



ASEAN

Tourism Marketing Strategy 2017-2020



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ASEAN Tourism Marketing Strategy (ATMS)

2017-2020

The ASEAN Secretariat

Jakarta

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PREFACE

The ASEAN National Tourism Organizations (NTOs) have developed the ASEAN Tourism Marketing Strategy (ATMS) 2017-2020 with a recognition that the marketing strategy will not only impact tourism but position ASEAN in other capacities. The ASEAN marketing efforts are based on the guiding principles of innovation, creativity, transparency, mutual-respect and responsible development. The strategy has been developed within the framework of the ASEAN Tourism Strategic Plan (ATSP) 2016-2025 and is designed to support the overall tourism activities of the ASEAN NTOs.

The ATMS 2017-2020 is built on the understanding that resource availability is an essential factor in determining the directions that can be pursued within the strategy. Given the budget constraints for ASEAN marketing opportunities, the knowledge and resourcefulness of those implementing the strategy are vital to its success. While the budgets and human resources can be seen as a constraint, they in fact provide opportunities for innovation and creativity. Taking into account the resource constraints of the ASEAN Tourism Competitiveness Committee (ATCC) and developments in the distribution landscape, the ATMS's primary focus is not on traditional marketing that requires media spend but on exploring opportunities that provide the most value and allow the story of the region to be told in a creative and engaging manner. The ATMS recognizes that public relations and social media are effective approaches to reaching target markets with the right message, on the right channel at the right time. The strategy is based on the ability of the NTOs to establish strong and effective partnerships to carry out many of the strategic actions.

As the effectiveness of specific marketing channels to reach travelers evolves, so does the ASEAN approach to marketing. As peer-to-peer advocacy becomes a key influencer of people's travel decisions, as seen in the changes in the traveler journey, the focus of the ATMS 2017-2020 is not on paid media but on engaging the most influential audiences (travelers) through social media networks who are likely to become effective advocates for Southeast Asia. Additionally, the boom in digital technology enables the focus to shift from traditional marketing tactics (which deliver messaging to a broad audience) to a more targeted approach using content marketing, enabling the delivery of highly customized content relevant to individual travelers in target markets.

The recurring themes seen throughout the strategy address the changing digital landscape with a sound understanding of the traveler's journey and the nature of the experiences the region supports.

These themes are shown in Figure 1.



Figure 1: Recurring Themes for ATMS 2017-2020

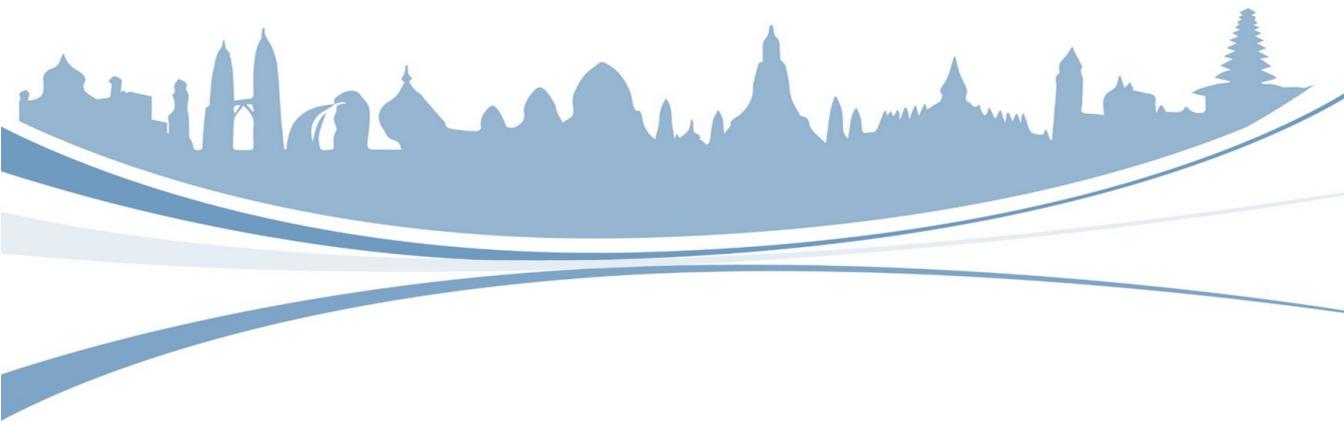
Inspire and Intercept: The need to build and leverage relationships with potential partners and travelers by using digital and traditional channels as a platform.

Connect and Engage: The necessity of capitalizing on interaction with potential travelers by connecting digital media to measurable goals while embracing and facilitating the sharing of information. The NTOs recognize their responsibility to create experiences across social and digital platforms that help drive travelers to Southeast Asia.

Measure and Optimize: The NTOs working with their stakeholders continue to discover how to effectively leverage all the options available in digital and social media, provide travelers access to the region, and integrate consumer feedback and analytical data in order to develop insights into traveler communication across media.

The ATMS 2017-2020 recognizes that successful marketing is based on the need to tell stories and create narratives that evoke a positive image of the lifestyle, culture, adventure, and romance of the region.

INTRODUCTION



INTRODUCTION

The ATMS 2012-2015 has served the region well but requires updating given the adoption of the ATSP 2016-2025 and its implications for marketing in the rapidly changing global and regional environment. The ATMS 2017-2020 is therefore designed to provide directions and actions that can strategically guide the implementation of the marketing function of the region. The importance of this strategy is that it is agile and able to adapt to rapid changes within the tourism industry globally and within the region. The ATMS 2017-2020 has been developed to deal with the realities of 2020 and beyond. The NTOs recognize that the ASEAN region needs to continue to be a competitive destination for travel and tourism. Since the ATSP 2016-2025 was approved, a variety of factors have changed in the environment in which it was developed.

The ATMS 2017-2020 is the product of consultation with a range of stakeholders, making reference to a number of studies and taking ongoing feedback and direction from the NTOs and the Secretariat. This is a living document that is to be updated on a regular basis to reflect changes in the global environment and the priorities and policies of the member states. It is understood that the strategy will begin to be implemented in August 2017. It is important to note that the development of the Visit ASEAN@50 campaign for 2017 was developed outside of the scope of this marketing strategy.

The themes proposed and explored in the ATMS 2012-2015 were Adventure Travel, Senior Long Stay, Business Travel and Experiential Travel. A survey was conducted to evaluate the brand, which is discussed in the Situation Analysis.

For the purposes of discussion, ‘Southeast Asia’ is used to refer to the region as a single tourism destination, while ‘ASEAN’ refers to the association of the 10 member states and the NTOs.

ATMS Development Process

The ASEAN Tourism Marketing Strategy was developed using the process illustrated in Figure 2.



Figure 2: ATMS Development Process

ATMS Context

The strategy development process began with a critical evaluation of the ATMS 2012-2015, with an emphasis on its accomplishments and the factors that still require attention. Alongside that evaluation, and given that the ATMS 2017-2020 is being developed within the context of the ATSP 2016-2025, the marketing dimensions of that strategy were also evaluated.

A thorough situation analysis was carried out assessing the impact of global forces and trends and assessing the key factors of the ASEAN marketing context. This assessment culminated in a SWOT statement.

The final stage of development was the creation of a vision and strategic objectives that guide the design of three strategic directions, together with the appropriate strategic actions.

The ATMS is divided into a series of parts, as shown in Figure 3.

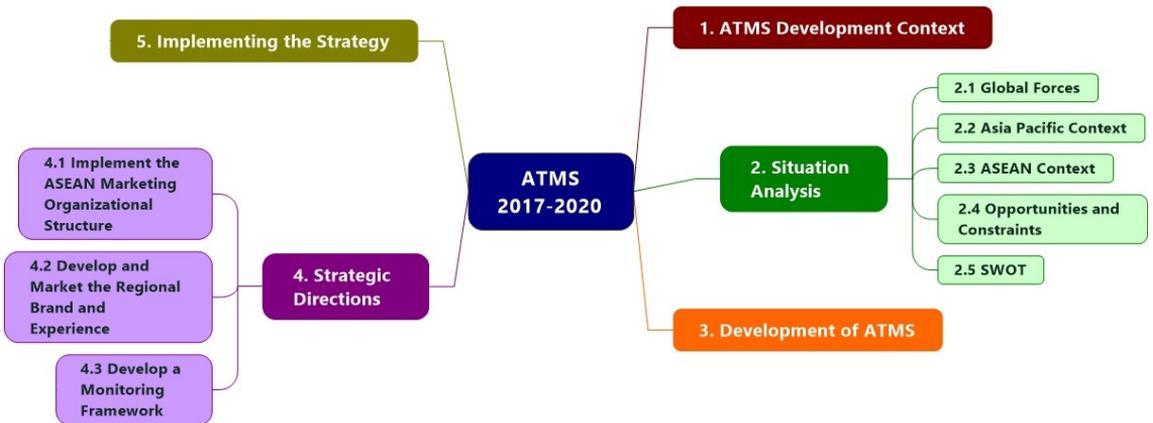


Figure 3: Structure of the ATMS 2017-2020 Document

PART 1

ATMS DEVELOPMENT CONTEXT



ATMS DEVELOPMENT CONTEXT

To provide an understanding of the context in which the ATMS was developed it is necessary to review the previous strategy and assess the marketing dimensions of the ASEAN Tourism Strategic Plan 2016-2025.

1.1 Review of the Marketing Dimensions of the ASEAN Tourism Strategic Plan

The ATMS 2017-2020 has been developed within the context of the ASEAN Tourism Strategic Plan 2016-2025. While considerable activity centered on implementing the previous marketing strategy and specific initiatives undertaken by the ASEAN Tourism Marketing and Communication Working Group (MCWG), the ATSP identified specific issues to be resolved and addressed in the new marketing strategy. These issues include:

- The enhancement of the availability and reliability of market research data and analysis to guide experience development, packaging, pricing, distribution and promotion.
- Better coordination of the activities of the ASEAN Tourism Product Development Working Group (PDWG) and MCWG in terms of information sharing and their respective marketing function, and to ensure that these are combined in the marketing strategy and plan.
- After five years of the previous ATMS the acronym “ASEAN” is still relatively unknown to most consumers of ASEAN tourism and most are more familiar with the region as Southeast Asia, however there is high recognition of the individual member states. The website www.aseantourism.travel does not routinely appear in travel searches for Southeast Asia (SEA) travel, SEA vacations, visit SEA, SEA trips or SEA tours. The ATSP recommends that the European Union approach be adopted.
- A need to increase the number of tourism experiences and promote the less developed parts of the region where most of the poorer population lives.

Specifically, the ATSP 2016-2025 recommends the following actions and policies, which the ATMS 2017-2020 has taken into account:

Positioning and Branding ASEAN in its Markets

“To minimize the potential for market confusion and ensure clarity, there is a need to revisit the question of how ASEAN should be positioned and branded in its markets as a single destination. Clearly, the market should be presented with one destination brand under which can be presented various product thematic destinations/circuits/corridors such as the Mekong River and Cruise Corridors, equatorial ecotourism destinations of EAGA, resort corridors, adventure circuits, pilgrimage circuits, etc. In this context, the challenge going forward is not to change the positioning and branding concept that has already been well developed, but to refocus efforts to create the necessary momentum to implement the positioning and branding strategy and integrate the existing regional and subregional destinations/corridors/circuits under this.”

Networks with Multi and Bi-lateral International Partners

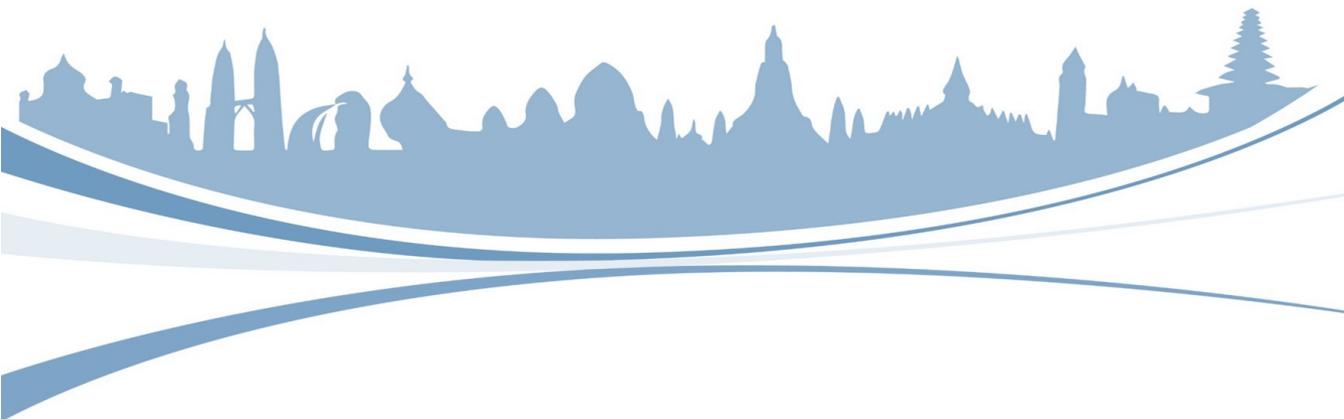
“Given the regional nature of the tourism enterprise and the expertise required, there is a need to fully engage the private sector as major packagers, distributors and operators and the major global and regional development partners such as ADB, USAID, WB, UNEP, AUSAID, UNESCO, UNWTO, and UNDP in the sustainable development of these assets. These organizations bring global, regional and subregional multi-country nature and culture and community-based tourism product development perspectives and technical expertise that are critical to informing the development of sustainable and inclusive natural and cultural heritage products and related action at the national level by the NTOs and their private sectors.”

Development and Marketing of ASEAN Subregional Destinations/Corridors/Circuits

“The challenge of the vision going forward is to give more attention to promoting ASEAN subregional destinations and circuits targeting more inclusive and measurable tourism outcomes. There are already destination product development and marketing tourism programs in the Mekong, BIMP-EAGA and IMT subregions that need to be integrated into the ASEAN tourism framework and supported with technical assistance in the area of planning, policy, infrastructure, product development and marketing, capacity building and monitoring and evaluation.”

PART 2

SITUATION ANALYSIS



SITUATION ANALYSIS

2.1 Global Forces and Trends



Global forces and trends have a significant influence on tourism offerings, experience design and future supply demands in Southeast Asia. Eight of these key global forces and trends, presented in Figure 4, are considered in the context of developing a marketing strategy for Southeast Asia.

Figure 4: Selected Global Forces and Trends

2.1.1 Changing Visitor Expectations

It is increasingly challenging to understand the expectations of visitors and respond with appropriate experiences. With increasing information and sophistication, the tourist is able to identify and demand constantly changing and evolving experiences. Many sought-after opportunities are personalized, authentic and exclusive. These are not necessarily exclusive as measured by luxury, but what is not normally available to the mass tourist. Safety and security continue to be of importance, especially with the nature of the geopolitical environment. One key theme to be explored is food/culinary tourism, which is an increasingly important motivator of where to visit and what to do.

