



ASEAN SHORT TERM MARKETING STRATEGY FOR THE EXPERIENTIAL AND CREATIVE MARKETS

For the ASEAN Tourism Marketing and Communication Working Group

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PREFACE

This report has been prepared at the request of the ASEAN Tourism Marketing and Communication Working Group (MCWG) in order to assist in its overall work of promoting the region. The responsibility for product and experience development has been allocated to the ASEAN Tourism Product Development Working Group (PDWG). As will be seen in the report there still remains significant work to be done in developing region wide products and experiences. It was not within the purview of this assignment to develop products but rather to look at developing themes and stories and suggesting a distribution strategy.

It must be recognized that the tourism marketing and communication working group has scarce resources and must rely on partnerships to tell its story. In fact, less than US\$10,000 will be allocated each year to promoting a specific set of themes and stories.

It is strongly recommended that this document be read in tandem with the ASEAN Tourism Strategic Plan and the ASEAN Tourism Marketing Strategy (ATMS). The ATMS, given the level of available resources, is seen as piggybacking off the activities of the national tourism organizations most of whom devote significant amounts of money in promoting their individual countries. The challenge for the tourism marketing and communication working group is to identify experiences that will attract both the group traveler through various operators and the independent traveler.

INTRODUCTION

The ASEAN tourism strategic plan and the ASEAN tourism marketing strategy identify a set of products and experiences that are felt to be relevant to the ASEAN region. These experiences and products are heritage, nature, community-based and cruise.

Within the marketing strategy each of the member countries have identified a range of resources that correspond to these four categories. Many of these resources have yet to be converted into what are commonly understood to be products and experiences. There is a dramatic need to work with these resources to make certain that they meet the overall needs of the tourists through innovative and practical interpretation, storytelling, visitor management, provision of visitor services, marketing, branding, events planning etc.

As noted earlier it must be understood that the product development activities of the ASEAN NTOs is the responsibility of the Product Development Working Group and therefore this strategy deals only with identifying the nature of potential markets and how a distribution strategy can be developed to ensure that the message gets to the right audiences.

THE MASS-MARKET

The strategy recognizes that for the vast majority of the visitors mass tourism is still very much what is being sought and what motivates people to travel. Many Asian travelers coming to the region are driven by shopping, eating and the more traditional forms of sightseeing which can also be termed “trophy hunting” where people get their picture taken in front of landmarks and attractions. It is probably safe to say that for the vast majority of the mass traveler this type of activity meets both their motivations for travel as well as provides them with what could be a quality experience from their perspective. If they have received value for money, have been treated fairly, have had convenient transportation, adequate accommodation based on their financial willingness and ability to pay and are able largely to be understood either through the use of interpreters or language trained staff they are likely to leave the destination satisfied. They are also likely to be return visitors who may be looking for more specialized experiences.

When one looks at the major market potential of Russia, India and China there can be no argument that the first wave of tourists from these destinations at least are and for the short term will be mass tourists. In addition, Russian tourists are looking for sea, sun and sand while they escape the rigors of the Russian winter. This is of course true of many Europeans who largely come to many countries in the region for reasons of warmth.

It is vitally important that the region be cognizant of the power of mass tourism. What is equally true is the region must provide reasons for these mass tourists to return to the region and provide them with a different type of experience than when they first traveled.

STUDY APPROACH

The process that was approved by the Marketing and Communication Working Group is presented in Figure 1.

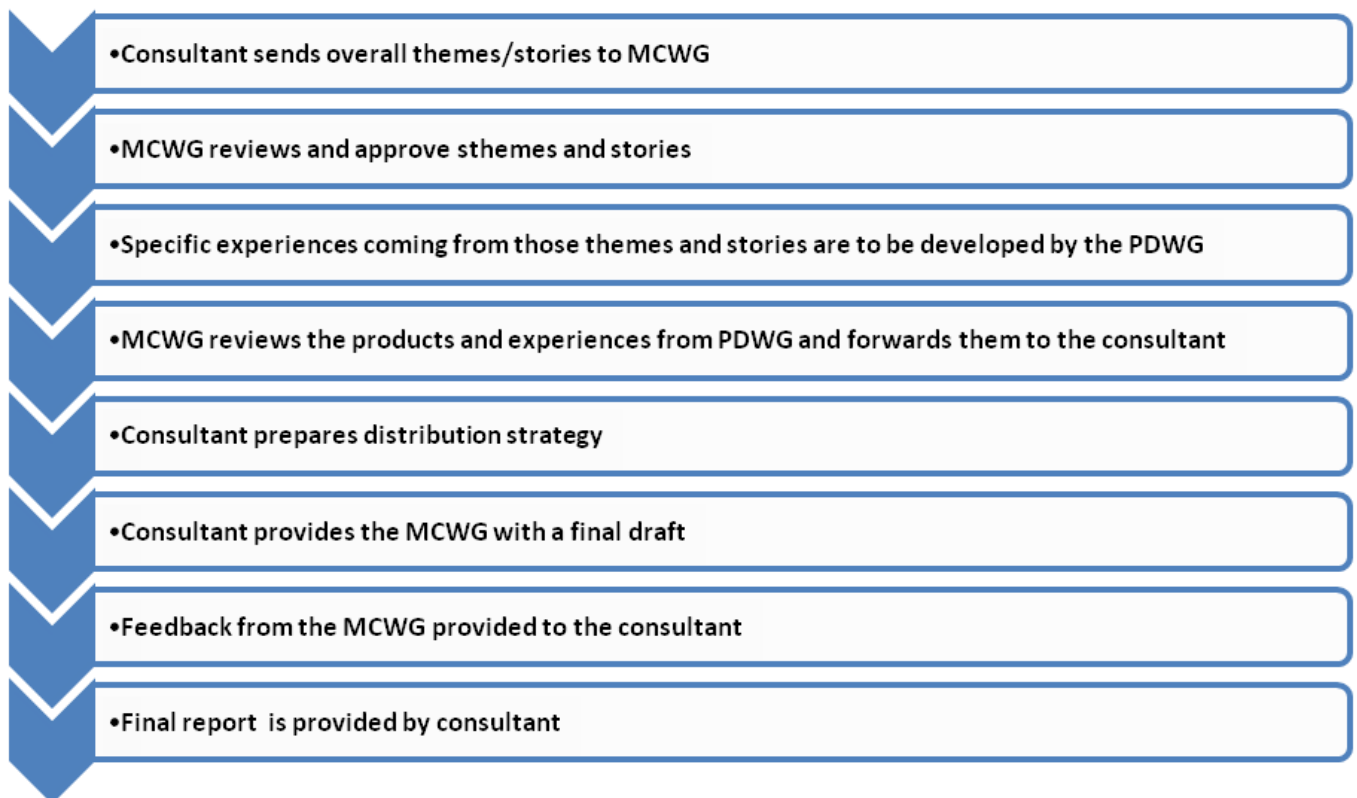


Figure 1: Study Working Process

This process was designed to be consultative and required the active participation of both the Marketing and Communication Working Group and the Product Development Working Group. The themes and stories developed by the consultant were reviewed and approved by the Marketing and Communications Working Group. This material was then passed on to the Product Development Working Group to allow them to develop regional experiences based on the themes and stories. As discussed later in this report more work needs to be done to better illustrate how this particular market segment can be developed.

The concept of “package” has been taken quite literally by the PDWG. As discussed in the ATMS and subsequent discussions packaging in the context of Southeast Asia is seen as a way of bringing together a set of experiences and products that would have regional appeal.

Given the limited resources of both working groups the best that can be achieved is to identify a set of experiences that the private sector can then package and

sell as market oriented offerings. The other objective is to make independent travelers aware of the incredible opportunities in the region. There is no notion that they would necessarily follow highly detailed day by day packages but that they would pick and choose from those things that are of particular interest. It is also recognized that few travelers participate solely in one area of activity but usually pick and choose from diverse experiences offered by the destination.

It is also important to take into account that the ATMS was based on the understanding that it is the responsibility of the countries to sell their own products and experiences. In addition, it is also the responsibility of the countries and the private sector to be the major agents for the delivery of the regional message. It was always envisaged that the ASEAN marketing strategies should be designed to raise awareness about the region and to ensure that the mix of visitors who come to Southeast Asia are not those simply looking for shopping and food as well as warm weather. This is not say that these are not important segments since they are essential to the economic well-being of the countries but rather that the responsibility of the ASEAN NTO's is to provide different types of experiences that raise visitor numbers but also help to position the region from the point of view of its image as an essential and important part of the world economy.

Therefore the goal of the experiential and creative strategies is not only to attract international visitors but to ensure that the region itself is well understood and is able to attract foreign investment not only in tourism facilities but also in the larger social, economic and cultural development of the region.

