

# The Development and Evolution of the ASEAN Community – ASEAN Tourism Strategic Plan 2011-2015

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**Abstract :** The ASEAN (Association of Southeast Asian Nations) Member States are about to enter a very exciting period of development in the ongoing evolution of the regional community. It is recognized that there are a wide range of issues to be considered with tourism seen as an important element in the ongoing evolution of the ASEAN community. This article discusses the development of the ASEAN Tourism Strategic Plan, which was designed to enable the community to move forward in fully realizing the power of tourism as a tool for development and change. Furthermore, the context of tourism within the larger community and key elements of the strategy will be discussed and will conclude with an assessment of the planning and implementation process. The plan is organized around four sets of strategic directions:

The development of experiential and innovative regional products :

- Creative marketing and investment strategies, policies
- Programs for increasing the quality of human resources, services and facilities in the region
- How to increase travel facilitation and ASEAN connectivity
- The design and implementation of an ASEAN tourism cooperation organizational structure.

**Keywords:** Tourism, planning, ASEAN, marketing, product development, human resources

## Introduction

While there have been a number of national as well as sub-national tourism plans developed in Asia there have been few, if any, regional plans that have been developed. One of the key criticisms of most tourism master planning and strategic planning processes is that rarely are these plans implemented. It is the authors' view that too often plans do not reflect political realities, they are rarely developed involving a wide range of

stakeholder views and reflect a realistic assessment of what can actually be done within existing political as well as administrative processes. The planning process described in this article, sought to address these issues and produce a document that could be implemented. As of May 2012, the authors are able to report that the plan is being implemented following the structure, policies and procedures agreed to by the member states. The authors have been heavily influenced by the work of key tourism planners (Inskeep, E. 1991; Hall, M. C. 2000; Gunn C. 2002) but also the authors' own history and experience in tourism planning and development within Southeast Asia. The authors looked at a number of different tourism plans in order to understand what had been done in other places. The authors' scan identified that there have been few successful attempts at regional tourism planning that brought a number of countries together to develop a roadmap to ensure the competitiveness of the region.

In 2009, the Special Working Group on ASEAN Tourism Integration made a decision, during its 9th Meeting in Phnom Penh, to prepare the new ASEAN Tourism Strategic Plan (ATSP) for 2011 - 2015 to achieve the overall goals of the ASEAN Community in 2015. (ASEAN 2008; ASEAN Secretariat 2009; ASEAN Secretariat 2011) The Philippines, Chair of ASEAN Tourism Marketing Task Force at the time, was responsible for the coordination of the overall ATSP development. The ACE Project (ASEAN Competitiveness Enhancement), subsequently renamed the VALUE Project (Valuing ASEAN Linkages under Economic Integration), funded the development of the plan with the College of Innovation at Thammasat University, Thailand, given the responsibility for the overall coordination and formulation of the strategic plan. (The Thammasat team was made up of Dr. Walter Jamieson, Pawinee Sunalai, Dr. Napat Settachai and Michelle Jamieson)

There is no attempt in this article to provide complete and comprehensive details of the strategy. The plan is available from the authors or at the ASEAN website. (ASEAN, 2011) Rather the intent of this article is to describe some of the key elements of the plan in order to draw conclusions about the process and reflect on future directions of regional planning efforts.

It also ends by looking at the academic implications for training future tourism planners.

From the very beginning of the planning process the intent was not to produce a document that would be assessed by its length or weight, but rather would be judged by its ability to provide concise, user-friendly and tangible information about the planning process and its recommendations. While it may seem curious to make this point it is the authors' experience that very often the size and weight of the document is often seen as a reflection of its value! The entire planning exercise focused a great deal on an action planning approach where every specific recommendation carried with it a full implementation approach that considered timing, resources, areas of responsibility and expected results. It is important to note that each of the actions were discussed and approved by all of the member states. As with any planning process there were a wide range of issues and options put forward but it was decided that the document would only include the essential items in order to ensure that all stakeholders were fully aware of the directions being proposed. This entire approach differs from many other tourism planning exercises where significant master planning documents are prepared, which are difficult, if not impossible, for the key stakeholders to understand and to endorse. After 14 months of work, the plan was adopted by the Ministers of Tourism in January 2011.

## **The ASEAN Community and Tourism**

The purpose of this article is not to provide a complete overview of the community since this is done very effectively in other places, but is intended to describe the key elements that will be of interest to readers in positioning the strategic plan that is discussed later in the article.