Uncertainty and instability have changed the behavior of travelers. Geopolitical realities play a role in the motivation for travel, and can indirectly affect destinations. The perception of a destination's safety and security impacts the number of visitor arrivals. Governments and travel associations play an influential role in encouraging and communicating the safety situation of a destination or region. Technology provides opportunities for information dissemination, to position and educate travelers both before and during travel. One element of taming fears about traveling is creating and communicating a nurturing environment and celebrating the tourism culture of the region, from the people to the food and the culture of hospitality.

2.1.2 Demographic Changes

There are several demographic changes that present challenges for some destinations and opportunities for others.

Female Travelers

There is a growing segment of female travelers for both business and leisure. These female travelers often seek adventure and some travel companies are responding with women-only adventure tours. Safety and security are important for any traveler, but play an especially important role in decision making for female travelers, particularly solo travelers.

Growing Middle-Class

An increasing part of the global population is considered to be middle class,¹ due to an increase in incomes and a decrease in poverty levels. In 2009 the middle-class population was 1.8 billion and this is projected to increase to 3.2 billion by 2020 and 4.9 billion by 2030.² The largest segment of the middle class is predicted to be from the Asia-Pacific region, representing about two thirds of the global middle class population (66%) by 2030. While in Europe (14%) and North America (7%) the growth will come to a halt and there will be a decrease by 2030. With a growing middle-class come changes in values, interests and expectations, and part of these changing expectations is that value for money is increasingly important.

Multi-Generation and Family Travelers

Many families are starting to travel with the whole family, including mothers, fathers, children and grandparents. These multi-generational trips are growing in popularity. Part of the fuel for this growth is the increase in overseas destination celebrations such as weddings and birthdays. This segment of travelers seek house rentals and aspects of the destination for all members of the family to enjoy.

Senior Travelers

While tourism has increased in Southeast Asia, it is important to note where and when the greatest number of tourists visit. The number of visitors in high season is exploding in key destinations, while secondary and third-tier destinations do not reach their full potential. The low season, throughout the region, poses a problem. To create a more rounded tourism industry it is necessary to develop strategies that encourage travel during the low seasons, which provide valuable propositions for various segments of travelers. Europeans aged 55 or over represent about 40% of travelers outside the peak months of July and August.³ This is an important segment of the market mix for Southeast Asia as they are primarily long-stay, low-impact travelers who engage with the community and are interested in many of the creative industries. The product demands of senior travelers,⁴ while not highly unique, have elements that need to be tailored specifically to their abilities and needs.

2.1.3 Experience Economy

There have been significant changes and innovations in the way services are conceived and delivered. Tourism, which forms the largest segment of the service sector, has only recently begun to adopt an approach that is customer-centric and accept that rather than talk about products, the focus of the process should be on developing tourism experiences. With this approach, there is a strong emphasis on designing the various opportunities presented to visitors, focusing on problem solving, and the creation of new opportunities to meet the needs of the tourist, while ensuring that the tourism development process is beneficial to local residents and the social, cultural and natural environment.

¹ The term 'middle-class' is a relative term and is not standardized across the globe.

² OECD Yearbook; Horwarth HTL (Hotel, Tourism and Leisure). Tourism Megatrends.

³ Eurostat. 2016. Seasonality in tourism demand.

⁴ Senior travelers are defined as travelers over the age of 60.

Travel Journey

A variety of new influences from social media, travel focused media, live streaming and other technologies have changed the travel journey. The journey is a continuous cycle that allows travelers to both influence, and be influenced by, others throughout their journey. Every point within the visitor's experience must be carefully understood as it ultimately affects the level of satisfaction of the visitor and his/her willingness to return or recommend the destination to friends and family. Figure 5 highlights the key phases of the travel journey.



Figure 5: The Phases of the Travel Journey

Phase 1: Discover. A traveler's journey can start with the conscious decision to travel, whether for business or leisure, but it can be influenced by travel related content. The discovery phase can happen months, weeks or just days before the actual travel; the timeframe for each journey varies. Social media plays an influential role in this phase, with almost 87% of people under the age of 34 getting their travel inspiration from Facebook, primarily from their friends and families' travel posts.⁵ Mobile search also plays a big role, with 81% of people researching travel on their mobile devices.⁶

Phase 2: Plan. Once a destination has been chosen and dates set, the final acts of planning are usually carried out online. Previously, consumer habits were to research online and book through a travel agent or other non-mobile means, but travelers are beginning to research and book online, including on mobile devices.

Phase 3: Travel. Many travelers use review sites and social media to get information and insights into destinations or regions. These sites become highly influential once the traveler has reached their destination. During this phase, they share information on their own social media about the progress of their trip, influencing others.

Phase 4: Relive and Repeat. Once a traveler has returned from their trip, the journey does not end there. They relive their trip for days, weeks or even months, through social media campaigns such as #ThrowBackThursdays and #FlashBackFridays. Travelers' photos are reposted several, if not dozens, of times on social media. As one traveler ends their journey, another traveler is beginning theirs, often being influenced by previous travelers.

Experience Design

This is a multidisciplinary activity requiring a range of expertise, as illustrated in Figure 6.

⁵ Kemsley, T. 2014. The State of Content Marketing: Travel. Contently

⁶ Adobe. 2015. Mobile Consumer Report



Figure 6: Disciplinary Dimensions of Experience Design

The ATMS recognizes the urgent need to develop the capacity of tourism officials to manage the experience design process and obtain input from various design, interpretation, visitor management and site operation personnel. The product of an experience development process based on human-centered design principles is desirable, as it meets the needs of the client, is feasible within the realm of available technology, and is feasible from a financial perspective.

2.1.4 Increasing Uncertainty

Changes in technology, visitor expectations and the geopolitical situation, together with climate change, present destinations with significant challenges. In order for the marketing function of tourism destinations to be able to cope with this rapidly changing environment, marketing activities must be agile. Agile marketing is a “tactical marketing approach in which teams identify and focus their collective efforts on high value projects, complete those projects cooperatively, measure their impact, and then continuously and incrementally improve the results over time”.⁷ With growing recognition of the impact of climate change on destinations, marketing needs to become more sophisticated in demonstrating how certain destinations are considering the effects of climate change and how they are adapting to this new reality.

2.1.5 Rapid Urbanization

With over 50% of the world’s population now living in cities, there is a need to adjust marketing and promotion initiatives accordingly. The largest growth in urban areas (about 90%) is seen in African and Asian countries where the demand on infrastructure, services, jobs and the environment is also the greatest.⁸ Growth in urban centers provides opportunities, as no country has reached middle-class income status without urbanizing. Cities throughout the world generated 85% of world GDP in 2015. People are drawn to cities for reasons beyond just jobs, as they seek social mobility and women’s empowerment. Marketers need to adjust their strategies to ensure they account for the growth in the number of people living in cities. In the travel industry this may have implications of higher demand in resorts and beach holidays, over city tours.

⁷ Work Front. 2016, June 2. What is Agile Marketing? (And Why You Should Care).

⁸ Pwc. A New Urban Agenda: Accommodating 2 billion new urban citizens.

2.1.6 Sharing Economy

There has been significant investment in the sharing economy, of \$4.1 billion in 2014 and \$17.9 billion in 2015. The sharing economy is transforming the travel landscape and will continue to do so. The nature of the transformation, and what the future holds, can be seen in the significant impact that Airbnb and Uber have had in a very short time. A wide range of technologies and applications, such as Beyond Stays and Guesty, offer concierge services which help hosts manage bookings, room cleaning, repairs and other services. Both Airbnb and Uber are now looking to the business travel market by partnering with business travel management company Concur. Elsewhere, companies like Eatwith and Bookalokal are pairing travelers with home cooks in cities around the world, while Getmyboat and Onefinestay are exploring the possibilities of luxury sharing.

2.1.7 Technological Advancements

Technological advancements have not only made information more accessible but also influenced the behavior and expectations of travelers. Technology has drastically changed the expectations of customer service with digital interaction, real time customization and access to information and feedback online and on mobile devices. Changes are being seen in the digital aspects of travelers' lives, with many aspects of the travel experience happening online. The term SoMo has been coined, meaning social networks plus mobility (smartphones, smart gadgets, wearables).⁹

While static content and video are both highly desirable for social media and online content, digital marketing is making strides with immersive tactics such as live streaming, augmented reality and virtual reality. Consumers are looking for authentic and relevant experiences that are delivered in new ways. Drones have played a huge role in redefining video in 2016, with many using drone footage to diversify their content by providing a whole new perspective on a property, city or region. These technologies are predicted to continue to grow in popularity with digital marketers in 2017.

Digital Revolution

Online travel booking is becoming increasingly popular, and the travel industry is experiencing the impact of the rise in connected travelers. Euromonitor International's Digital Consumer Index identifies five markets that are the most promising for their digital growth in the travel industry: China, South Korea, United Arab Emirates, United States and Switzerland.

Vital to any marketing strategy is digital activity that, together with public relations, storytelling, and content curation, can reach target audiences and provide influential and inspiring messages about traveling to Southeast Asia. Today, social media is a major player in reaching, influencing and converting target audiences, and will play a major role in the approach taken in the future. There are effective overlaps that can re-emphasize the messaging and segment the market. Directed and segmented content creation will be vital to future success, as the travel market is highly oversaturated with content and the strategy needs to address the fact that travelers today are very savvy in their consumption of media and messaging.

2.1.8 Tourism Growth

The tourism industry continues to experience healthy growth. In 2016, international visitor arrivals reached 1,235 million according to the UNWTO World Tourism Barometer (2017).¹⁰ In the first nine months (January – September) of 2016, the global tourism market welcomed 956 million international tourists, 34 million more than in the same period of 2015.¹¹ According to the World Travel & Tourism

⁹ Tutek, E. 2015, December 9. Tourism Megatrends Report. Horwath HTL (Hotel, Tourism and Leisure).

¹⁰ United Nations World Tourism Organization. 2017. UNWTO World Tourism Barometer, Volume 15.

¹¹ United Nations World Tourism Organization. 2016, November 7. Close to one billion international tourists in the first nine months of 2016.

Council (WTTC), the total contributions to world GDP of travel and tourism rose to a total of \$7.6 billion (10.2% of GDP) in 2016. Travel and tourism has a total contribution to employment of nearly 300 million jobs globally and the employment requirements are expected to rise according to WTTC.

2.2 Asia Pacific Context

The Asia Pacific region experienced a 9% growth in international visitor arrivals (overnight visitors), which led to growth across world regions, up to September 2016. Several countries experienced double-digit growth, with the Republic of Korea (+34%), Viet Nam (+36%), Japan (+24%) and Sri Lanka (+15%) in the lead. The world's top source market, China, is among the top five source markets for the region with a 19% growth in spending.¹²

Approximately 23% of the world's international overnight arrivals are from Asia Pacific. Since 2005, Asia Pacific has been the fastest growing region for international tourism, with South Asia and Southeast Asia the two fastest growing sub-regions with 8.6% and 7.9% growth during the past decade, according to the United Nations World Tourism Organization.¹³

According to STR data from November 2016, the Asia Pacific region saw mixed results from the hotel industry's three key performance indicators compared to November 2015. The Asia Pacific region reported a 3.1% increase in occupancy to 72.3% while the average daily rate (ADR) dipped 1.0% to \$101.65; the revenue per available room (RevPar) showed an increase of 2.1% to \$73.49.¹⁴

In the Asia Pacific region, in November 2016, the STR Pipeline Report recorded 594,933 rooms in 2,659 projects under contract, representing a 5.7% increase over November 2015 in rooms under contract. With 136,451 rooms in 510 hotels, China has the most reported rooms in construction. India (24,646 rooms in 154 hotels) and Indonesia (23,440 rooms in 120 hotels) also reported more than 20,000 rooms in construction.¹⁵

In 2015, five of the top ten most visited cities in the world were in Asia Pacific, according to the MasterCard Global Destination Cities Index. The top five were Bangkok, in second place, Singapore (7), Kuala Lumpur (8), Seoul (9) and Hong Kong (10). The top destination in 2016 by international overnight arrivals in Asia Pacific was Bangkok (see Figure 7). Singapore was second, closely followed by Kuala Lumpur. Eight of the top 20 cities are in Southeast Asia.

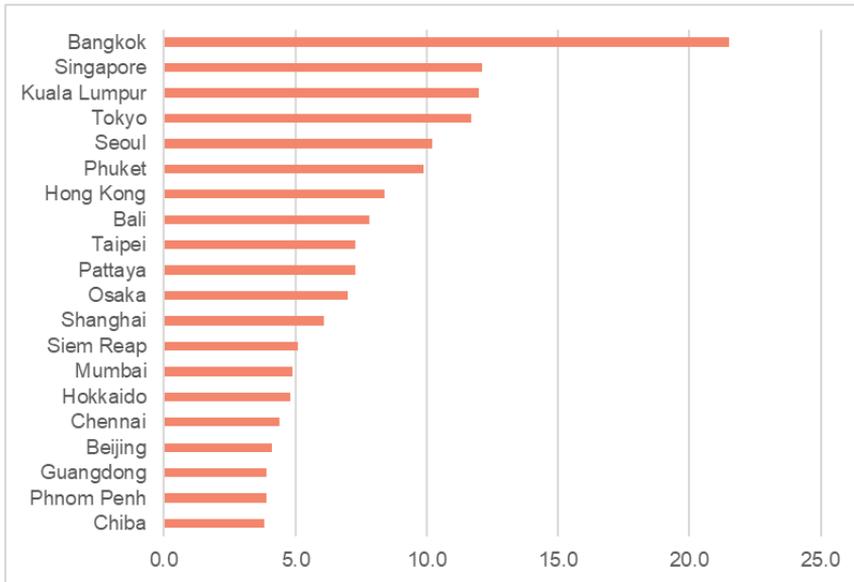
¹² United Nations World Tourism Organization. 2016, November 7. Close to one billion international tourists in the first nine months of 2016.

¹³ Willmore, S. 2016, November 8. Almost one billion international tourists in Q1-Q3 2016. Travel Daily Media.

¹⁴ Hotel News Now. 2016, December 22. STR: Asia/Pacific hotel performance for November 2016.

¹⁵ Hotel News Now. 2016, December 16. STR: Asia/Pacific hotel pipeline for November 2016.

¹⁶ World Travel & Tourism Council. 2017. Travel & Tourism Economic Impact 2017 South East Asia.



Source: MasterCard. 2016. Asia Pacific Destination Index 2016: Tracking the growth of tourism in Asia Pacific.

Figure 7: Top 20 Destinations by International Overnight Arrivals in Asia Pacific

China is the top origin market for six destinations and one of the top for another three. For Asia Pacific, USA is the second biggest source market for nine destinations, followed by South Korea, Japan, and Taiwan (Table 1).