THE NATURE OF THE REGIONAL PRODUCT AND EXPERIENCE

It is important to take into account that the task of the ASEAN NTOs is not to look at single attractions or regions within a particular country but rather to attract people already coming to the region to visit more than one country or for those planning to visit Southeast Asia that they recognize the advantages of visiting two or more countries. This obviously is part of the regional nature of the NTO's activities.

Regional products and experiences need to have thematic connections that will either meet the major objectives and motivation of the travelers' intentions or at least are a major element around which they will participate in other activities. There is no intention to portray that the experiential and creative tourist will only be involved in a narrow band of activities. The real difference is that their choice of travel to Southeast Asia will largely be guided by the fact that countries themselves as well as the ASEAN NTO's are able to help them better understand one or more dimensions of what is a unique region of the world.

DEFINITIONS

It is useful to start off with some definitions so that everyone is on the same page.

Experiential Tourism

Experiential tourism is fully discussed in the ATMS. For the purposes of this report experiential tourism can be seen in the following way "...has become the current term that encompasses a variety of tourism and traveler categories, including the following: cultural tourism, ecotourism, educational travel, heritage tourism and nature tourism, where activities are environmentally sensitive, displaying respect for the culture of the host area and looking to experience and learn rather than merely stand back and gaze. Experiential tourism involves active participation, involvement, even immersion" (Nature and Outdoor Tourism Ontario).

Creative Tourism (with special thanks to Sashon Vutipongsatorn)

The concept of creative tourism was first developed by Richards and Raymond (2000). They define creative tourism as tourism that offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences, which are characteristic of the holiday destination where they are undertaken. Furthermore, they conceptualize creative tourists as consumers who look for more engaging, interactive experiences, which can help them in their personal development and identity creation.

According to Ohridska-Olson (2010), creative tourism is a form of cultural tourism. However, it is essentially different from mainstream cultural tourism. While traditional cultural tourism is based on viewing, seeing, and contemplating, creative tourism is based on experiencing, participating, and learning. As described by UNESCO (2006), it is a travel that directed toward an engaged and authentic experience, with participative learning in the arts, heritage, or special character of a place and it provides a connection with those who reside in this place and create this living culture.

This puts creative tourism as the next generation of cultural tourism that satisfies the higher level need of self-actualization with a primary focus of active skill development (Ohridska-Olsen, 2010). Furthermore, creative tourism is not so place-bound as cultural tourism in general is, because creative tourism utilizes tourist resources that are processes – like dances, singing, crafts, painting, festivals (Prentice and Andersen, 2003). As a result, creative tourism can be seen to be more sustainable in nature than traditional cultural tourism which is based on the consumption of built environments (Richards and Wilson, 2006) and contributes to the development of the destination (Lindroth, Ritalahti and Soisalon-Soininen, 2007).

The creative industries are illustrated in the Figure 2.

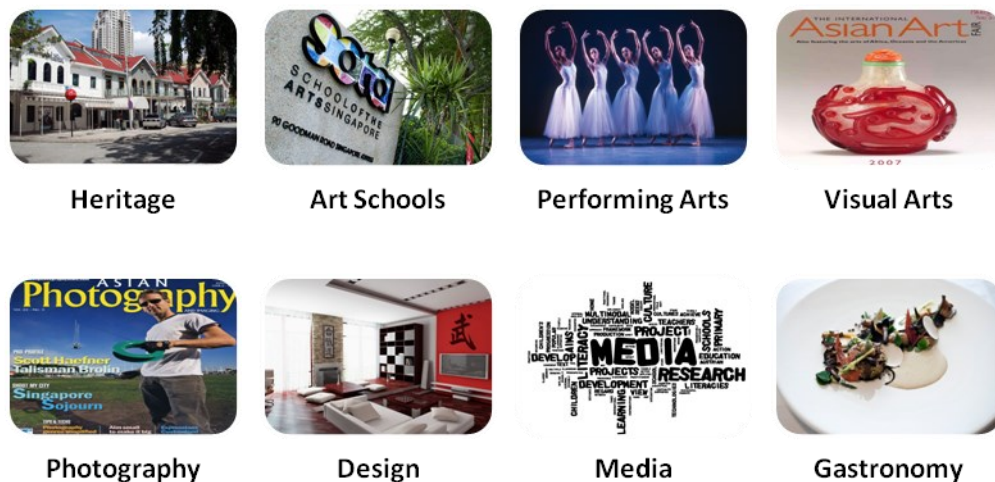


Figure 2: Creative Industries

Specific tourism related creative activities are illustrated in Figure 3.



Figure 3: Specific Tourism Related Creative Activities

NATURE OF THE EXPERIENTIAL TOURIST

There is certainly not one single profile of this particular type of travelers but they do share certain characteristics that are identified in the definitions above. These travelers range in age from the young adventure seeking modern backpacker to senior citizens who have traveled a great deal and are looking for the fulfillment of what are clearly a different set of objectives from that of the backpacker. While much has been said about the backpacker there can be no doubt that the backpacker segment was essential in opening up new parts of the world tourism given their willingness to visit areas that did not yet possess a complete tourist infrastructure – in fact in some cases minimal infrastructure. The traditional notion of the backpacker is also changing as travelers within the traditional 18 to 25 age range exhibit different characteristics and motivations. The modern backpacker who may be older is often looking for unique and immersive experiences and is prepared to live in a community-based home stay for three days and then move into a five-star hotel for the luxury experience.

What distinguishes those that might be seen as experiential tourists is their ability to take risks at times, to look for what is unique, want to interact with local people and their environments and many have expectation that they will leave a destination with a better understanding of the overall culture and ways of life as well as natural systems or with specialized knowledge.

The question always is how large this market segment is. Certainly when measured against mass tourism it is very small in terms of percentages and

overall spend. However, when one begins to better understand this market it can be seen as a major component of an overall regional development and heritage preservation strategy. Fragile ecological systems or sensitive social systems are often overwhelmed by mass tourism and the economic benefits from this type of tourism are often outweighed by the significant negative impacts brought about by large numbers of people visiting certain types of environments.

However, through the use of well accepted visitor management approaches ecological and social systems can prosper and develop if they are able to accept small numbers of tourists who are sensitive to their footprint and at the same time are prepared to interact in an appropriate way with diverse social, cultural and environmental systems. More importantly this type of tourism can have immediate benefits to a local or sub regional community given the amount of money spent by visitors. (Much more can be said on this.) Suffice to say at this point therefore the ASEAN NTOs should see experiential and creative tourism as a way of developing an identity for the region while promoting a unique set of social, cultural, economic and environmental systems.

NATURE OF THE EXPERIENCE

Those involved in marketing and product development often talk about packaging. Packaging is really about bringing together a series of resources that can provide a satisfying, cost-effective and hopefully unique experience for the traveler. This packaging has typically been done by inbound operators, country based tour operators and at times by communities or nonprofits. This has certainly worked very well for many such operators.

This strategy does acknowledge that there is an important role for various stakeholders to package experiential and creative experiences for tourists whether they come from long haul destinations or from closer in Asian countries. However the role of the Marketing and Communications Working Group is not to rely solely on this type of provider. There is a growing group of travelers that are independent but also may need help in accessing a package of experiences that will meet their needs. Part of the task is simply be to make people aware of the fact that if they have a strong interest in gastronomy that they can actually access very authentic experiences through packages suggested by the ASEAN NTOs. Through their own research as well as resourcefulness they then may access these experiences on their own without any type of intermediary.

They still may be a minority but are clearly they growing segment that must be carefully considered. Some may be looking for locally based packages which provide them with a convenient and cost-effective way of accessing a unique social, cultural, community-based experience. This may be everywhere from simply providing ground transportation to providing skilled interpreters to ensuring that the visitor has the opportunity to directly participate in an experience. Finally there are those that would be looking for a complete package that includes air travel from their home countries, ground services, determination of accommodation and food options and exposure to the experiences themselves. It is important to remember therefore that the term “package” means

bringing together a series of opportunities for people to enjoy. It really is the design of experiences that we are talking about. Who actually delivers them will depend on the market segments and the resourcefulness and creativity of the various stakeholders.

If one accepts that the suppliers will expand from the traditional international or local tour operators to communities, nongovernmental groups and social enterprises we can see that exponential and creative tourism will open up new opportunities for economic, creative and community development.

Experiential and creative tourism can be very complex. We are not talking about bringing people from one attraction to another interspersed with visits to jewelry shops or other types of commercial activities. What we are talking about is developing opportunities for travelers to do something that is very individualized in many cases. Through the use of technology it is possible for travelers to develop their own packages by bringing together a number of different elements of the experience.

For example a regional tour based on the history of food could identify opportunities in every ASEAN country. It could then identify different regional variations of food, the type of local experiences that are available, whether there are operators prepared to help introduce them to the regional culinary opportunities, the type of accommodation that is available and what other kinds of activities can be enjoyed in the area. They then could formulate based on their budget and time what would best suit their needs. In later parts of this project the consultant will describe how Internet-based technologies and database management would assist travelers in determining the nature of their experiential and creative experiences.

