

# ASEAN Tourism Strategic Plan 2016-2025



ASEAN

Southeast Asia  
*feel the warmth*





# ASEAN Tourism Strategic Plan 2016-2025



The Association of Southeast Asian Nations (ASEAN) was established on 8<sup>th</sup> August 1967.

The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

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## Executive Summary

Building on the momentum of the ASEAN Tourism Strategic Plan 2011-2015, ASEAN tourism seeks to make a greater contribution towards the ASEAN integration goal in the post 2015 decade of moving to an economic growth scenario that is more “inclusive,” “green” and “knowledge-based.” There is a need to consolidate the gains already made, and take a more strategic approach to addressing the single destination marketing, quality standards, human resource development, connectivity, investment, community participation, safety and security and natural and cultural heritage conservation challenges facing the development of ASEAN as a competitive, sustainable, and more socio-economically inclusive and integrated tourism destination. In this context, the vision for ASEAN tourism over the next decade to 2025 is:

*“By 2025, ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, and will be committed to responsible, sustainable, inclusive and balanced tourism development, so as to contribute significantly to the socio-economic well-being of ASEAN people.”*

To work towards the vision for ASEAN tourism over the next decade, it will be necessary to complete and continue existing initiatives such as the marketing of ASEAN as a single destination, implementation of the ASEAN tourism standards, and implementation of the ASEAN Mutual Recognition Arrangement on Tourism Professionals (MRA-TP); adopt new and innovative approaches to destination and product development and marketing; mainstream existing sub-regional tourism initiatives such as the Greater Mekong Subregion (GMS), the Brunei, Indonesia, Malaysia and Philippine East ASEAN Growth Area, (BIMP-EAGA) and the Indonesia, Malaysia and Thailand Growth Triangle (IMT-GT) within ASEAN; and to work with other agencies controlling or influencing key connectivity, investment, safety and security and natural and cultural heritage conservation challenges to the integration and development of ASEAN tourism. The core challenges to achieving the vision for ASEAN tourism have been grouped as follows:

**Strategic Direction 1: To Enhance The Competitiveness of ASEAN As A Single Tourism Destination**

<b>No</b>	<b>Strategic Action</b>	<b>Activities</b>
1.1	Intensify Promotion And Marketing	1.1.1 Enhance the ASEAN tourism statistical framework
		1.1.2 Expand the ASEAN regional destination-marketing program
1.2	Diversify Tourism Products	1.2.1 Complete the ongoing and identify new product development and marketing approaches
		1.2.2 Support the development of ASEAN sub-regional destinations/corridors targeting more inclusive tourism outcomes
1.3	Attract Tourism Investments	1.3.1 Prepare an ASEAN tourism investment program that identifies investment corridors where the convergence and consolidation of investments in tourism infrastructure and products will take place
		1.3.2 Promote further liberalization of tourism services
1.4	Raise Capacity and Capability of Tourism Human Capital	1.4.1 Continue the implementation of the ASEAN mutual recognition arrangement on tourism professionals (MRA-TP)
		1.4.2 Prepare and implement the ASEAN tourism human resources development plan in coordination with the ASEAN tourism resources management and development network (ATRM)
1.5	Implement and Expand ASEAN Tourism Standards for Facilities, Services And Destinations	1.5.1 Promote the adoption and implementation of the ASEAN tourism standards certification system into the policy and regulatory and tourism HRD framework of the Member States
		1.5.2 Identify and implement new ASEAN tourism standards
		1.5.3 Develop ASEAN tourist protection guidelines

<b>Strategic Direction 1: To Enhance The Competitiveness of ASEAN As A Single Tourism Destination</b>		
<b>No</b>	<b>Strategic Action</b>	<b>Activities</b>
1.6	Implement and Expand Connectivity and Destination Infrastructure	1.6.1 Enhance ASEAN Air Connectivity by supporting implementation of the ASEAN Single Aviation Market (ASAM)
		1.6.2 Promote the development of cruise and river tourism including its infrastructure for sea and river cruise
		1.6.3 Implement the Agreement on the Recognition of Domestic Driving Licenses issued by ASEAN Countries to promote drive/overland tourism across ASEAN
		1.6.4 Promote the development of road connectivity along major tourism corridors
1.7	Enhance Travel Facilitation	1.7.1 Prepare white paper to implement the facilitation of intra-ASEAN and international travel (Article 2 of ASEAN Tourism Agreement 2002)

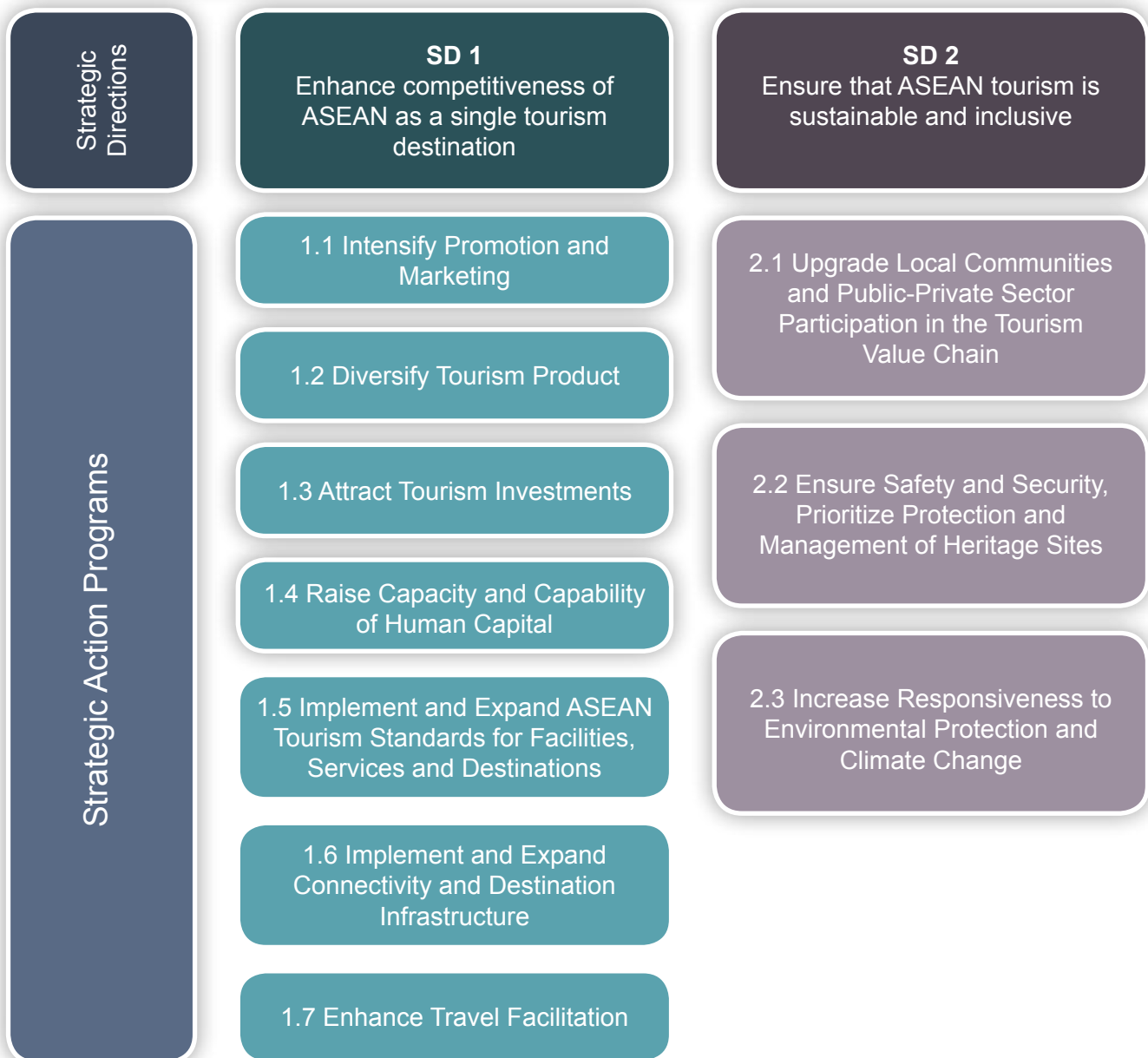
<b>Strategic Direction 2: To Ensure That ASEAN Tourism Is Sustainable And Inclusive</b>		
<b>No</b>	<b>Strategic Action</b>	<b>Activities</b>
2.1	Upgrade Local Communities and Public-Private Sector Participation in the Tourism Value Chain	2.1.1 Develop and implement the strategy on participation of local communities and private sectors in tourism development
2.2	Ensure Safety and Security, Prioritize Protection and Management of Heritage Sites	2.2.1 Work with official bodies and organizations in support of safety, security, and protection of key destinations in ASEAN
		2.2.2 Work with official bodies and organizations in support of the protection and management of heritage sites
2.3	Increase Responsiveness to Environmental Protection and Climate Change	2.3.1 Work with official bodies and organizations to address environmental, and enhance climate change responsiveness
		2.3.2 Prepare a manual of guidelines for incorporating environment and climate change mitigation, adaptation, and resilience

The supervision of the design, implementation and monitoring and evaluation of regional tourism programs and projects will continue to be undertaken at the regional level. The ASEAN Tourism Ministers will continue to provide the policy framework and direction, while the ASEAN NTOs shall continue to serve as the executing body to implement the ATSP 2016-2025 through four Committees:

- The ASEAN Tourism Competitiveness Committee
- The ASEAN Sustainable and Inclusive Tourism Development Committee
- The ASEAN Tourism Resourcing, and Monitoring and Evaluation Committee
- The ASEAN Tourism Professional Monitoring Committee



“By 2025, ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, and will be committed to responsible, sustainable, inclusive and balanced tourism development, so as to contribute significantly to the socio-economic well-being of ASEAN people”



Given that the strategic programs and projects are fully resourced and implemented, it is anticipated that by 2025:

- The GDP contribution of ASEAN tourism could increase from 12% to 15%.
- Tourism’s share of total employment could increase from 3.7% to 7%.
- Per capita spending by international tourists could increase from US\$ 877 to US\$ 1,500.
- Increase the average length of stay of international tourist arrivals from 6.3 nights to 8 nights.
- The number of accommodation units could increase from 0.51 units per 100 head of population in ASEAN to 0.60 units per 100 head of population.
- The number of awardees for the ASEAN tourism standards could increase from 86 to 300.
- The number of community-based tourism value chain project interventions could increase from 43 to over 300.

## **PREFACE**

The Association of Southeast Asian Nations (ASEAN) is emerging as a very dynamic region with a population of about 600 million, rich natural resources and a relatively stable environment. The region's integration process, propelled by the commitment of the ASEAN leaders, is increasing ASEAN's competitive position in global markets. Global and regional development organisations such as the World Bank/International Finance Corporation and the Asian Development Bank project that the prospects for economic growth driven by trade, higher-level manufacturing, agriculture and tourism remain robust going forward. According to the ASEAN Foreign Minister's Retreat held in HuaHin, Thailand on August 20, 2013 to consider the post 2015 vision, ASEAN's overall goal is now moving from one concerned with just sustaining economic growth, towards an economic growth scenario that is "inclusive," "green" and "knowledge-based" and the tourism sector is seen as a leading player in contributing towards the overall post 2015 ASEAN vision.

## ABBREVIATIONS

AADCP	-	ASEAN-Australia Development Cooperation Program
ADB	-	Asian Development Bank
APEC	-	Asia Pacific Economic Cooperation
ASEAN	-	Association of Southeast Asian Nations
ASEAN-CCI	-	ASEAN Coordinating Committee on Investment
ASEAN CCS	-	ASEAN Coordinating Committee on Services
ASEANTA	-	ASEAN Tourism Association
ATA	-	ASEAN Tourism Agreement
ATMS	-	ASEAN Tourism Marketing Strategy
ATPMC	-	ASEAN Tourism Professional Monitoring Committee
ATRM	-	ASEAN Tourism Resources Management And Development
Network		
ATSP	-	ASEAN Tourism Strategic Plan
ATF	-	ASEAN Tourism Forum
BIMP-EAGA	-	Brunei-Indonesia-Malaysia-Philippines East ASEAN Growth Area
GDP	-	Gross Domestic Product
GMS	-	Greater Mekong Subregion
IMT-GT	-	Indonesia-Malaysia-Thailand Growth Triangle
MCWG	-	ASEAN Tourism Marketing and Communication Working Group
MICE	-	Meetings, Incentives, Conventions, Exhibitions/Events
MRA	-	Mutual Recognition Arrangement
NTO	-	National Tourism Organisation
PATA	-	Pacific Asia Travel Association
PDR	-	People's Democratic Republic
PDWG	-	ASEAN Tourism Product Development Working Group
PR	-	Public Relations
QTWG	-	ASEAN Quality Tourism Working Group
SAR	-	Special Autonomous Region
SEA	-	Southeast Asia
STOM	-	ASEAN Senior Transport Officials Meeting
TIBC	-	ASEAN Tourism Integration and Budget Committee
UNDP	-	United Nations Development Programme
UNEP	-	United Nations Environment Programme
UNESCO	-	United Nations Educational, Scientific and Cultural Organization
UNWTO	-	United Nations World Tourism Organization
WB	-	World Bank
WEF	-	World Economic Forum

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## 1.0 INTRODUCTION

### 1.1 TOURISM, ASEAN COMMUNITY, AND ATSP 2011-2015

Southeast Asia has rich and diverse set of natural and tangible and intangible cultural tourism resources located in both rural and urban areas. The region's 11 natural and 17 cultural heritage sites inscribed in the UNESCO World Heritage List highlight and reflect its unique heritage. Enmeshed with its natural heritage is a rich and diverse endemic ethnic culture with overlays of Arab, Chinese, Indian, and European influences. Buddhist, Hindu, Muslim and Christian religious traditions, and vernacular architecture, music, literature, and indigenous knowledge enrich the region and add to the appeal of its outstanding natural heritage, its rural landscapes, and its vibrant urban centers.

- ***Tourism and the ASEAN Community***

Under the ASEAN Economic Community pillar, tourism is one of the priority sectors for integration by 2015. Tourism represents an important component of the economy of all ASEAN Member States—especially in Cambodia, Lao PDR, Malaysia, Philippines, and Thailand, where tourism accounts for more than 10% of GDP<sup>1</sup> and contributes significant employment in their economies. According to the WTTC, in 2013 the ASEAN Member States generated US\$112.6 billion in tourism exports or foreign exchange earnings and \$294.4 billion in value added linked to the travel and tour operations, shopping, entertainment, transportation, and various other tourism-related service occupations and productive sectors, accounting for 12.30% of regional GDP.

- ***Recent Growth Trends & Forecasts***

The evolution of the development of international tourism arrivals is shown in Figure 1. As noted, total arrivals in 2012 have already exceeded the forecast of 86.7 million by 2015 set in the ATSP 2011-2015. While the share of the big three destinations of Malaysia, Singapore and Thailand decreased from 70.71% of total arrivals in 2010 to 64.1% in 2014, the major beneficiaries of increased tourism were Cambodia, Myanmar and Viet Nam.