Rank by 2016 Contribution Share of Overnight International Arrivals		Origin Country
2009	2016	
6	1	China
5	2	South Korea
3	3	Taiwan
2	4	United States of America
1	5	Japan
4	6	Singapore
10	7	Malaysia
8	8	Australia
7	9	United Kingdom
11	10	Thailand

Source: Table has been adapted from MasterCard. 2016. Asia Pacific Destinations Index 2016: Tracking the growth of tourism in Asia Pacific.

Table 1: Top 10 Countries for Asia Pacific Destinations by Overnight IVAs

2.3 ASEAN Context and Situation

ASEAN comprised of 10 economies within Southeast Asia with a total population in excess of 600 million. The total contribution of travel and tourism to GDP, as reported by the World Travel & Tourism Council, was \$301.1 billion in 2016.

Tourism in Southeast Asia in 2016 made a total contribution of 11.8% to GDP which is forecast to rise to 12.1% in 2017.¹⁶ There were more than 30 million jobs (total contribution) in ASEAN in 2016 which is expected to increase by 3.7% in 2017, to reach over 31 million jobs, in total contribution, to travel and tourism.¹⁶ The projection is that travel and tourism could account for 15% of GDP by 2025 based on the ASEAN Tourism Strategic Plan 2016-2025.

Tourism has been recognized as an important economic activity of each Member State in ASEAN.

Economy	International Arrivals (mns)			CAGR (%)		Volume Increase (mns)	
	2010	2015	2020	2010-15	2015-20	2010-15	2015-20
Brunei	0.214	0.218	0.450	0.4	15.6	0.004	0.232
Cambodia	2.508	4.775	6.328	13.7	5.8	2.267	1.552
Indonesia	7.003	10.407	12.263	8.2	3.3	3.404	1.856
Lao PDR	2.513	4.684	9.080	13.3	14.2	2.171	4.396
Malaysia	24.577	25.721	32.562	0.9	4.8	1.144	6.841
Myanmar	0.311	1.289	1.970	32.9	8.9	0.979	0.681
Philippines	3.292	5.149	6.420	9.4	4.5	1.857	1.271
Singapore	11.639	15.221	19.305	5.5	4.9	3.582	4.084
Thailand	15.936	29.881	49.630	13.4	10.7	13.945	19.749
Viet Nam	5.050	7.917	10.286	9.4	5.4	2.867	2.369
Total	73.043	105.263	148.149	7.6	7.1	32.220	42.886

Sources: PATA; Brunei figures provided by the NTO

Table 2: International Arrivals to Southeast Asia 2010, 2015 and 2020

2.3.1 Regional Groupings

Southeast Asian countries have organized themselves into a number of regional groupings to assist in the promotion of tourist destinations and travel corridors that have complimentary attributes. The groupings build opportunities for sustainable and inclusive tourism growth based on the countries' current tourism status and infrastructure. The cooperation of all the countries to best facilitate transport and visa policy will be instrumental in maximizing tourism benefits. Cooperation is also a vital component in strengthening tourism marketing, developing human resources, and increasing investment.

There are a number of regional groupings, shown in Figure 8, which need to ensure cohesion in a number of activities. Ideally these groupings would share objectives and work together to reach their goals, as the countries are all part of the larger ASEAN region. The complimentary efforts of all regional groups can strengthen the message of the region and best utilize resources. The various strategies and activities should be mapped and consistently shared to ensure complimentary efforts. ASEAN is the lead grouping, with the other groupings providing complimentary efforts for promoting the region.

It is recognized that the groupings present overlapping interests in activities which can either be seen as positive reinforcement of a series of measures, or causing duplication and, more importantly, confusion in the eyes of the consumer.

¹⁶ World Travel & Tourism Council. 2017. Travel & Tourism Economic Impact 2017 South East Asia.

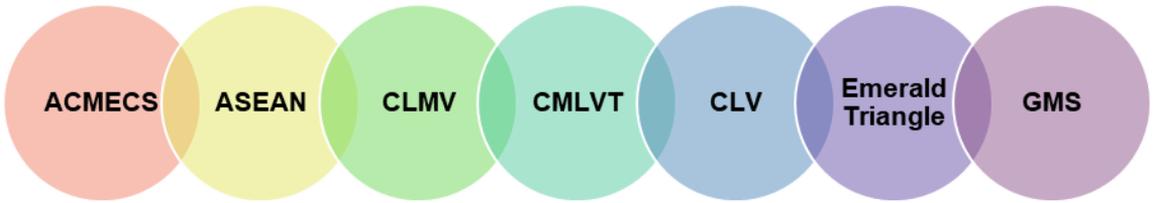


Figure 8: Regional Tourism Groupings in Southeast Asia

ASEAN and GMS

The Experience Mekong Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015-2020 identified joint tourism marketing and product development objectives for the GMS and ASEAN (Table 3).

Greater Mekong Subregion	ASEAN
<ul style="list-style-type: none"> • Position the GMS as a single tourism destination • Promote multi-country tourism in the GMS economic corridors • Target high-yield markets • Improve the business-enabling environment for product development by the private sector • Emphasize development of pro-poor tourism • Improve quality standards for accommodation, food, and tourist site management • Promote intra-GMS travel 	<ul style="list-style-type: none"> • Increase the number of tourists traveling to Southeast Asia • Increase multi-country visits in Southeast Asia • Develop experiential regional tourism products • Position ASEAN as a preferred destination by focusing marketing and promotion efforts on the national tourism organizations • Harness the benefits of marketing to help meet social, economic, and cultural goals • Promote intra-ASEAN travel
<p>Source: Table adapted from the Experience Mekong, Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015-2020.</p>	

Table 3: Joint Objectives for Marketing and Product Development between GMS and ASEAN

The GMS is shared here as an example of the synergy that can be created amongst the regional groupings. This type of collaboration will enable the region to wholly, and in part, develop a strong presence globally. The other regional groupings do not have formal marketing strategies that outline their efforts and alignment with ASEAN.

2.4 Southeast Asia Opportunities and Constraints

Given the significant growth in tourism worldwide and most importantly within the Asia Pacific region and the diversity and richness of the Southeast Asian experiences there can be no doubt that with consistent management and ongoing development of experiences the Southeast Asian region has excellent prospects for the future. To better understand the opportunities and constraints that exist a series of factors were considered (see Figure 9).



Figure 9: Assessment of Southeast Asia Opportunities and Constraints

2.4.1 Connectivity

There have been significant changes in the transportation landscape that impact the quality of connectivity within the region. The influence of the low-cost carriers is now well understood and documented and continues to be important in opening up new destinations. The introduction of low-cost carriers has been positively influenced by the ASEAN Open Skies Agreement. Significant investments are projected in rail infrastructure which increases opportunities for travel while contributing to sustainability. Within the GMS region cross-border rural connections are being facilitated and opening up opportunities for those wishing to explore less developed parts of the region by vehicle. The cruise industry is increasing its capacity to provide multi-country experiences within the region. Finally, investment in increasing the quality and infrastructure of airports is ongoing. These improvements facilitate connections into, and within, the region.

2.4.2 Intra-Regional Travel

Current and future trends continue to support ASEAN's efforts to encourage intra-regional travel. Many travelers (76%) take shorter trips more often through the year. These trips are generally short-haul and are for beach holidays or city trips, where travelers go up-market for their accommodation options and have higher average spending. Traditional tours have lost a large part of their market share according to the World Travel Monitor.¹⁷

2.4.3 Visa Policy

Cross-border facilitation plays a role in attracting travelers to the region. It is largely visa-free for ASEAN nationals for travel within the region, and this is the direction in which visa policy is moving. For international travelers individual visas for each country are required. This varies by passport but is the general policy for the region. Travelers planning a multi-country visit currently require multiple visas, which can be cumbersome and expensive, reducing the price competitiveness of the region. The initial plan to initiate one visa for ASEAN would open doors for travel and tourism. There are indications that fewer visa restrictions could lead to an increase of up to 10 million visitors to the ASEAN region.¹⁸

2.4.4 Hotel Investment

Throughout the region there are luxury brands entering new markets. While some countries have developed tourism markets, others, such as Myanmar, are experiencing significant investment. Some key brands' recent and scheduled developments include:

- Marriott – scheduled to open in 2017, Courtyard by Marriott resort in Siem Reap and Marriott resort in Sihanoukville, a key secondary destination in Cambodia.
- Four Seasons – scheduled to open in 2018, Four Seasons in Kuala Lumpur, Malaysia; opened December 2016 – Four Seasons in Hoi An, Viet Nam; opened in 2016, Four Seasons in Jakarta, Indonesia.
- Conrad – opened in 2016, Conrad Manila, Philippines.
- St. Regis – opened in 2016, St. Regis Langkawi, Malaysia.

The increase in investment by key brands is an asset for marketing purposes. These brands can be leveraged and become strategic partners, developing opportunities for promotion of the region, and becoming key players in developing FAM tours for travel agents and media.

¹⁷ ITB World Travel Trends Report 2015/2016.

¹⁸ World Economic Forum. 2015. The Travel & Tourism Competitiveness Report 2015: Insight Report.

2.4.5 Key Markets

The key inbound source markets' share of international arrivals for Southeast Asia (as seen in Figure 10) have, in large part, remained the same since 2010, as identified in the previous ATMS 2012-2015. The member states have depended on long-haul international arrivals for many years. However, with many changes in travel motivation and the ease of travel within the Southeast Asian region, the share of intra-ASEAN visitors remains strong and is a vital part of maintaining healthy tourism growth for the region.

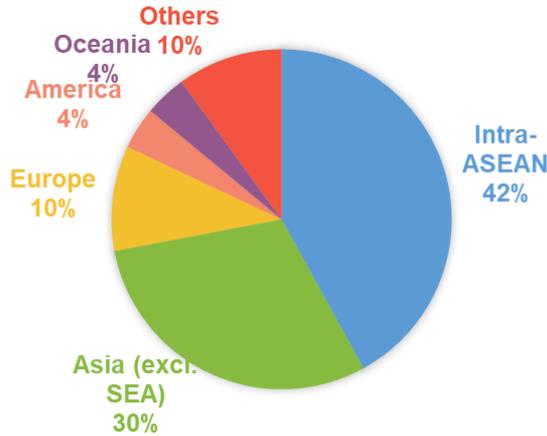


Figure 10: Share of International Visitor Arrivals to Southeast Asia (2015)

2.4.6 Performance Metrics

International Arrivals to Southeast Asia by Country of Residence

While international arrivals by origin show an increase in arrivals from China, many arrival figures have stayed relatively constant over the three-year period (Table 4).

2013		2014		2015	
Singapore	16,390,579	Singapore	17,074,533	China	18,596,288
China	12,651,154	China	13,059,472	Singapore	16,047,128
Malaysia	9,012,068	Malaysia	9,246,233	Malaysia	6,827,787
Indonesia	6,618,147	Indonesia	6,779,162	Thailand	6,502,843
Korea (ROK)	4,873,486	Thailand	6,013,384	Indonesia	6,446,579
Japan	4,724,344	Korea (ROK)	5,018,414	Korea (ROK)	5,838,540
Thailand	4,552,376	Australia	4,841,645	Japan	4,702,988
Australia	4,302,486	Japan	4,634,179	Australia	4,190,633
United States	3,178,256	United States	3,254,300	United States	3,382,318
India	2,945,696	India	3,070,969	India	3,307,942

ROK = Republic of Korea
Source: ASEAN Secretariat

Table 4: International Visitor Arrivals to Southeast Asia by Country of Residence

Purpose of Visit

The purpose of visit statistics show that leisure is the primary purpose of visit. Given the importance of member states visiting within the region, this should alert the region to consider increasing business as a motivation for travel.

%	2013		2014		2015	
	Leisure	Business	Leisure	Business	Leisure	Business
Brunei	38.5	21.2	39.0	21.8	40.7	19.1
Cambodia	94.81	4.408	94.5	4.57	90.03	6.27
Indonesia	...	...	...	...	...	...
Lao PDR	83.6	7	89.6	4.6	91.1	3.5
Malaysia	57.8	11.2	...	...	57.9	5
Myanmar	56	19	61	26	42	17
Philippines	59.58	9.86	56.04	8.99	...	...
Singapore	36	20	39	13	...	...
Thailand	87.54	8.09	87.22	8.39	87.79	8.07
Viet Nam	61.29	16.73	60.48	16.79	...	...
... = data is not available						
Source: PATAmPower. Data collected November 25, 2016; National Tourism Organizations						

Table 5: Purpose of Visit by Country

Average Length of Stay by ASEAN Country

The length of stay has remained consistent despite efforts to increase it (Table 6). Part of the reason for this lack of increase is that Asians typically stay for a shorter period in a destination, given the relatively short time required to travel. Unlike for travelers in long-haul markets, return visits are easier to accomplish.

Economy	2012	2013	2014	2015	
Brunei	2.3	2.5	2.3	2.2	Days
Cambodia	6.3	6.75	6.5	6.8	Days
Indonesia	7.7	7.65	7.66		Days
Lao PDR	4.6	5.2	4.9	4.75	Days
Malaysia	7	6.8	5.5	...	Nights
Myanmar	7	7	9	9	Nights
Philippines	9.61	9.56	10.63	...	Nights
Singapore	3.54	3.48	...	...	Days
Thailand	10.02	9.85	9.83	9.47	Days
Viet Nam	...	...	...	...	-
... = data is not available, Lao PDR = Lao People's Democratic Republic; Figures for Brunei are based only on hotels					
Source: PATAmPower. Data collected November 25, 2016; National Tourism Organizations					

Table 6: Average Length of Stay by Country

Forecasts of International Arrivals to Southeast Asia

The marketing strategy has been developed considering growth forecasts provided by the ATSP 2016-2025 (Table 7), which identify a growth rate of twice the world rate, in line with the larger Asia Pacific region. This should give all stakeholders optimism for the future, but caution about achieving the projections, if they are considered suitable by the member states.

The UNWTO World Tourism Barometer recorded 113.2 million international visitor arrivals in 2016 to Southeast Asia.

Region	Projected Growth in Arrivals (%)		Actual (millions)	Projections (millions)		
	2010-2020	2020-2030	2015	2020	2025	2030
World	3.8%	2.9%	1,186	1,360	1,569	1,809
Asia and the Pacific	5.7%	4.2%	279	355	436	535
Southeast Asia	5.8%	4.3%	105	123	152	187

Source: Adapted from ASEAN Tourism Strategic Plan 2016-2025; UNWTO. 2016 UNWTO Tourism Highlights

Table 7: Forecasts of International Arrivals to Southeast Asia in 2020, 2025 and 2030

2.4.7 Southeast Asia Brand

In 2016, ASEAN conducted an online survey to assess the effectiveness of ASEAN marketing. The major objectives of the survey, as illustrated in the Online Survey Research Final Report: The Assessment of the Effectiveness of the Brand 2016, which was developed by the ASEAN Tourism Marketing and Communications Working Group, were to gain a better understanding and awareness of: The Southeast Asia tourism brand; The logo and tagline among the travel trade globally; and The perception of the Southeast Asian region as a tourism destination among the international travel trade.