For the purposes of this study the consultant recognizes that in the short term – which is the focus of this study – that cruise operators will make their own decisions. Hopefully as they become more aware of the possibilities within the region they then may alter their itineraries to take advantage of the growing sophistication of the travelers. This of course is nothing new where cruises often have themes and use experts to help introduce people to the specific attributes of a destination.

THEMES AND STORIES

Background

In the August 2, 2012, the summary report of the Product Development and Marketing Communication Working Groups identified what they felt were the products and experiences that would appeal to visitors coming to Southeast Asia. They included the following:

- Participation
- Sightseeing: foot, cycling
- Education / Understanding
- Taste local food
- Natural Parks:
 - o On land, e.g. forest, rock climbing, trekking, animal watching
 - o Marine, e.g. kayaking, diving
- Eco-tourism : photography
- Urban :- zoo, park, science museum
- Home-Stay program
- City stays with Youth Centers (community activities)
- Cultural villages (sea, water, land)
- Candle light festivals
- Rice planting/rice farming
- Dolphin/whale watching
- Wellness: spa, massage
- Health & medical: treatment, plastic surgery, cosmetic
- Recreation: golf, cycling, running, diving, water rafting, etc.
- Heritage cruise on Mekong
- Ocean cruises
- ASEAN sea to sea - 2 weeks length (island hopping to very different geographic regions)

In another exercise the participants were asked to identify and rank the best experiences that will bring tourist into the region by product category. (The numbers after each activity are the number of participants who voted for this type of activity.) They included:

- ASEAN Cuisine (83)
- Mass tourism (65)
- Eco-tourism (48)
- Sea to Sea to Fly options (46)
- Water Festivals (26)
- ASEAN Wellness (spa & massage) (26)
- Recreation - golfing (25)
- Historical / UNESCO Sites (24)
- Combination of countries (18)
- Luxury & Romance (15)
- Interaction with local people (10)
- Health & medical treatment and cosmetics (5)
- Cultural Performances (4)
- Recreation - cycling (1)

From this summary the PDWG ranked culinary activities, cultural tourism, ecotourism, wellness and golfing as the best experiences to bring tourists into the region. The consultant started his work taking these collaborations into account and identified a number of dimensions illustrated in Figure 4.



Figure 4: Dimensions of Experiential and Creative Experiences

The six themes developed by the consultant and approved are illustrated in Figure 5:

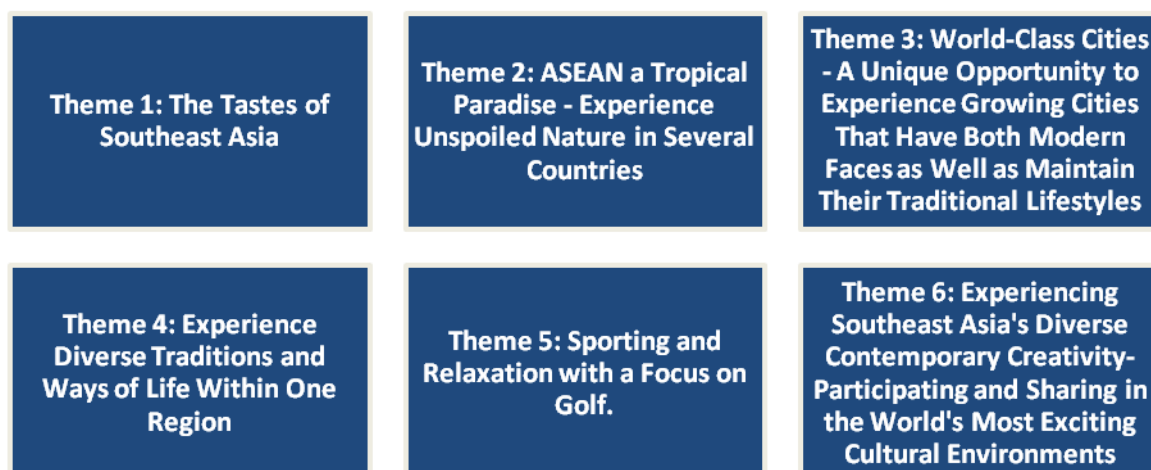


Figure 5: Experiential Thematic Areas

Theme 1: The Tastes of Southeast Asia

Story: One of the easiest and most obvious themes has to be that of food. Each country has its own unique culinary traditions but there are obvious connections between different regions given the kind of migration that has occurred between countries. The theme would be concerned not only

with tasting the food but its growing and cultivation, how the agricultural community is organized, the process of cooking and how this reflects the traditions and rituals around the consumption of food. This theme would appeal to an ever growing population of people who are very much taken with gastronomy in its widest sense. These people would be looking for unique and authentic experiences where they could spend more than one day in a location understanding agricultural traditions as well as the actual process of cooking. They could be drawn from a wide range of age groups given the incredible popularity of anything culinary. The theme could be further refined by looking at the entire “slow food” movement which is very relevant in many parts of the region. Gastronomy and culinary pursuits can also be tied to community-based activities. River-based experiences or even cruise ships could also have a gastronomy theme that would be featured both onboard as well as when people actually visit a destination.

Theme 2: ASEAN a Tropical Paradise – Experience Unspoiled Nature in Several Countries

Story: While significant parts of the region have been affected by agriculture, deforestation, tourism and other forces the region is fortunate that there are areas that are largely untouched and unexplored. This represents a unique experiential opportunity for those with strong ecotourism interests to view firsthand these unique natural ecosystems in a carefully controlled and responsible way. This would be seen as high-end tourism with significant tariffs attached to ensure adequate income for providers and communities while ensuring the conservation of the natural environments by limiting the number of visitors. This theme would have a number of important dimensions including highlighting the uniqueness of the region and the reason why people want to visit. It is recognized that for a large number of people a simple nature-based experience may be sufficient but the simple existence of world-class natural environments would be of significant importance and branding.

Theme 3: World-Class Cities – A Unique Opportunity to Experience Growing Cities That Have Both Modern Faces as Well as Maintain Their Traditional Lifestyles

Story: For many long-haul travelers and even those within the region many countries have urban areas that are absolutely unique on the world tourism stage and at the same time serve as excellent starting points for other types of travel pursuits. As ASEAN cities become increasingly modernized they present unique opportunities to view traditional as well as global perspectives. The cities of course possess a significant repository of each nation's culture and heritage. This ties in very nicely with the theme of gastronomy. Urban-based experiences can be offered at varying levels from those for the sophisticated backpacker to five-star treatment. The packaging here would have to bring together the essential social, economic and cultural elements of the city in such a way that it can be easily understood and experienced by the tourist since cities quite often

provide dilemmas of choice given the richness of their resources and opportunities.

Theme 4: Experience Diverse Traditions and Ways of Life Within One Region

Story: This is a very diverse theme and therefore the suggestion here is that it would be tied to a particular dimension. With the growing interest in festivals it is suggested that festivals could be the “glue” that would enable visitors to experience traditions and ways of life. The advantage of this theme is that a great deal of the product/experience already exists. The experience could be woven around particular types of festivals (water, music, religious, design, film etc.) or simply would look at a range of different festivals taking place at the same time. Festivals are an excellent way of allowing people to view different values and traditions within the context of celebration. Festivals also have the advantage that they occur every year and given their popularity can encourage return visits. The challenge here would simply be to ensure that all of the member countries work effectively together to ensure a seamless experience from one festival to another.

Theme 5: Sporting and Relaxation with a Focus on Golf.

Story: This may appear to be a somewhat surprising addition to the list of themes given that it is often largely connected with mass or single-purpose tourism. This is not to suggest that there will not continue to be a significant number of tourists that continue to travel to Southeast Asia for the excellent golf courses and the value that they offer. This theme is more tied to people interested in experiencing different golf courses and in this case the unique natural environments in which they are situated. There is a growing interest amongst golfers as exhibited by the number of golf courses now seeking certification through the Audubon International Signature Program. The National Audubon Society (Audubon) is an American, non-profit, environmental organization dedicated to conservation. Incorporated in 1905, Audubon is one of the oldest of such organizations in the world and uses science, education and grassroots advocacy to advance its conservation mission. This could easily be tied into shared experience holidays where one member of the family may be golfing with the other person experiencing the unique natural environment of the golf course that allows for the protection and appreciation of different flora and fauna. This is the type of value add activity that has tremendous benefits. It must be remembered that bird watching is certainly the biggest pastimes in any part of the world.