The ASEAN community was formally established in 1967, initially with five countries and then over time joined by another five countries. The community is concerned with economic growth, social progress, cultural development and creating an environment for regional peace and stability. The names and the geographic relationships of the 10 countries can be found in Figure 1.

Figure 1: ASEAN Countries



The tourism activities were established under the ASEAN Tourism Agreement (ATA) adopted by the ASEAN Leaders during their 8th Summit in November 2002 in Phnom Penh, Cambodia. The ATA was aimed a

- Facilitating travel into and within ASEAN
- Enhancing cooperation in the tourism industry to improve its efficiency and competitiveness
- Reducing restrictions to trade in tourism and travel services,
- Establishing an integrated network of tourism and travel services to maximize the complementary nature of the region's tourist attractions
- Promoting ASEAN as a single tourism destination
- Enhancing mutual assistance in human resources development and training
- Creating favorable conditions for public and private sector partnerships.

For some time, the ASEAN National Tourism Organizations (NTOs) have been working with other ASEAN bodies, dialogue partners and regional groupings to recognize the reality that much of what affects tourism is within the purview of other ASEAN groups as well as a range of stakeholders. One of the challenges of developing the strategic plan was in

getting stakeholder to recognize the limitations of the powers and areas of responsibility of tourism agencies and the myriad of other bodies responsible for many dimensions of the tourism and travel experience. For example, the ASEAN NTOs have worked closely with the Senior Transport Officials (STOM) to address issues relating to, and facilitating air, land and sea travel in the region with the view to enhance and boost intra ASEAN travel and promote the region as a single tourist destination. Coordination has also been undertaken by the NTOs to ensure that its activities provide impetus to other ASEAN initiatives such as the free trade areas (FTAs) and various groupings.

• Some of these regional groupings have been more active than the others. The Greater Mekong Subregion (GMS) has developed the Greater Mekong Subregion Tourism Sector Strategy, funded by ADB, (Asian Development Bank) which has a coordinating office with two employees. Under the BIMP-EAGA (Brunei, Indonesia, Malaysia, Philippines East ASEAN Growth Asia), ADB funded a study on a Community-based Ecotourism Strategy. Part of the challenge of implementing the ATSP will be to ensure coordination between these various sub-regional initiatives in order to avoid duplication.

Several agreements have been signed with various countries resulting in a number of Dialogue Partners, namely, China, the Republic of Korea (ROK), Japan as well as India, Russia, EU, US, New Zealand and Australia allowing the NTOs to benefit from technical assistance and numerous programs relating to human resources development, marketing and ecotourism among others.

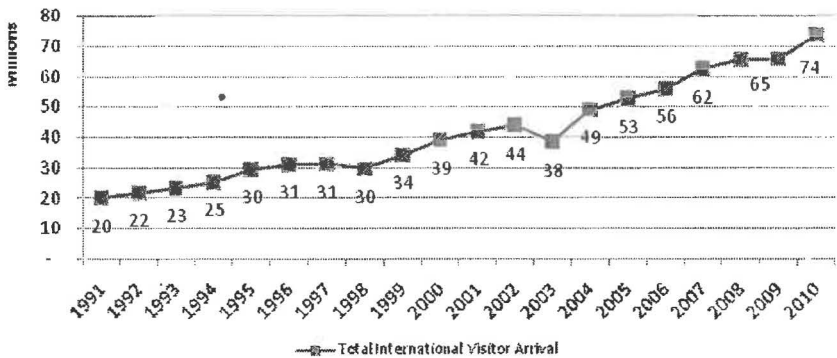
The ASEAN Economic Community (AEC) 2015 initiative aims to create the free flow of goods, services, investment, capital and skilled labor. It is designed to result in a number of benefits and opportunities to the member states. These opportunities include the:

- Creation of a large regional market designed to increase the competitiveness of each member economy. The ASEAN market will have 600 million people.

- Increase of the liberalization of tourism services by allowing businesses to invest in new businesses in other ASEAN nations.
- Increase of foreign investment
- Stimulation of the competitive improvement of local businesses
- Creation of employment
- Increase of opportunities of working overseas.

Tourism into the region has continued to grow with intra ASEAN tourist traffic accounting for the greatest bulk of international arrivals to the region. Figure 2 illustrates that growth from 1991 to 2010.