The current logo and tagline are shown in Figure 11.



Figure 11: Southeast Asia Logo and Tagline

The study gathered information on demographics, travel patterns, etc. from travel industry professionals, along with their level of brand awareness of Southeast Asia tourism. A total of 1,033 professionals from around the world responded via email and social media, to an online survey.

Based on this survey, and as expressed in the final report of the ASEAN Tourism Marketing and Communications Working Group, of the 1,033 respondents, only 40% (413) were familiar with the ASEAN logo and tagline. Of those who were familiar with the brand, 80% (330 of 1,033) considered the logo and tagline to represent their expectations of Southeast Asia.

Suggestions from the study for modifications to the logo and tagline included:

- The logo needs to be improved with the colors of the graphics better reflecting the diversity of Southeast Asia. The line graphics are too simple to be representative of the whole of Southeast Asia.
- There does not seem to be any connection between the logo and tagline in terms of visual impact or cultural indicators as a unique selling point.
- The tagline lacks the power to attract attention, unlike Amazing Thailand or Incredible India.

The most mentioned descriptors used in reference to Southeast Asia are shown in Figure 12.



Figure 12: Descriptors of Southeast Asia from Survey

Despite the implementation of the previous marketing strategy there should be concern that only 40% of the respondents, who were industry professionals, were familiar with the brand. Nevertheless, the online survey research final report concluded that, given 80% (330 of the 413) of respondents feel that the current logo and tagline satisfactorily represent ASEAN, there is no need to make any adjustments to the logo or tagline.

The NTOs recognize that attention needs to be paid to the fact that there is low recognition of the logo and tagline (60% unfamiliar), and efforts need to be focused on working with global partners to assist in better positioning the ASEAN brand.

In 2015-2016, ASEAN, led by Indonesia, conducted a consumer survey of 5,844 respondents. The majority of the respondents were from Europe and Asia Pacific. The survey results identified that the respondents' primary motivations were holiday related with over 68% of respondents identifying as repeat visitors to the region. Their primary sources of information about the region were from the internet (83%), friends (word-of-mouth) (34%), newspapers/magazines (8%) and others. Most bookings were made on the internet (62%) with over 30% of bookings through a travel agent. Only 18% of respondents were familiar with the Southeast Asia logo and tagline. Of the 18% who were familiar with the brand, 52% felt that the logo and tagline accurately represented their experience of the region.

The results from the survey provide valuable insights into the consumer market. With high percentages of respondents sourcing information and booking travel online, it provides direction for the marketing strategy. The low rate of familiarity with the brand clearly identifies a need to undertake strategies to increase awareness of the region and the Southeast Asia brand.

2.5 SWOT

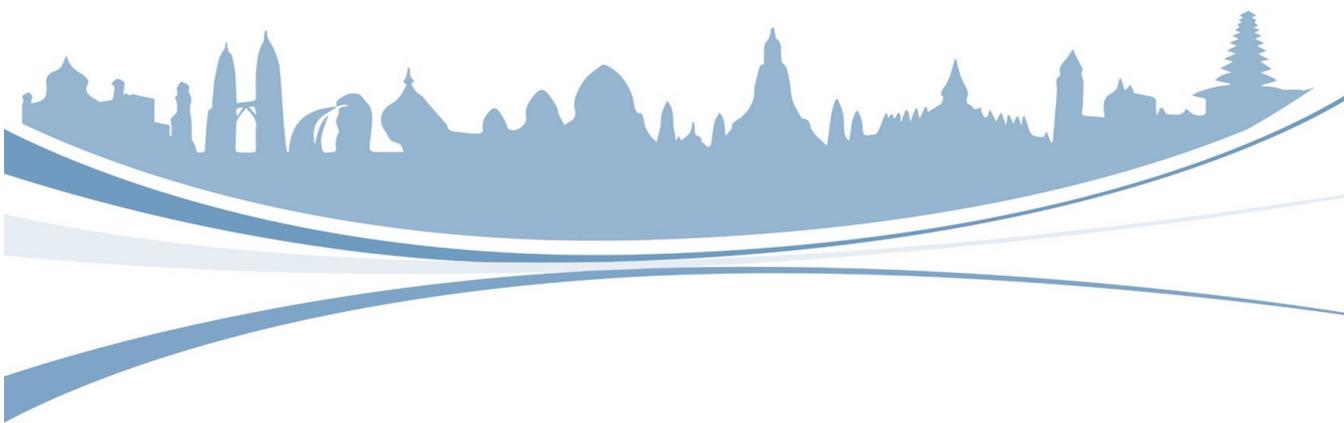
In Table 8, the strengths, weaknesses, opportunities and threats (SWOT) that face Southeast Asia as a tourism destination are explored. This SWOT statement was used to define the ATMS strategic directions and actions from a marketing perspective. It is important to note that there are a number of external and internal forces to be considered.

<p style="text-align: center;">Strengths</p> <p>Overall</p> <ul style="list-style-type: none"> Steady tourism growth year on year, with a positive outlook for the next few years. Intra-regional visa formalities for all travelers from Southeast Asia. A high resilience to major natural or made-man disruptions. Within ASEAN, there is high recognition of the importance of tourism as a development tool. Short flight times for intra-regional travel. Strong socio-economic development in the region spurring future regional travel demand. Generally good MICE facilities across parts of the region. <p>Marketing</p> <ul style="list-style-type: none"> Most of the destinations in Southeast Asia are well established and known destinations. Seasonality patterns are similar and are conducive to multi-country tour patterns. <p>Tourism Experience</p> <ul style="list-style-type: none"> Highly developed entertainment options: shopping, nightlife activities, food, and other cultural activities; unique cultural and natural destinations. Diverse cultural heritage with vibrant traditions. Highly desired cuisine and unique culinary experiences. Numerous UNESCO World Heritage Sites. Diversified tourism experiences from vibrant gateway cities to secondary destinations and beach front destinations. 	<p style="text-align: center;">Weaknesses</p> <p>Marketing</p> <ul style="list-style-type: none"> Low ASEAN brand recognition. Lack of a strong digital marketing strategy. Inadequate data collection mechanisms. Duplication of product offerings and marketing efforts between countries and regional groupings. No visible ROI mechanisms for validating marketing efforts. No apparent advocacy program for satisfied visitors. No highly visible brand ambassadors. Reputation management not yet seen as a relevant issue. <p>Tourism Experience</p> <ul style="list-style-type: none"> Visa formalities for some of the member countries present international travelers with a difficult travel experience given that the one visa policy has still not been implemented. Variable service quality standards and offerings. Large disparity between destinations' levels of tourism and quality (different levels of inbound and outbound market maturity). Poor infrastructure in some countries. Poor ICT in some countries. Some member countries still focus on visitor arrival numbers, with less attention to tourism yields and dispersion. Poor CIQ procedures especially at peak periods - airports at capacity. Poor intra-country transport options (taxis etc.) Lack of a service mindset across suppliers to the tourism sector. <p>Business Environment</p> <ul style="list-style-type: none"> Insufficient human resource development. Lack of cooperation with other government departments, i.e. immigration, transportation, infrastructure, etc. Some countries have cumbersome bureaucracies obtaining decisions from individual countries can be time-consuming and not conducive to agility in decision-making.
<p style="text-align: center;">Opportunities</p> <p>Marketing</p> <ul style="list-style-type: none"> Reinvigorating the "Feel the Warmth" tagline and logo to better reflect the uniqueness and quality of Southeast Asia. Capitalizing on the emerging markets (e.g. Central/East Europe). Greater interest in exotic destinations. <p>Tourism Connectivity and Infrastructure</p> <ul style="list-style-type: none"> Expansion of low-cost air carriers. Improved connectivity throughout Southeast Asia. Strong regional travel and development partner opportunities. Use of visa policy to stimulate source market entry at various ports. 	<p style="text-align: center;">Threats</p> <p>Overall</p> <ul style="list-style-type: none"> Safety and security issues. Political instability. Economic downturns. Possible pandemics with resultant negative travel advisories. Rising cost for long-haul travel. Currency fluctuations. Overcrowding and insufficient management of core attractions. <p>Marketing</p> <ul style="list-style-type: none"> Overcrowding and insufficient management of core attractions. Confusion of the many regional groupings with potential competition. Changing demographics and motivations for travel, such as shorter, more frequent vacations. Single source market dominance. Competition from other destinations/regional groupings in other parts of the world.
<p>UNESCO = United Nations Educational, Scientific and Cultural Organization, GMS = Greater Mekong Subregion, ASEAN = Association of the Southeast Asian Nations, ICT = information and communication technologies, ROI = return on investment, CIQ = China Inspection and Quarantine, MICE = meetings, incentives, conventions and exhibitions. Source: PATA Strategic Intelligence Centre; Experience Mekong GMS Tourism Marketing Strategy and Action Plans 2015-2020</p>	

Table 8: Strengths, Weaknesses, Opportunities and Threats for Southeast Asia as a Destination

PART 3

DEVELOPMENT OF THE ATMS



DEVELOPMENT OF THE ATMS

The ATMS 2017-2020 has been developed within the context of the ATSP 2016-2025. The ASEAN NTOs recognize that there are many stakeholders involved in marketing the Southeast Asian region, significant efforts and investments made by individual member states that, by definition, are focused on the countries themselves, and considerable efforts on the part of the private sector (airlines, hotels, tour operators, travel agencies etc.) which are concerned with promoting and positioning their experiences and products. The challenge of the ASEAN NTOs is to support these activities by increasing the overall awareness of Southeast Asia as a quality and unique destination, engaging the industry as part of the marketing effort, and reaching the consumer to build interest in the region and promote travel to more than one Southeast Asian country. This idea is expanded from the core task for ASEAN, which reflects the first phase of the travel journey, 'discover', as discussed in 2.1.3 of the Situation Analysis.

The ATMS 2017-2020 is built on the objective of providing an end-to-end experience that meets multiple traveler objectives and recognizes that travelers look for the seamless, unique and authentic experiences that only can be accessed in Southeast Asia.

Based on the contextual review and the Situation Analysis, a strategic framework has been developed to guide the overall development of ASEAN marketing activities (see Figure 13). The framework defines a vision of the future of ASEAN tourism and the strategic objectives required to meet that vision. It articulates three strategic directions to guide the implementation of the ATMS. Each of the strategic directions have strategic actions that create the appropriate context for the directions that need to be developed.

The three strategic directions reflect the way the strategy has been developed for implementation over three to four years. The NTOs recognize the variety of additional activities that could have been explored in the marketing strategy but, given the current resource situation, the approach taken is realistic and implementable. The digital focus of the marketing efforts will require resource allocations from the ASEAN NTOs fund in order to implement the digital marketing efforts.

The strategy is designed to take into account the reality of limited resources. The strategy is centered around the development of a range of partnerships, the crucial role of the marketing coordinator, the development of KPIs to measure the marketing effort, and ongoing monitoring. Given the scarcity of resources, the principle of partnerships and the need to ensure that the NTOs are an integral part of the marketing process, the marketing coordinator is key to the implementation process and will be responsible for ensuring that the key activities to support marketing occur. The coordinator, working with key stakeholders, will establish mutually-beneficial partnerships that help to responsibly promote and position the region. The NTOs are seen as part of the partnership supporting the regional marketing effort with much-needed data, promotion, technical support and advice. The NTOs recognize that without this support it is not possible to effectively market the region.

Following on from the ATSP 2016-2025, the NTOs have developed a framework for the ATMS 2017-2020, shown in Figure 13.

The marketing strategy recognizes the significant growth the tourism industry in Southeast Asia is experiencing and is projected to experience in the near future.

VISION

To continue to build recognition of Southeast Asia as a unique, competitive, sustainable and inclusive tourism destination.

STRATEGIC OBJECTIVES

- Raise awareness of the unique qualities of Southeast Asia and inspire travel.
- Develop an integrated, digitally-focused marketing action plan that provides an action framework for the ASEAN NTOs.
- Develop a strategic implementation process based on collective programs/mechanisms with key industry partnerships.
- Promote innovative regional visitor experiences that meet the development needs of the member countries.



Figure 13: ASEAN Tourism Marketing Strategy Framework

The guiding principles the marketing efforts will ensure are upheld in each activity are:

- Market responsible and sustainable tourism experiences consistent with the overall goals of the ATSP.
- Ensure that equitable development is highlighted in all marketing activities.
- Work in a transparent manner to allow all stakeholders to engage in the development and implementation phases.
- Recognize the power of tourism to encourage tourism development in secondary destinations.
- Adopt innovative solutions to marketing-related issues that recognize global forces and issues.

Through the overarching themes presented in Strategic Direction 2, ASEAN has the opportunity to highlight key experiences while making travelers aware of the cultural sensitivities of the unique cultures found throughout Southeast Asia. ASEAN's goals for marketing are to promote, educate, highlight, inspire, engage and encourage travel to Southeast Asia (Figure 14).



Figure 14: ASEAN's Core Goals for Marketing

To measure the success of the implementation of the strategy, the NTOs will work together to develop and adopt finer grained metrics, other than international arrivals to ASEAN, as an indication of the effectiveness of their marketing efforts and activities.

It is important to note that the NTOs recognize that ASEAN will continue piggybacking on the activities of the individual NTOs as previously adopted by the ATMS 2012-2015. The NTOs will continue to follow the concept of piggybacking through:

- Promoting the larger regional context while promoting their individual sites and attractions when appropriate.
- Working together to secure promotional opportunities for ASEAN and/or Southeast Asia, which may include trade fairs at which ASEAN and/or Southeast Asia collateral can be distributed.
- Encouraging multi-country travel, when appropriate.

PART 4

STRATEGIC DIRECTIONS AND ACTIONS



STRATEGIC DIRECTIONS AND ACTIONS

Crosscutting Theme: Development of Strategic Partnerships to Support the Implementation of the ATMS

In the spirit of partnership, increasingly seen as an effective way to implement a wide range of projects from infrastructure to human resource development and now marketing, the NTOs will establish strategic partnerships in a wide range of areas, for the strategic directions identified in the framework.

As with any destination a significant number of stakeholders directly brand and position Southeast Asia. Hotels, airlines, tour operators, travel agents and media organizations are all actively involved in marketing individual products and experiences or a country and, in some cases, the region. In some cases, the message may be supportive of the branding position that the ASEAN NTOs adopt while in other cases it may put forward different themes. The situation in Southeast Asia is far more complex than most other destination marketing approaches, given the fact that not only are there 10 countries but private-sector stakeholders from quite different destinations. Strong and strategic partnerships offer the only opportunity for the ASEAN NTOs to meet the challenge of establishing and promoting a strong regional brand. Many of these potential partners have long standing connections with key media and other influencers that add a dynamic to the overall marketing and the NTOs will need to support these partners.

