN coordination and governance:

Establish an ASEAN cross-sector coordination mechanism (such as an ad hoc ASEAN Technical Working Group on Health and Wellness Tourism under the purview of ACCMSME) to guide implementation of this report. This ad hoc body, comprising representatives from tourism authorities, health ministries, and MSME agencies from all Member States, will oversee the rollout of initiatives, ensure alignment across sectors, and monitor progress.

The ASEAN Secretariat will play a facilitative role by supporting regional cooperation and coordination, including convening inter-sectoral meetings, enabling information and data sharing, and supporting resource mobilisation where appropriate, in coordination with designated focal points from ASEAN Member States (e.g. ACCMSME members, NTOs, relevant line ministries, and business organisations).

Through these cooperation activities, national focal points will serve as the primary interface with MSMEs and other business actors, facilitating partnerships, business matching, and supply chain linkages at the national and sub-regional levels, while feeding implementation insights and progress updates back to the ASEAN coordination mechanism.

2. Promote the adoption of internationally recognised accreditation frameworks:

Establish and promote the adoption of existing internationally recognised accreditation frameworks for health and wellness services. This will ensure ASEAN remains globally competitive by adopting high-quality standards for hospitals, clinics, spas, and traditional medicine centres across ASEAN (such as JCI for hospitals and ISO standards for wellness facilities). Member States are encouraged to adopt these internationally recognised standards, which will facilitate upskilling and enhance work mobility at the regional and global levels. This will incentivise the region to enhance service consistency and build international trust in ASEAN's health and wellness offerings.

In promoting accreditation frameworks, Member States may also consider adopting a proportional and inclusive approach that accounts for the diversity of service types and enterprise sizes, including MSMEs. In addition, the role of traditional health services may be strengthened within the health and wellness tourism ecosystem while ensuring appropriate quality, safety, and ethical standards.

⁸ [ASEAN Tourism Strategic Plan \(ATSP\) 2026–2030](#)

3. Develop a regional digital health and wellness platform:

Invest in a multilingual ASEAN wellness tourism digital platform that serves as a one-stop portal for travellers and the industry alike.⁹ The platform would feature a comprehensive directory of accredited wellness providers and facilities in all Member States, allowing users to book treatments or wellness packages online, and provide tools for cross-border patient referrals and medical record transfers (in line with data privacy regulations).

By leveraging digital innovation, this platform will increase the global visibility of ASEAN wellness SMEs, enable travellers to plan multi-country wellness trips more easily, and improve continuity of care for roaming patients (for example, enabling a hospital in one country to securely receive a patient's records from a clinic in another).

The development of such a platform may also be supported by appropriate governance arrangements and legal frameworks to ensure the protection of health data, patient privacy, and responsible data-sharing practices in accordance with national regulations.

4. Enhance the adoption of internationally recognised sustainable and inclusive tourism standards:

Introduce and encourage the adoption of existing, internationally recognised sustainable standards (e.g. the Global Sustainable Tourism Council) to ensure the industry's growth is environmentally and socially responsible. This will encourage clinics, resorts, and other providers to upskill to meet internationally recognised eco-friendly criteria (energy efficiency, waste reduction, water conservation, carbon footprint mitigation) and adhere to ethical practices (respect for local culture, community involvement, and fair employment).

In parallel, Member States should encourage relevant industry stakeholders to incorporate traditional medicine and indigenous wellness knowledge into quality standards—for instance, by supporting research and documentation of effective traditional remedies and training practitioners in safe, standardised methods. Embracing sustainability and cultural authenticity in this way will bolster ASEAN's reputation among eco-conscious travellers and protect the resources on which the wellness tourism sector depends.

Member States may also consider promoting the protection of traditional knowledge associated with indigenous wellness practices and exploring fair and equitable benefit-sharing mechanisms with local communities that contribute to these practices.

5. Promote investment and infrastructure development:

Encourage strategic investment in sustainable wellness tourism infrastructure, particularly in secondary cities and emerging destinations. Member States should consider identifying and developing Health and Wellness Tourism Zones (e.g. expanded SEZs or cluster areas in cities such as Chiang Mai, Da Nang, Luang Prabang, and Bali) with incentives to attract investors and healthcare providers.

Through public–private partnerships, governments can offer tax breaks, co-investment, improved transport links, and streamlined permit processes to develop new wellness resorts, rehabilitation centres, training institutes, and other facilities. Upgrading infrastructure beyond

⁹ English should be the main language, with additional languages to be determined following consultation with Member States, as translation costs will be quite significant.

primary urban centres will help distribute tourism benefits more evenly, ease congestion in over-visited hubs, and create new wellness travel circuits across the ASEAN region.

6. Empower wellness MSMEs and integrate value chains:

Provide targeted support to improve the competitiveness of MSMEs in the wellness sector and integrate them into regional value chains through a phased and practical approach. Initial efforts should focus on capacity-building and readiness, including skills training for spa therapists, traditional healers, wellness tour guides, and small clinic operators, as well as business development services such as mentorship in marketing, financial management, and basic compliance requirements. During this phase, MSME participation and engagement should be monitored to inform subsequent support measures.