Figure 2: International Arrivals  
(Source: ASEAN Secretariat)



Based on figures supplied by each NTO the growth figures until 2015 can be found in the Table 1.

**Table 1: Actual and Forecasted Number of Tourist Arrivals in ASEAN 2009 - 2015**

2009	2010	2011	2012	2013	2014	2015
Actual	Actual	Actual	Forecast	Forecast	Forecast	Forecast
65,680,630	73,740,988	79,347,283	86,048,671	92,722,389	99,733,838	107,381,527

(Source: ASEAN Tourism Marketing Strategy 2012-2015)

It must be understood that the forecasted growth in tourism within the

region will be a result of number of different forces and trends. Some of these will be well beyond the control of either the ASEAN NTOs or their various member states such as natural disasters, uncertain global political situations and the availability and cost of fossil fuels. Obviously, any of these factors can have a significant impact on achieving the forecasted growth numbers.

Given that sustainable development is one of the important themes of the strategic plan, it should be remembered that international are but one means of measuring the region's success in meeting the overall goals of the ASEAN countries. An increase in the quality of life of residents, increased conservation of the natural and cultural heritage, higher levels of service, increased skill level attainment and facilitated liberalization are all essential elements that must be considered in judging the success of the implementation of the ATSP.

It is, therefore, within this context that the tourism strategic plan was developed.

### **Developing the ASEAN Tourism Strategic Plan (ATSP)**

The preparation of any strategic plan is a complex process. It involves a number of stakeholders, at times with differing views about the future and priorities, identifying the resources necessary to implement the plan and the difficult task of developing action plans that can be realistically implemented within the timeframe of the plan itself.

Preparing a strategic plan for the ASEAN region was, by definition, even more challenging given the need to meet the vision and needs of 10 unique member states. It was made even more complex by the fact that there were a wide number of stakeholders that have a direct influence on the future of tourism in both the member states themselves as well as the region. As was discussed earlier, within any country there are a number of ministries and departments who are responsible for developing plans, policies and programs that will facilitate the development of tourism across the region. Ministries and departments of tourism, foreign affairs, immigration, investment, airports, ports, roads, education, vocational training, natural and heritage interests, urban and rural development, construction etc. all have essential roles in ensuring sustainable tourism, while providing for a unique

*The Development and Evolution..... Walter Jamieson and Michelle Jamieson* and memorable set of tourism experiences. The private sector is an essential player given its role in providing many of the services and in some cases the tourism products themselves.

The challenge of preparing the plan was further complicated by the need to work under the umbrella of the ASEAN Member States and its Secretariat. There are a number of initiatives being carried out at the regional level specifically in the areas of investment, transportation and connectivity that directly impact the contents of the plan and most importantly its implementation and need to be factored into the overall development process.

The planning process began by recognizing that much of what occurs in terms of tourism activity is directly impacted by a series of global forces whether they are economic, social, cultural or political. These forces have had a significant impact on tourism activity and all predictions are that they will continue to positively and negatively impact the level and nature of tourism in the future. The region has been impacted by a series of human as well as natural disasters that have affected the region in general but more specifically certain countries. It is therefore within this context of uncertainty and turbulence that the plan was developed.

The plan development process involved meeting with a range of stakeholders, visits and meetings with key ministries in all countries and several meetings of the NTOs. The overall process is illustrated in Figure 3.

**Figure 3: Strategic Plan Development Process**





As with any planning process, the NTOs began by defining a series of objectives to guide the planning and implementation process. The overall objective that was finally agreed on was to develop a blueprint defining the policies, programs and projects of the ASEAN NTOs in the areas of marketing, product development, standards, human resources development, investment, and communication, among others. The blueprint was to be developed using world recognized sustainable and responsible tourism principles and practices.

**Specific objectives included the following**

- Conduct consultations and interviews with the ASEAN NTOs and Chairs of the Task Forces and Working Groups as well as the private sector, including the ASEANTA and NTO officials from Dialogue Partners to elicit their inputs, ideas, opinions and recommendations on the vision, goals and objectives for ASEAN Tourism by 2015.
- Conduct an assessment of the work and projects undertaken by the NTOs, task forces and working groups in the areas of marketing, product development, standards, manpower development, investment, cruise tourism and crisis management and other relevant committees.
- Identify new areas as well as programs and activities that the NTOs, task forces and working groups as well as other ASEAN forums should be engaged in and undertake to attain the vision and goals for ASEAN Tourism by 2015.
- Prepare a new roadmap for ASEAN Tourism identifying programs and activities, time frames and coordinating/responsible units.