There is significant expertise within tourism and the complimentary industries, and the challenge is for the ASEAN NTOs to obtain the cooperation and participation of their key stakeholders in order to access this expertise. This cooperation can take many forms, as shown in Figure 15, potentially centered around joint promotions, sharing expertise, experience development and, very importantly, research and data sharing. Most, but not all, of these possibilities require a willingness to share expertise and information rather than the exchange of money.



Figure 15: Examples of Public-Private Sector Marketing Oriented Partnerships

The NTOs recognize that the partnership approach requires a significant mindset change, where the NTOs, rather than having access to the often considerable national financial and human resources that individual member states allocate to marketing and promotion, must seek creative solutions based on a

shared vision of the promotion and development of responsible tourism within the region. This is very much in keeping with the growth of the sharing economy, where, rather than every stakeholder developing expertise in all dimensions of marketing, information is seamlessly shared.

Partnership Opportunities

There are a number of potential partners that can be leveraged to develop content, build relationships in the travel and tourism industry, provide training and development opportunities and much more. These partnerships are not based on financial contributions but recognize the value of the partnership to both parties. These types of partnerships require ongoing relationship building and attention in order to effectively use the resources available.

The NTOs, working with the ASEAN Secretariat and the ASEAN Tourism Marketing Coordinator, will identify strategic partners and work with them to develop mutually advantageous outcomes. There is a strong incentive for NTOs to work directly on the development and implementation of the marketing strategy. By assigning staff to particular tasks, individuals will benefit from experience they would not normally have, including opportunities to network and grow professionally while developing a regional view of their work within the NTO. The key success element will be the ability of the NTOs, working through the coordinator, to make the business case for the establishment of strategic partnerships. There are a number of actual and potential partnerships that the NTOs have identified, which are in various stages of development within the ASEAN region.

ASEAN-China Center, ASEAN-Korean Center, ASEAN-Japan Center and ASEAN Promotion Tourism Chapters (APCTs)

The various ASEAN centers and APCTs continue to provide valuable support and direction to the ASEAN region. They are involved in significant activities and the member states recognize the need to ensure alignment between the marketing directions established by ASEAN and the ongoing activities of these important partners.

International Tourism Organizations such as UNWTO, WTTC and PATA

UNWTO, WTTC and PATA are good examples of strategic partnership opportunities. The partnerships would not only be with the Associations themselves but with their members, who represent a diverse cross-section of expertise with vested interests in supporting the growth of the tourism industry in Southeast Asia. These leading organizations are in strong positions to support strategic intelligence, tourism insights, research, data analysis, and other initiatives tied to marketing.

Other Sub-Regional Tourism Coordinating Offices in Southeast Asia, e.g. MTCO, etc.

MTCO is a natural partner, already working on a range of sub regional development issues, in particular marketing and promotion. There is a need to establish formal channels between ASEAN and MTCO to ensure there is no overlap in their activities and that specific initiatives can be undertaken within an overall framework of understanding what is best for the region. The Experience Mekong Tourism Marketing Strategy 2015-2020 provides a number of initiatives for cooperation.

Similar cooperation may be sought in other sub-regional offices within the Southeast Asia region.

ASEANTA

ASEANTA is already a partner, given its region-wide mandate and significant key stakeholder membership within the region. There will be continued initiatives to ensure this partner remains an important stakeholder in promoting and positioning the region. The challenge is identifying the limited but strategic initiatives that will benefit all partners.

Airlines

Airlines are clearly major partners in promoting and positioning the destination. They have significant marketing budgets and media presence, which are key to achieving the objective of having visitors visit more than one country. The low-cost carriers have been very effective in providing access to secondary destinations at reasonable prices. Some airlines are already marketing Southeast Asia and ASEAN.

Bloggers and Other Digital Influencers

Partnerships with media content providers who directly communicate and engage with Southeast Asia's key markets, present targeted promotional opportunities that did not exist before. Bloggers and influencers are a key component of the overall marketing approach. Influencers in specific niches can be dynamic partners that co-create campaigns promoting Southeast Asia. These partners will help to inspire travel to the region and assist in developing and sharing experiences and stories about Southeast Asia. These partnerships require other strategic partnerships in order to make them holistic in their approach – hotels, restaurants, airlines. Influencer marketing opportunities do not need to be paid opportunities, especially when the right partnership is developed between the influencer and ASEAN.

Educational Institutes

Universities provide dynamic partnership opportunities, as many are looking for research collaborations with faculty and/or graduate students. Universities can be tapped as important sources of research, data gathering and training. Other advantages for educational institutions are outlined earlier in this strategy.

Media Groups

Clearly traditional media are still effective in reaching particular audiences and in particular the industry. Media groups are constantly looking for content and will work with destination groups in helping to position particular experiences. However, social media is becoming increasingly important in reaching certain audiences, especially in the awareness stage of making a buying decision.

Private Sector Organizations

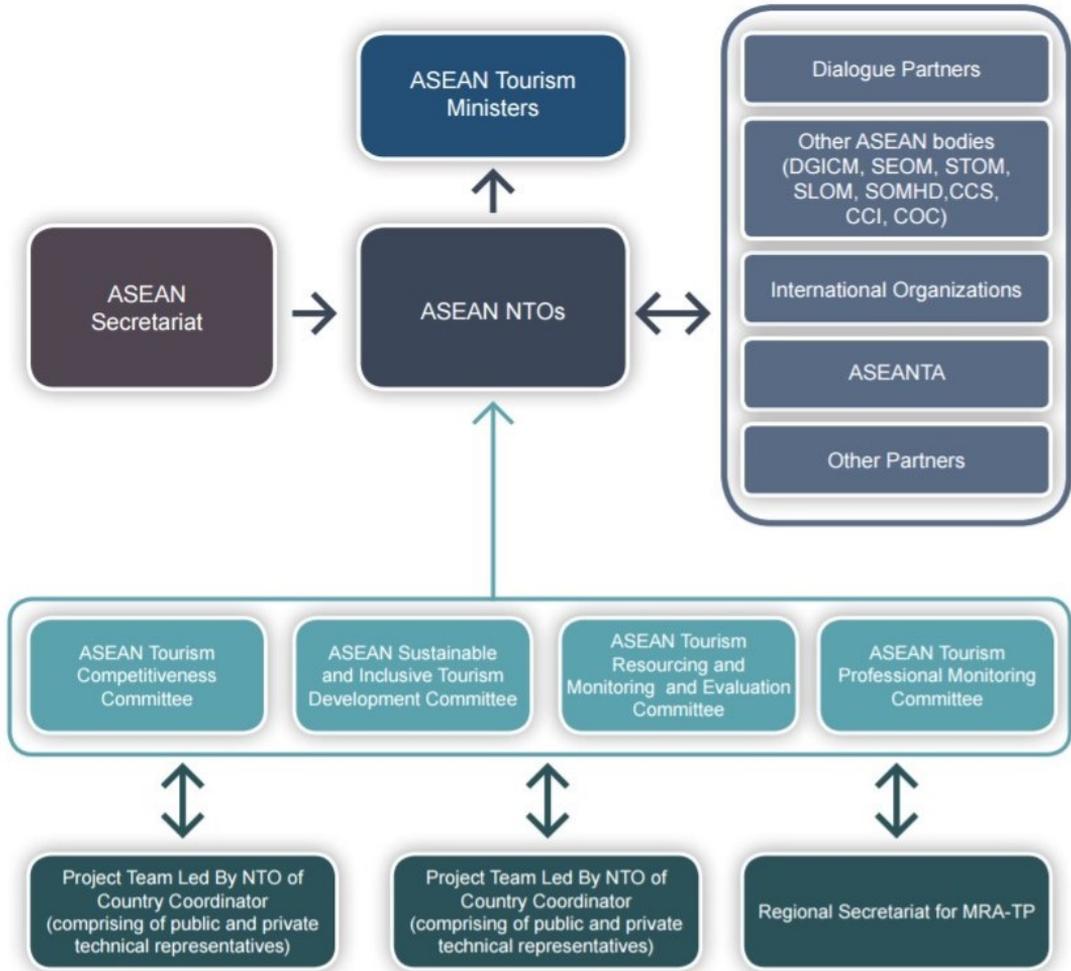
The current business environment has spurred a great interest in collaboration in organizations in many industries. Opportunities exist to work with some of the most data-driven and innovative organizations. The NTOs recognize that special attention will be necessary to cultivate these relationships. These private-sector organizations, as indicated in ATMS 2012-2015, include Intel, IBM, Microsoft, Cisco, Facebook, Google, TripAdvisor, and other technology and travel businesses. These partnerships will allow for access to information, data collection, and possible training opportunities. It is important to note that PATA has partnered with Microsoft and a great deal could be learned from their approach. The key to success in dealing with the private sector will be in making the right business case for a partnership arrangement. This may require the support of senior NTO officials.

Summary

The marketing strategy recognizes the need to work closely with partners and strategically allocate resources to support these partnerships. The dynamics of the partnerships will vary depending on the nature of the organization and what value-added benefits each brings to the partnership.

STRATEGIC DIRECTION 1: IMPLEMENT THE ASEAN MARKETING ORGANIZATIONAL STRUCTURE

There is a long tradition of the ASEAN NTOs working effectively together on a number of initiatives. Based on this understanding, the ATSP 2016-2025 adopts a structure for implementing the strategic plan, as shown in Figure 16. Within that structure the Marketing and Communication Working Group, the Products Development Working Group, and the Quality Tourism Working Group, from the previous strategic plan, are merged into the new ASEAN Tourism Competitiveness Committee (ATCC).



Source: ASEAN Tourism Strategic Plan 2016-2025
Figure 16: ATSP 2016-2025 Implementation Arrangements

These marketing related changes have been developed in response to a marketing landscape that is dynamic and requires far more resources than was the case before. The activities that make up the marketing strategy are shown in Figure 17. Clearly, some of these tasks require specialized knowledge, expertise and access to information and technology. The strategy is based on the recognition that the coordinator has a set of carefully defined responsibilities and that a marketing agency will continue to be engaged to ensure a professional and timely set of market research, experience development, branding advice, PR, communication, distribution and monitoring activities.



Figure 17: ASEAN Tourism Marketing Activities

Strategic Direction 1 has four strategic actions, as shown in Figure 18.

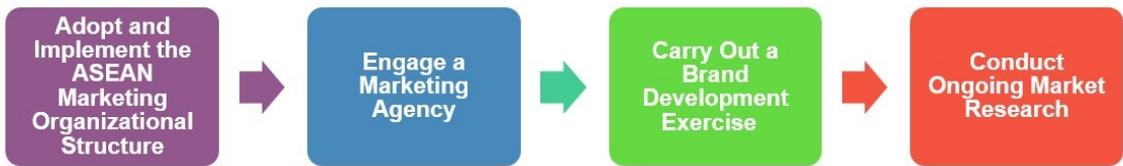


Figure 18: Strategic Direction 1 Strategic Actions

Strategic Action 1.1 Adopt and Implement the ASEAN Marketing Organizational Structure

It is recognized that the ATCC is a work in progress and will require monitoring and modification in order to ensure that the vehicle functions effectively within the ASEAN environment. This is true of any new strategy and it is assumed that the NTOs will assess the structure and effectiveness of the ATCC at least once a year. A specific entity, provisionally called the ASEAN Tourism Marketing Partnership (ATMP) Working Group, will be established to deal with marketing issues and will operate under the ATCC mandate (Figure 19). This concept will provide a focus and direction to marketing specific activities and be structured and managed as a true partnership in order to ensure that the private sector, as well as other stakeholders, collaborate effectively in ensuring an efficient and professional set of ASEAN marketing activities.

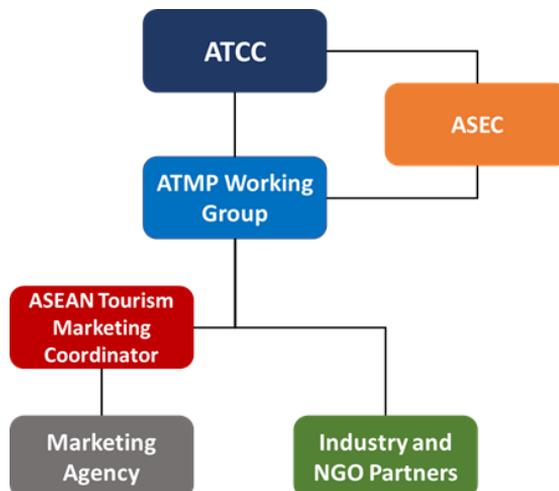


Figure 19: Organizational Structure for ASEAN Tourism Marketing

Given that the ATMP is a partnership initiative, the role of the ASEAN Tourism Marketing Coordinator is to ensure that the various stakeholders work effectively together and that initiatives decided by the ATMP are implemented. The ASEAN Tourism Marketing Coordinator is responsible for communicating with the relevant stakeholders and, most importantly, the NTOs, while at the same time acting as the voice of ASEAN tourism for marketing purposes, to ensure that the right message is being distributed to the right people. In addition, the ASEAN Tourism Marketing Coordinator is responsible for working closely with any consultants and organizations contracted.

The specific activities of the ASEAN Tourism Marketing Coordinator include:

- Monitoring the ATMP's success based on the KPIs determined by the NTOs, in partnership with a marketing agency.
- Championing the need for participation from the NTOs to support the ASEAN marketing efforts.
- Mobilizing resources.
- Developing strong relationships with key partners.
- Establishing new opportunities for innovative marketing.
- Effectively managing the budget.
- Reporting directly to the Chairman of ATMP and ensuring a timely and efficient flow of information among ATMP members.

Other responsibilities of the ASEAN Tourism Marketing Coordinator include acting as a liaison for ASEAN NTOs engaging marketing agencies to performing the following tasks:

- Connect with influential media outlets and journalists to place stories about ASEAN tourism news and other initiatives.
- Create content regularly to grow ASEAN tourism awareness (press releases, corporate announcements, and creative content).
- Collaborate with prominent members of the ATMP, to craft and pitch press releases and thought leadership columns.
- Establish the core messages with the ATMP and marketing agency.
- Develop and manage a core media relations program, including the establishment of media contact lists, regular contact with key sector business and regional journalists, preparation and distribution of regular media updates and input into positive media coverage.
- Work effectively within an international environment, incorporating many cultures.
- Coordinate with the ASEAN Tourism Market Research Group led by Indonesia, to obtain an analysis of visitor research, current market conditions and competitor information.
- Develop and implement marketing plans and projects.
- Expand and develop marketing platforms.
- Manage the productivity of the marketing plans and projects.
- Monitor, review and report on all marketing activity and results.
- Deliver marketing activity within agreed budgets.
- Monitor industry best practice.