Building on this foundation, support should progressively strengthen domestic and sub-regional networks, linking MSMEs with national tourism, health, and SME ecosystems. Improved access to financing, such as microgrants or affordable loans, to upgrade facilities, adopt digital tools, or obtain relevant certifications, will enable MSMEs to scale and meet market expectations.

In parallel, digital platforms should be utilised to expand training delivery and market access, including online learning modules, virtual business matching, and regional marketplaces. ASEAN may facilitate targeted networking and business-matching initiatives, both physical and virtual, to connect MSMEs with larger tourism and healthcare players. For example, regional trade fairs or curated online platforms can enable local organic product suppliers, herbal medicine producers, and rural wellness retreat operators to partner with major hotels, hospitals, and tour operators.

Strengthening these linkages over time will allow MSMEs to access broader distribution channels, participate in cross-border wellness packages, and collectively contribute to a richer, more inclusive ASEAN wellness tourism experience.

7. Launch an ASEAN wellness marketing campaign:

Develop and launch an ASEAN wellness tourism marketing campaign in collaboration with the appointed ASEAN Tourism Marketing Agency to promote the region's unique strengths. This marketing campaign may include joint marketing efforts such as identifying and promoting "ASEAN Wellness Trails" (a list of curated wellness attractions across ASEAN Member States), regional wellness tourism fairs and roadshows (led by private industry stakeholders), and leveraging existing ASEAN Tourism digital marketing platforms.¹⁰

Marketing materials may include information on ASEAN's diverse wellness offerings—from cutting-edge medical services to serene yoga retreats and ancient healing practices. By pooling resources to promote Southeast Asia as a wellness sanctuary, Member States can achieve greater international reach, position Southeast Asia as an attractive wellness destination, and attract new traveller markets.

¹⁰ [Southeast Asia](#); [VisitSoutheastAsiaOfficial](#); and <https://www.instagram.com/visitsoutheastasiaofficial/>

6 Proposed Pilots and Quick Wins (2026–2030)

In parallel with the long-term recommendations above, ASEAN Member States and the ASEAN Secretariat have identified several **pilot projects** and “**quick win**” initiatives that can be launched in the short term to build momentum and demonstrate early successes:

1. ASEAN Wellness Digital Platform Prototype:

As an immediate deliverable, ASEAN will develop a pilot version of the regional wellness tourism portal. This prototype platform will aggregate information on health and wellness services across ASEAN Member States and showcase a selection of accredited hospitals, clinics, spas, and wellness retreats. Users will be able to search by destination or treatment and make preliminary inquiries or bookings directly through the portal.

By starting with a modest, multilingual site and gradually expanding its features, this quick-win project will visibly kick-start regional digital integration. It offers immediate value by increasing MSMEs’ online exposure and making it easier for travellers to discover ASEAN’s wellness offerings.

2. MSME Wellness Certification Pilot Programme:

To jump-start the accreditation framework, ASEAN will implement a pilot certification programme for MSME providers, based on existing internationally recognised standards. In this pilot, a small number of volunteer wellness businesses (for example, a handful of spas, traditional medicine clinics, or boutique wellness retreats from different countries) will be encouraged to obtain internationally recognised certification. They will receive technical assistance to meet the requirements of these internationally recognised standards.

The results of this pilot will demonstrate that ASEAN industry stakeholders can meet internationally recognised criteria. By sharing success stories from these MSMEs that have achieved internationally recognised standards, more businesses will be inspired and encouraged to upskill and attain high-level internationally recognised standards in the future.

3. Regional Wellness MSME Partnership Initiative:

ASEAN will launch a business matching and networking initiative to integrate MSMEs into larger wellness tourism value chains. As a quick win, this could take the form of a regional wellness tourism business forum or a series of virtual networking events where small wellness providers (e.g. local spa operators, yoga retreat centres, herbal product makers) connect with major industry players, such as international hospitals, hotel chains, and tour operators. These platforms will enable MSMEs to form referral partnerships (for instance, a hospital partnering with a local spa for post-surgery rehabilitation packages) and to develop multi-country wellness packages jointly.

Early partnership successes—such as an agreement between a community wellness centre in one country and a tour operator in another to include that centre in tour packages—will exemplify the benefits of regional cooperation and motivate further collaboration.

7 Implementation and Coordination

The successful implementation of these policy recommendations will require strong ASEAN-level coordination, multi-sectoral collaboration, and the **practical staging of initiatives**. Key considerations include:

1. Institutional Coordination:

ASEAN will leverage existing bodies to drive this agenda. The ACCMSME, in collaboration with the NTOs and relevant health sector working groups, will coordinate implementation at the regional level.