A series of six overarching principles were adopted that would guide the development of the ATSP, as illustrated in Figure 4.

**Exhibit 4: Guiding Principles**



## **Situational Analysis of Asean Tourism**

The consulting team together with the member states examined a wide range of activities and actions, obstacles and opportunities that existed for ensuring competitive and sustainable tourism in the region. Based on the analysis of the information gathering and consultation stage a number of regional issues were identified.

### **Marketing**

ASEAN NTOs have been working together on marketing issues and initiatives for over 10 years. Many of these initiatives have been related to activities such as Visit ASEAN Campaign, participating at international tourism and travel fairs, establishing an ASEAN Promotional Chapter for Tourism (APCT), promoting youth travelers in ASEAN, and producing a variety of promotional materials for ASEAN tourism. In 2009, a tourism marketing strategy and plan for ASEAN was developed by ASEAN Competitiveness Enhancement (ACE Project). The marketing strategy defined a series of recommendations, with the major recommendation to rebrand the marketing efforts to Southeast Asia - Feel the Warmth. The ATSP recommended the development of a marketing strategy, which was produced during 2011 and adopted by the ministers of tourism in January 2012. The authors together with a somewhat expanded team developed the marketing strategy. (ASEAN 2012)

### **The Development of Regional Products and Experiences**

Based on the analysis of the authors and results of the consultation process it became clear that the NTOs required a coherent product development process to remain competitive in the global tourism environment. It was recognized that tourism products must be enhanced and made to be more interactive to meet the needs of the changing consumer. The development of individual products and experiences is clearly the responsibility of individual member states, their NTOs, the private sector and a range of non-governmental organizations. It was determined that the role of the ASEAN NTOs was to package these products and experiences in such a way that there is more visitation to the region.

## **Investment**

Based on the consultation process, it was widely recognized that investment is largely a function of national government agencies such as boards of investment or ministries of commerce and was clearly not a direct function of the NTOs. There was universal recognition of the need for the ASEAN NTOs as well as the relevant government ministries and departments to work closely with other ASEAN bodies that are responsible for investment related matters.

There are a number of obstacles facing investors such as different policies and approaches in every country, rules and regulations, unclear resettlement issues and land titles. In addition, labor laws are protective and do not encourage doing business across national borders. As a result, the private sector has a difficult time in complying with existing rules on local and foreign nationals when establishing a new business. Even with the agreements in place to harmonize investment strategies there is still a great deal of ground to be covered before there are even a common set of investment procedures and standards within the region.

There is also uncertainty about the nature of the liberalization process. The realities of liberalization are becoming recognized and many countries are now struggling to develop a set of investment strategies that meet both the regional goal of liberalization while protecting the interests of national stakeholders.

## **Manpower Development**

A great deal of effort has been expended in developing and initializing the Mutual Recognition Arrangement (MRA), which in large part identifies a set of competency standards. Work has been done on developing the specific competency standards in 32 jobs titles with 242 competency units. In the consultation process it was recognized that this is an important initiative to facilitate the movement of people from one member state to another. However, this will be a challenging task to implement. Moving from an agreement on competencies to actually implementing them and getting approval at the national level among ministries of labor, education and tourism, and then at the regional level is seen as a long process that would take a number of years.

## **Creation and Implementation of ASEAN Tourism Standards**

Given the overall goal of the plan for ASEAN to be a quality destination, the creation and implementation of standards in many areas of activity were seen as essential. It was recognized that this is a significant task given the multiplicity of stakeholders in the public, private and non-governmental sectors. The issue of standards and enforcement becomes particularly important as source markets become increasingly concerned about consumer protection. There are already clear indications that major tour operators are now more concerned with a wide range of standards in destinations. Those destinations that are able to satisfy the increasingly high standards will have a distinct position of advantage.

It was recognized that the overall tourism experience is influenced by a wide range of different touch points including airport immigration procedures, taxi service, levels of attention in hotels and so forth. It also must be recognized that the creation of standards is straightforward if it is basically dealing with an inventory of attributes such as facilities. When concerns of quality are introduced it becomes much more complex both in terms of defining standards and most importantly assessing the process. It is the view of the authors that the certification/assessment process was not something that can be left to the ASEAN NTOs but must be the purview of a third party. It appears that the member states have chosen to go with a procedure of self assessment without the benefit of a third party. An essential element of any set of standards is the concern with safety and security. This includes not only personal safety but also the safety of food, transportation and attractions. Priorities must be established on what sectors will be examined.