Strategic Action 1.1.1 Operationalize the Marketing Organizational Structure

The ASEAN Tourism Marketing Partnership (ATMP) structure is based on the coordinator providing leadership and coordination support (see Figure 17). The nature of the membership of the partnership is discussed in Strategic Action 1.1.2. The ATMP will be responsible to the ATCC and, through the ASEAN Tourism Marketing Coordinator, required to provide timely reports to the NTOs as well as the Secretariat. The NTOs will appoint the chair of the ATMP. The actual coordination work will be carried out by the ASEAN Tourism Marketing Coordinator.

Strategic Action 1.1.2 Establish the Membership of the ATMP Working Group

This ATMP Working Group will have two chambers, the first made up of representatives from the NTOs who will meet on a regular basis and the second representing the wider group made up of a number of stakeholders and experts, as shown in Figure 20. Expert membership of the ATMP will be by invitation, by consensus of the NTOs through the ATCC. The membership of the second chamber will be determined on a project by project basis, and continued membership will be based on ASEAN NTOs' evaluation and the members' contribution to ATMP work.

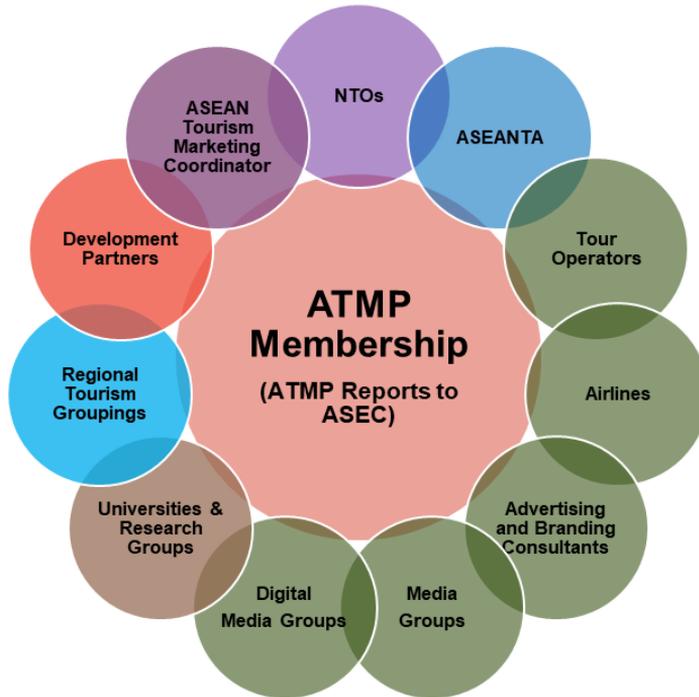


Figure 20: Potential Members of ATMP

Strategic Action 1.1.3 Define the Roles of the ATMP Members

The ATMP members will be selected for their expertise and commitment to contributing to the ASEAN marketing effort. NTOs will propose individuals for inclusion in the ATMP based on their ability to contribute to the substantive discussions and development process. Some of the experts will be invited to participate based on their knowledge and skills while others will not only bring their knowledge and skills but the platforms from which they operate. It is important to note that development partners must be seen as key stakeholders given the support they can provide to meeting their own development goals. Development partners refers to aid agencies who are an important part of the overall development process in many Southeast Asian countries. It can also be organizations such as the development banks and in some cases NGOs such as the UNWTO. One could argue that the ASEAN+ countries could be seen as development partners.

Strategic Action 1.1.4 Develop the Roles and Responsibilities of the ATMP

The implementation of the strategy will require oversight by the ATCC with the NTOs and their representatives, the coordinator and designated partners working effectively together. Each member country has a marketing group within their organization and most have the assistance of marketing and branding companies. There is no intention to replicate these models from a staffing perspective.

Strategic Action 1.2 Engage a Marketing Agency

The NTOs will continue to engage a marketing agency to provide the necessary expertise required to become more competitive in the growing travel industry. There are a number of benefits in continuing to engage a marketing agency as they have the necessary marketing experience, skills, outside perspective, and built-in relationships with publishers and other key digital partners.

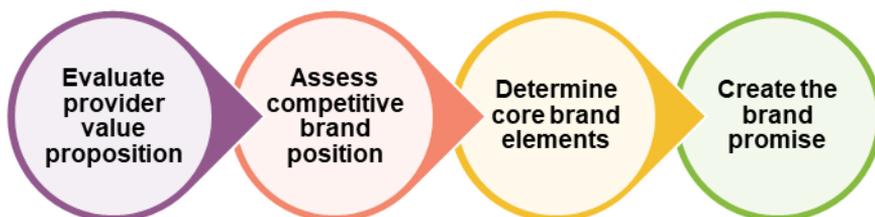
In order for the marketing agency to be successful in their approach, the ASEAN Tourism Marketing Coordinator will work closely with the agency to ensure it has the necessary information and tools to fulfill its role. The marketing agency will be engaged in the following activities:

- Integrated marketing activities.
- Branding exercise.
- Public relations – at least one press release a month – one for consumers and one for trade - to be distributed to key media and partners.
- Social media development and implementation.
- Social media in various places require language and content adaptation. ASEAN will continue their efforts with the Chinese social media channels Weibo and WeChat.
- A database of key influencers that ASEAN could partner with will be built along with the ATMP marketing coordinator.
- Website content development, management and optimization as well as working with the ASEAN Secretariat in revamping the ASEAN Tourism website.
- Blog development and content creation.
- Newsletter development.
- Email database development.
- Assisting in the development of KPIs.

Strategic Action 1.3 Carry Out a Brand Development Exercise

The NTOs will engage in a branding exercise to ensure that the brand – brand elements and brand promise – work for the region. The NTOs recognize that a brand is more than a logo and tagline. While these components are used to relay the qualities of the brand, destination branding needs to include the key elements that make Southeast Asia authentic, unique, competitive and a must-see destination. This exercise will be facilitated with the help of the marketing agency.

The NTOs recognize that developing a brand at a regional level is complex given the intricacy of the decision-making process. The brand promise will be very much based on a regional set of experiences, given that the objective of any regional marketing strategy must be to encourage people to visit at least two countries within the region. The NTOs will continue to develop the brand following the process described in Figure 21.



Source: Adapted from ATMS 2012-2015

Figure 21: Recommended Brand Development Process

Strategic Action 1.3.1 Develop Brand Guidelines

Once the branding exercise has been completed, brand elements will be compiled into a brand guideline document that will allow for a consistent and streamlined branding approach across all marketing channels in all markets. The guidelines will include such details as the specified color for the logo and the placement and proper use of the logo and tagline. This would be an exercise for a branding firm to carry out, given that they have the necessary expertise. The NTOs recognize that this will occur over a period of time.

Strategic Action 1.4 Conduct Ongoing Marketing Research

The ATSP 2016-2025 recognizes the need for an enhanced research framework. The activities, as outlined in the ATSP 2016-2025, include: evaluation of ASEAN travel patterns and multiple-country trip related questions in data instruments; development of statistical templates for new products to be developed and marketed; updating of the ASEAN tourism statistics to reflect the dataset; conduct of training on the use of templates; updating/monitoring of tourism data; data gathering and analysis of tourism trends and consumer behavior.

The NTOs will work with the lead country, Indonesia, to gain access to the vital information that will help lead the marketing efforts. ATMP members will be consulted on a regular basis to provide input and direction in data gathering and analysis to support the ongoing development of the marketing strategy.

Strategic Direction 1: Short-Term Activities and Responsible Parties

Specific short-term activities and the responsible parties are identified in Table 9.

Activity	Responsible
Establish the ATMP	NTOs
Establish the responsibilities of the marketing coordinator	ATCC
NTOs propose members of the ATMP	NTOs
ATMP initial membership proposes a chairman to the ATCC	ATMP
Proposal call and hiring of a marketing agency is released	ATMP and ASEAN Tourism Marketing Coordinator
Proposal call and selection of partners from the public and private sector to participate in the marketing exercise	ATMP and ASEAN Tourism Marketing Coordinator
Initial ATMP membership is approved by the ATCC	ATCC
ATMP develops a work plan	ATMP
Establish a reasonable timeline for branding exercise and brand guidelines	ATMP and ASEAN Tourism Marketing Coordinator
Engage in the branding exercise	Marketing agency, ATMP, ASEAN Tourism Marketing Coordinator
Develop brand guidelines	Marketing agency, ATMP, ASEAN Tourism Marketing Coordinator
Ongoing marketing research	Indonesia as lead country coordinator of Market Research Group

Table 9: Strategic Direction 1 Short-Term Activities and Responsible Parties

STRATEGIC DIRECTION 2: DEVELOP AND MARKET THE REGIONAL BRAND AND EXPERIENCES

The ATMS 2017-2020 recognizes that the member states themselves have the resources and mandate to develop specific visitor experiences. The role of the ASEAN NTOs is to assess the regional significance of national experiences and bring together and market these experiences in ways that encourage multi-country visitation. The NTOs also recognize the significance of identifying markets and themes that allow for representation of each Member State, and ASEAN, as one destination.

In order to support the discovery process (as identified in the traveler journey) the NTOs will adopt the process outlined in Figure 22.

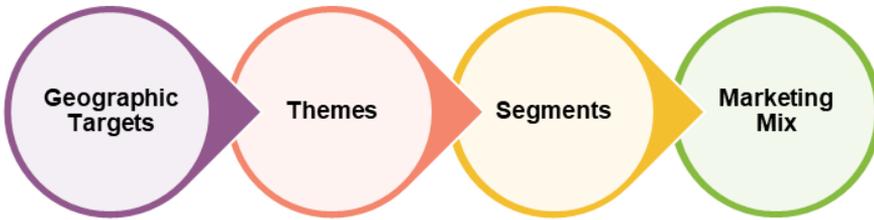


Figure 22: Process for Developing Regional Marketing Approach

Geographic segmentation is an important first step in the overall marketing approach, which is further fine-tuned through the process identified in Figure 22. The interest-based segments, which can be explored in each geographic segment, allow for defined storylines to reach specific audiences.

Strategic Direction 2 has four strategic actions as shown in Figure 23.

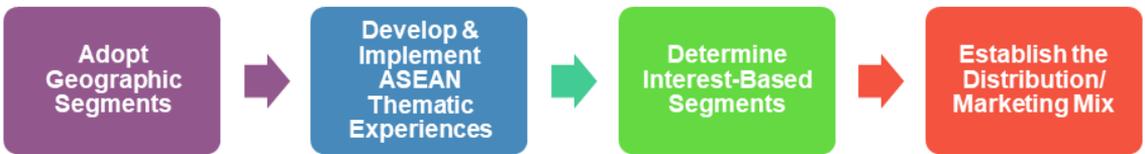


Figure 23: Strategic Direction 2 Strategic Actions

Given the climate variation in the region, with high and low seasons, the member states recognize the need to position the region as a destination with a wide range of opportunities to be enjoyed throughout the year.

Strategic Action 2.1 Adopt Geographic Segments

The NTOs, based on their research and the regional tourism goals, have identified the following geographic areas to be the focus of the marketing activities of the ATMS 2017-2020. Working with marketing agencies the NTOs will focus on particular geographic areas each year, in cooperation with various ASEAN Centers and other partners, as shown in Figure 24.

Recognizing the significance of Intra-ASEAN travel, the NTOs will establish a “ASEAN-First Campaign” to act as a platform for ASEAN Member States to work together on marketing for Intra-ASEAN travel. Given the insight that each Member State has regarding the travel behaviors of travelers from their country, part of the planning process for the “ASEAN First Campaign” will be to organize special meetings where NTOs will exchange information and data to best address their position when marketing Intra-ASEAN travel.



Figure 24: ASEAN Target Geographic Segments

Strategic Action 2.2 Develop and Implement Regional Thematic Experiences

Based on the global forces and trends explored in the Situation Analysis and specific market research, the member states have adopted four overarching themes to be the focus throughout this strategy: culinary, wellness, culture and heritage, and nature and adventure, as illustrated in Figure 25.



Figure 25: Overarching Themes

The overarching themes are in alignment with the ongoing efforts of ASEAN product development set forth in 1.2.1 of ATSP 2016-2025.

Culinary

Food is a dynamic and creative segment of tourism that motivates many groups of travelers. Food tourism allows travelers to engage with the local community, indulge in the local culture, and develop new skills related to food preparation. The increase in food travel has been motivated by food-focused media and social media, the farm-to-table movement, and highly visible celebrity chefs that celebrate a variety of ethnic cuisines. The food industry is about more than just eating, it includes authentic experiences and learning about food culture. Food plays an important role for any interest-based group. Almost every traveler eats out at least once during their trip. While not every aspect of a traveler’s journey concerns food, every traveler does participate in some form of food tourism.

Wellness

Wellness travel emphasizes health-focused services and programs, which include nutritious meals, spa treatments, fitness and adventure activities. It focuses on the body, mind and soul. The Global Wellness Institute indicates that wellness tourism is one of the fastest developing sectors of the travel market. Wellness tourism can lure travelers of any age and budget. The increased interest in a wellness getaway can be attributed to a faster paced lifestyle and increased interest and concern for health. In the United States, a 2015 National Institute of Health survey revealed that yoga participation had nearly doubled to 21 million, with 9.5% of American adults participating. The potential diversification of tourism products, given the extensive number of options that already exist, is primarily a matter of repackaging for wellness travelers.

The global wellness economy was \$3.7 trillion in 2015, which includes wellness tourism (\$563 billion), fitness and mind-body (\$542 billion), healthy eating, nutrition and weight loss (\$648 billion) etc. From 2013 to 2015, global wellness tourism revenue grew from \$494.1 billion to \$563.2 billion. World travelers made 691 million wellness trips in 2015, 104.4 million more than in 2013. It has been reported that a wellness tourist spends 130% more than an average tourist.

Culture & Heritage

Cultural tourism is concerned with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of the people, their art, architecture, religion(s), performing arts, visual arts, festivals, heritage sites, fashion, theaters and other elements that shape their way of life. Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres. It can also include tourism in rural areas showcasing the traditions of indigenous cultural communities (i.e. festivals and rituals), and their values and lifestyles. Heritage tourism, which can be seen as a subset of the larger field of cultural tourism, is a branch of tourism oriented towards understanding and appreciating the heritage of a destination. It involves visiting historical or industrial sites that may include old canals, railways, battlegrounds, etc. The overall purpose is to gain an appreciation of the past. Heritage tourism can also apply to historical events that are dramatized to make them more entertaining such as a historical tour of a town or city. Increasingly, heritage tourism is concerned not only with the tangible elements of the past but with the intangible dimensions of a culture.

Nature & Adventure

Nature-based tourism covers a wide range of possibilities from visitors who are motivated to have a casual nature-based experience (e.g. bird watching, hiking, fishing or beachcombing) to those who have a strong interest in understanding ecosystems and their preservation, often defined as ecotourism. The International Ecotourism Society defines ecotourism as "*responsible travel to natural areas that conserves the environment and improves the well-being of local people*". The Society states that ecotourism is about "*uniting conservation, communities, and sustainable travel*". A complimentary form of experience is adventure travel which involves exploration or travel to remote, exotic and possibly hostile areas. It gains much of its excitement by allowing its participants to step outside their comfort zone and may include activities such as mountaineering, trekking, bungee jumping, mountain biking, rafting or rock climbing.