Theme 6: Experiencing Southeast Asia's Diverse Contemporary Creativity – Participating and Sharing in the World's Most Exciting Cultural Environments

Story: Most governments have recognized the importance of the creative industries not only for their economic development potential but because they provide unique opportunities to look at the way that Southeast Asian societies are evolving. (For example, we now have the Indonesian Ministry of Tourism and Creative Economy.) Too often countries focus on

traditional and historical areas of creativity. This theme suggests that packages would be put together looking more generally at contemporary creative industries as described above or it could look at specific areas such as fashion, furniture, performing arts, visual arts etc. If the countries cooperated this market segment then could travel through several countries experiencing different types of creative industry output. The creation process is important both to be observed as well as many tourists want to be part of the overall experience. People are interested in making things and it is quite possible that people could be involved in some or all of the stages of the creative process. Southeast Asia is seen as an unexplored area of creativity and innovation. Positioning the region as a creative destination would not only create unique opportunities for tourists but would help many governments in meeting other societal goals that recognize that the creative industries are essential to the development of today's modern global experience economy.

PRODUCTS AND EXPERIENCES RECOMMENDED BY THE PRODUCT DEVELOPMENT WORKING GROUP

The themes presented to the Marketing and Communications Working Group were in turn presented to the Product Development Working Group recognizing the responsibility of the product development group would work together to produce experiences and products that would be promoted by the Marketing and Communications Working Group. There was an expectation that based on the type of experiences already identified in the ASEAN Tourism Marketing Strategy and the themes and stories adopted that innovative and creative approaches would be cooperatively used for product development. Since each country is represented on the Product Development Working Group it was hoped that its members could bring together existing experiences and activities that would highlight particular regional themes and stories and thereby create unique opportunities for travelers.

Most of the recommendations coming from the Product Development Working Group were in the form of products already being delivered by existing tour operators. The fact that there were existing products if somewhat tangentially applied to the themes is important since it clearly supports the idea that experiential tourism is on the agenda of the various operators. However, these types of experiences are for one particular market segment that are prepared to participate in group travel in some cases for considerable periods of time. This type of group travel does not take into account the independent traveler. A great deal more information would be required to allow travelers to make decisions but the material below provides an indication of the nature of the experiences already being offered. Full information on these tours is available from the Secretariat.

It is clear that many operators now understand the nature of this market and with assistance from the ASEAN NTOs can begin to effectively promote the region as a diverse and unique place to visit. What is clear is that many of the tours are quite similar.

The themes and stories developed by the consultant were very carefully chosen to provide the Product Development Working Group and the Marketing and Communications Working Group with the opportunity of identifying resources, products and experiences that could be easily integrated to form regional experiences. There was strong recognition by the consultant that there were no funds available to create regional experiences. Moreover, the entire philosophy behind the marketing strategy was to use existing national resources and experiences to knit together unique opportunities for people to experience more than one country.

DEVELOPING AN EXPERIENTIAL DISTRIBUTION STRATEGY

INTRODUCTION

As noted above there is virtually no budget for marketing the experiential and creative markets. It is only with the creative use of social media, working with the private sector and encouraging governments to work cooperatively will success be achieved. Individual countries are spending millions of dollars in marketing and sales and any thought that very small marketing budgets will make any substantial difference without cooperation is foolhardy. The marketing effort is ever more challenging given the fact that the region is competing with individual countries and other regions that are spending considerable amounts of money in promoting their own tourism products and experiences.

OVERALL DISTRIBUTION STRATEGY

The distribution strategy is straightforward as would be expected given the level of available resources. It provides heavily on the coordinator to use his/her network and abilities to identify opportunities as they arise and to diligently work at ensuring that the regional perspective is put forward wherever possible. It also requires that the national tourism organizations work diligently to promote the region as part of their national efforts. This would require that within each national tourism organization there is a staff person(s) who work with their colleagues in other countries to develop products as well as position those products on the world stage. Without this level of commitment any regional strategy will not succeed.

The major components of the distribution strategy are seen in Figure 6.

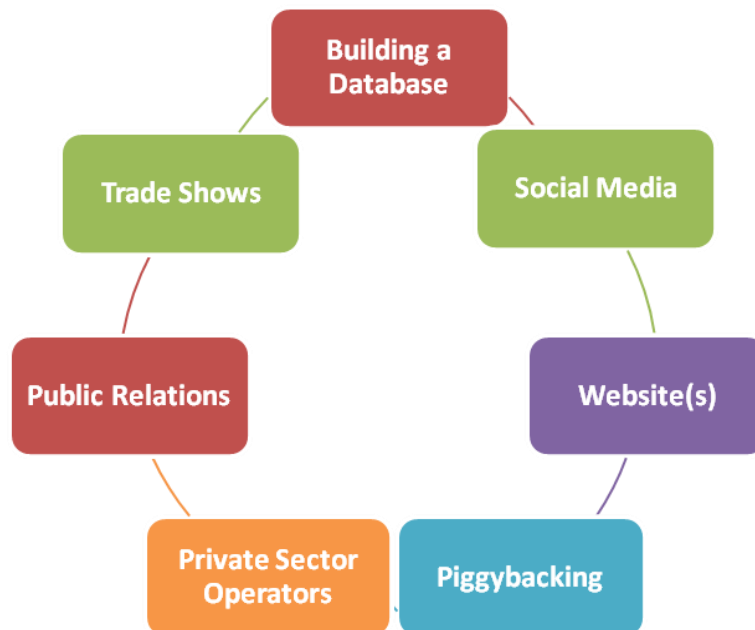


Figure 6: Distribution Strategy

SPECIFIC DIVISION STRATEGY

It is difficult to identify specific distribution channels given the lack of specific product development to date but some suggested directions are put forward for consideration. It is based on the fact that all of the NTOs are working to position these themes – already approved by the MCWG – within their own promotion and product development exercises.

The coordinator will be responsible for ensuring that the themes and specific actions outlined below are actually implemented using the website, the distribution channels of the NTOs, building relationships with the relevant travel writers, issuing a constant stream of PR information for the industry as well as the media, making contact with the relevant social media stakeholders to feed information on various experiences and identifying regional events where the experiences can be made available to participants, piggybacking on the presence of the NTOs. It is clear that there needs to be collateral for each of these themes.

Money has been allocated to implement campaigns and it is recommended that part of the funding be used to commission stories that can be provided to the various media outlets as well as introduced to social media. The commissioned pieces can also be used on the website.

The nature of the target groups for these directions is described earlier in this report.

Theme 1: The Tastes of Southeast Asia

This is probably the easiest of all of the themes to promote. Possibilities include:

- Every newspaper has articles on food. The coordinator can work with food editors putting together news items looking at regional food stories. There is no cost to doing this but simply making contacts in various major markets with the help of the NTOs media offices.
- Working at getting a major cooking show(s) to come to Southeast Asia to highlight the regional food. This may take some time but there is intense interest in the regional cuisines.
- Working with slow food groups who are increasing in size and are looking for unique experiences.
- Helping the tour operators to identify food experiences that will enrich their existing travel itineraries.
- Working with the cruise river operators in helping to put together unique regional food and gastronomy experiences.
- Working with UNESCO in order to determine whether the region could be seen as a center of gastronomy – much as has occurred in Chengdu for example.
- Development of collateral.

Theme 2: ASEAN a Tropical Paradise – Experience Unspoiled Nature in Several Countries

This theme requires product development on regional natural experiences that can be promoted. Until that occurs the coordinator can:

- Work with travel writers from various Asian newspapers. Many stakeholders are looking for well-written stories which will certainly get the attention of editors.
- Helping the tour operators to identify natural environment experiences that will enrich their existing travel itineraries.
- Working with the cruise river operators in helping to put together unique regional culinary experiences.
- The coordinator works with government ministries in various countries to identify unique experiences that can be promoted.
- Development of collateral.

Theme 3: World-Class Cities – A Unique Opportunity to Experience Growing Cities That Have Both Modern Faces as Well as Maintain Their Traditional Lifestyles

No product development to date in this area. In the meantime the coordinator can:

- Contact the tourism offices of each of the major cities to determine when they feel are unique characteristics that they would like to highlight as part of a regional strategy.
- Work with the various tour operators to ensure that they are aware of the special characteristics and activities of regional metropolitan areas.
- Look for key metropolitan events that can be linked together and sent to the various travel writers and operators to see whether they will highlight them either in their articles or tour itineraries.
- Development of collateral.

Theme 4: Experience Diverse Traditions and Ways of Life Within One Region

As suggested in this report in the first instance festivals could be targeted. Every destination has festivals and specific actions could be:

- The coordinator or the PDWG catalog the various festivals (water, music, religious, design, film etc.) and look for common elements and timing. There are numerous activities going on and it simply means that there needs to be a well-established database that can be accessed and put together with news stories and press releases.
- The NTOs can play an important role in this activity in cross promoting their various festivals and events. The coordinator would play an important role in making certain that this happens.
- Use the webpage to constantly make people aware of festivals of a regional nature.
- Development of collateral.