## **Travel Facilitation and Connectivity**

There can be no doubt that achieving the vision of an integrated region where travel is facilitated to the highest possible degree is a major challenge facing the 10 member states. While the overall goal is well recognized and supported there remain a number of significant security, safety, customs, income and other issues to be resolved before a vastly improved travel

system is realized. It was clear that a single tourist visa could substantially benefit travel facilitation in the region. However, there was equal recognition that the establishment of such a visa will not likely occur in the near term due to barriers of technology, political issues, concerns of sovereignty and security and the different visa systems in the member states. In the feedback process, ministries of foreign affairs and immigration officials were pessimistic about the possibility that one visa would be in place within five years. However, many private sector representatives felt confident that with careful planning and increasing cooperation that the lack of a common visa would not be seen as a major impediment to increasing travel in the region. Many stressed the need for innovative sub-regional approaches e.g. sub-regional visas and e-visas.

A major policy issue within ASEAN is that of connectivity. It was recognized that connectivity could be enhanced by policies and programs dealing with various transport linkages (e.g., road, sea, air and rail linkages). Several attempts have been made to achieve this goal. For example, there are ongoing regional efforts for open skies in ASEAN cities. During the planning process various stakeholders addressed several problems associated with the connectivity of ASEAN member states. Many of the issues are nationally based and need to be resolved as part of the larger regional effort to improve connectivity. There is significant interest and support for enhancing deep-sea cruises and coastal cruises as a major form of connectivity. However, consultations indicated that in many cases the port authorities are not willing to work with the cruise operators. Member States need to resolve the issues of port handling and immigration procedures as well as the availability of market information. It is widely recognized that there is an urgent need to develop port facilities that will help to grow the cruise industry and with it the economic impacts of increased water based activity.

## **Communications**

While there has been a focus on crisis communication within the ASEAN NTOs, it has been recognized that the communication function must be expanded to include a wide range of different types of communication in concert with various promotional activities of the ASEAN NTOs. There is

no doubt that the ability to deal with crises once they have occurred is of importance and needs to be a central part of overall communication strategies. Determining areas of responsibility for communications and obtaining the necessary human and financial resources will be a major consideration in achieving a better process for internal and external dialogue and consultation.

There is an urgent need to ensure that protocols are well understood and deal with a wide range of communication issues including crises. Capacity can be built through training and workshops. As with many other aspects of the ATSP, partnerships need to be identified and relationships established with both internal and external organizations/agencies such as PATA and NGOs.

### **Issues of Governance, Planning and Implementation**

One of the objectives of the strategic plan was to determine how ASEAN tourism cooperation could be most effectively managed. One of the integral dimensions of the issue is defining the role of a wide range of stakeholders in the implementation process. Some of the key stakeholders include PATA, ADB, World Bank, UNESCO, UNESCAP, Mekong Tourism Coordination Office, UNWTO, WWF, Child Wise, and Green Globe, etc. How these various stakeholders interact with ASEAN needs to be carefully examined with clear communication processes put into place. While there is ongoing discussion and consultation there is yet to be a definitive model of stakeholder participation where all key actors are represented and seen as part of the overall decision-making and implementation process. This is clearly a work in progress and it is hoped by 2015 a workable and comprehensive stakeholder involvement model will have been developed.

## **ATSP Vision, Strategic Directions and Structure**

### **Vision**

After a long process of consultation the following vision statement was approved to guide the development of tourism in the region from 2011 to 2015.