Strategic Action 2.3 Determine the Interest-Based Segments

Recognizing the need to further focus its marketing efforts, the NTOs, working with the marketing agency, will identify specific interest-based segments to be the focus of awareness raising and engagement. There are many ways to define interest-based segments and the marketing agency may adopt a different formulation of these interests. For the purposes of this strategy the framework presented in Table 10 is recommended (table found on the following page).

Interest-Based Market Segments	Description and Motivation for Travel
Connected Explorers	<ul style="list-style-type: none"> • Look for new experiences • Research, books, and share travel experiences through new online technologies • Open and interested in diverse cultures and lifestyles. • Travel as a way to expand their horizons
Bold Mature Couples	<ul style="list-style-type: none"> • Want to maintain a connection to the world • Look to interact with new people and maintain their vitality • Consume traditional forms of travel related media • Want to feel sensible/responsible on vacation
Family Bond Builders	<ul style="list-style-type: none"> • Families with children under the age of 18 • Seek a playful vacation with activities such as theme parks • Want to make memories as a family and strengthen the bond • Consume more traditional media about travel than social media
Youthful Socializers	<ul style="list-style-type: none"> • Desire to travel driven by interest in socializing • Travel with close friends • Share travel experiences via social networks • Are extraverts with high energy • Mostly travel on a limited budget • Consume information from social media
Knowledge Seekers	<ul style="list-style-type: none"> • Are inclined to learn about the place • Look to expand knowledge • Are driven by a desire to explore culture, history, architecture and natural landmarks • Are highly connected with travel media through traditional and digital channels
Pampered Vacationers	<ul style="list-style-type: none"> • Are oriented to being pampered • Prefer the resort lifestyle • Are attracted to beach, water and sun destinations • Travel primarily during winter • See vacations as a time to relax and re-energize

Source: TAG

Table 10: Interest-Based Market Segments

Strategic Action 2.4 Establish the Distribution/Marketing Mix

In the extensive array of potential distribution channels, traditional and digital, each presents a specific purpose, opportunity, market and, most specifically, cost effectiveness for the purposes of promoting Southeast Asia. ASEAN will build a better understanding of the mix of distribution channels, and how they tie into the marketing activities of the individual countries and partners. There will be instances where certain channels will be ideal for specific campaigns and tasks based on markets and timing. This will influence the development of campaigns and should be considered whenever messaging is developed.

Some digital channels to be highly considered as part of the marketing mix are blogs, social media (a variety of social media sites will be required to reach certain geographic targets), ASEAN website, and mobile technology. These digital channels will be further highlighted through traditional efforts such as public relations, influencer outreach, program sponsorship, forums and events, newsletters, road shows and trade fairs, research papers etc. The marketing agency in partnership with the ASEAN Tourism Marketing Coordinator will determine the best approach to developing the marketing mix based on the geographic targets, overarching themes and the interest-based segments.

Strategic Direction 2: Short-Term Activities and Responsible Parties

Specific short-term activities and the responsible parties are identified in Table 11.

Activity	Responsible
Confirm the themes to be explored over the duration of the strategy	ATMP and ASEAN Tourism Marketing Coordinator
Develop a timeline that outlines the duration and timing of the various campaigns	Marketing firm, ATMP and ASEAN Tourism Marketing Coordinator
Confirm marketing approach with marketing agency	Marketing firm, ATMP and ASEAN Tourism Marketing Coordinator
Identify key partners that can assist with the marketing approach	Marketing firm, ATMP and ASEAN Tourism Marketing Coordinator

Table 11: Strategic Direction 2 Short-Term Activities and Responsible Parties

STRATEGIC DIRECTION 3: DEVELOP AND ADOPT A MONITORING FRAMEWORK

The importance of ongoing monitoring is recognized by the NTOs as essential in helping to refine and reposition the marketing strategy as well as evaluating the impact of the regional marketing initiatives. The monitoring and reporting will be transparent and based on factors that can be reasonably dealt with, given budgetary and human resource constraints.

Strategic Direction 3 has three strategic actions as shown in Figure 26.



Figure 26: Strategic Direction 3 Strategic Actions

Strategic Action 3.1 Develop Regional Performance Metrics/KPIs

The NTOs, along with their partners, will agree on performance metrics/KPIs. To accomplish this the NTOs will evaluate the policy and development areas that they feel are most important and, based on widespread stakeholder consultation, determine the best metrics/KPIs. This information will be used by stakeholders to assess success as well as justify the ongoing participation and investment of stakeholders. Precise analysis and reporting is important to gaining the support of development partners.

While there is universal agreement that success in tourism cannot be realistically assessed only by examining international arrival numbers, this is often the only statistic or type of data available at a national, or certainly regional, level. If statistical data is to be used as a development tool, the NTOs require finer grained information to be taken into account in assessing impact and success.

The collection of more robust and meaningful performance data will require political will, as well as creativity in developing the necessary protocols and processes. There is also the challenge of separating the impact of the marketing efforts of the member states from those that are regional in nature. These are methodological issues that will be addressed through expert advice.

A very important part of the overall marketing strategy is to understand how the Southeast Asia brand compares to other regional groupings. The NTOs will engage an organization or group to do an audit of other regional groupings' marketing efforts and evaluate ASEAN or Southeast Asia's brand success against those. It will provide baseline data that will be used for evaluation. Baseline data needs to be collected in order to evaluate a number of KPIs. This is a key activity that could be assigned to a university or public research group.

Given the current state of regional data gathering and analysis, agreeing on metrics other than international arrivals and tourism spend will require time and significant discussion. It is recognized that this will, in part, be a technical exercise and will, in part, be politically driven. The suggested metrics that could measure the impact of marketing on selected regional development objectives are:

- Higher levels of recognition of Southeast Asia as a regional tourism destination.
- Increased participation of the private sector in the regional marketing effort.
- Increased levels of tourism activity in underdeveloped areas.
- Increased levels of appreciation of the role of tourism as a tool for development by public officials.

A key indicator that the region is being recognized by consumers/travelers would be data that measures travel to more than one country. It is recognized that financial resources will be required in order to work with organizations that provide the kind of data that accurately reflects the impact of the region-wide marketing efforts. An agreement could be made with an organization collecting regional data that would enable ASEAN to gather this data on a yearly basis. The data from 2016 would be used as the baseline data.

The development of marketing activity specific KPIs will occur over a period of time. Potential KPIs are identified in Table 12.

Potential KPIs	Examples of Action
Number of Press Clipping (Assessing the number of press clippings from a campaign can be a way of assessing the impact of a campaign or press release).	Percentage increase of the number of press clippings by 2018.
Amount of Website Traffic (The number of interested travelers or trade partners that access the website within minutes of being exposed to either a paid or earned placement).	Percentage increase of website traffic every quarter.
Marketing Email Database	Percentage increase in the new email addresses every quarter.
Number of Fans and Followers on Social Media Networks	Percentage increase every quarter.
Comments (Two-way conversation - comments are a way to keep the conversation going).	Percentage increase of comments every quarter.
Likes and Shares (What the audience likes is a good indication of whether your content is attractive to them).	Percentage increase of likes and shares every quarter.
Mentions (The number of times people talk about ASEAN or Southeast Asia on social media contributes to the overall effort of digital marketing and public relations).	Percentage increase of mentions every quarter.

Table 12: Potential Marketing Activity KPIs

Strategic Action 3.2 Develop a Baseline Information System

Based on the nature of the KPIs identified by the NTOs working with their marketing agency, the NTOs will develop a series of baselines for each of the KPIs. This will require working with partners to develop an information base that will allow for an assessment of the performance of the NTOs' marketing efforts.

Strategic Action 3.3 Design an ASEAN Regional Monitoring Process

As with other dimensions of the Strategy, the monitoring process will be a partnership effort for which the ASEAN Tourism Marketing Coordinator will be responsible. This task could be carried out by educational or research institutes who are members of ATMP and are equipped with the necessary skills and knowledge and a vested interest in collecting and reporting on success in implementing the ATMS 2017-2020. The coordinating group will be responsible for the identification of indicator(s), identifying the relevant data sources and ensuring on a yearly basis that a report is produced and made available to the NTOs and the industry about its success in meeting its strategic objectives.

Strategic Direction 3: Short-Term Activities and Responsible Parties

Specific short-term activities and the responsible parties are identified in Table 13.

Activity	Responsible
Marketing agency and ATMP will work together to develop the specific tourism marketing KPIs	Marketing agency, ASEAN Tourism Marketing Coordinator, and ATMP
Establish the baseline data based on the identified KPIs	ASEAN Tourism Marketing Coordinator and Marketing Firm
Identify indicators and data gathering process early in 2018	ATMP and ASEAN Tourism Marketing Coordinator
Using the regional network, the data gathering process will occur on a yearly basis	ATMP and ASEAN Tourism Marketing Coordinator

Table 13: Strategic Direction 3 Short-Term Activities and Responsible Parties

PART 5

IMPLEMENTING THE STRATEGY



IMPLEMENTING THE STRATEGY

The ATMS 2017-2020 draws on the momentum of the previous strategy, recognizing that activities can be expanded and new opportunities explored. The member states have carefully considered past activity, present conditions and future trends in the situation analysis.

The development of the Strategic Directions has been influenced by changing trends within the marketing and tourism industry, along with the needs and objectives of tourism for Southeast Asia. The three Strategic Directions have been developed in light of budget and human resource constraints. Realistic action plans that allow for greater market penetration and increased visibility and desirability of the region as one tourism destination have been developed. The member states recognize that they can expand their marketing reach with increased resource allocation and effective partnership building. Efforts to increase the resource base are recognized as an important priority.

The key ideas that form the basis of the implementation of the plan are the necessity of the development of partnerships, the crucial role of the ASEAN Tourism Marketing Coordinator and the need for ongoing assessment which will require the development of KPIs to measure the marketing effort.

The strategy is based on the reality that the marketing landscape changes rapidly, and the evolution and introduction of new platforms dictates an ongoing assessment of the type of content and messaging that is required. There has been careful consideration of the overall implications of this reality while developing the ATMS 2017-2020.

Timeline

The time period of the marketing strategy is limited and the timeline (Table 14) identifies a realistic set of actions that can occur in that time. It is recognized that new priorities may develop which may affect these activities.

Activities Timeline		2017		2018		2019		2020		Responsible Stakeholders
		Q1-2	Q3-4	Q1-2	Q3-4	Q1-2	Q3-4	Q1-2	Q3-4	
Crosscutting Theme: Partnerships										
Develop list of key potential partners for ASEAN										
Determine partnership outreach approach based on potential partner										
Explore partnerships opportunities										
Strategic Direction 1 – DEVELOP THE ASEAN MARKETING ORGANIZATIONAL STRUCTURE										
Identify key members of the ATMP										
Establish roles and responsibilities of ASEAN Tourism Marketing Coordinator position										
Develop relationship with marketing agency										
Strategic Direction 2 – DEVELOP REGIONAL EXPERIENCES										
Campaign planning and development										
Culinary										
Wellness										
Culture and Heritage										
Nature and Adventure										
Revamp ASEAN Tourism website (www.aseantourism.travel)										
Strategic Direction 3 – DEVELOP A MONITORING FRAMEWORK										
Identify key areas to be measured based on available information										
With partners, determine KPIs based on marketing activities and direction										
Establish the baseline information system based on the KPIs										
Follow steps in SA 5.2 to develop the regional monitoring process										
Next Steps										
Develop a successor of ATMS 2017-2020										
<p>Note: The darker the color shading indicates the importance of that activity at that time. A lighter color shading signifies the need for attention however, not the highest level of importance. The shading corresponds to the specific timeframe based on each year, broken down into two parts – Quarters 1 and 2, and Quarters 3 and 4.</p>										

Table 14: Timeline of Marketing Activities

FUTURE DIRECTIONS

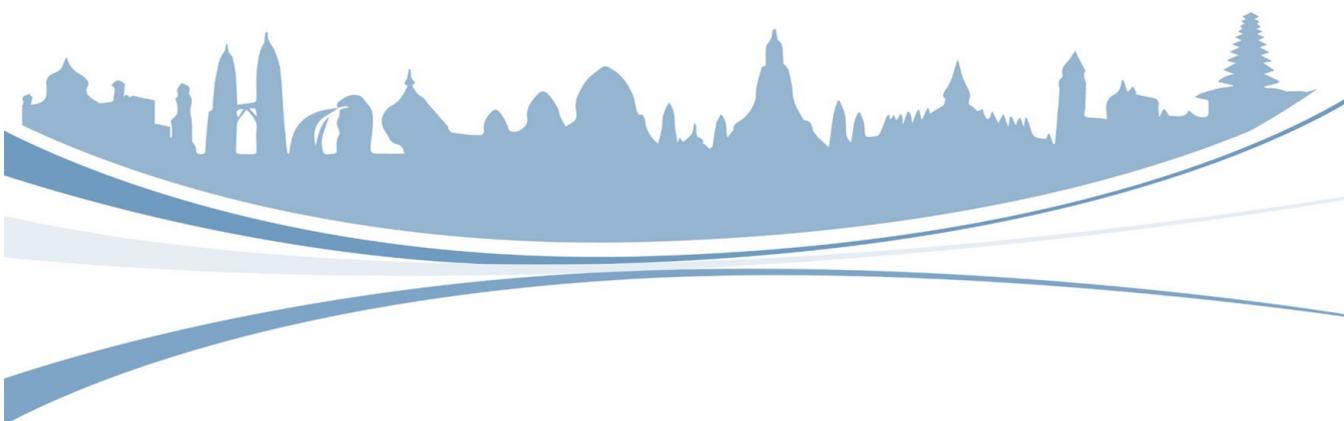
This marketing strategy developed by the ASEAN NTOs is designed to allow the member states to work effectively together to meet overall regional tourism goals and to better position the region as a quality destination offering unique and authentic experiences. The NTOs will strive to ensure that their marketing efforts will responsibly help the region to benefit from tourism development.

Going into the future the ASEAN NTOs will have the following objectives:

- Ensure that the overall marketing efforts take into consideration an integrated approach (tourism, economic development, attracting human resources, investment, etc).
- Showcase Southeast Asia as a quality tourism destination and committed to responsible, sustainable, inclusive and balanced tourism development
- Encourage travel to less developed destinations within the region.
- Help to introduce a sense of pride and commitment to the region.

The NTOs recognize that the strategy is a living document and will be updated on a consistent basis to reflect changing forces as well as priorities.