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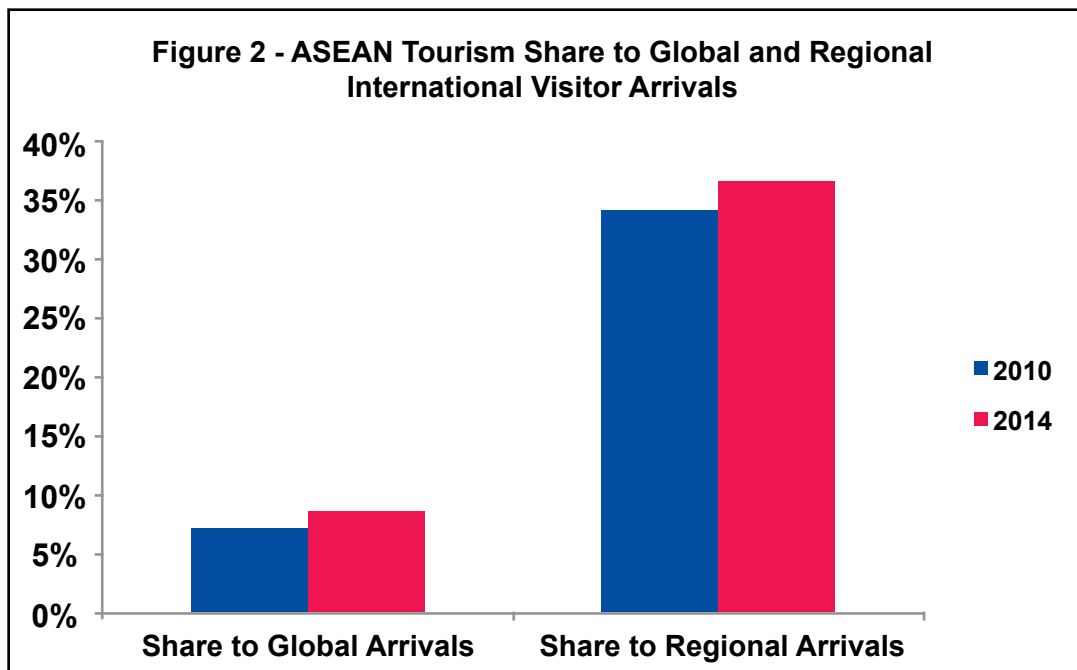
<sup>1</sup>WTTC-based Oxford econometric model forecasts. It should be noted that the WTTC forecasting model estimates cover both international and domestic tourism impacts.



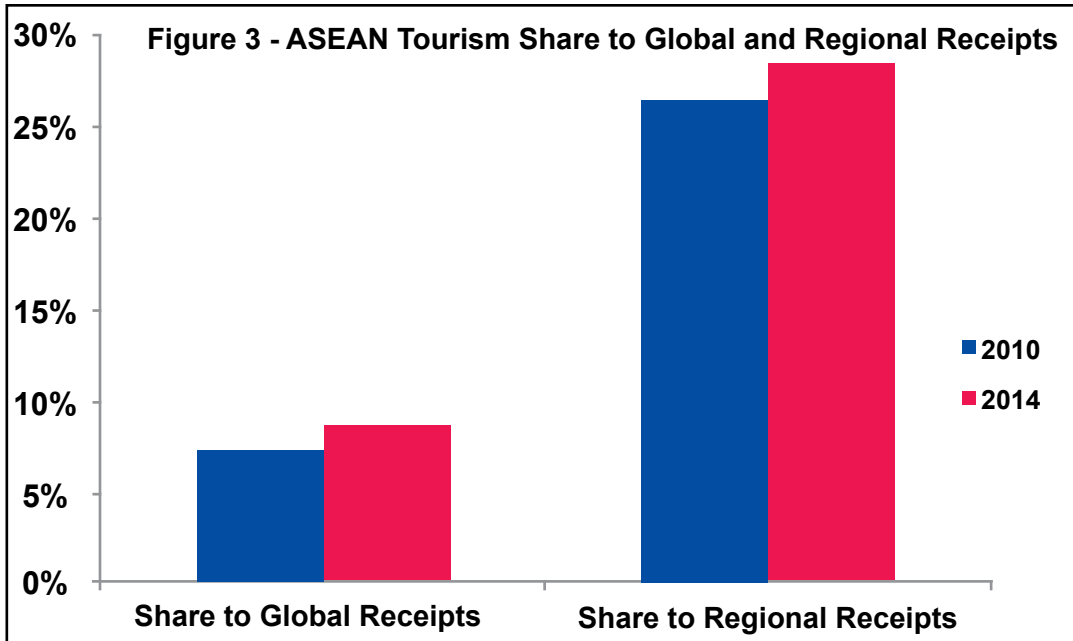
\*Data from 2001 to 2012 reflect arrivals by air only for Brunei Darussalam

Source: ASEAN Secretariat

The ASEAN region has significantly increased its share of global and Asia Pacific regional arrivals and receipts from 2010 to 2014 as shown in Figures 2 and 3. UNWTO data indicate that leisure travel is the main purpose of travel for 56% of arrivals in the Asia Pacific Region, followed by visiting friends and relatives at 26%, and business at 16%.

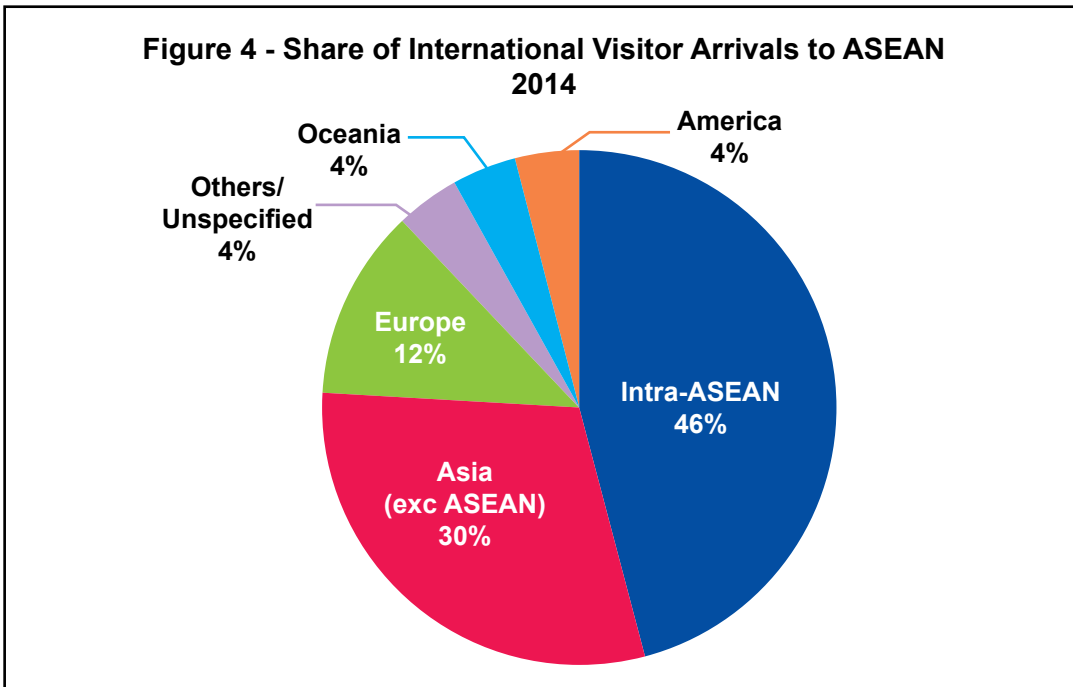


Source of basic data: UNWTO Highlights 2015 Edition



Source of basic data: UNWTO Highlights 2015 Edition

The major source market is intra-ASEAN with 46% share of total international visitor arrivals to ASEAN in 2014. The markets of Asia (30% excluding ASEAN), Europe (12%), Oceania (4%) and America (4%) account for 50% of total arrivals. It is noted that the fastest growing country markets between 2010 and 2013 were China (+30.92%), Japan (+12.95%), Republic of Korea (+10.49%), Taiwan (+9.14%), and Australia (+8.24%).



Source: ASEAN Secretariat

According to the UNWTO, total international arrivals to ASEAN are expected to increase to 123 million by 2020, 152 million by 2025, and 187 million by 2030. This raises issues concerned with the long term sustainability of this growth, most especially the management of relatively static heritage tourism resources, increased distribution of direct and indirect income and employment benefits to less advantaged populations in the region.

**Table 1 – Forecasts of International Arrivals to Southeast Asia in 2020, 2025 and 2030**

Region	Projected Growth in Arrivals		Actual		Projections	
	2010-2020	2020-2030	2013	2020	2025	2030
<b>World</b>	3.8%	2.9%	1,087	1,360	1,569	1,809
<b>Asia and Pacific</b>	5.7%	4.2%	248	355	436	535
<b>Southeast Asia</b>	5.8%	4.3%	102*	123	152	187

- **Subregional Tourism Destinations**

Based on comparative data available for 2010, the GMS was the largest of the three sub-regional groupings in terms of ASEAN arrivals accounting for 45.9% of total arrivals; generating \$39.7 billion in visitor exports; contributing 12.1% to subregional GDP (about 35% of total ASEAN tourism GDP), and directly employing 3.31 million people (between 50 and 70% are women).<sup>2</sup> While the shares of ASEAN international arrivals of the BIMP-EAGA and the IMT-GT are relatively modest compared to the GMS, their GDP shares are higher and the BIMP-EAGA has a faster growth rate.

Women represent at least half the subregion’s tourism industry workers and hold 60% or more of hospitality related tourism jobs in Thailand, Philippines, and Viet Nam<sup>3</sup>. Gender profile by job type varies considerably, with the majority of women employed in lower-skilled jobs paying lower wages. Observations in all ASEAN countries indicate that men tend to secure a higher proportion of managerial positions in government and private sector tourism enterprises. In Thailand, 66% of hotel and restaurant workers were women<sup>4</sup> and the percentage of women employed as housekeepers in Lao PDR’s accommodation subsector is nearly 100%.<sup>5</sup> Not with standing lower wages and gender-biased pay rates that favor males, remittances from low and semi-skilled tourism workers are an important source of supplementary income for rural households. A study in Cambodia found over 75% of both men and women working in Siem Reap and Phnom Penh hotels remit wages that amount to over \$1.2 million per month<sup>6</sup>.

<sup>2</sup>Based on computations by Project Team.

<sup>3</sup>ADB. 2009. *Gender-Related Impacts of the Global Economic Slowdown in the Greater Mekong Subregion: Emerging Trends and Issues*. Manila.

<sup>4</sup>Paitoonpong, S.,N. Akkarakul, and S. Rodsomboon. 2009. *Triple Burden: Impact of the Financial Crisis on Women in Thailand*. p. 31. Oxfam Research Report. Bangkok: Oxfam GB.

<sup>5</sup>Lao National Tourism Administration.2009. *Tourism, Employment and Education in Lao PDR*. Vientiane.

<sup>6</sup>Overseas Development Instituteand United Nations Development Programme. 2009. *Cambodia Country Competitiveness: Driving Economic Growth and Poverty Reduction*. Phnom Penh. The study found that on average, males earn 30% more than females employed in comparable professions.



## 1.2 DEVELOPING THE ATSP 2016-2025

### • *Building on the ATSP 2011-2015*

To achieve the integration envisioned by the ASEAN Leaders, the ASEAN Tourism Ministers adopted the ATSP 2011-2015 that was built on the accomplishments by ASEAN tourism of the 19 measures under the Roadmap for Integration. These measures were consistent with the ATA adopted by the ASEAN Leaders during the 8<sup>th</sup> Summit in November 2002 in Phnom Penh, Cambodia.

The ATSP 2011-2015, through its vision and overarching goal of sustainable tourism development sought to maximize the tourism sector's capability to contribute toward ASEAN's regional integration goal by addressing key constraints to the integration of the sector, namely: fragmented, incoherent and ad hoc approaches towards regional marketing, destination and product development, investment, human resources, quality standards, travel facilitation and connectivity, safety and security, and communications.

The main activities for which each working group is responsible, together with the current status of implementation and achievements to date are reviewed in Annex 1. In the scorecard prepared by TIBC, it was noted that 91% of all activities under the ATSP had been completed or were being implemented on an ongoing basis.

A review of the results of the implementation of the ATSP 2011-2015 to date, together with the review of performance of ASEAN tourism between 2010 and 2015, and the deliberations of the ATSP Task Force at its Singapore meeting in 2014 indicates that the core challenges facing the sustainable development of quality tourism and its integration within the ASEAN economy are:

- creating a better balance in the distribution of the benefits of tourism between the Member States;
- reducing concerns over safety and security;
- making cross border formalities more convenient and less costly;
- reducing transportation and destination infrastructure congestion;
- reducing the high cost of travel industry services in the region;
- increasing participation by local communities in the tourism value chain especially in the less developed yet tourism resource rich areas of the region;
- reducing the vulnerability of the heritage assets and related populations to climate change; and
- developing destinations that are inclusive, green and knowledge-based.

Together, these challenges remain the main barriers to developing a higher quality and more inclusive tourism economy, one of the key goals of the ASEAN economic integration agenda. The main causes underlying the core challenges are:

- policy weaknesses related to investment in tourist facilities and services, persistence of restrictive policies on cross border travel and connectivity, insufficient resources for enforcing destination safety and security, and weak communications infrastructure and systems—especially in the less developed portions of the region;
- lack of clearly defined policies for the development of inclusive, green and knowledge-based subregional thematic destinations and products;

- lack of prioritisation of tourism in public infrastructure investment especially air and ground transportation infrastructure, tourism destination infrastructure,<sup>7</sup> and ICT infrastructure;
- weak policy frameworks for mainstreaming sustainable tourism development principles and practices, community participation, climate change adaptation and resilience, and protecting natural and cultural heritage through enhanced site management and controls; and
- lack of a well defined results framework and related monitoring and evaluation system.

Overall, while there has been a significant improvement in the approach to regional marketing, product development, and quality standards, there is still much to be done to:

1. Implement existing marketing, product development, and quality tourism initiatives;
2. Enhance investment, travel facilitation and connectivity, safety and security, and communications; and
3. Address core policy weaknesses in the area of:
  - a. thematic subregional destination and product development,
  - b. prioritization of investment in transportation,
  - c. destination and ICT infrastructure,
  - d. mainstreaming sustainable tourism principles and practices,
  - e. upgrading community and private sector participation, and
  - f. climate change adaptation and resilience, protection and management of heritage sites

Finally, developing and implementing an effective results framework and monitoring and evaluation system is essential to improving the competitiveness and inclusiveness of ASEAN tourism. Addressing these issues should be the core concern of the ATSP 2016-2025.

For the ATSP 2016-2025, the Philippine Department of Tourism served as the NTO responsible for coordinating the development of the plan together with the ASEAN Secretariat. The project team from the USAID Advancing Philippine Competitiveness Project provided technical assistance to the Philippine DOT and the ASEAN Secretariat in developing and completing the plan.