Theme 5: Sporting and Relaxation with a Focus on Golf.

This has to be one of the easiest of all themes to promote. The coordinator can:

- Work with the NTOs to determine what they are promoting in terms of golf tourism. Thailand has identified golf as a major area of activity. Piggybacking on the existing activities of the NTOs would be an easy first step.
- Contact all of the major golf organizations in the region to determine when they are having major tournaments. These can then be promoted to the sportswriters.

- Contact the major sportswriters in the region to highlight the possibilities of golfing on a regional basis by for example promoting the idea of playing golf in three different countries within one holiday.
- Development of collateral.

Theme 6: Experiencing Southeast Asia's Diverse Contemporary Creativity-Participating and Sharing in the World's Most Exciting Cultural Environments

No product development yet carried out by the PDWG on this particular theme. Until this is done the coordinator can:

- Contact the relevant government ministries and the NTOs on what is being done in the creative industries. Several countries have in fact identified this as a major area of activity with the most notable example being Indonesia and its Ministry of Tourism and Creative Economy.
- The Coordinator can identify major performing and visual arts exhibits and link them together thematically. This information can then be distributed to the various tour operators and travel writers. The NTOs can then piggyback this on to their existing promotional campaigns.
- Look at what major cities are doing in the areas of fashion, furniture, performing arts, visual arts etc. and tying these together.
- Begin to work with the various NTOs and allied ministries to position Southeast Asia as a creative destination.
- The coordinator should work with the relevant ministries and departments concerned with the creative industries to seek their assistance in promoting creative output and in helping promote the region. These ministries and departments should be strongly motivated and helping to promote their country's stature as a center of creativity and innovation.
- Development of collateral.

BUILDING A DATABASE

The essential platform for building a distribution strategy is clearly a well organized and accessible database. All of the information on individual resources, products and experiences needs to be designed and implemented immediately. It must be done in such a way that detailed information can be accessed from the website by individual travelers as well as operators. It will also be an invaluable tool for the Product Development Working Group to continually put together new regional experiences. The database program that is eventually designed needs to be straightforward but powerful enough to be able to allow access to photographs, other images, maps, tours, tourism services and text. It also needs to have the ability to allow cross-referencing from the database to appropriate digital sites. It must have a search function and ideally allow for interested travelers to use it to put together their individual itineraries through the region. The objective would be that prospective visitors could indicate their interests, geographical preferences, time available, budget, level of mobility and time of year they wish to travel in and get sample itineraries that they can use to visit the region. This would also be of use to travel agents and operators who are constantly looking for new and distinctive experiences for their customers.

The database should also ideally contain a listing of all media contacts social media links which can be built over a period of time with the input of various NTOs.

At minimum the information that is required would include the following:

| Name of Experience/Product/Attraction |
|--|
| 1. Keywords |
| 2. Location within the country |
| 3. Operator of the site |
| 4. Contact Information |
| 5. Website |
| 6. Language(s) |
| 7. Opening times (or incase of a festival the period of time) |
| 8. Entry Cost |
| 9. Location of the nearest airport (map if available) |
| 10. Distance to major destination (map if available) |
| 11. Level of visitor services including accommodation, food, ease and availability of local transportation, guiding services, etc. |
| 12. Significance of the experience (example: World Heritage Site) |
| 13. Enjoying the spectacular view along the back of the Chao Phraya River including many historical sites, temples and other state buildings |
| 14. Where appropriate, the interpretive story (this will be crucial for the experiential and creative tourist) |
| 15. Connection to other similar experiences within the country |
| 16. Connection to other proposed regional experiences |
| 17. Opportunities for volunteering |
| 18. Opportunities for experiencing local culture, nature and history |
| 19. Photographs and images |
| 20. Other relevant information |

SOCIAL MEDIA

The nature of the social media campaign will largely be a function of the capacities and networks of the coordinator or the person or group who the social media distribution activities is outsourced to. Each country should be encouraged to provide video clips that can be brought together to design an overall regional strategy based on a theme or themes and distributed through such outlets as YouTube. It is obvious that a Facebook page must be developed and Twitter and other accounts set up for various interest groups especially tour operators and travel agents. There is a need to constantly feed information into these various channels. Visitors should be encouraged to join interest groups set up by the Marketing and Communication Working Group that will allow them to stay in touch, provide information and when necessary make buying decisions.

Recent announcements by the Tourism Authority of Thailand on their digital strategies could be used as the basis for designing a social media strategy hopefully with its assistance. Other countries have developed their own capacities and these must be combined to both minimize the investment required to design and maintain social media activities and to maximize connectivity between different social media types. For example, while the gastronomy efforts are being highlighted in one country the same campaign could also lead people to a regional food related initiative.

THE WEB SITE

The consultant has assessed the proposed webpage (www.aseantourism.travel) and from his perspective it does not conform to the original concept put forward in the ATMS. The ATMS calls for a separate webpage with supporting pages that deal strictly with promoting tourism within the region. The webpage developed to date contains a mixture of information. NTOs can have their own website that provides access to relevant data and decisions but this should be kept separate from the prime function of marketing page which is to sell and promote the region.

Please refer to Figure 7 which outlines several of the consultant's concerns with the proposed webpage. The numbers refer to the text below.

1. This presents individual types of products by country at the top of the website as opposed to regional experiences.
2. There is no link to private sector partners. The links to the various countries set the bottom of the page are difficult to see.
3. The decision was made to use Southeast Asia as the “brand” since it was more recognizable to the tourist than ASEAN. In fact this was approved by the Ministers.
4. The present website contains a good tagline but one not in keeping with the officially approved logo and tagline.
5. This is the officially approved tagline and logo.
6. This really is of little or no use to the visitor and does not belong on the marketing page.

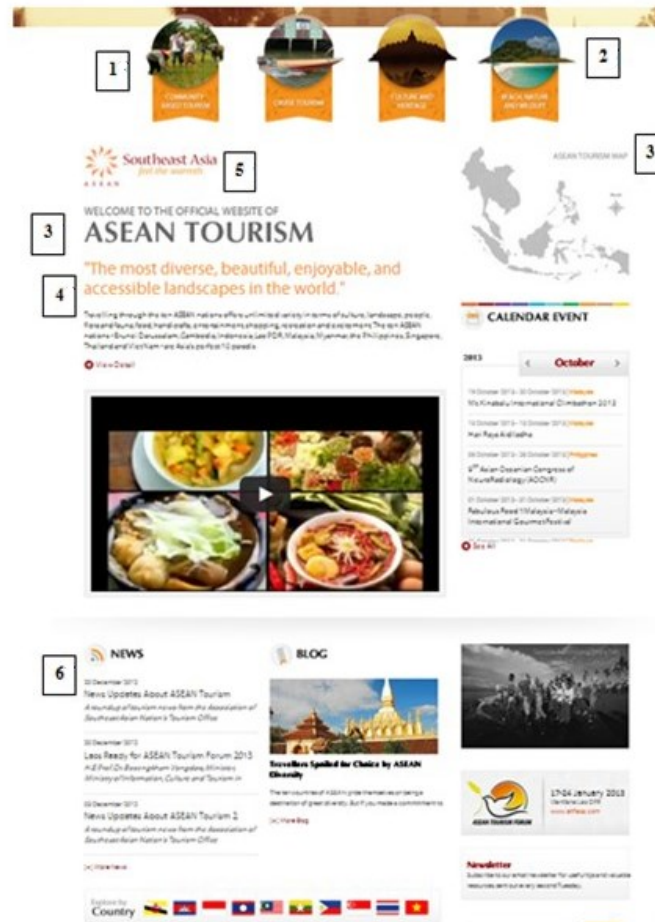


Figure 7: Existing Website Proposal

It is envisaged that the webpage would be constantly changed and have new information added on a consistent basis. The objective would be that both tour operators as well as independent travelers would come back to the page to view new experiences and products that have been developed. All research clearly supports that web pages must be dynamic. It also must be remembered that the website is the only means of distribution that the MCWG directly controls.

It is recognized that there is a great deal of the content and information that is required to maintain a regional website that will be of utility to both the independent traveler and travel agents. The ultimate objective would be that the website would be the single repository of information about Southeast Asian tourism with particular emphasis in the first stages on experiential products and experiences. Different levels of information and access privileges can be considered for various users. For example, tour operators and travel agents could be provided more detailed information than would normally be required by the independent visitor. Tour operators would be encouraged to link to the page and populate certain aspects of the website information. This will require monitoring and coordination by the coordinator or an outsourced group.

The ideal site would have a wide range of functionality and planning tools for both the independent traveler as well as the travel trade. It is important that the website be interactive so that the user can interact with it in various ways from obtaining general information to actually make buying decisions.

This study is not meant to design the website but an attempt is made here to represent conceptually what a webpage could look like.