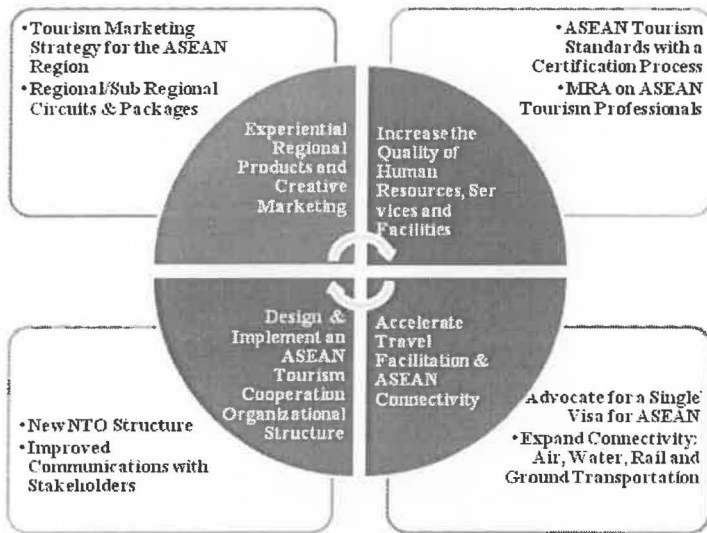
*By 2015, ASEAN will provide an increasing number of visitors to*

*the region with authentic and diverse products, enhanced connectivity, a safe and secure environment, increased quality of services, while at the same time ensuring an increased quality of life and opportunities for residents through responsible and sustainable tourism development by working effectively with a wide range of stakeholders.*

### **Strategic Directions**

Based on the overall objectives of the project, the perspectives of the stakeholders and the level of resources available four sets of strategic actions and activities were developed and adopted by the national tourism organizations. The strategic directions are illustrated in Figure 5. Strategic actions and activities are introduced and are more fully developed in the planning document.

**Figure 5: ATSP Strategic Directions**



#### ***Strategic Direction 1: Develop Experiential Regional Products and Creative Marketing and Investment Strategies***

The NTOs based on their resource base decided to concentrate product development around natural, heritage, community-based and cruise experiences as illustrated in Figure 6.

**Figure 6: Products and Experiences**



The strategic actions coming from Strategic Direction 1 included:

- The development and implementation of a regional tourism marketing strategy. This has already been developed and adopted by the tourism ministers (January 2012) and is in the process of being implemented.
- The NTOs working together develop regional products in the form of circuits and packages. This action recognizes that each of the national tourism organizations are responsible for the development of the individual products and experiences. The task of the ASEAN and the NTOs is to put these experiences together in creative packages that will encourage people to visit more than one country. The target markets that the NTOs are working with are illustrated in Figure 7 and are fully discussed in the ASEAN Tourism Marketing Strategy referred to earlier in this article
- Establish a regional research group to pool resources in order to better understand and define what to offer the tourist on a regional basis.

**Figure 7: ASEAN Tourism Market Segments**





***Strategic Direction 2: Strategically Increase the Quality of Human Resources, Services and Facilities in the Region***

The task of developing standards cannot be minimized given the different levels of elements of each of the countries as well as quite different political agendas and systems. Obtaining approval on standards from the 10 member states will require significant time and facilitation. As noted earlier, developing standards will involve not only the NTOs but also a range of other government departments and private sector groups. This will require careful management in order to ensure that the needs of the industry and governments are clearly met. An important part of the strategic plan is the implementation of a mutual recognition agreement on tourism professionals signed by nine of the ten countries. This is a significant task largely funded by AusAid, which will concentrate on six labor divisions with 32 job titles. The process is underway and will be administered by a separate group.

***Strategic Direction 3: Enhance and Accelerate Travel Facilitation and ASEAN Connectivity***

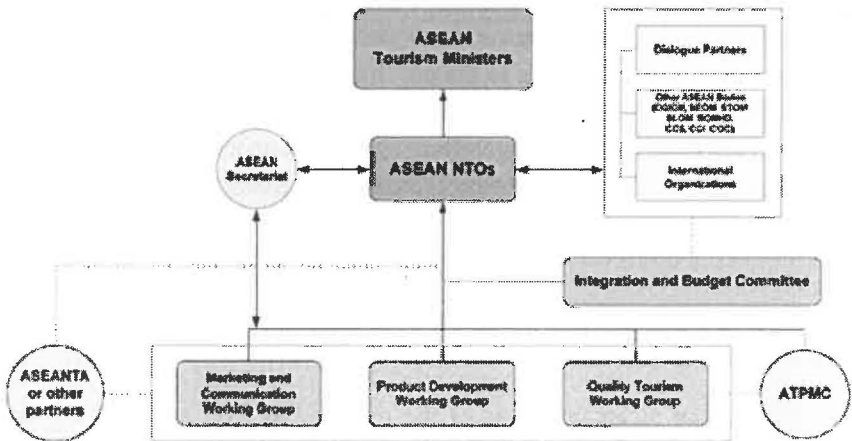
One of the major concerns of the industry as well as visitors is the difficulty of obtaining visas, a series of widely differing regulations and information needs for visas, differing procedures for air as opposed to ground travel, the lack of airplane seats and in some markets the need for more airports, ports and roads.