- ***Report Roadmap***

Chapter 2 proceeds with a discussion of the ten focus areas of the ATSP 2016-2025 that were endorsed by the ASEAN Tourism Ministers in Nay Pyi Taw, Myanmar last January 25, 2015. These focus areas arise from an analysis of the core challenges facing the sustainable development of ASEAN tourism (Table 2). They were identified by the ASEAN NTOs as being relevant to the implementation of the ATSP 2016-2025 vision.

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<sup>7</sup>Destination infrastructure includes the provision and operations and maintenance of water, power, local transportation, ICT, liquid and solid waste management, and social infrastructure such as medical facilities and services.

**Table 2 – Focus Areas of the ATSP 2016-2025**

Within the NTOs Purview	Beyond the NTOs Purview
• marketing and promotion	• travel facilitation
• product development/standards	• safety and security
• human resource development	• connectivity and infrastructure
• tourism investment	• responsiveness to climate change
• quality tourism	
• sustainable growth and development (including inclusive tourism development)	

These focus areas became the basis for the 10 strategic action programs, strategic activities and implementation arrangements presented in Chapter 3. The detailed activities and timeline are presented in Chapter 4. Lastly Chapter 5 presents the results framework for monitoring and evaluating the outputs, outcomes and impacts.

## 2.0 FOCUS AREAS OF ATSP 2016-2025

### 2.1 TOURISM COMPETITIVENESS

The global competitiveness reports and surveys reveal that ASEAN's natural and cultural heritage is one of its key competitive strengths. The main weaknesses are in the areas of infrastructure and business environment, regulatory framework and human resources. Developing quality tourism destinations and products remains a major challenge for ASEAN. The weak performance of the less developed Member States is reflected in the asymmetric nature of the distribution of tourism flows within the region. The challenge therefore is to raise the competitiveness of the tourism sector in the affected Member States to bring about a more inclusive distribution of benefits relative to factors such as population and resource capacity. Thus, the focus areas to raise competitiveness are marketing, product development, investments, quality tourism, human resources, connectivity and infrastructure and travel facilitation.

#### 2.1.1 MARKETING

- *Marketing of Southeast Asia (ASEAN Tourism)*

Whilst considerable activity has taken place, and specific projects pursued by the MCWG, it is noted that:

- There is a dearth of market research to guide product development, packaging, pricing, distribution and promotion.
- There is a need to better coordinate the activities of the PDWG and that of the MCWG in terms of the marketing function and to ensure that these are combined in the marketing strategy and plan.
- The Acronym "ASEAN" is in fact not known to most consumers of ASEAN tourism who are more familiar with the regional name Southeast Asia or specific countries therein having learned of these at school or in current affairs. The website [www.aseantourism.travel](http://www.aseantourism.travel) therefore does not show up in travel searches on SEA travel, SEA vacations, visit SEA, SEA trips or SEA tours, and thus is not an effective way to promote ASEAN destinations and products. It is recommended that the European Union approach be adopted—see <http://www.visiteurope.com/en/>, i.e. [visitsoutheastasia.com](http://visitsoutheastasia.com), etc.
- The current list of regional and subregional destination/circuit/corridors and related product themes needs to be augmented with destinations/corridors and related products that better coincide with the less developed destinations of the region—notably where much of ASEAN's poor live.

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<sup>8</sup>See the World Travel and Tourism Competitiveness Reports.

- ***Positioning and Branding ASEAN in its Markets***

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

- ***Networks with Multi and Bi-lateral International Partners***

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

- ***Development and marketing of ASEAN Subregional Destinations/Corridors/Circuits***

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

## **2.1.2 PRODUCT DEVELOPMENT**

Critical to raising the competitiveness of ASEAN as a global destination in terms of the value it offers to its visitors and the benefits it generates in terms of length of stay, expenditure per day, and inclusive growth is marketing a diverse set of high quality destinations and products. The lessons learned are that there is a need to:

- a) at the outset set an effective stakeholder framework for undertaking market-product research to inform product development, packaging, pricing, promotion, distribution and monitoring and evaluation initiatives;
- b) engage the participation of the private sector early on in the product development research, planning and development phase of the product development cycle; and
- c) remain focused on the core strategic initiatives of the ATSP and avoid ad hoc projects where these cannot be demonstrated to contribute significantly to the strategic outcomes.

### **2.1.3 INVESTMENTS**

Over the years, ASEAN has pursued initiatives pursued to promote the ASEAN as destination for investments in general and with tourism as one of the priority industries being promoted for investments as revealed in the official website of ASEAN investments. In 2008, an ASEAN Tourism Investment Guide was produced to provide the compendium of policies, laws and incentives across Member States. The website <http://investasean.asean.org/> serves as platform where investors can access information on broad ASEAN investment opportunities in tourism, currently limited on the ASEAN 5 and focused largely on infrastructure, gaming and theme parks. There are wider opportunities to increase the investments levels in ASEAN and in ASEAN tourism thru an identification and promotions of investment opportunities in regional clusters of destinations or corridors. In terms of investment policies and regulatory framework as a single production base and tourism destination, there are considerably wide variations from country to country thus making cross border investments cumbersome, inconvenient, insecure and expensive to undertake.

### **2.1.4 QUALITY TOURISM**

The bigger challenge towards achieving high quality of standards is related to the development and implementation of the certification processes. The challenge is rooted in the fact that ASEAN countries have varying systems of certification and levels of priorities for delivering effective certification systems due to resource issue – funding and manpower as examples. In some countries the certification is voluntary while in others it is mandatory. Likewise, as pointed out in the ATSP 2011-2015, there is a need to develop measurable standards and indicators for each of the areas and make them transparent to the tourists when they make decisions.

There is scope for ASEAN to collectively do more to strengthen the ASEAN focal points for consumer complaints, consider an information exchange mechanism between agencies responsible for tourism, strengthen cross-border redress mechanisms and consider an on-line system for complaints.

### **2.1.5 HUMAN RESOURCE DEVELOPMENT**

Significant progress has already been made in developing standards and certification processes, providing guidelines on addressing climate change, and raising the quality of ASEAN tourism human resources through planning, capacity building and the MRA program on tourism professionals being spearheaded by the ATPMC.

As recognised in the ATSP 2011-2015, while competencies can be identified and MRA on Tourism Professionals has been concluded, their application by the various tourism educational and training providers will be voluntary particularly in terms of quality of instruction, evaluation and standards of curriculum development. In some states, the issue is the nature of the regulatory frameworks and structures as well as financing for implementing the competencies given the needs for effective trainers, presence of training centers to name a few.

## **2.1.6 CONNECTIVITY AND INFRASTRUCTURE**

A major factor impeding the development of a more competitive tourism sector in ASEAN is the low quality and limited provision of air, sea and road connectivity infrastructure, particularly in the less developed destinations outside the main gateway areas of the region, as well as the basic destination infrastructure (including small-scale community-based infrastructure such as visitor information centers) necessary to support sustainable and inclusive growth.

There are still significant opportunities to connect a number of secondary gateways and sub-regional points to other ASEAN destinations and to the rest of the world by accelerating the development of airport infrastructure and removing barriers to free flow of people and goods across ASEAN. Together with enhanced travel facilitation programs, investments in connectivity and infrastructure will help ASEAN tourism stakeholders upscale and expand the development of regional tourism products and experience along regional tourism clusters or corridors. The provision of these infrastructure support facilities will also enable the engagement or participation of local communities in the tourism value chain along the tourism clusters or investment corridors.

## **2.1.7 TRAVEL FACILITATION**

To encourage tourists to choose ASEAN regional products over other alternatives and to stay longer and to spend more in the region, it is important to make cross-border travel seamless and cost-competitive not only through well-connected destinations by air, sea and land but also through enabling border control policies and procedures. Most ASEAN Member States continue to require visas from residents of non-ASEAN countries as well as in the case of some ASEAN residents. This makes multiple country visits—especially by long haul markets—expensive and inconvenient, reduces the price competitiveness of the region as a destination, and works against the goal of inclusive economic development.

As the provision of cross border customs, immigration, quarantine and security (CIQS) services is outside the purview of the NTOs and destination managers, a convergence strategy needs to be adopted between the NTOs and the responsible CIQS national agencies for moving towards a more integrated system of cross border management as well as providing for the multi-country destination travel needs of the long haul tourism markets.

## 2.2 SUSTAINABLE AND INCLUSIVE TOURISM

### 2.2.1 UPGRADING COMMUNITY PARTICIPATION

Although great strides have been made in reducing poverty in the region, the reality is that in 2013, over 215 million mainly rural residents lived on less than US\$2 per day even as the income gap between rural and urban populations continues to grow. Among various services industries, tourism offers great potential for contributing towards the overall goal of eradicating regional poverty because rural areas and the communities living in them are often the primary focus of tourism activity such as natural and cultural area sightseeing, trekking, river and coastal recreation and sports, etc. Tourism, if developed within an inclusive destination policy and framework, is thus capable of contributing new economic opportunities to rural and remotely located communities in ASEAN.

A more inclusive pattern of tourism in ASEAN, that is a key goal of the vision for ASEAN tourism post 2015, requires that marginalised communities are more engaged in the tourism economy at a destination level – directly and/or indirectly. This engagement may be: direct where the community provides a service such as home-stay or guided treks to natural heritage sites in their vicinity; or indirect where the community provides inputs into the tourism supply chain such as production of vegetables and fruits for restaurants, and production of cultural objects for sale as tourist souvenirs.

A review of the experience with inclusive tourism development projects in ASEAN, especially in the Mekong River Tourism Corridor of the GMS indicates that significant inclusive impacts are likely to be achieved by adopting an inclusive tourism destination development framework that creates and is able to support multi-niche opportunities for direct and indirect participation across the full range of tourism facilities and services offered in the destination.

### 2.2.2 SAFETY, SECURITY AND PROTECTION OF ASSETS

- *Safety and Security*

Safety and security are essential components of sustainable and competitive quality tourist destinations. Safety must be ensured in the use of tourism facilities and services, especially transportation, accommodation and tour operations services, while security against crime, terrorism, and armed conflict must be provided. Although tourism safety and security is undertaken at the national level by the Member States, the lack of a consistent policy approach and affirmative strategy towards improving and securing visitor safety and security may affect the ability to position the region as a single global destination.

As safety and security are generally not in the purview of the NTOs and destination managers, it will be necessary to work with the responsible regional, subregional and national organisations to prepare and implement an ASEAN Tourism Safety and Security Policy and Strategy. The policy and strategy would guide subregional and national programs to increase and secure tourist safety and security.

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<sup>9</sup>Key Indicators for Asia and the Pacific. Asian Development Bank. 2013.



- ***Protection and management of assets***

ASEAN tourism depends greatly upon the drawing power of its unique natural and cultural heritage resources many of which are globally recognised including 11 natural and 17 cultural heritage sites inscribed in the UNESCO World Heritage List.

The rapid growth of both domestic and international tourism are likely to exert increasing pressure on ASEAN's limited heritage resources. As its heritage is reported in WEF competitiveness surveys as one of ASEAN's key competitive strengths, it is vital that ASEAN's heritage is not only protected but its attractiveness enhanced and the benefits of this directed to local communities.

Except for some national ecotourism strategies, there is no regional-wide policy framework to ensure that tourism supports the conservation of biodiversity and culture, expands the number of listed sites, helps to strengthen the management of protected areas and sites, and promotes community-based income generation.

As the natural and cultural heritage sites are not in the purview of the ASEAN NTO, it will be necessary to work with the responsible regional and subregional organisations to craft and implement policies and strategies designed to achieve the above objective.

### **2.2.3 ENVIRONMENT AND CLIMATE CHANGE**

Whilst environmental protection and climate change mitigation have been part of the agenda of the ATSP 2011-2015, (specifically in the area of developing green standards and product development), there is a need to expand the scope of environmental protection and climate change responsiveness initiatives to encompass broader environmental protection concerns— notably the environment of ASEAN's tourism cities and towns and ASEAN Heritage Parks, and to move to provide policy guidelines and knowledge on climate change adaption and building resilience to climate change events.

As the policy and regulatory framework for environmental improvements and climate change mitigation, adaptation and resilience is not directly in the purview of the NTOs, it will be necessary to work with the related organisations at the regional, subregional and international level to develop and implement the policy and strategy.

## 3.0 DIRECTIONS FOR ATSP 2016-2025

### 3.1 VISION

Building on the momentum of the ASEAN Tourism Strategic Plan 2011-2015, there is a need to consolidate the gains already made and take a more strategic approach to address the challenges facing the development of ASEAN as a competitive, sustainable, and more socio-economically inclusive and integrated tourism destination. This means that it will be necessary to tackle key connectivity, cross border, investment, destination and product development, quality standards, safety and security, tourism infrastructure, natural and cultural heritage, and climate change issues.

Consistent with the post 2015 ASEAN vision and challenges facing the development of tourism in ASEAN, the guiding vision for the development of ASEAN as a single tourist destination is:

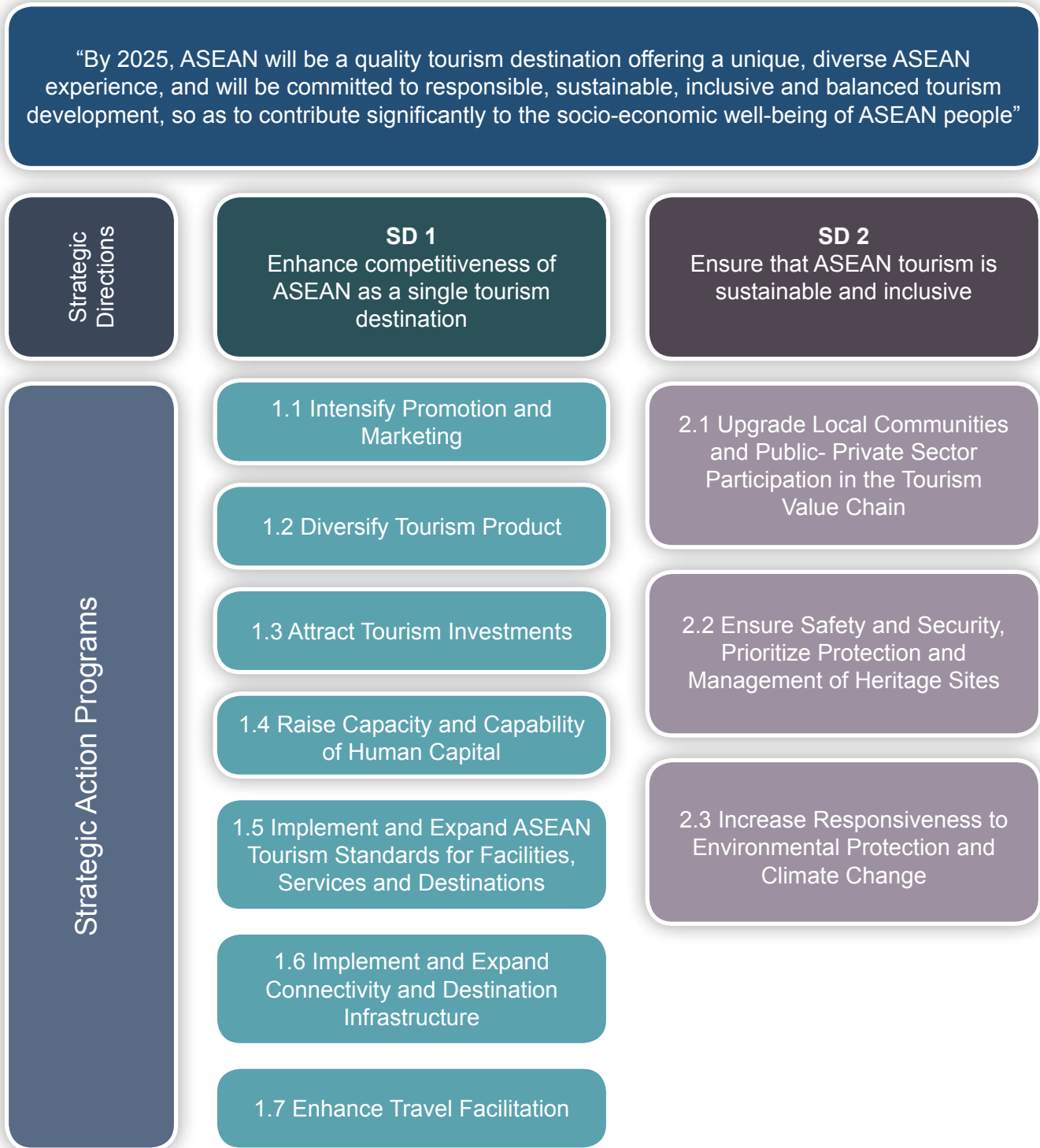
***“By 2025, ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, and will be committed to responsible, sustainable, inclusive and balanced tourism development, so as to contribute significantly to the socio-economic well-being of ASEAN people.”***

### 3.2 STRATEGIC DIRECTIONS

Towards achieving the ASEAN tourism vision, it will be necessary to complete existing and adopt new and innovative approaches to destination and product development, and marketing; and to work with other agencies controlling or influencing key elements of the development of tourism. In this context, the core strategic objectives of the Plan are:

1. to enhance the competitiveness of ASEAN as a single tourism destination, and
2. to ensure that ASEAN tourism is sustainable and inclusive.

