



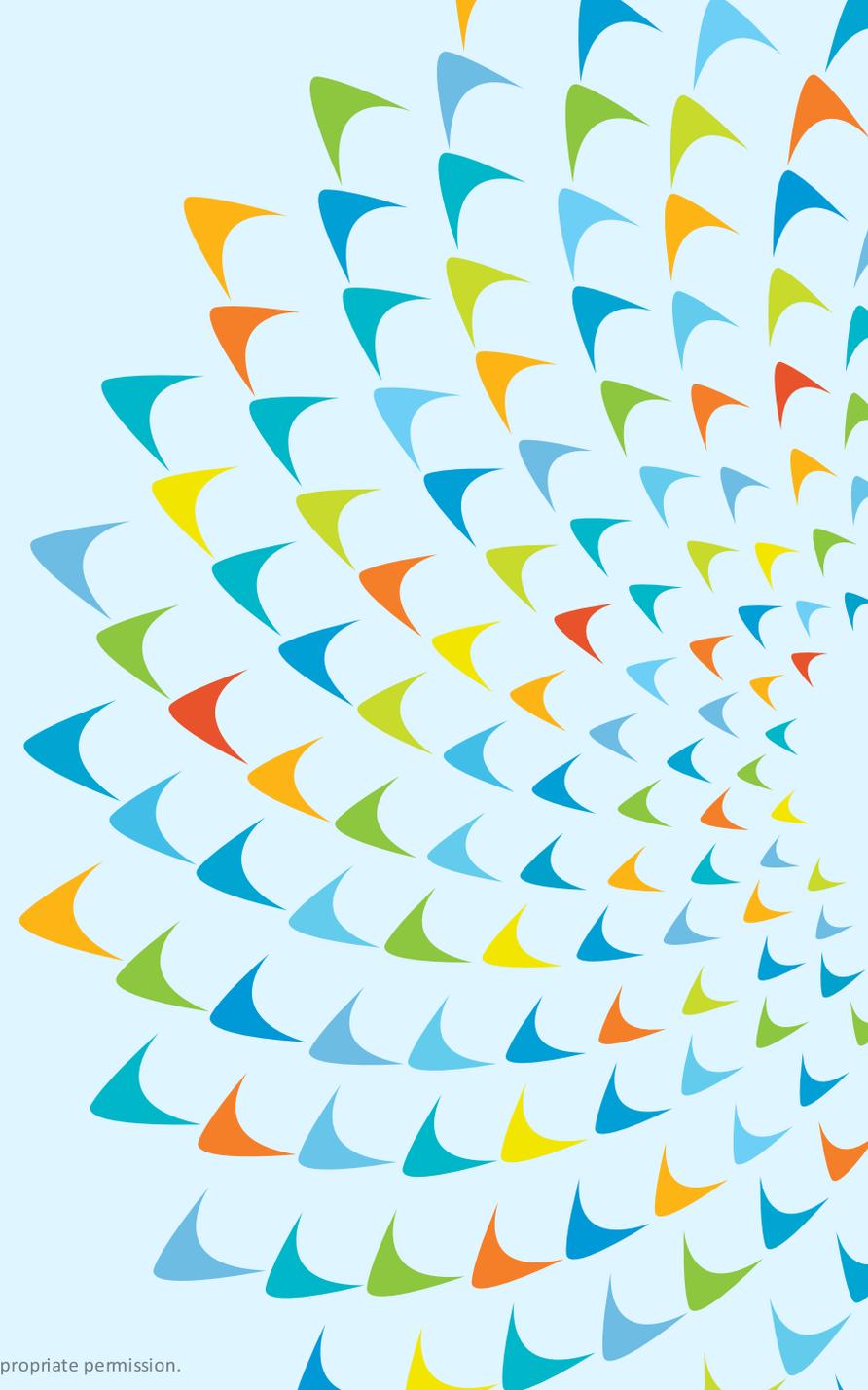
Cruise and Tourism Ports: Managing Growth Responsibly

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Tourism generated \$11.3 trillion in 2025,
contributing over 10% to global GDP.

A scenic view of a village built on a hillside overlooking a body of water. In the foreground, a green wooden boat is visible. The background shows a lush green hillside with several small buildings and a large rock formation. The text is overlaid on a semi-transparent teal rectangle.

In ASEAN, tourism generated 13.5% of jobs in 2024, creating employment pathways for women, youth and rural communities.

Marine tourism is a key driver of tourism demand



33% of the \$2.5 trillion Blue Economy



39.6 million global cruisers expected for 2026



4.03 million cruisers to Asia Pacific in 2024



Luxury cruise travel market tripled since 2010

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



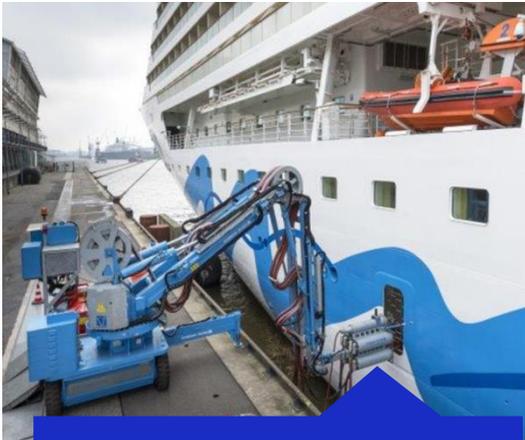


and tourism's negative externalities put pressure on destination resources.