Clearly much of this activity is not within the realm of NTOs but belongs to a range of other government departments and therefore the key role of the NTOs is to continue to advocate for a single visa for the ASEAN region as well as work with other ASEAN bodies to expand connectivity by air, water, rail and ground transportation. There can be no doubt that a single visa is a noble goal but clearly will be something accomplished outside of the 2015 timeframe. Nevertheless, it was seen that the NTOs should continue to work to ensure the timely adoption of a single visa. Prior to that adoption, ongoing harmonization and the development of sub regional visas should be carefully investigated.

***Strategic Direction 4: Design and Implement ASEAN Tourism Cooperation Organizational Structure***

Based on wide ranging consultation and discussion, a new structure to guide the implementation of the plan and make effective use of existing resources was designed and is presented in Figure 6. As can be seen, the structure now corresponds to the strategic directions described above. How to work with with key stakeholders is built into the structures but exact protocols and procedures have yet to be developed.

**Figure 8: ASEAN Tourism Cooperation Organizational Structure**



## Observations and Conclusions

Being tasked with the development of a regional plan is a unique opportunity as well as a challenge. As noted at the beginning of this article, it is far more complex than developing national or sub-national plans given the number of stakeholders and the complexity of the issues. The development of the ASEAN plan was ever more challenging given the different levels of development of the member states, together with quite different political and social systems and values. Having said that, given the leadership provided by the Philippine NTO, the process was positive with a great deal of consensus around key points and issues. Where there were occasional differences - as would be expected in any planning process - consensus was able to be reached in a positive manner.

While there was general understanding at the beginning of the planning process that tourism was very much integrated into the overall economy and activities of each country, and by extension the region, it was somewhat humbling to discover that many of the levers for change and the influence

to bring about new and innovative policies were outside the purview and power of the national tourism organizations. This strengthened the realization that without effective communications there would be little opportunity for many of the changes to occur.

One of the concerns in any planning process, where there is an uneven level of capacity, is whether each stakeholder is in a position to effectively and equitably participate in the decision-making process. Quite clearly countries with English as a first language, or where a large percentage of the population speaks English, have a position of advantage certainly within the public debates. However, it must be said that private discussions and communications helped to overcome some of the challenges of English expression.

It was clear from the beginning that the notion of regional cooperation was one adopted in principle by all of the participants but from an operational point of view it became more difficult to accept this notion of cooperation when national interests were challenged.

There are very few resources allocated to the operation of ASEAN NTO together with the implementation of the plan. One of the concerns always is that there will be insufficient support to carry out many of the directions and strategies. To date this has not been an issue given the support for some of the key directions and in particular marketing and human resource development by the NTOs themselves as well as donors. The introduction of the Budget and Integration Committee will help to ensure coordination and an effective use of resources.

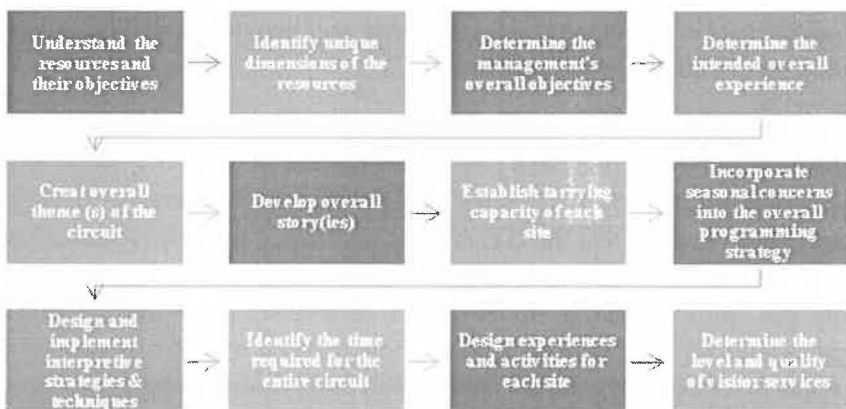
The hiring of a full-time marketing coordinator will make certain that the marketing function has a person responsible for ensuring coordination as well as initiating and evaluating the development of marketing campaigns. It will be essential that the NTOs work with the coordinator to ensure that the various stakeholders participate in the overall marketing process both by the "piggy backing" of activities as well as by outright financial contributions. Without this kind of cooperation it will be difficult for the region to effectively position itself within the global marketplace.