Ten action programs identified for implementation are designed to deliver the outcome and impacts sought by the vision. The action programs under each strategic direction are presented in Figure 5:



**Figure 5 – ATSP 2016-2025 General Framework**

### 3.3 INSTITUTIONAL ARRANGEMENTS

With the exception of certain functions that are better organised at a regional level, i.e. marketing, quality standards, and occupational standards, the basic philosophy of implementation is that the Member States are responsible for the implementation of the action plans and projects. This philosophy has worked reasonably well to date and should continue to be the approach going forward.

Instead of five working groups currently supervising various aspects of the implementation of ATSP 2011-2015, the ATSP 2016-2025 implementation arrangement will be as follows:

- The ASEAN Tourism Ministers to provide the policy framework and direction
- The ASEAN NTOs to serve as the executing body to implement and monitor the ATSP
- The Four Committees to implement the action programs and activities:
  - ASEAN Tourism Competitiveness Committee
  - ASEAN Sustainable and Inclusive Tourism Development Committee
  - ASEAN Tourism Resourcing, and Monitoring and Evaluation Committee
  - ASEAN Tourism Professional Monitoring Committee

### 1. **The ASEAN Tourism Competitiveness Committee**

This Committee would be responsible for the focus areas affecting competitiveness of ASEAN Tourism. It would be responsible for:

- planning, designing and implementing the programs and projects related to the development of a more conducive tourism investment framework, raising the service skills and quality of tourism human resources, promoting destination and product diversification, raising destination and product quality, and moving to highly focused thematic and experiential destination and product marketing and promotions approaches.
- planning, designing and implementing the programs and projects related to improving and expanding connectivity infrastructure, facilitating cross border travel, and investing in destination infrastructure development (hardware/software).

### 2. **The ASEAN Sustainable and Inclusive Tourism Development Committee**

This Committee would be responsible for planning, designing and implementing the programs and projects related to increasing responsiveness to climate change, ensuring safety and security, prioritising protection and management of heritage sites, and upgrading local community participation in the tourism values chain at the destination level.

### 3. **The ASEAN Tourism Resourcing, and Monitoring and Evaluation Committee**

This Committee, known previously as the ASEAN TIBC in the ATSP 2011-2015, would be responsible for:

- securing financial resources to support the implementation of the programs and projects of the ATSP 2016-2025
- implementing monitoring and evaluation as well as reporting the progress of the Plan to the ASEAN NTOs and Tourism Ministers with assistance of the ASEAN Secretariat

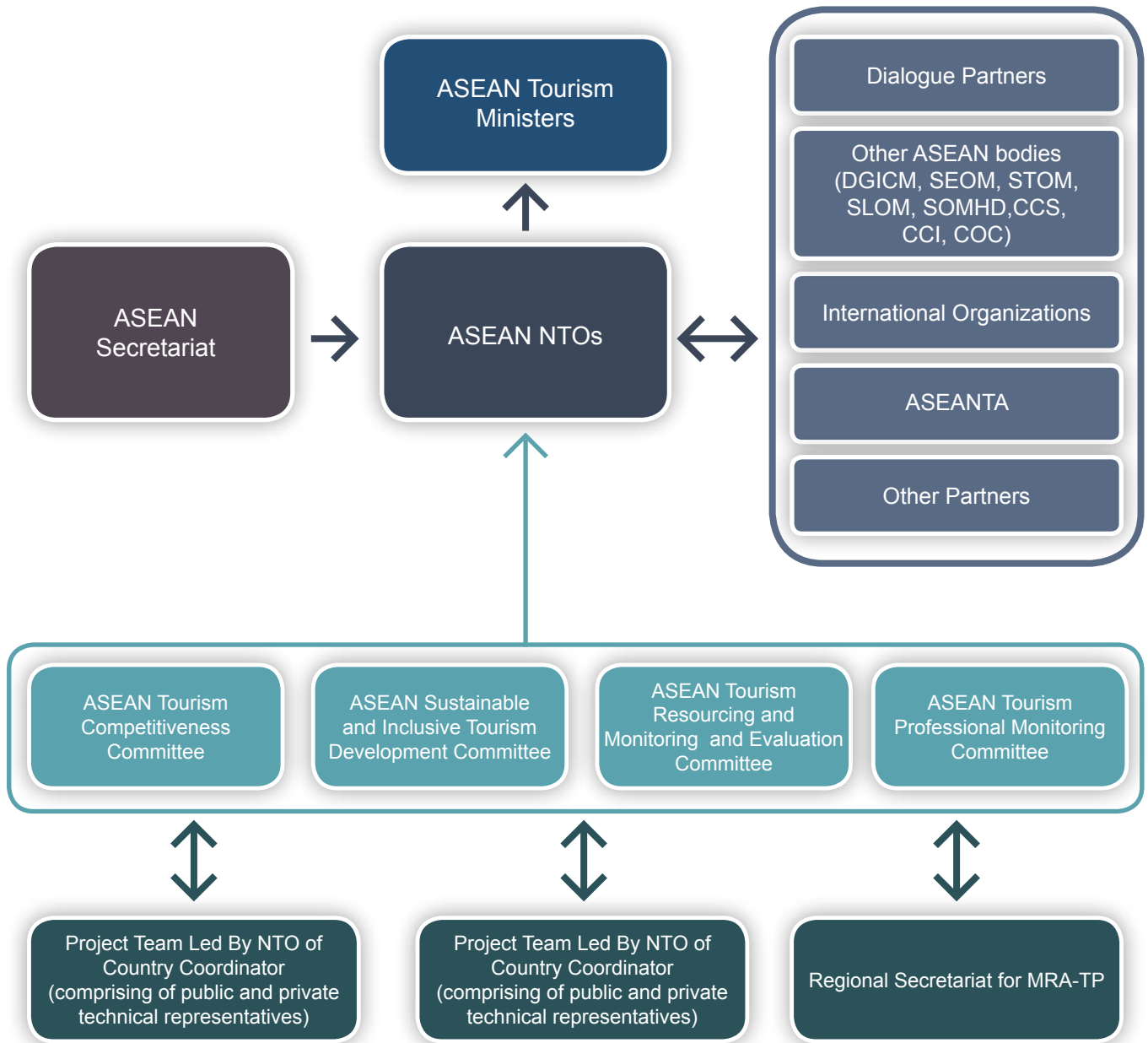
#### 4. **ASEAN Tourism Professional Monitoring Committee (ATPMC)**

The ATPMC was established earlier in pursuance of Article 5 (3) – Responsibilities of the ASEAN Mutual Recognition Arrangement (MRA) on Tourism Professionals adopted by the ASEAN Tourism Ministers in 2009. The objectives of MRA-TP is to facilitate mobility of tourism professionals; and exchange information on best practices in competency-based education and training for tourism professionals, and to provide opportunities for cooperation and capacity building across ASEAN Member States. In addition to roles and responsibilities identified in its TOR, the key activities of the ATMPC under ATSP 2016-2025 is to continue the implementation of the MRA-TP.

To ensure convergence of approach and cross fertilisation of ideas and solutions, the structure of the committees should reflect the participation of convergence partner organisations in the public and private sector rather than only the NTOs. For example, under the ASEAN Tourism Competitiveness Committee:

- transportation and infrastructure agencies of the Member States and development partners as well as private sector associations are encouraged to participate in the design and implementation are encouraged to participate in the discussion of programs to enhance destination connectivity and infrastructure;
- participation of the private sector through ASEANTA and other organisations need to be facilitated towards enhancing cooperation programmes relating to product development and marketing; and
- participation of the bilateral and multi-lateral development partners and ASEAN dialogue partners need to be encouraged by the ASEAN Tourism Resourcing, and Monitoring and Evaluation Committee

Annex 2 provides the ATSP Committee Terms of Reference.



**Figure 6 – ATSP 2016-2025 Implementation Arrangements**

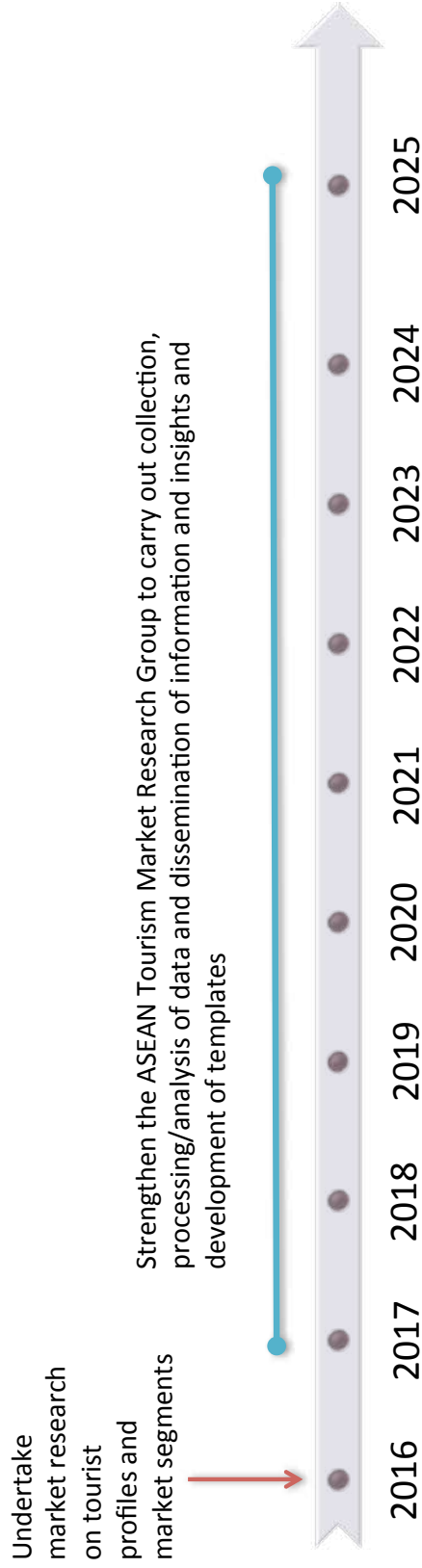
## **4.0 STRATEGIC ACTIONS, ACTIVITIES AND TIMELINE**

**STRATEGIC DIRECTION 1:  
ENHANCE THE COMPETITIVENESS OF ASEAN AS A  
SINGLE TOURISM DESTINATION**



## 1.1 INTENSIFY PROMOTION AND MARKETING

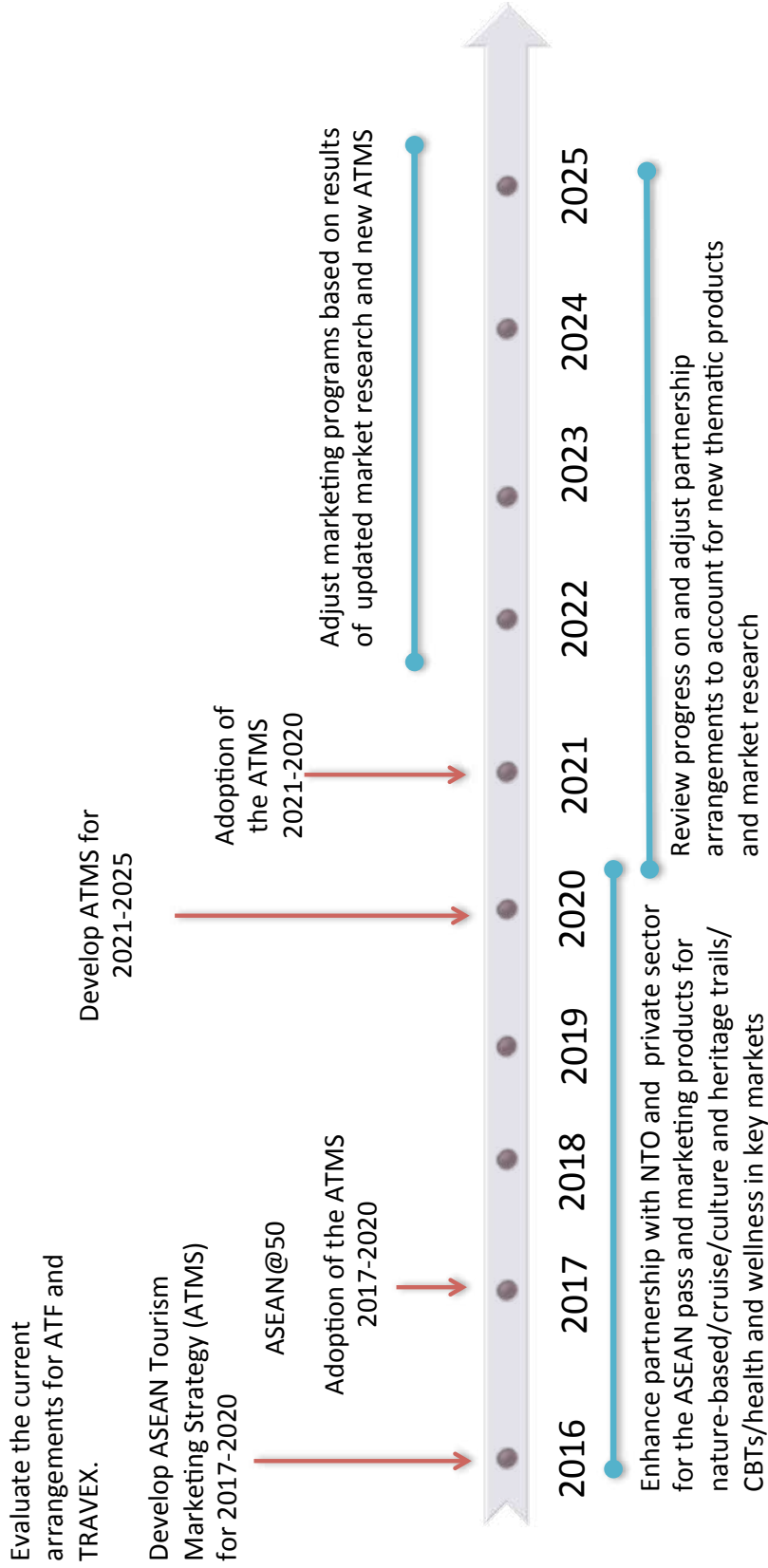
### 1.1.1 Enhance the ASEAN tourism statistical framework



Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	Activities to include but not limited to: (a) Evaluation of inclusion of ASEAN travel patterns and multiple-country trip related questions in data instruments, (b) Development of statistical templates for the new products to be developed and marketed, (c) Update of the ASEAN tourism statistics to reflect the dataset, (d) Conduct of training/on the use of templates, (e) Updating/monitoring of -tourism data for nature-based/cruise/culture and heritage trails/CBTs/health and wellness, (f) Gathering/Collecting investment data

## 1.1 INTENSIFY PROMOTION AND MARKETING

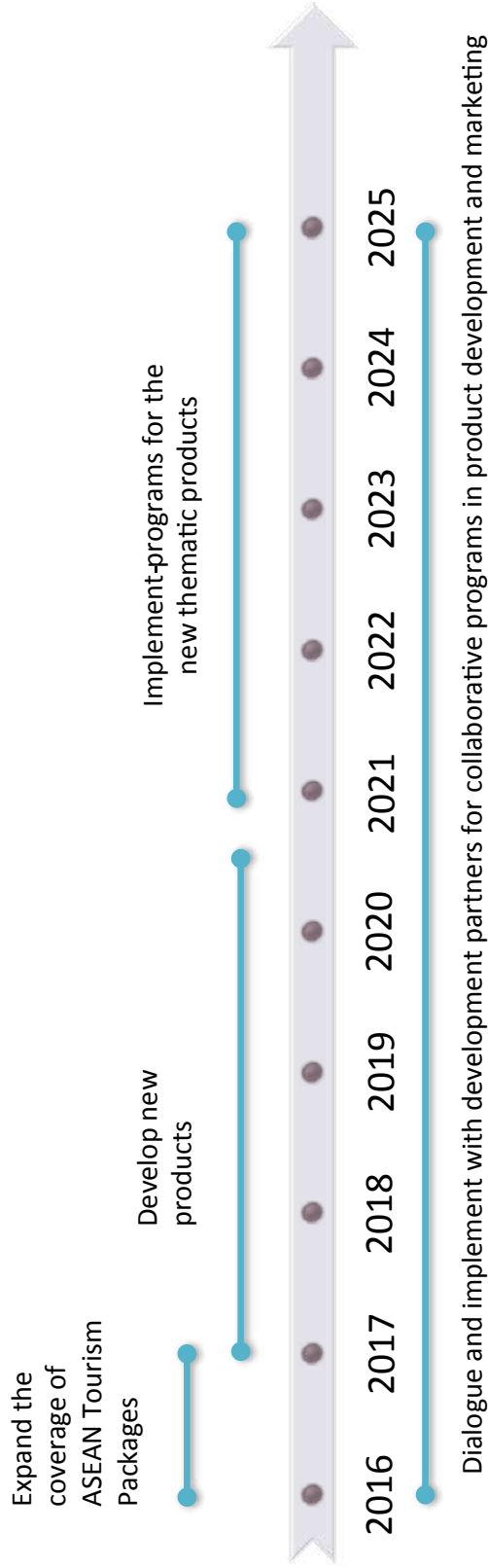
### 1.1.2 Expand the ASEAN regional destination-marketing program



Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	The ATMS will enhance application of ICT, social media and website and leverage on GOASEAN

## 1.2 DIVERSIFY TOURISM PRODUCT

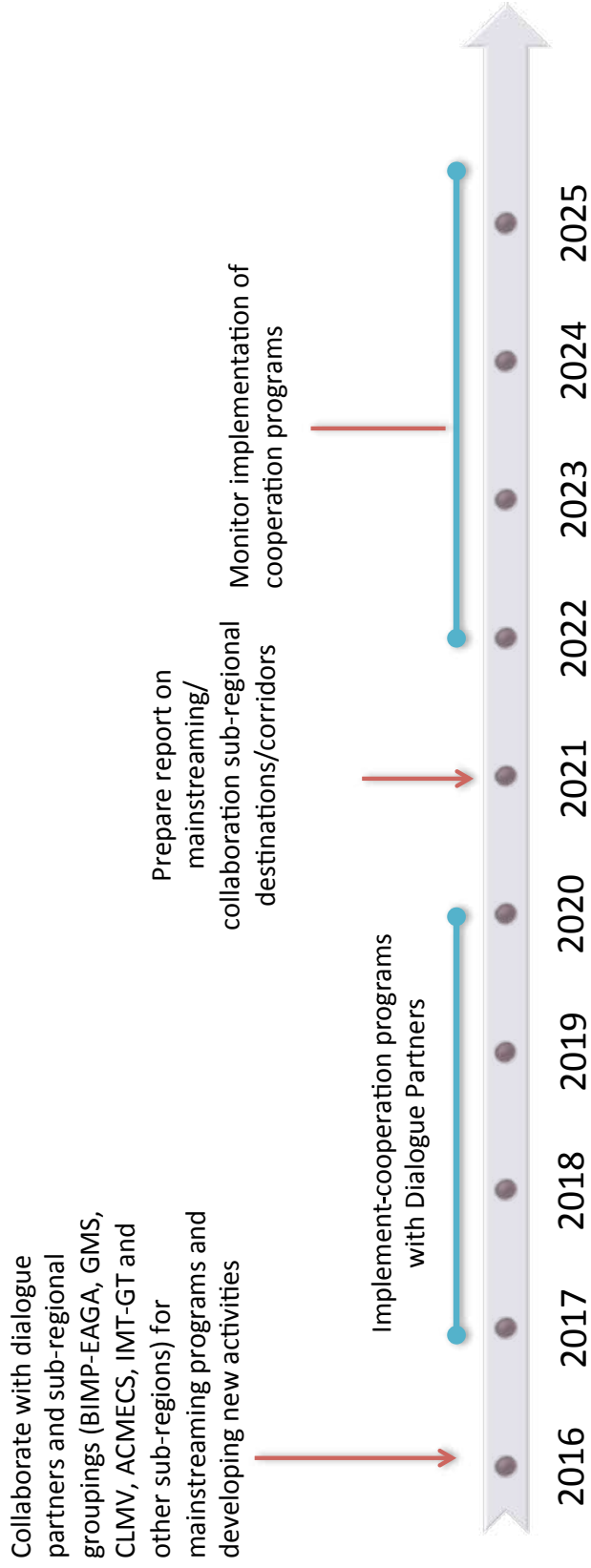
### 1.2.1 Complete the ongoing and identify new product development and marketing approaches



Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	

## 1.2 DIVERSIFY TOURISM PRODUCT

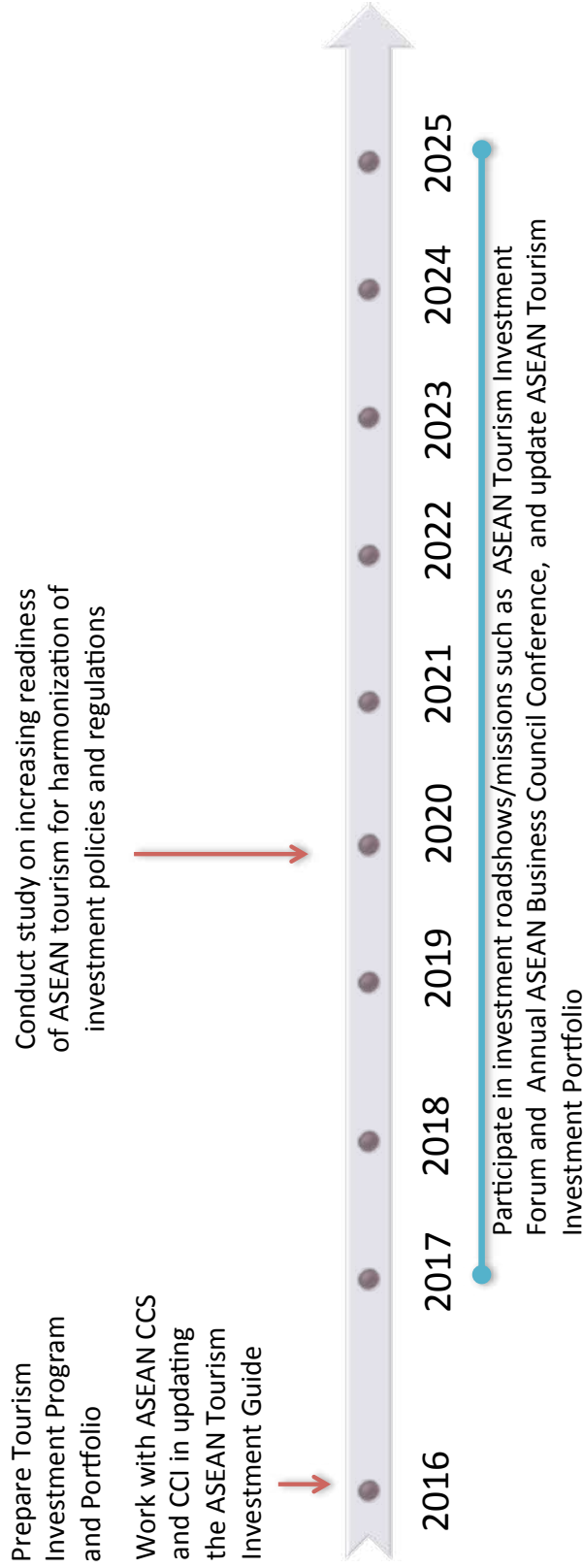
### 1.2.2 Support the development of ASEAN sub-regional destinations/corridors targeting more inclusive tourism outcomes



Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	

### 1.3 ATTRACT TOURISM INVESTMENTS

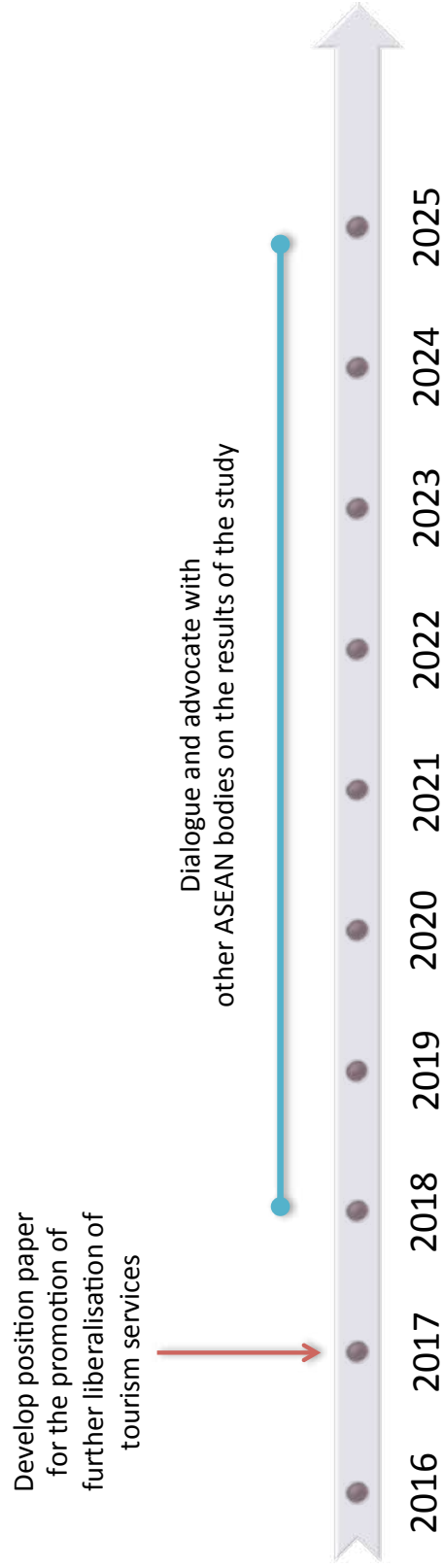
#### 1.3.1 Prepare an ASEAN Tourism Investment Program that identifies investment corridors where the convergence and consolidation of investments in tourism infrastructure and products will take place



Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	

## 1.3 ATTRACT TOURISM INVESTMENTS

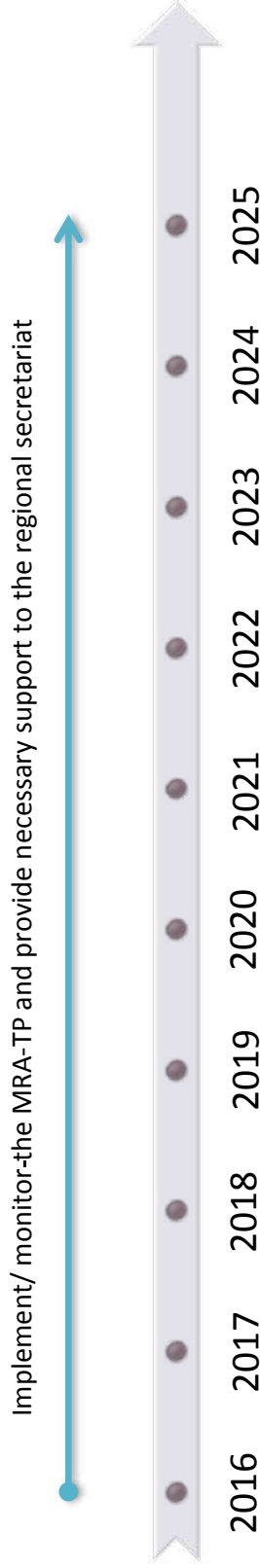
### 1.3.2 Promote further liberalization of tourism services



Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	

## 1.4 RAISE CAPACITY AND CAPABILITY OF TOURISM HUMAN CAPITAL

- 1.4.1 Continue the implementation of the ASEAN Mutual Recognition Arrangement on Tourism Professionals (MRA-TP) by:**
- 1.4.1.1 Supporting the operation of the Regional Secretariat for Implementation of MRA-TP including the operation and maintenance of the ASEAN Tourism Professionals Registration System