The four categories identified in the marketing strategy (heritage, nature, community-based and cruise) evolved from decisions made by the countries based on what they felt would be most important in positioning the region. These categories were not meant to be separate categories but rather a grouping of experiences that were felt to reflect a regional perspective. In other words, heritage, nature, community-based and cruising are not meant to be separate categories with products and experience developed strictly within their confines. Rather they were seen as ways of characterizing what makes the region different. It is quite conceivable that an experience offered on the website could combine all four elements. The present organization of the Product Development Working Group will in effect limit creative and innovative experiences from being developed since they are being done within these categories as opposed to the development of experiences meeting a series of market segments.

It should be that the website offers a changing panorama of experiences as well as listing all of the promise and experience identified by countries under the four categories.

The web site would have three levels of information as can be seen in Figure 8.

- The landing page
- Pages with current offerings under the theme of the marketing strategy for a particular year
- A complete listing of products that each country has identified under the four headings of heritage, nature, community-based and cruising. The present level of information is completely inadequate and must be updated with descriptions as well as coordinates as discussed earlier in this section. Ideally each of the experiences must be tied to a webpage which provides a greater level of information.

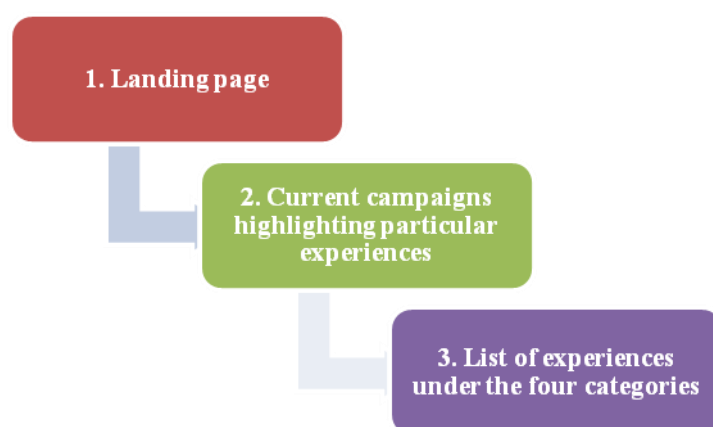


Figure 8: Different Levels of Pages within the Website

Example of Landing Page

Users should have the option of clicking on a series of images to reach another set of web pages as can be seen in Figure 9. It must be remembered that the consultant is not a webpage designer so the designs are only meant to be illustrative and would have to be professionally designed.



Figure 9: Example of a Landing Page

Example of a Page with New Offerings and Experiences Based on a Yearly Marketing Campaign

By clicking on any one of the images the user would be brought immediately to a set of experiences based on the stories previously developed by the consultant as can be seen in Figure 10.



Figure 10: Possible Additions to the Website

PIGGYBACKING ON THE ACTIVITIES OF NTOS

As has been put forward earlier in this report and extensively discussed in the ASEAN Tourism Marketing Strategy the only way that an effective regional campaign with little funding can succeed is by piggybacking on the activities of the public and private sectors. No more needs to be said here other than it is clearly the case that the marketing coordinator needs to work closely with each of the national tourism organizations to ensure that the relevant ASEAN messages are being included in the activities of individual countries..

WORKING CLOSELY WITH PRIVATE SECTOR OPERATORS

There are clearly many opportunities for the private sector to be an effective partner. As can be seen earlier in this report there are already extensive and creative regional efforts by tour operators. Part of the ASEAN effort is to further publicize these offerings through various media and certainly through the website.

The coordinator working with key tour operators can ensure that there is a fit between the strategic directions of the Marketing and Communications Working Group and what the industry is putting forward. The objective obviously is always to be looking for creative and innovative campaign opportunities. One observation is that the offerings by many of the operators are quite similar. Operators are always looking at minimizing their risk and possibly working with the ASEAN NTOs would provide them with an opportunity to try out new ideas with the marketing and technical support of the Marketing and Communications Working Group. This would be especially valuable for smaller tour operators seeking to expand within the region as AEC 2015 comes into being.

ASEANTA as the region-wide industry representative is the obvious key stakeholder to work with but it is an organization with many different objectives and limited resources. There should be continued efforts to work with the organization by providing specific content that can be easily updated and added to their webpage. Attempts should also be made to work with tour operators who have a region-wide area of activity. Many of the larger tour operators are already offering experiences that expose people to the incredible diversity and richness of the region. Given that many of the operators are busy having ready-made content and material available to them would certainly be beneficial. Smaller operators cannot be ignored since they tend to appeal to the experiential market. Having well-designed packages and experiences that they can then commercialize for their own purposes would be one way of building relationships with the private sector and ensuring close fit between the objectives of the MCWG and private sector stakeholders. In the end however it really is a question of how effectively the MCWG and coordinator are able to engage various key stakeholders.

PUBLIC RELATIONS CAMPAIGN TO GENERATE CONSUMER INTEREST

The ASEAN Tourism Marketing Strategy lays out a complete public relations strategy. This is clearly an activity that must be carried out by the marketing

coordinator and has to be an ongoing aspect of his/her work. Some of the travel operators still welcome the distribution of conventional PR material. Part of the function of the coordinator working with colleagues within the NTOs will assemble relevant media lists as well as websites that need to be serviced on a regular basis. This is free promotion and must be considered to be an important part of the overall strategy.

ATTENDANCE AT TRADE SHOWS – VISIBILITY AND PRESENCE AT MAJOR EVENTS

Many would argue that attending trade shows is no longer as important as it was in the past given the digital age. Others would put forward that tradeshow provide a key opportunity to work with tour operators and to hear their plans and concerns. This is clearly a case where piggybacking is absolutely essential and the member countries must make it their responsibility to always have a strong ASEAN presence.

MEASURING SUCCESS

The success of the eventual marketing process will of course be the result of a number of factors. The ability of the Marketing and Communications Working Group to identify the right kind of experiences is essential. Equally the ability of the countries to respond with appropriate product development is also essential. When these two factors are brought together in a marketing strategy the success of the marketing initiatives cannot only be seeking to increase the number of international arrivals but rather there is a need to evaluate whether the region is better positioned as a tourism destination, there is a better understanding of the ASEAN family, areas of the region are better off economically, socially or environmentally because of tourism that has been generated through this regional approach and are the foundations being built to create unique products that cannot be found anywhere else in the world.

There can be no argument that mass tourism has been successful with some countries experiencing significant growth in arrivals and job growth. The nagging question that should be considered is whether tourism growth brings with it the types of benefits that were expected in the ATSP and more importantly is it really contributing to the overall sustainability of the region. There can be no doubt that significant numbers of tourists place incredible stresses on all types of infrastructure. Too often the revenue and therefore profits do not stay in countries and most importantly the tourists leave with very little understanding of the region in which they visited. This is not to argue against mass tourism but to say that experiential and creative tourism is not only an innovative approach to beginning to meet overall societal economic and social goals of the region but also to create a unique set of opportunities in the long-term that will be sustainable.

Large-scale water parks, theme parks, and environmentally damaging water-based activities, tour guiding and operations that do not provide full value heritage in nature etc. cannot be seen as the basis of an overall regional tourism marketing strategy. These elements themselves if properly planned and located can provide for the overall visitor experience but ultimately cannot be seen as what will be a sustainable process in product positioning.

The NTOs need to determine the measures by which they will evaluate the regional marketing strategy.

CONCLUSION

For the MCWG and the PDWG defining products and experiences and how to distribute them is a work in progress. The process must be seen as an integrated and multidisciplinary approach rather than one concentrated on one category of product. It clearly is the responsibility of the two working groups to develop the products and detailed experiences from one category of product to another.

There can be no success without political commitment and the ongoing participation of the industry. Ensuring that these two elements exist is obviously the responsibility of the NTOs.

What is presently lacking in the process is the willingness and ability of the working groups to look at creative solutions. Each of the countries possesses significant creative talent that must be brought to bear on the overall marketing and promotion process. The message must be that this can be done inexpensively simply by thinking about out-of-the-box experiences based on what the consumer is looking for.

Many countries are now investing heavily in the creation of innovative small and medium-size enterprises based on the creative industries. For example, Indonesia has even created a ministry entitled Tourism and Creative Economy. Singapore has invested very heavily in the creative industries as have many other countries including Thailand. Putting together regional products and experiences based on the performing arts, visual arts and creative output could be seen as an important strategy for positioning the region as one that is growing economically but also culturally and socially. There is intense interest in Asian art that could form the basis for very extensive urban-based experiences. Film festivals are incredibly popular and can help position not only individual destinations but in this case the entire region.

Gastronomy, as has been discussed earlier, provides unlimited opportunities for linking the region. This will require some creative thinking and input from food experts working with marketers. Putting together a series of interconnected food festivals would be one way of bringing in this highly desirable market segment. The idea of street food festivals as suggested by Thailand would be an innovative and creative way of introducing people not only to the food of the region but its people.