ANNEXES



TERMS OF REFERENCE FOR ESTABLISHING ASEAN TOURISM MARKETING PARTNERSHIP WORKING GROUP

ATMP WORKING GROUP PURPOSE

The purpose and mandate of the ASEAN Tourism Marketing Partnership (ATMP) Working Group is to develop and provide strategic guidance for the ASEAN tourism marketing activities. Specifically, the ATMP Working Group supports and advises on the following:

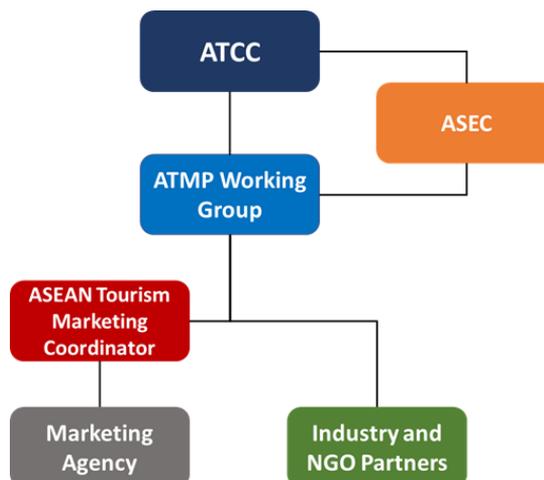
- Marketing strategies for ASEAN.
- Policies and approaches to ensure that ASEAN marketing strategies and programs are aligned with tourism marketing programs across Southeast Asia.
- Performance metrics to act as the basis for transparent tracking of the success of ASEAN tourism marketing programming, and the performance of the tourism sector.
- Identifying and leveraging key partnerships.
- Other tasks will be determined and outlined as the group begins to form and establish a base understanding of the direction for ASEAN tourism marketing based on the ATMS 2017-2020.

RATIONALE AND BACKGROUND

A specific entity, provisionally called the ASEAN Tourism Marketing Partnership (ATMP) Working Group is required to deal with marketing issues and will report to the ASEAN Tourism Competitiveness Committee (ATCC). This concept will provide a focus and direction to marketing specific activities and be structured and managed as a true partnership in order to ensure that partners comprising private sector, as well as other stakeholders, would be able to collaborate effectively in ensuring an efficient and professional set of ASEAN marketing activities.

ASEAN TOURISM MARKETING STRUCTURE

The ATMP will be responsible to the ATCC. One of ASEAN Member States will be Chair of the ATMP. The actual coordination work will be carried out by the ASEAN Tourism Marketing Coordinator.



MEMBERSHIP OF THE ATMP

The ATMP Working Group will have two chambers, the first chamber made up of representatives from the NTOs in-charge for tourism marketing, and the second chamber representing the wider group of partners comprising stakeholders and experts. Representatives from ASEAN NTOs would be core members in the decision-making process of the ATMP WG, where internal discussion among themselves may be organized to facilitate this role.

Expert membership of the ATMP will be by invitation by consensus of the core members. Each partnership initiative will be developed on a project by project basis and continued membership will be based on evaluation and the members' contribution to the ATMP work.

Potential partners of the ATMP may include:

- ASEANTA
- Tour Operators
- Airlines
- Advertising and Branding Consultants
- Media Groups
- Digital Media Groups
- Universities and Research Groups
- Regional Tourism Groupings
- Development Partners
- Other partners would be decided by core members of ATMP.

ROLES AND RESPONSIBILITIES

The ATMP partner members (second chamber) will be selected for their expertise and commitment to contributing to the ASEAN marketing effort. NTOs may propose individuals for inclusion in the ATMP based on their ability to contribute to the substantive discussions and development process. Some of the experts will be invited to participate based on their knowledge and skills. It is important to note that development partners are key stakeholders given the support they can provide to meeting their own development goals.

PARTNER PROFILE

Partners chosen for the ATMP Working Group should have the following characteristics:

- Are collaborative and prepared to work for the benefit of tourism within the Southeast Asian region;
- Are experienced and knowledgeable about tourism marketing on global, national and provincial scales;
- Have a thorough understanding of the issues, sectors and opportunities in the region from which they are chosen, and have direct experience in one or more of: consumer marketing, partnerships, product development/enhancement, visitor services, and/or research and evaluation;
- Are willing to work collaboratively with others in a fully transparent and accountable process;
- Desire to contribute to ASEAN's objectives in a meaningful way, including prioritizing time for ATMP Working Group meetings and review of materials.

OPERATIONS OF ATMP WORKING GROUP

The ASEAN Tourism Marketing Coordinator will be responsible for coordination and participation of partners in the ATMP Working Group.

Partners of the ATMP Working Group will be responsible for their travel expenses to attend committee meetings. The ATMP Working Group will prioritize utilizing digital technologies to facilitate the meetings to minimize travel and expenses.

Experts and other resource people may be invited to participate by the Chair as appropriate, to contribute to specific agenda items.

ASEAN TOURISM MARKETING COORDINATOR RESPONSIBILITIES IN THE ATMP WORKING GROUP

The ASEAN Tourism Marketing Coordinator will have a leadership role in providing effective governance and management of the working group and is responsible for, with the directions of Chairman of ATMP:

- Scheduling meetings and notifying committee members
- Inviting guests to attend meetings when required

MEETING SCHEDULE

To ensure smooth set-up of the working group and seamless discussion, ATMP may meet in person twice a year, especially in the first 2 years.

MEETING AGENDAS

Meeting agendas will be approved by the Chair and distributed to all members of the ATMP Working Group at least one month prior to the meeting date by the ASEAN Tourism Marketing Coordinator.

MINUTES

Minutes of the meeting will be recorded by ASEAN Secretariat. Minutes will be distributed to all members following review by the Chair and approved by ASEAN NTOs.

RECOMMENDATIONS

The recommendations of the ATMP Working Group shall be arrived at via consensus and shall be reported in writing to the ATCC. This should include any background information and/or reports that have been provided to the ATMP Working Group.

TERMS OF REFERENCE FOR DEVELOPING PARTNERSHIPS

Title	ASEAN and XXX Partnership
Language(s) Required	English
Duration of Agreement	To be decided by ASEAN NTOs
Partnership Specifics	Partnership between ASEAN Tourism and XXX, primarily working with ASEAN NTOs through ASEAN Tourism Marketing Coordinator

OVERVIEW

The ASEAN Tourism Marketing Strategy (ATMS) 2017-2020 has identified partnerships as a crosscutting theme and a key strategic direction to assist in the further promotion and development of the Southeast Asian region. Partnerships are key to implementation of the ATMS 2017-2020, and to further the outreach and promotion, to enable a diverse and far reaching distribution of inspirational and influential marketing messages, as well as to develop the region's capacities for data gathering and analysis.

ASEAN tourism welcomes partners from all sectors that are interested and invested in the betterment of the tourism environment throughout Southeast Asia. As part of the larger objectives of ASEAN tourism, partners should understand that Southeast Asia promotes a unique, competitive, sustainable and inclusive destination.

BACKGROUND & RATIONALE

With limited resources, ASEAN tourism requires assistance from strategic partners who have objectives and resources aligned with quality tourism development in the Southeast Asian region.

The Strategic Objectives as identified in the ATMS 2017-2020 are:

- Raise awareness of the unique qualities of Southeast Asia and inspire travel.
- Develop an integrated, digitally-focused marketing action plan that provides an action framework for the ASEAN NTOs.
- Develop a strategic implementation process based on collective programs/mechanisms with key industry partnerships.
- Promote innovative regional visitor experiences that highlight the unique qualities of Southeast Asia

Key ASEAN Tourism Marketing activities will include:

- Trend and market research
- Identifying market segments
- Designing regional tourism experiences
- Providing strategic PR and communications
- Designing and managing a regional digital strategy
- Responsibility for regional distribution
- Monitoring the outcomes of the ATMS

PURPOSE

To engage with a dynamic, supportive and strong organization that is interested and invested in further promoting tourism in Southeast Asia as well as to provide strategic guidance to ASEAN tourism and marketing efforts.

Potential Partnerships Opportunities:

- Public-private joint marketing
- Cross promotional traditional and digital partnerships
- Partnerships with tour operators
- Working with individual NTO country promotion offices
- Involving NGOs in mutually beneficial promotion
- Cooperation with regional and global media stakeholders
- Effectively nurturing digital partnerships
- Collaborative experience development
- Collaborative data collection and analysis

PARTNERSHIP OBJECTIVES

1. To maximize and align support of media, businesses, organizations to assist in raising the awareness of ASEAN or Southeast Asia region as a single tourism destination and inspire travel to the region.
2. To support, promote and encourage quality tourism within the Southeast Asian region.
3. To analyse and review data to inform decision making process and tackle identified areas from the ATMS 2017-2020 for successful implementation.

ROLES AND RESPONSIBILITIES OF PARTNERSHIP

Each partnership will include a varied set of roles and responsibilities based on the agreements of the partnership. Those will be determined on a case by case basis with each individual partner. The nature of each partnership initiative will be determined on a program by program basis.

The role and responsibility of ASEAN, in part, is to ensure that the partner receives the necessary information in order to have a successful partnership.

ACCOUNTABILITY

In agreeing to a mutually beneficial agreement with ASEAN, both parties will work together, primarily working through the ASEAN Tourism Marketing Coordinator, who then will report to the ATMP and the ATCC.

DECISION MAKING

- Decisions will be arrived at by consensus among ASEAN NTOs.
- All decisions will be recorded and monitored for purposes of evaluation of partnership. It is important for ASEAN to understand their effectiveness in developing, nurturing and continuing strategic partnerships with key industry leaders.

FINANCIAL ARRANGEMENTS

- Financial arrangements are dependent on the nature of the partnership and the various agreements.
- Any financial arrangements will be subject to the approval by the ATMP and ATCC and are dependent on the budget restrictions.
- In most cases, financial arrangements will not be encouraged given the principle that strategic partnerships should be developed based on mutual benefit.

CONFLICTS OF INTEREST

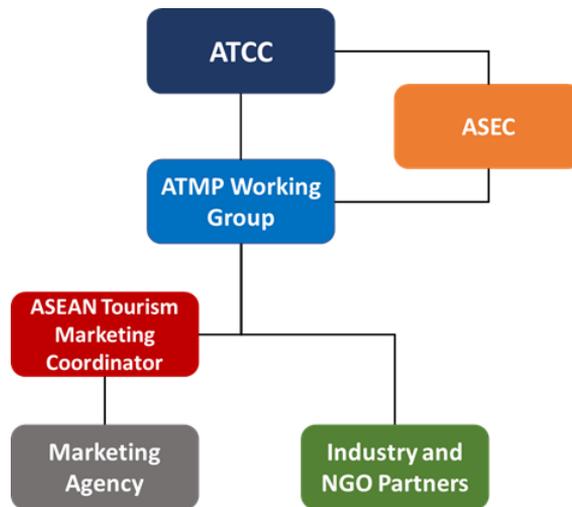
Proper evaluation of each partnership should be done to examine the potential of current or future conflicts of interest of ASEAN tourism.

ANNEX 3

TERMS OF REFERENCE FOR ASEAN TOURISM MARKETING COORDINATOR

BACKGROUND

Within the new structure of the ATMS 2017-2020 (as can be seen below), the ATMP is seen in part as a partnership initiative. The role of the ASEAN Tourism Marketing Coordinator is to ensure that the



various stakeholders are working effectively together and that initiatives decided by the ATMP are implemented.

ROLE AND RESPONSIBILITY

The ASEAN Tourism Marketing Coordinator is responsible for communicating with the relevant stakeholders and, most importantly, the NTOs, while at the same time acting as the voice of ASEAN tourism for marketing purposes, to ensure that the right message is being distributed to the right people. In addition, the ASEAN Tourism Marketing Coordinator will be responsible for working closely with any consultants and organizations that have been contracted.

The specific and vital activities of the ASEAN Tourism Marketing Coordinator include:

- Monitoring the ATMS's success based on the KPIs determined by the NTOs, in partnership with a marketing agency;
- Championing the need for participation from the NTOs to support the ASEAN marketing efforts;
- Mobilizing resources;
- Developing strong relationships with key partners;
- Establishing new opportunities for innovative marketing; and
- Effectively managing the budget.
- Reporting directly to Chairman of ATMP
- Ensuring a timely and efficient flow of information among ATMP members.

OTHER KEY RESPONSIBILITIES

- Other key responsibilities include serving as a liaison of ASEAN NTOs in engaging a marketing agency in performing the following tasks:
- Connect with influential media outlets and journalists to place stories about ASEAN tourism news and other initiatives.
- Create content regularly to grow ASEAN tourism awareness (press releases, corporate announcements, and creative content).
- Collaborate with prominent members of the ATMP, to craft and pitch press releases and thought leadership columns.
- Establish the core messages with the ATMP and marketing agency.
- Develop and manage a core media relations program, including establishment of media contact lists, regular contact with key sector, business and regional journalists, preparation and distribution of regular media updates and input into increased positive media coverage.
- Work effectively within an international environment, incorporating many cultures.
- Coordinate with ASEAN Tourism Market Research Group led by Indonesia, to obtain an analysis of visitor research, current market conditions and competitor information.
- Develop and implement marketing plans and projects.
- Expand and develop marketing platforms.
- Manage the productivity of the marketing plans and projects.
- Monitor, review and report on all marketing activity and results.
- Deliver marketing activity within agreed budget.
- Monitor industry best practices.

KEY COMPETENCIES

- Excellent written and verbal communication skills
- Formal presentation skills
- Organization and planning
- Strategic thinking
- Problem analysis and problem-solving
- Team-leadership
- Persuasiveness
- Adaptability
- Creativity
- Judgment
- Decision-making

ASEAN TOURISM MARKETING COORDINATOR RESPONSIBILITIES IN THE ATMP WORKING GROUP

The ASEAN Tourism Marketing Coordinator playing a leadership role in providing effective governance is responsible for, with the direction of the ASEC:

- Scheduling meetings and notifying committee members
- Inviting guests to attend meetings when required
- Guiding meetings in accordance with the agenda, including way decision items result in a decision or action
- Reviewing and providing comments on meeting minutes and ensuring circulation to all members of the ATMP.

EVALUATION OF ASEAN TOURISM MARKETING COODINATOR

The ASEAN Tourism Marketing Coordinator will be evaluated based on a number of key performance indicators (KPIs) that allow for the effective measurement of the performance of the coordinator.

Potential KPIs are:

KPI	Action
Number of Press Clipping (Assessing the number of press clippings from a campaign can be used as a way of assessing the impact of a campaign or press release.)	Percentage increase of the number of press clippings by 2018.
Amount of website traffic	Percentage increase of the website traffic every quarter
Number of partners and profile of partners	Develop new partnerships with quality partners per year.
ATMP Chair’s, ASEAN NTOs’ and ASEAN Secretariat’s Feedback	ATMP Chair and ASEAN NTOs will be asked to provide feedback on the effectiveness of the ASEAN Tourism Marketing Coordinator and his/her ability to work towards the goal of ATMS.
Inbound Links	Percentage increase of the number of external links to the ASEAN tourism website in each quarter.
Projects Implemented	Projects or activities that were planned, organised and executed/implemented.