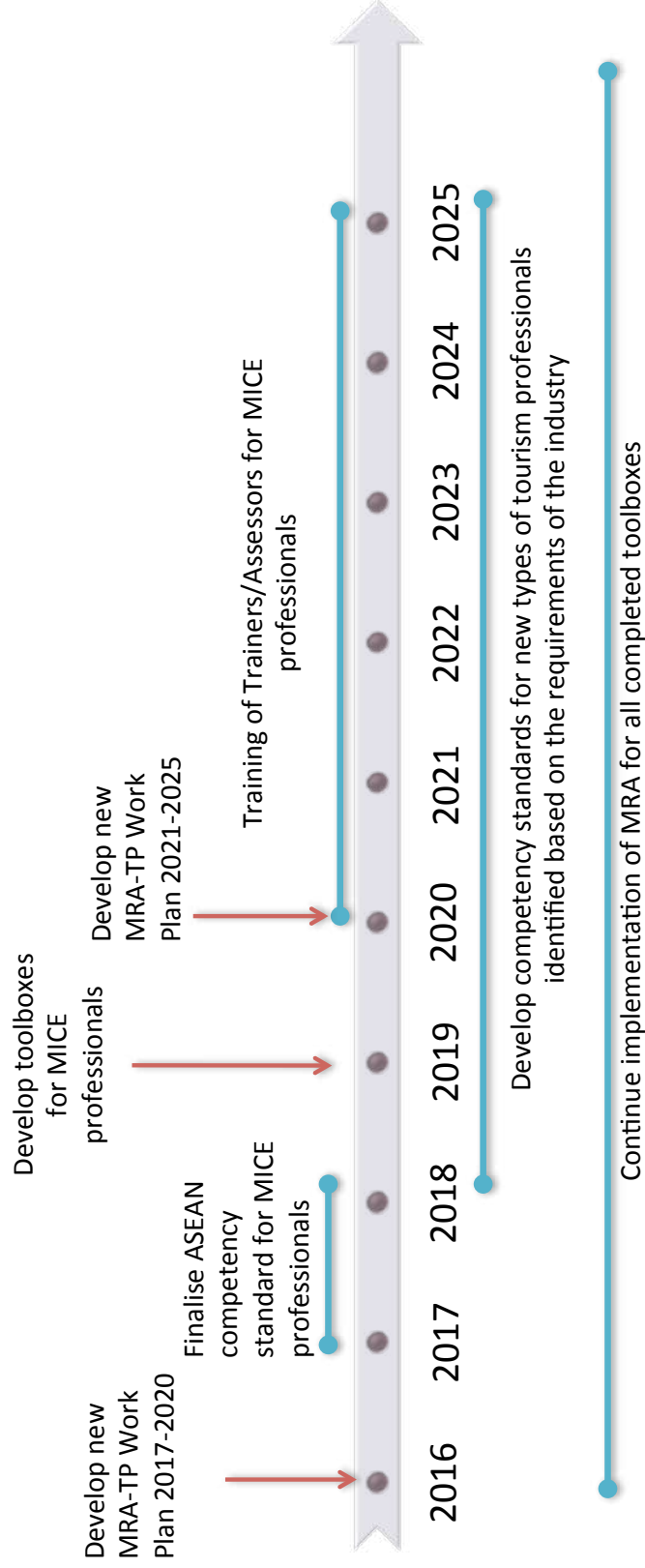


Implementing Body	ASEAN Tourism Professionals and Monitoring Committee (ATPMC)
Feasibility	High
Comments	Refer to Regional Secretariat Structure and MRA Work Plans

## 1.4 RAISE CAPACITY AND CAPABILITY OF TOURISM HUMAN CAPITAL

### 1.4.1 Continue the implementation of the ASEAN Mutual Recognition Arrangement on Tourism Professionals (MRA-TP) by:

1.4.1.2 expanding implementation of MRA-TP to other related tourism and hospitality job titles



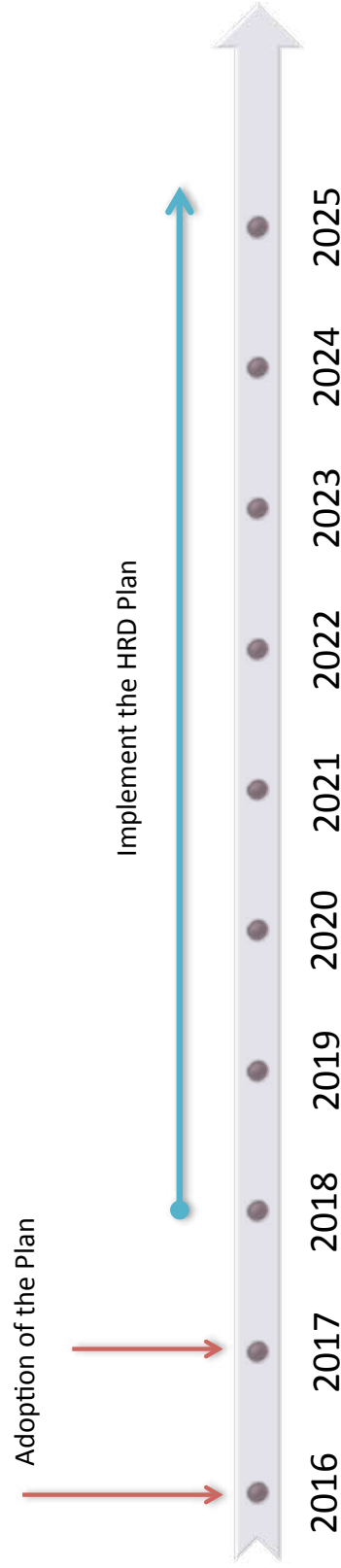
Implementing Body	ATPMC
Feasibility	High
Comments	



## 1.4 RAISE CAPACITY AND CAPABILITY OF TOURISM HUMAN CAPITAL

### 1.4.2 Prepare and implement the ASEAN Tourism Human Resources Development Plan in coordination with the ASEAN Tourism Resources Management and Development Network (ATRM)

Prepare the ASEAN Tourism HRD Plan



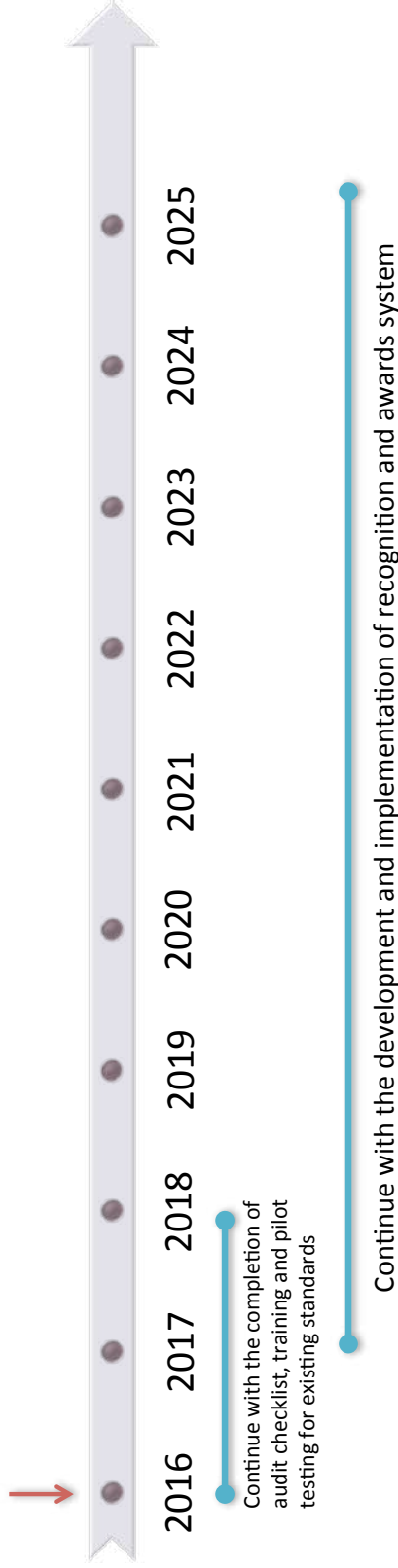
Implementing Body	
ASEAN Tourism Competitiveness Committee	
Feasibility	High
Comments	Covers capacity-building for those outside of MRA

## 1.5 IMPLEMENT AND EXPAND ASEAN TOURISM STANDARDS FOR FACILITIES, SERVICES AND DESTINATIONS

### 1.5.1 Promote the adoption and implementation of the ASEAN tourism standards certification system into the policy and regulatory and tourism HRD frameworks of the Member States

Disseminate the existing ASEAN Tourism Standards to all stakeholders through workshops, online, and other materials

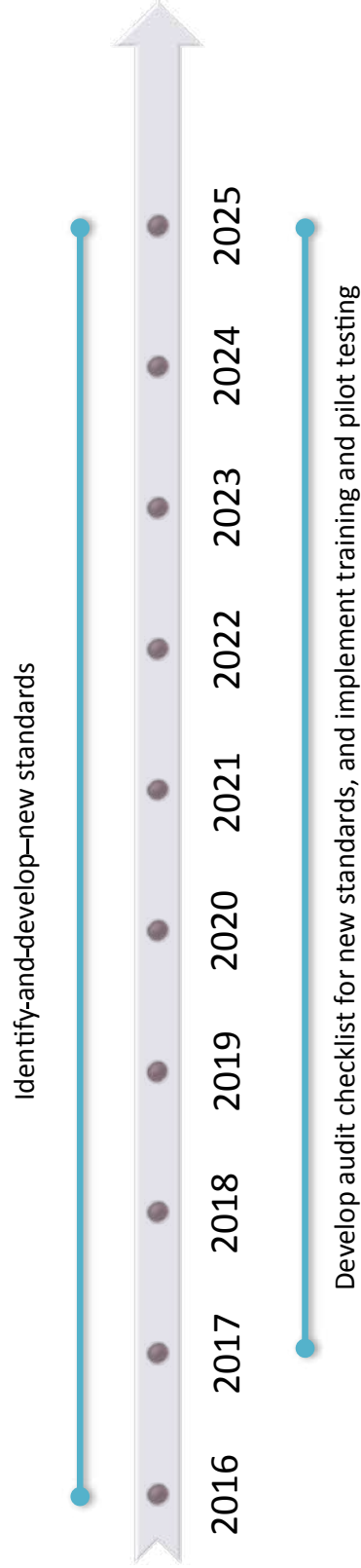
Continue with the completion of MICE venue standard



Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	

## 1.5 IMPLEMENT AND EXPAND ASEAN TOURISM STANDARDS FOR FACILITIES, SERVICES AND DESTINATIONS

### 1.5.2 Identify and implement new ASEAN tourism standards



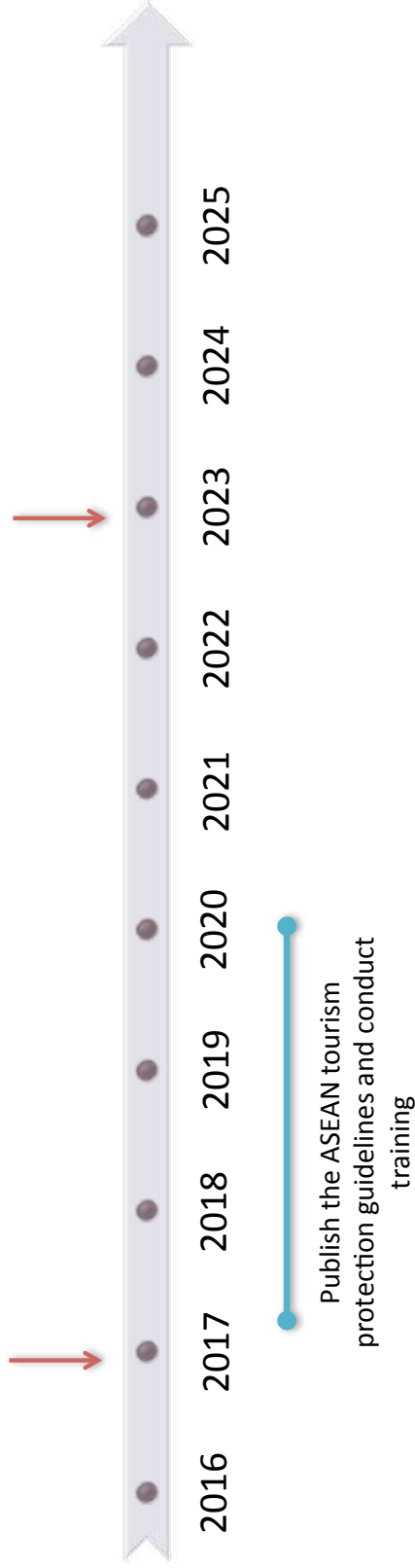
Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	

## 1.5 IMPLEMENT AND EXPAND ASEAN TOURISM STANDARDS FOR FACILITIES, SERVICES AND DESTINATIONS

### 1.5.3 Develop ASEAN tourist protection guidelines

Prepare a strategy paper for inclusion of tourism section in the ASEAN Consumer Protection Code

Update the ASEAN tourist protection guidelines



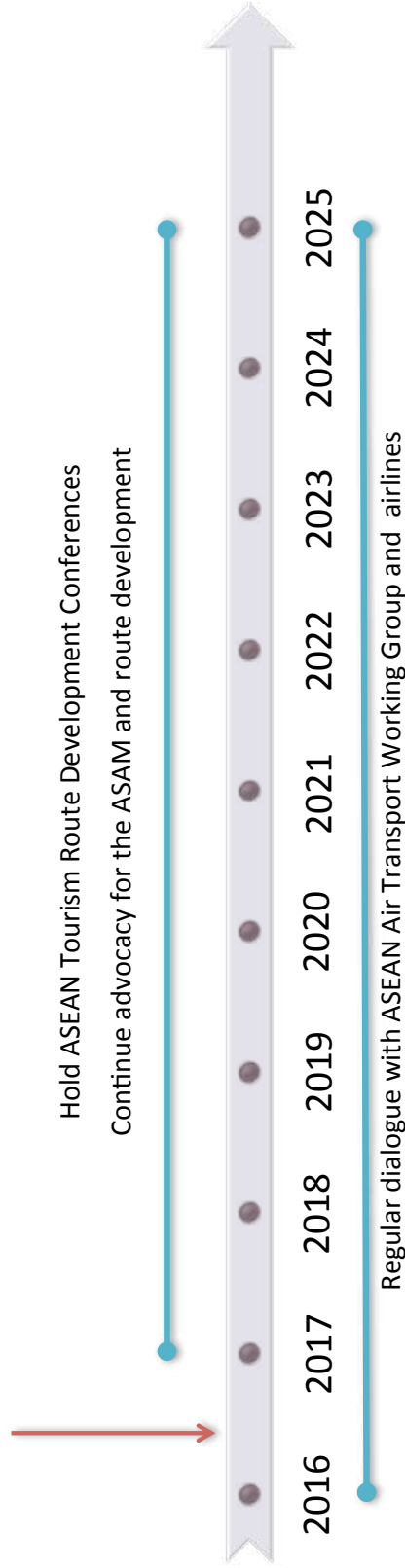
Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	