The establishment of the ad hoc ASEAN Technical Working Group on Health and Wellness Tourism (or a similar ad hoc task force) is a priority first step to ensure ongoing leadership and oversight. Each Member State should designate focal points from its tourism, health, and SME agencies to participate in this ad hoc working group. The ASEAN Secretariat will play a facilitating role – maintaining communication channels, organising coordination meetings and workshops, and managing a centralised progress dashboard.

2. Resource Mobilisation and Feasibility:

Implementing the recommended actions will require adequate resources (financial, human, and technical). ASEAN will seek funding support from mechanisms such as the Japan-ASEAN Integration Fund (JAIF), as well as from other development partners and private-sector investments. Member States are encouraged to integrate key projects (e.g. wellness zones, digital platform development, training programmes) into their national budgets and development plans to ensure co-financing and local ownership.

Feasibility assessments will be conducted for major initiatives to tailor them to each country's capacity, recognising that one size does not fit all. The report and policy recommendations are designed to be flexible and non-binding, allowing each ASEAN Member State to implement them in line with national priorities and circumstances, while still committing to the shared regional vision.

3. Cross-Sector Engagement:

Given the multifaceted nature of health and wellness tourism, broad stakeholder engagement is essential. Regular consultations will be maintained with the private sector (hospitals, wellness centres, and travel companies), civil society (health and tourism industry associations and community groups), and academia or experts. Such engagement through forums, advisory panels, or public-private dialogue sessions will help generate innovative ideas, foster public-private partnerships, and hold stakeholders accountable to the framework's inclusive and sustainable development goals.

4. Monitoring, Evaluation, and Adaptive Management:

ASEAN will establish a robust monitoring and evaluation system to track the progress of actions and ensure accountability. A set of Key Performance Indicators (KPIs), for example, the number of MSMEs obtaining internationally recognised certification, tourist arrivals for wellness purposes (where available), and patient satisfaction levels, will be tracked at both national and regional levels. The ASEAN Secretariat will maintain

a centralised ASEAN Health Tourism Dashboard for real-time monitoring and transparency. Member States will submit data periodically (where available), and the dashboard will visualise achievements and highlight gaps.

Additionally, annual review meetings (e.g. hybrid or virtual) may be convened (integrated into existing ASEAN tourism or SME meetings) to evaluate implementation, share lessons learned, and agree on any necessary adjustments to the plan. This feedback loop keeps the strategy dynamic and responsive to new challenges and opportunities (such as emerging wellness trends or technological innovations).

By addressing these implementation factors, ensuring coordination, securing resources, realistically phasing activities, engaging stakeholders, and monitoring outcomes, ASEAN will enhance the feasibility and set the stage for tangible on-the-ground results. With all Member States working in concert, guided by a common plan yet adaptable in execution, the ambitious goals of the *Report and Policy Recommendations on ASEAN Health and Wellness Tourism* can be attained in the coming years.

8 Conclusion

ASEAN is poised to become a leading global destination for holistic health and wellness tourism. With its rich cultural heritage, strong medical capabilities, diverse traditional healing systems, and commitment to inclusive development, the region has all the ingredients to deliver high-quality, sustainable, and culturally resonant wellness experiences. However, realising this potential requires more than ambition; it demands **coordinated regional action, bold policy innovation, and consistent investment** in people, systems, and infrastructure.

This report presents policy recommendations to achieve these goals, focusing on priority actions, shared standards, pilot programmes, and inclusive support for MSMEs. Immediate priorities include launching flagship initiatives such as the ASEAN Wellness Trails, securing high-level endorsement of this Report and Policy Recommendations (for example, through adoption by the ASEAN tourism and economic ministers or at the ASEAN Summit), and activating the necessary implementation mechanisms without delay.

Call to Action: This report invited ASEAN Member States to:

1. Endorse this Report and Policy Recommendations through the appropriate sectoral bodies;
2. Upon endorsement, take the following priority actions:
 - **Establishing an ad hoc ASEAN Health and Wellness Tourism Working Group** (under ACCMSME or a relevant ASEAN body) to steer and monitor the implementation of the Report and Policy Recommendations. This report recommends that ACCMSME establish an ad hoc Working Group in consultation with ASEAN NTO and relevant health sector mechanisms.
 - **Engaging MSMEs**—especially micro-, women-, and community-led enterprises—as key partners in all rollouts and programmes, ensuring inclusivity and local empowerment;
 - **Securing initial and sustained funding** (nationally and regionally) for pilot projects and priority initiatives, including tapping into ASEAN cooperation funds and mobilising support from development partners and the private sector.

With sustained collaboration and leadership at all levels, ASEAN can position itself as a globally competitive wellness tourism destination and a model for **inclusive, resilient, and sustainable** tourism-led development.

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Lastly, we recognise the efforts of the research and technical team, whose expertise and dedication helped translate stakeholder insights into actionable policy recommendations.

This collective effort has produced forward-looking, practical policy recommendations to guide ASEAN's journey toward becoming the world's leading holistic wellness sanctuary.



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