People are fascinated by various modes of transportation and the region boasts a number of unique transportation experiences from river-based opportunities to cruises to train trips and now increasingly through the improvement of road infrastructure land-based travel. Many of the tourists described above offered by tour operators are already doing this. What needs to be done is to promote the fact that one can have a series of unique experiences based around different

modes of transportation. The list could go on but is outside the purview of this study.

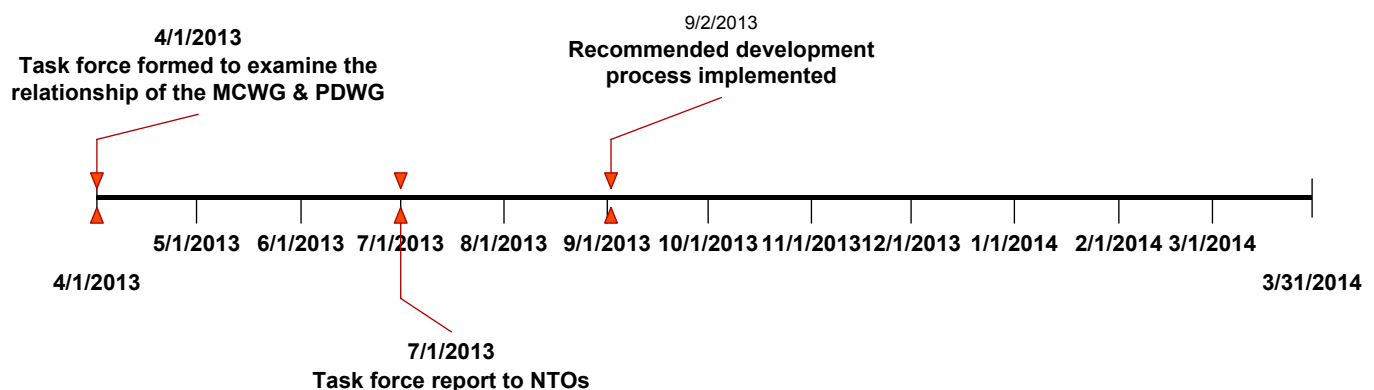
Hopefully the two working groups can begin to use the stories described in this report as a way of thinking about unique and special opportunities as a way of promoting the region.

ANNEX: RECOMMENDATIONS

Based on the discussion and assessment contained in this report there are a number of recommendations that can be considered by both the MCWG and the PDWG. The recommendations are presented by different sets of actions. The recommendations are designed to be carried out within one calendar year.

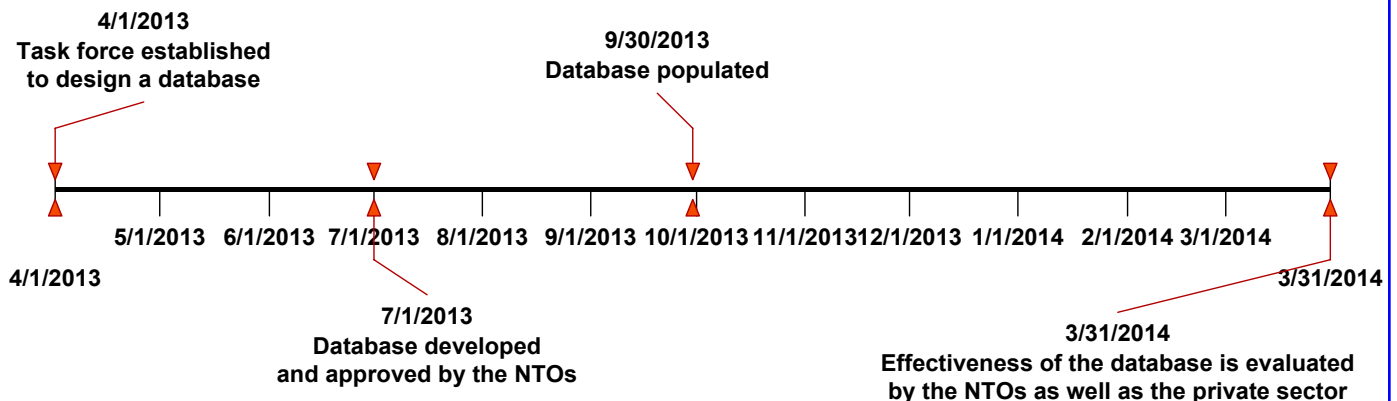
Recommendation 1: Improve the Effectiveness of the Marketing and Product Development Process.

It is essential that the process of developing products based on market research be examined again to ensure a closer fit in the process. It is also essential that the Product Development Working Group take the themes and stories developed by the Marketing Communication Working Group and develop unique products that involve more than one country. As recognized in this report this will require the participation of experts from various countries who are not societal serving members of the working groups. The Product Development Working Group should have access to a consultant to help them in the development process. The NTOs must ensure closer fit between the market research and development process and the product development set of activities.



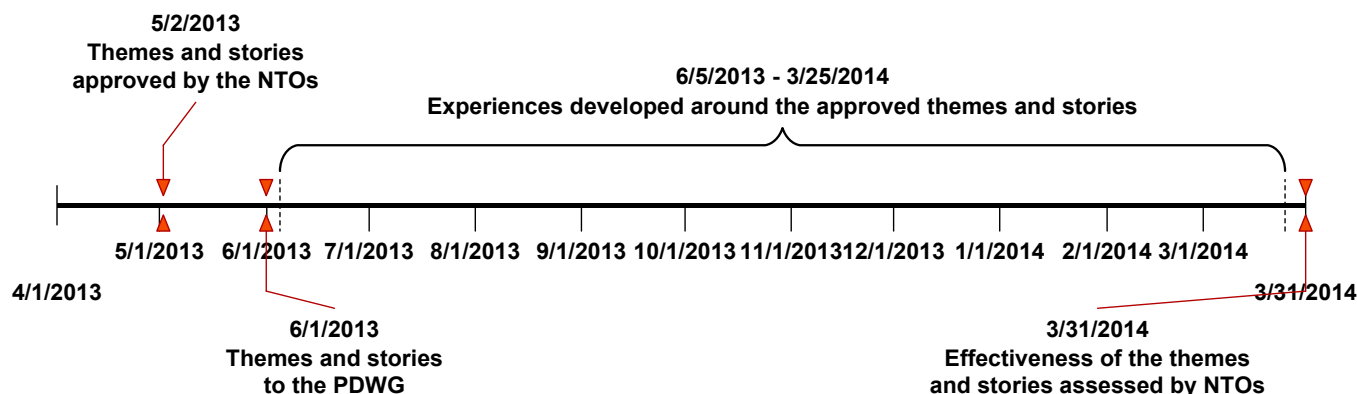
Recommendation 2: Build a Cost-Effective and Sustainable Database.

It is recognized that in order to develop a coherent distribution strategy that there will be a need to have a cost-effective and sustainable database. This will require either a consultant or employee from one of the NTOs to develop the database.



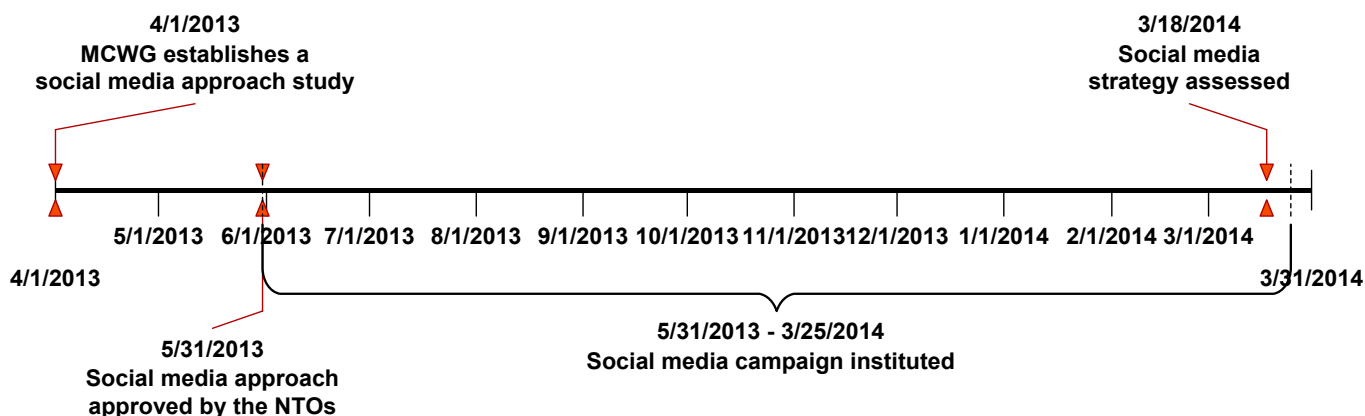
Recommendation 3: The NTOs Endorse the Themes and Stories Put Forward in the Report.