## 1.6 IMPLEMENT AND EXPAND CONNECTIVITY AND DESTINATION INFRASTRUCTURE

### 1.6.1 Enhance ASEAN air connectivity by supporting implementation of the ASEAN Single Aviation Market (ASAM)

Prepare position paper to support the ASAM

Prepare business case for airlines and Dialogue Partners

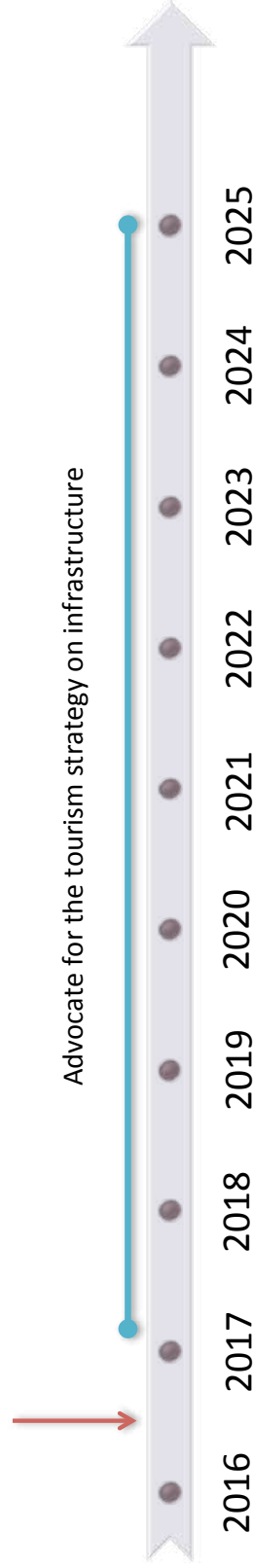


Implementing Body	
ASEAN Tourism Competitiveness Committee	
Feasibility	High
Comments	

## 1.6 IMPLEMENT AND EXPAND CONNECTIVITY AND DESTINATION INFRASTRUCTURE

### 1.6.2 Promote the development of cruise and river tourism including its infrastructure for sea and river cruises

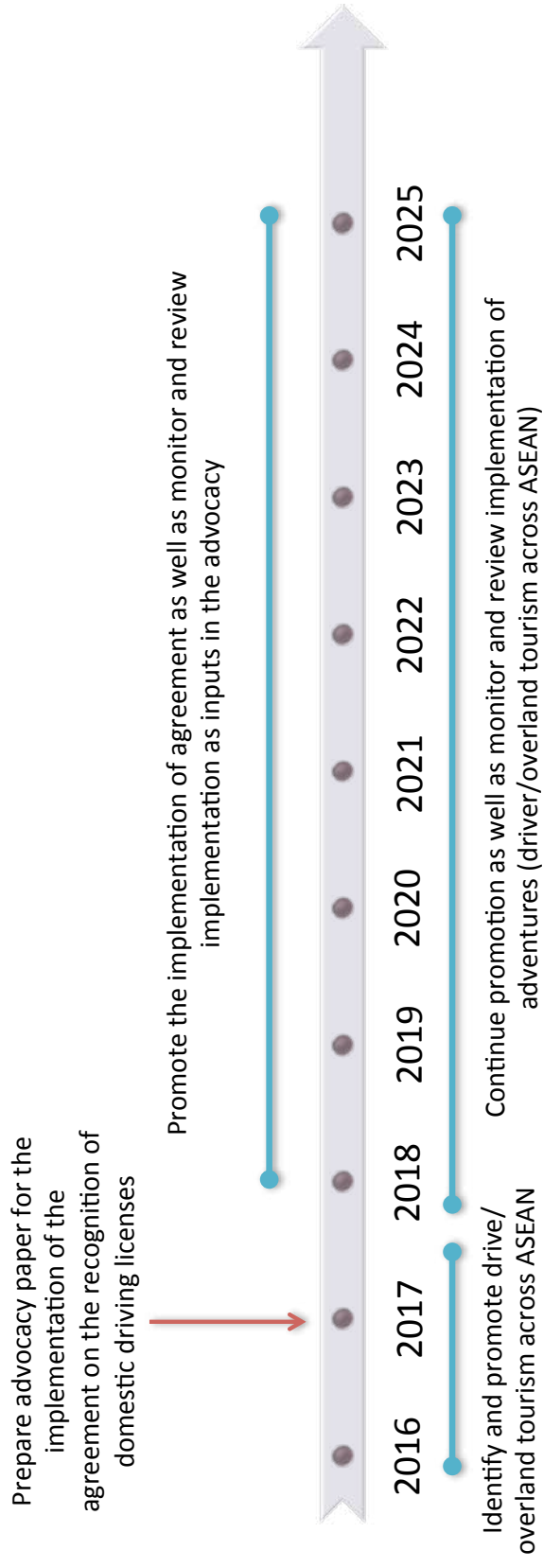
Prepare position paper/business case for the development of infrastructure supporting tourism growth in identified corridors or sub-regional groups



ASEAN Tourism Competitiveness Committee	
Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	Collaborate with private sector and other ASEAN bodies in promoting sea and river cruise tourism circuits/products (integrated in position paper)

## 1.6 IMPLEMENT AND EXPAND CONNECTIVITY AND DESTINATION INFRASTRUCTURE

### 1.6.3 Implement the Agreement on the Recognition of Domestic Driving Licenses Issued by ASEAN Countries to promote drive/overland tourism across ASEAN

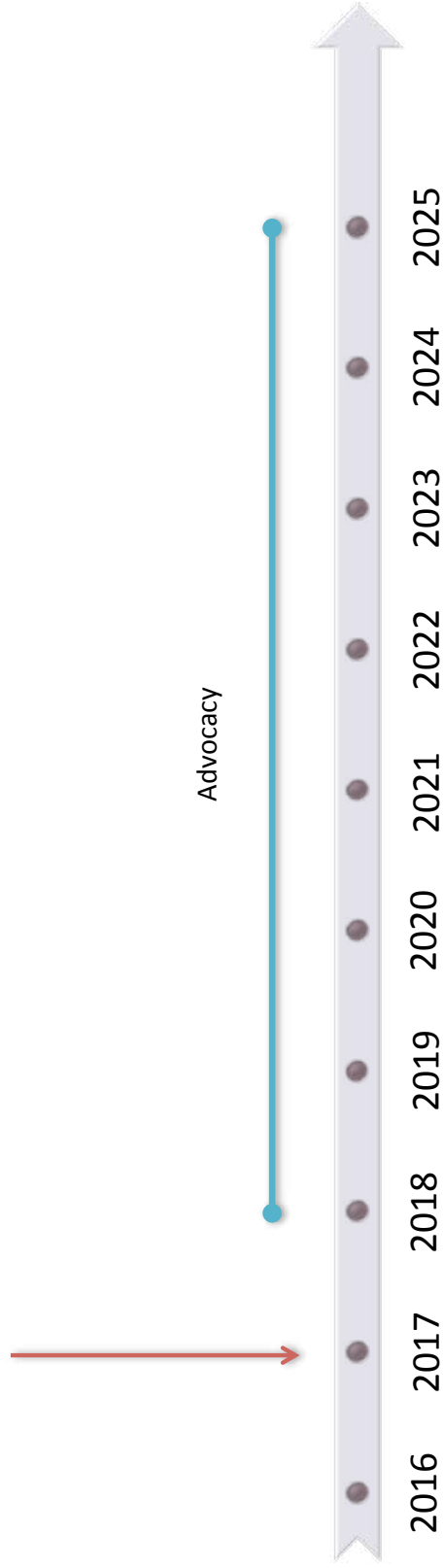


Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	

## 1.6 IMPLEMENT AND EXPAND CONNECTIVITY AND DESTINATION INFRASTRUCTURE

### 1.6.4 Promote the development of road connectivity along major tourism corridors

Prepare position paper to develop and improve connectivity and tourism corridors

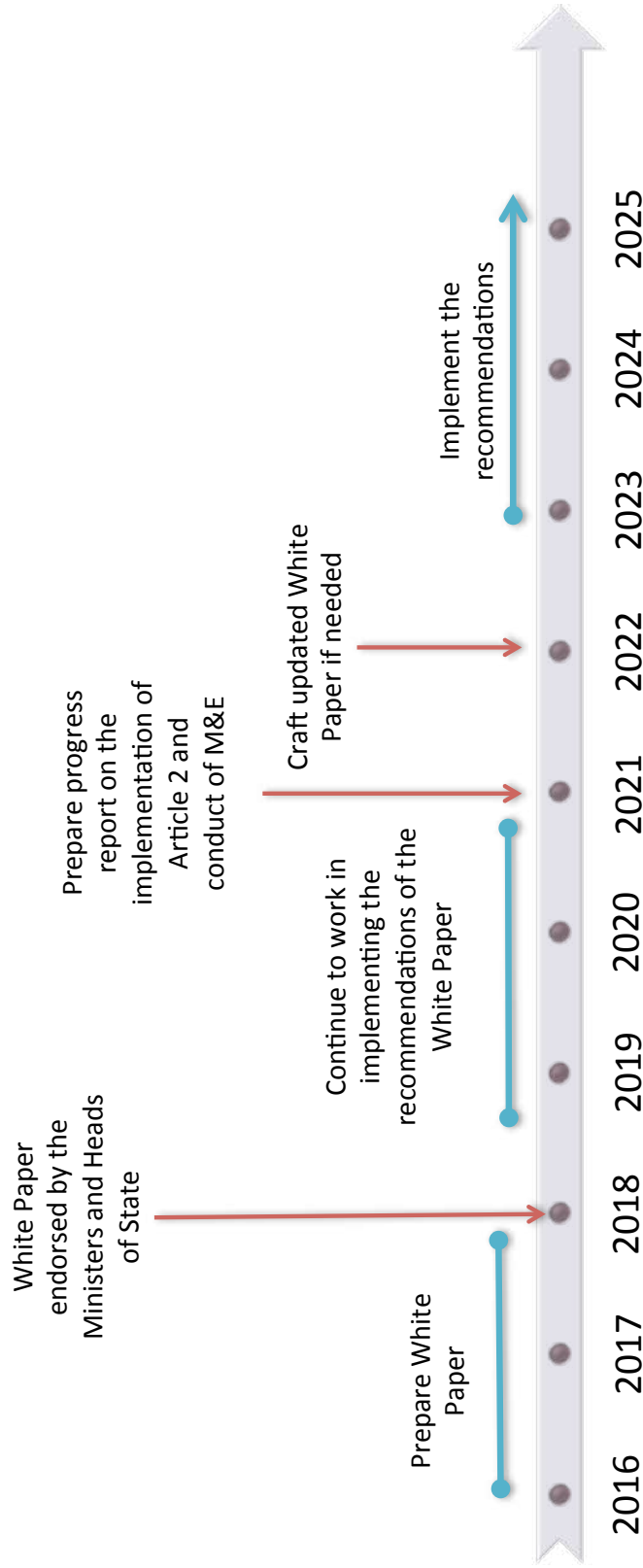


Implementing Body	ASEAN Tourism Competitiveness Committee
Feasibility	High
Comments	



## 1.7 ENHANCE TRAVEL FACILITATION

### 1.7.1 Prepare White Paper to implement the facilitation of intra-ASEAN and international travel (Article 2 of ASEAN Tourism Agreement (2002))

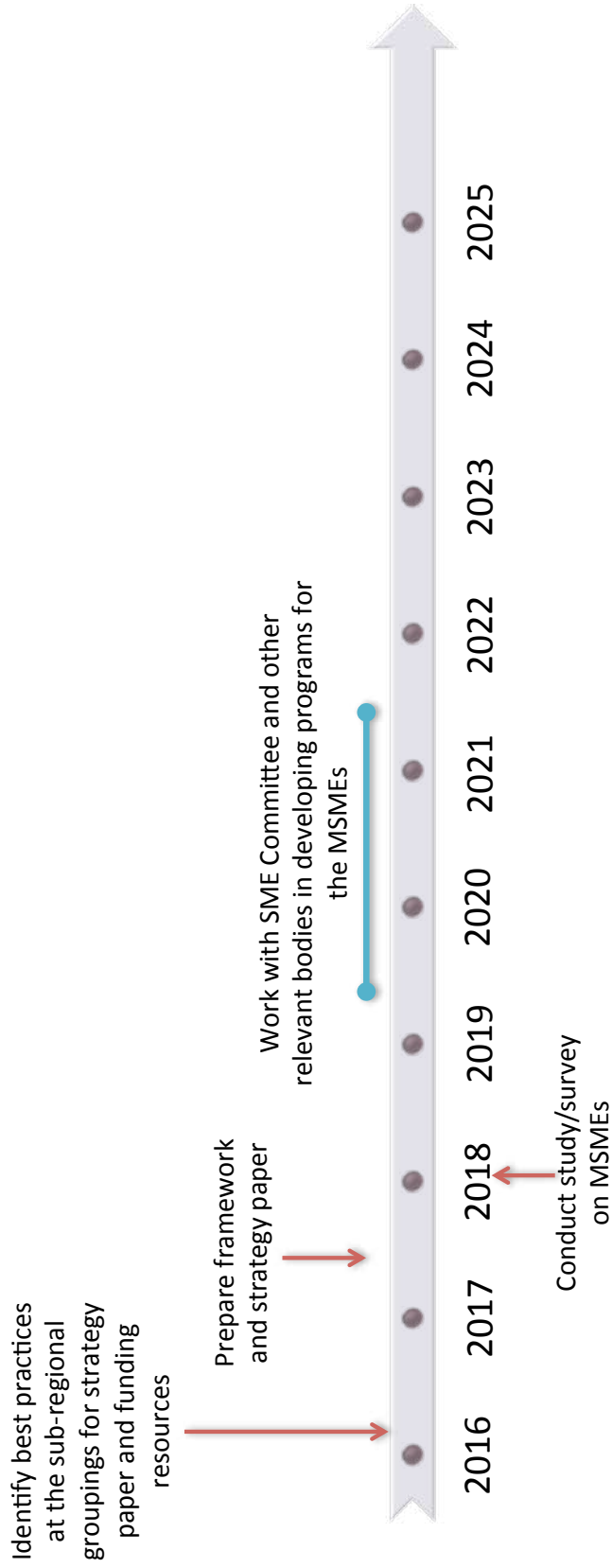


Implementing Body	ASEAN Tourism Competitiveness Committee	
Feasibility	High	
Comments	To work with the relevant bodies or organizations such as Directors-General of Immigration Departments and Heads of Consular Divisions of Ministries of Foreign Affairs (DGICM)	