The marketing strategy calls for a careful re-examination of the brand

statement. It calls for a thorough branding exercise to be initiated to ensure that the true nature and value of the region is reflected in the marketing and product development activities. It is the opinion of the authors that the present brand statement of "Southeast Asia - Feel the Warmth" and the logo are not representative of the diversity and quality of the region. Getting agreement on an overall branding strategy will be a difficult undertaking but one that must be addressed in order to ensure that the overall process of positioning the brand (the region) is successful.

There is a strong need to ensure that the product and experience development process is carried out in a professional manner. Many of the countries lack basic skills and knowledge in the product and experience development process. Too often resources are seen as products and experiences. This generally explains the lack of success of many marketing exercises. NTOs must begin to understand that a resource only becomes an experience or product when it is developed through design, visitor management strategies, interpretation and strategic management. The challenge of doing this on a regional basis cannot be underestimated and it is the position of the authors that there will be a need for professional assistance and direction in this area. It is suggested that a process such as the one illustrated in Figure 7 be implemented in order to ensure a competitive position for the region.

**Figure 9: The Product and Experience Development Process**



Issues of quality control will always be of concern. It is the intention of member states that ASEAN standards be developed not only for education but for products as well as operational and tourism infrastructure such as sanitation and hotels. It has been an ongoing area of concern in the region with little success to date. One has to accept that the standards established by Singapore for food sanitation and toilets - as one small example - will only be able to be implemented by some countries over a period of time given level of resources and other national priorities. The issue therefore becomes one of what common level of quality (i.e. an ASEAN standard) will be possible throughout the region. As previously discussed, it is strongly recommended that third person certification be instituted. The countries must overcome their concern about this process in order to ensure the credibility and integrity of the standards developed. Leaving this to the countries themselves is not likely to produce confidence on the part of many of the stakeholders - especially tour operators and tourists.

There will be a need to constantly revisit the strategic plan. Changes in market conditions as well as political and natural conditions will demand this type of re-examination. This will require either that representatives of the NTOs or consultants work on a regular basis to develop a clear indication of directions and approaches. It is hoped that the idea of the report card is instituted to provide an objective means of establishing success and especially in cases where goals and objectives have not been met. The proposed market research group will need to be joined by a wider research effort to ensure that the region has access to the best available information, not only on markets but also on emerging trends and forces.

One of the outstanding dimensions of the strategic planning process has been the adoption of an overall planning approach based on responsible and sustainable tourism. All of the NTOs were firmly of the opinion that the power of tourism had to be recognized and made an essential part of the product development and investment process. This is encouraging and is a clear sign of the changing paradigm of tourism development occurring in many parts of the world. In fact, in the marketing strategy there is a call for developing new metrics to measure success and failure. This in itself is a major movement away from seeing international arrivals and tourism spend as the sole way of measuring the success of tourism. It will be interesting to

see how the member states move on developing these new metrics and implementing them. The authors together with other colleagues are in the process of developing a set of indicators that hopefully can be seen as regional metrics that can be adopted by all ASEAN countries.

It is important to note the identification of community-based tourism as one of the four key product development areas. The member countries felt that in order to ensure that the benefits of tourism were spread throughout the region that one strategy was to ensure that smaller communities, especially those in areas that were underdeveloped, should have the benefit of tourism and the influence of the regional strategy to support that process. It will be important to monitor success and failure of various initiatives in this area.

The authors are of the opinion that external parties must be involved in the overall evaluation and appraisal process. Monitoring is difficult on a national basis but becomes ever more intricate on a regional level.

Achieving consensus on any element of the plan is difficult. The significant achievement of the NTOs to reach consensus on an overall strategic plan with some far-reaching and innovative approaches should be seen as an important advancement in the story of tourism development.

It is highly recommended that university programs begin to expose their students to tourism planning and more importantly to tourism planning on a regional basis in order for them to understand global forces and issues, the policies and tools that are available to help ensure that tourism is not only responsible and sustainable but creates competitive tourism experiences that enable the full power of tourism to be achieved.

The authors look forward to assessing the implementation process after three years in order to measure the success of the execution of the Marketing Strategy.

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