Enabling policies and investments are required to drive sustainable marine and cruise tourism growth

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

Sustainable infrastructure and proactive policies can support economic benefit



Asia only has 6 ports with Onshore Power Supply (18%)



Port infrastructure to accommodate homeporting



150% growth in global capacity for expedition and exploration ships (2019-2029)

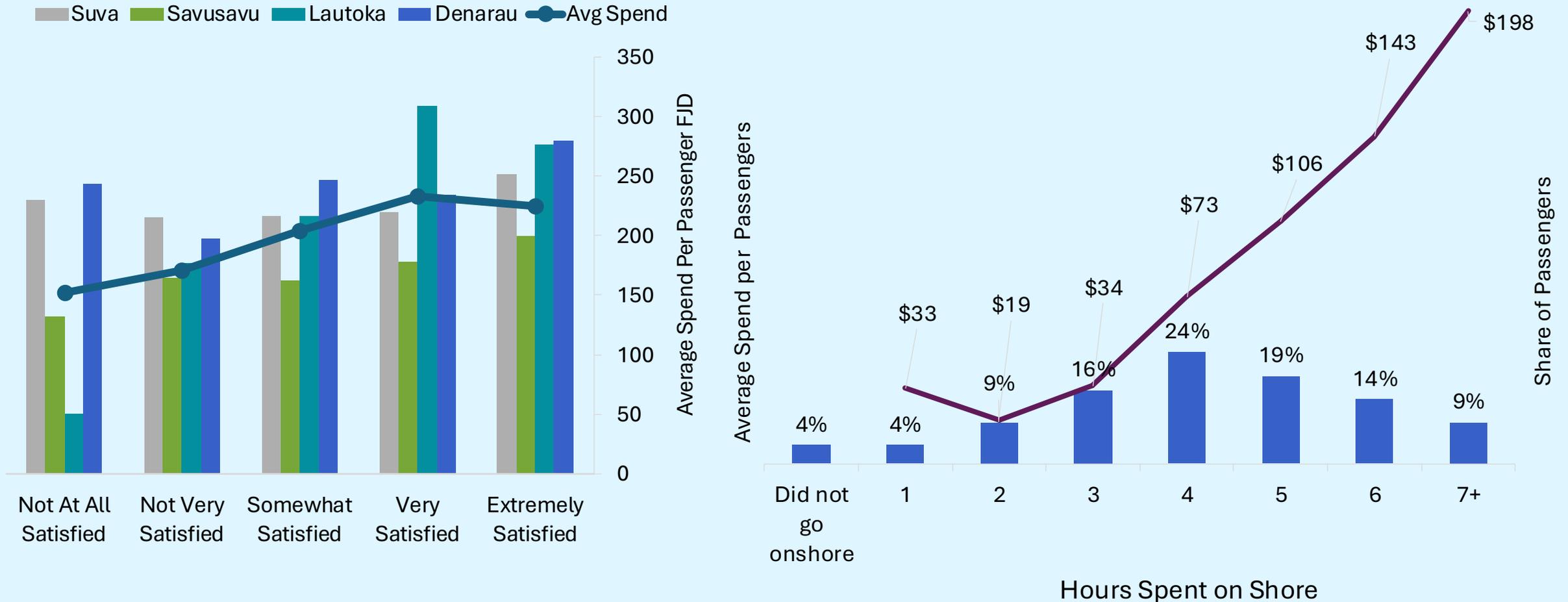


Dwell time in port contributes to higher spending

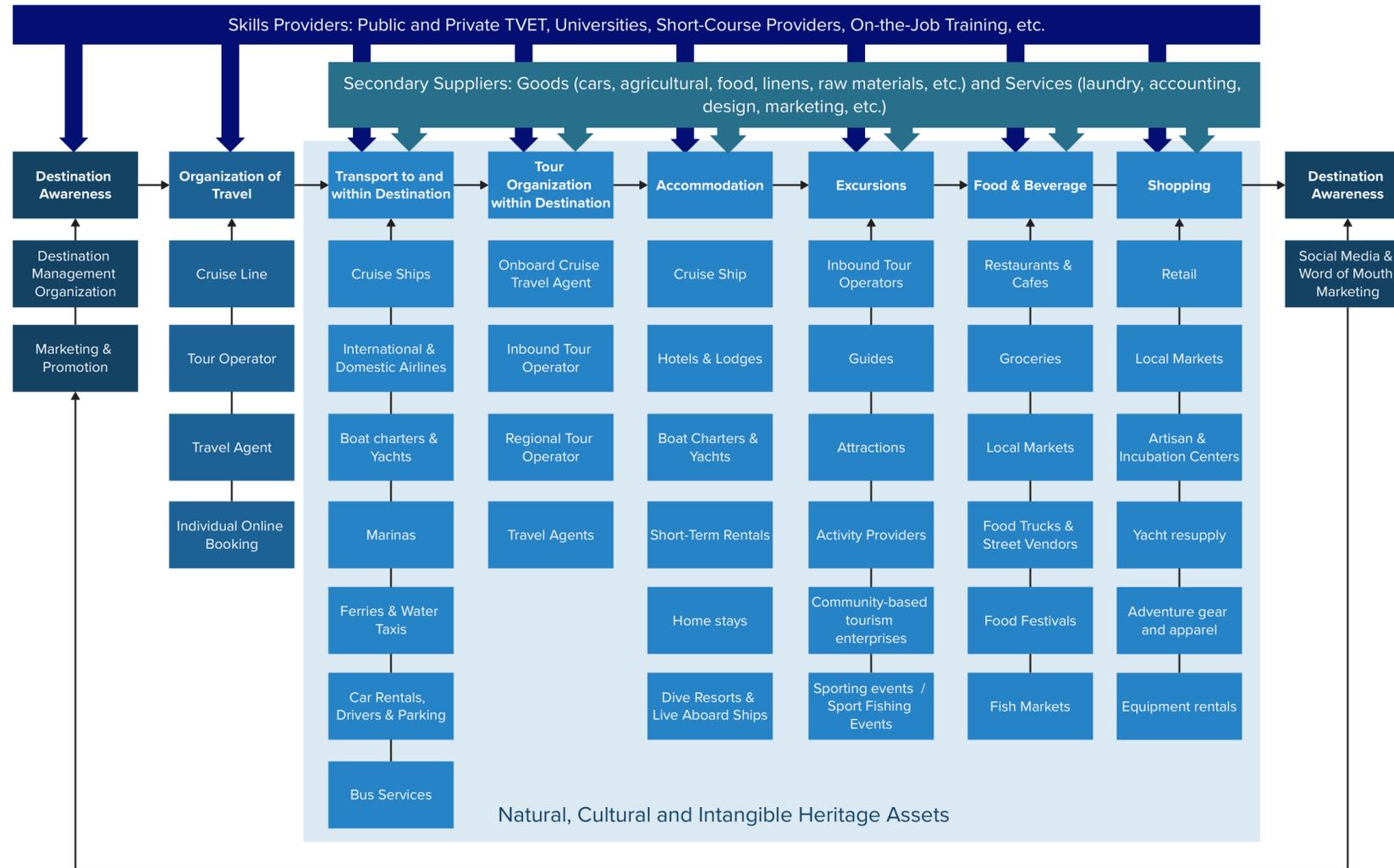
Passenger Satisfaction and Dwell Time are Key Drivers of Spending, with 47% of passengers wanting to spend more

IFC Fiji Cruise Economic Impact Assessment

Average spend per passenger and spend in port (including pre-booked tours) by satisfaction and dwell time and Fijian port (FJD)



Deriving benefit requires developing the whole marine tourism value chain



Opportunities for Deriving More Value from Cruise Sector



Port Infrastructure & Facilities

- Toilets, basic services and markets
- Reliable transport to attractions and shops



Marketing & Info

- Information readily available in ports
- Detailed and realistic marketing materials on board



Communication & Planning

- Business want schedules
- Cruise lines seek formal dialogues
- Government requires demand forecasts



Differentiation Across Ports

- Passengers want distinctive experiences with unique cultural positioning in each port.



Access to Local Products

- Local handicraft are not accessible or diversified.
- Lack of fresh produce and local cuisine education on board

Policy Considerations



Facilitate access to greener energy and waste management at ports through policies, PPPs, regional coordination



Leverage regional cooperation for harmonizing regulations, taxes and environmental fees



Strengthen environmental risk monitoring, enforcement and mitigation, including biosecurity



Prepare workforce and MSMEs for cruise tourism and associated industries. Strengthen networks with private sector.



Strengthen local linkages through partnerships, networks and product development

ADB projects add value through an integrated and custom approach

Integrated destination development solutions that address critical barriers to sustainable tourism. Strategic solutions aim to foster dynamic tourism private sectors that create jobs, sustain the environment, and promote resilient economic development.

Destination Management	Tourism Demand	Tourism Supply & Investment	Assets & Destination Infrastructure
Destination planning and management	Destination marketing capacity	Private sector and MSME development	Integrated destination infrastructure
Policy and regulatory guidance	Tourism data and statistics	Investment promotion and facilitation	Cultural, natural and intangible heritage conservation
Institutional Strengthening		Skills Development	Climate, disaster resilience, and inclusive design

Sustainability, Digital transformation, Gender, Inclusion, and Regional Cooperation and Integration



Thank You

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