It is essential that the themes and stories be endorsed with strong direction to the relevant working groups to develop unique products and experiences working with private sector groups. As discussed in the report this may require specialist assistance.



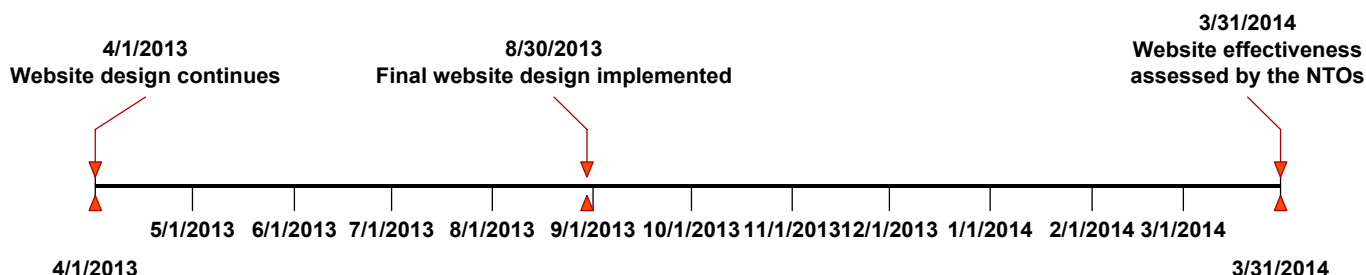
Recommendation 4: Develop a Social Media Approach Based on the Report

This is largely the responsibility of the marketing coordinator and will require the ongoing involvement and cooperation from the various NTOs as well as private sector stakeholders.



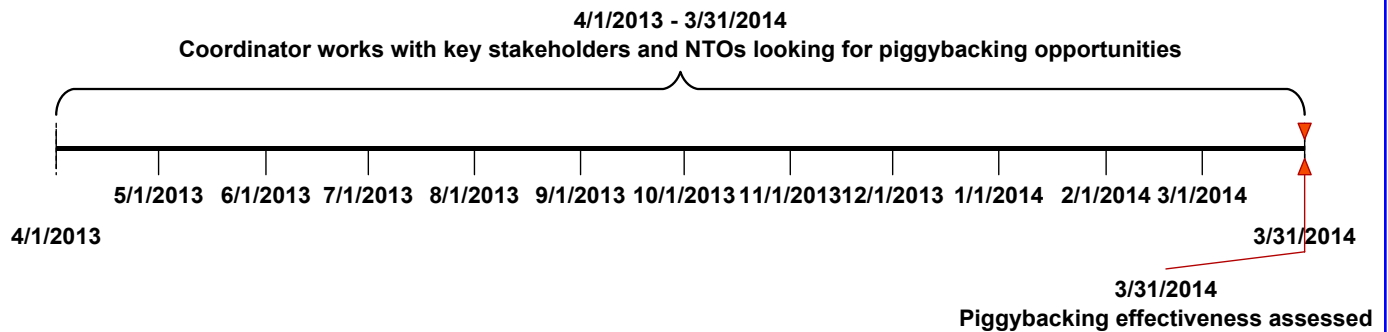
Recommendation 5: Design a Website Solely Concerned with Promotion

There is significant discussion within the report about the website that has been developed. The coordinator working with the designer must look at the design of a website presence that is user-friendly and constantly changing.



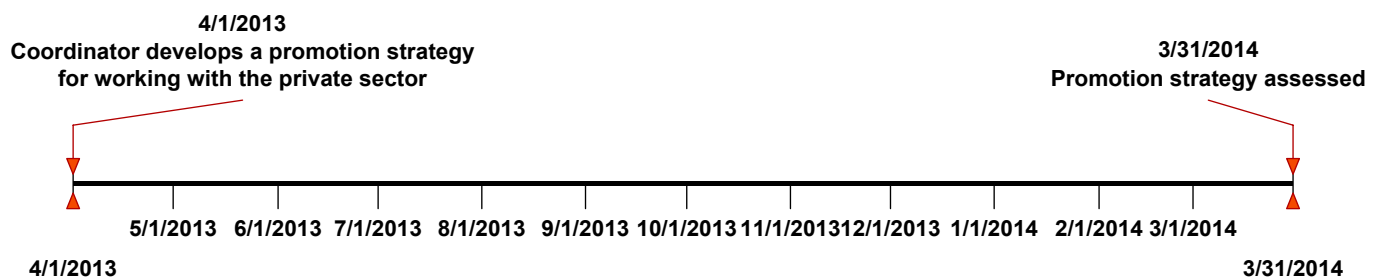
Recommendation 6: The Coordinator Work Effectively with the Various NTOs As Well As Key Stakeholders in Determining How to Piggyback onto Existing Campaigns and Promotional Approaches.

This is very much in keeping with the strategy put forward in the ATMS.



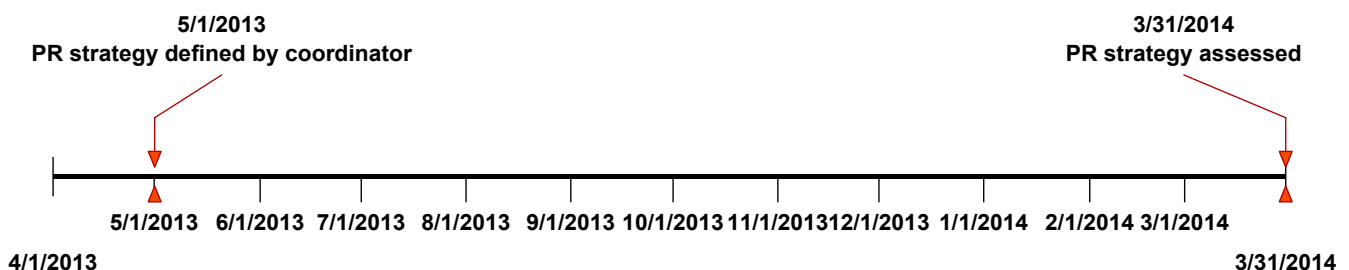
Recommendation 7: The Coordinator Establish a Set of Clear Relationships with the Private Sector to Promote the Experiences Packages Developed by the Product Development Working Group

It is recognized that this will require the cooperation of the NTOs and identifying reliable key partners.



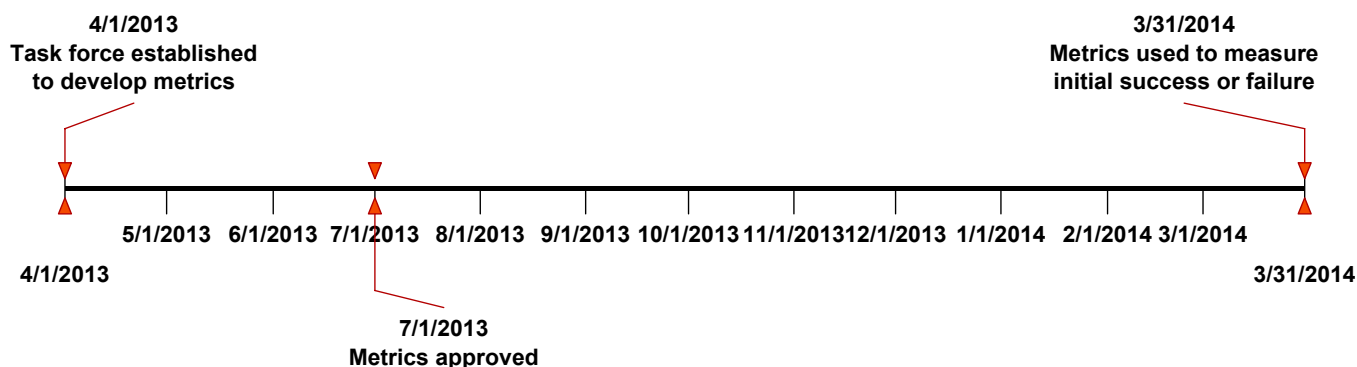
Recommendation 8: The Coordinator Develops a Yearly Public Relations Strategy Using All Possible Media.

This is fully discussed in the ATMS.



Recommendation 9: The NTOs Develop a Set of Measures to Assess Success

This really depends on what the NTOs determine to be the factors that they want to use to measure success. As discussed in the report these measures can take various forms depending on these overall objectives. This recommendation is especially important in helping to assess the effectiveness of various initiatives and strategies.



Recommendation 10: The NTOs Direct the Marketing and Communication Working Group to Carry Out a Comprehensive Branding Exercise

It will have been three years since the present logo and tagline were adopted. As discussed in various sections of the report and from the perspective of the consultant they do not necessarily represent the type of brand promise that the region should be putting forward. A complete branding process must be carried out. This will become increasingly important as the AEC more fully develops and competition grows within the region and the larger global environment.