**STRATEGIC DIRECTION 2:  
ENSURE SUSTAINABLE AND INCLUSIVE TOURISM**

## 2.1 UPGRADE LOCAL COMMUNITIES AND PUBLIC-PRIVATE SECTOR PARTICIPATION IN THE TOURISM VALUE CHAIN

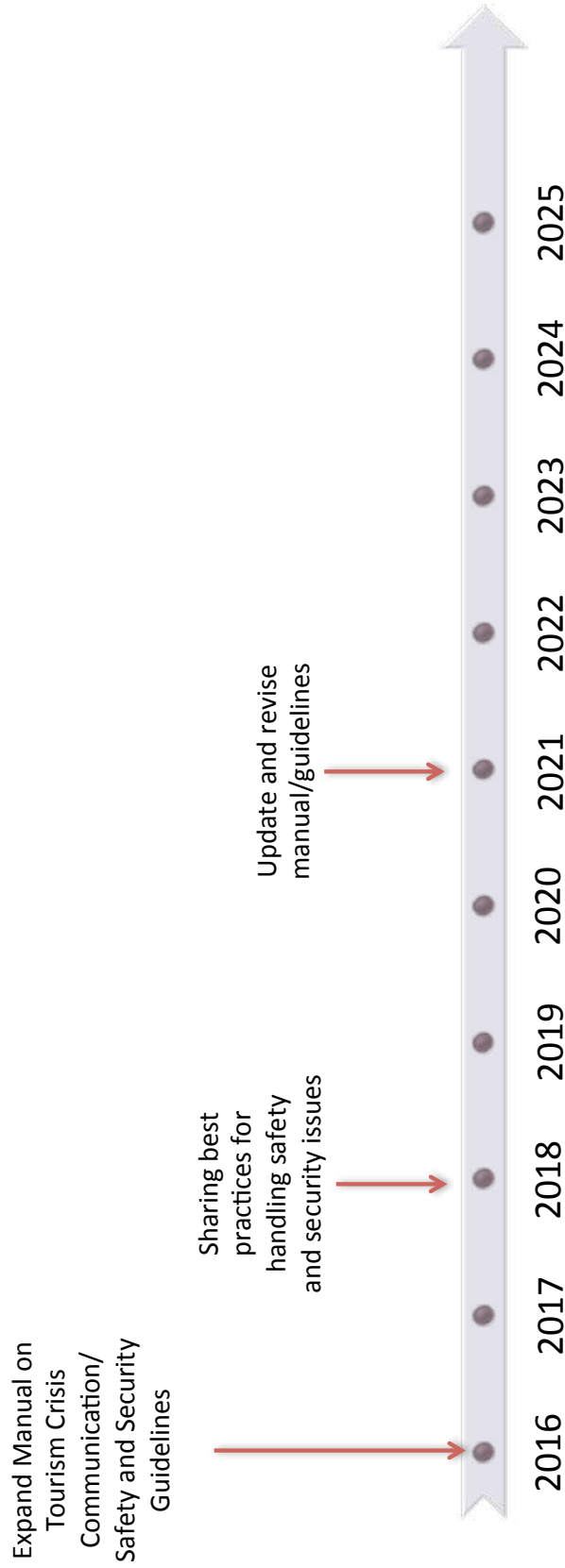
### 2.1.1 Develop and implement the strategy on participation of local communities and private sector in tourism development



Implementing Body	ASEAN Sustainable and Inclusive Tourism Development Committee
Feasibility	High
Comments	

## 2.2 ENSURE SAFETY AND SECURITY, PRIORITIZE PROTECTION AND MANAGEMENT OF HERITAGE SITES

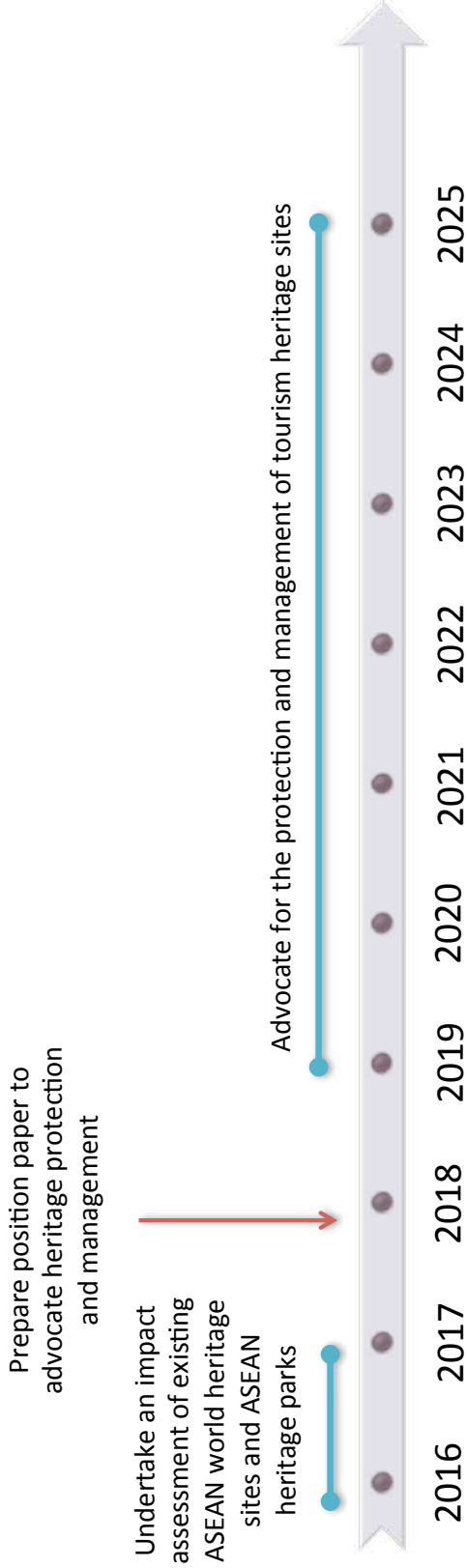
### 2.2.1 Work with official bodies and organizations in support of safety, security, and protection of key destinations in ASEAN



Implementing Body	ASEAN Sustainable and Inclusive Tourism Development Committee
Feasibility	High
Comments	

## 2.2 ENSURE SAFETY AND SECURITY, PRIORITIZE PROTECTION AND MANAGEMENT OF HERITAGE SITES

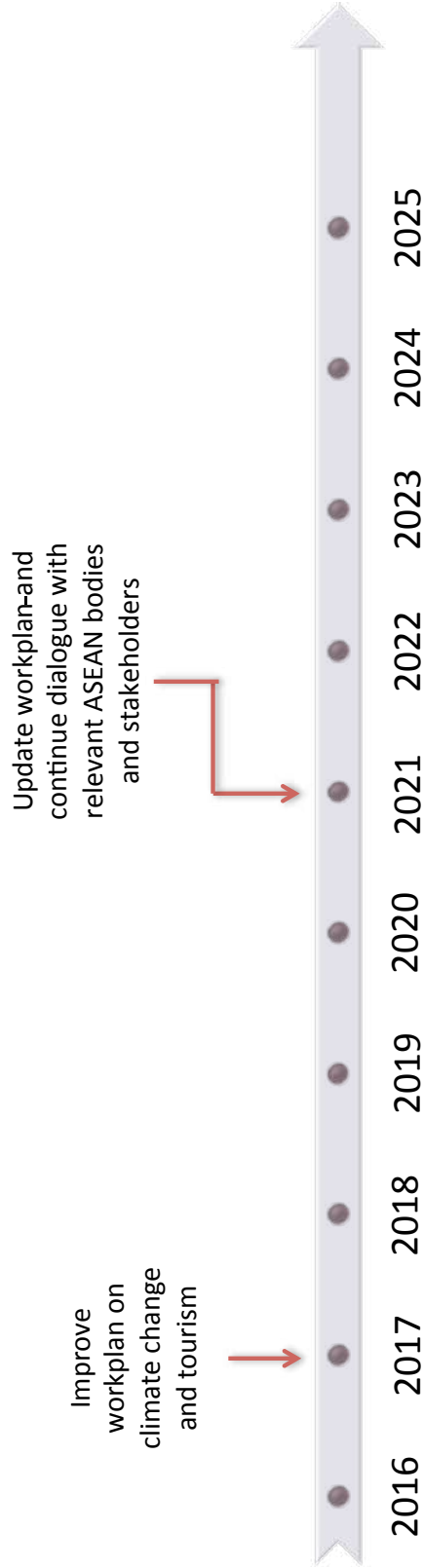
### 2.2.2 Work with official bodies and organizations in support of the protection and management of tourism heritage sites.



Implementing Body	ASEAN Sustainable and Inclusive Tourism Development Committee
Feasibility	High
Comments	

## 2.3 INCREASE RESPONSIVENESS TO ENVIRONMENTAL PROTECTION AND CLIMATE CHANGE

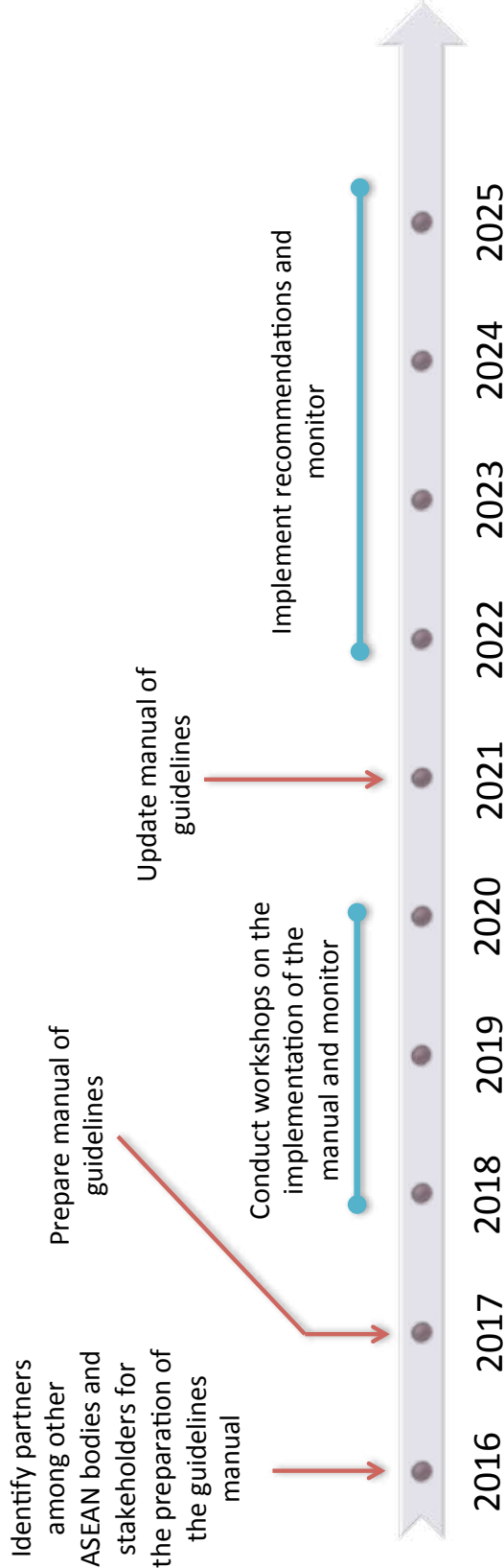
### 2.3.1 Work with official bodies and organizations to address environmental, and enhance climate change responsiveness



Implementing Body	ASEAN Sustainable and Inclusive Tourism Development Committee
Feasibility	High
Comments	

## 2.3 INCREASE RESPONSIVENESS TO ENVIRONMENTAL PROTECTION AND CLIMATE CHANGE

### 2.3.2 Prepare a manual of guidelines for incorporating environment and climate change mitigation, adaptation, and resilience



Implementing Body	ASEAN Sustainable and Inclusive Tourism Development Committee
Feasibility	High
Comments	

## 5.0 MONITORING AND EVALUATION FRAMEWORK

The aim of the monitoring and evaluation (M&E) framework is to report on the progress and performance of the strategic action programmes based on a set of stated targets, goals and objectives using indicators. The M&E provides a mechanism for the ASEAN Member States to assess the efficiency and effectiveness in the implementation phase. More importantly, the M&E serves as a tool to relate the actions and projects with the ATSP objectives.

The overall M&E Plan is a living document that will be modified as project implementation proceeds. It will be updated and approved yearly and monitored annually throughout the 10-year implementation of the ATSP 2016-2025 in order to add or adapt indicators, adjust data gathering methods and schedules, include new evaluation tools, adjust activities, and respond to any new initiatives that may be undertaken.



**IMPACT**  
 Tourism is making significant contributions to the socio-economic well-being of the ASEAN people

**INTENDED OUTCOMES**  
 ASEAN is a highly competitive quality tourism destination offering a unique, diverse ASEAN tourism experience, with a strong commitment to a culture of responsible, sustainable, balanced and inclusive tourism development.



## **APPENDICES**

## APPENDIX 1 – REVIEW OF ATSP 2011-2015 STATUS

The main activities for which each working group is responsible, together with the current status of implementation are summarised below.

### 1. ASEAN Tourism Marketing and Communication Working Group (MCWG)

The MCWG is responsible for coordinating the implementation of the marketing and communication activities of the ATSP focusing on:

- (i) developing a strategic marketing framework and implementing a tourism marketing strategy for the ASEAN region including establishing a market research group
- (ii) working closely with the product development working group (PDWG) in developing campaigns to promote experiential and creative regional/sub regional destinations/circuits and product packages and
- (iii) enhancing the external relations policies and procedures of ASEAN tourism through public relations, obtaining dialogue partner and international organisations support, and enhanced communications with private sector stakeholders.

### 2. ASEAN Tourism Product Development Working Group (PDWG)

The PDWG is responsible for developing experiential and creative regional and subregional circuits and packages together with identifying the investment strategies to finance product development. Based on a review of the minutes of the 7th PDWG meetings and Annexes, the main thrust of its product development initiatives have focused on product development planning, research and statistics, and investment. Its main product development planning initiatives include plans for developing ecotourism, parks and garden tourism, home-stay tourism, culture and heritage tourism, cruise tourism, river-based tourism (with UNWTO), and health and wellness tourism.

### 3. ASEAN Quality Tourism Working Group (QTWG)

The QTWG is responsible for enhancing the quality of services, facilities and human resources in the region. The Working Group is primarily responsible for developing standards, ensuring third-party certification, identifying new areas for standards development and providing inputs into ASEAN human resource development.

The QTWG has already completed a substantial part of its program covering:

- (i) the development of standards and certification processes for Green Hotels, Home-stay, Toilets, spas, security and safety, clean tourist cities, community based tourism and MICE venues;
- (ii) enhancing the ability of ASEAN tourism to address climate change including the development of baseline data, and a work plan of activities to contribute to climate change mitigation; and
- (iii) development of an ASEAN tourism human resources plan.

### 4. ASEAN Tourism Professional Monitoring Committee (ATPMC)

The ATPMC was established earlier in pursuance of Article 5 (3) – Responsibilities of the ASEAN Mutual Recognition Arrangement (MRA) on Tourism Professionals adopted by the ASEAN Tourism Ministers during their 12th Meeting on 8 January 2009 in Hanoi, Viet Nam. The objectives of MRA-TP are to facilitate mobility of Tourism Professionals; and exchange information on best practices in competency-based education and training for tourism professionals and to provide opportunities for cooperation and capacity building across ASEAN Member States.

## **5. ASEAN Tourism Integration and Budget Committee (TIBC)**

The TIBC plays a crucial role in ensuring that the strategic actions of the ATSP are implemented including implementing the travel facilitation and connectivity component of the ATSP, marshaling the resources required to carry out the various activities, developing a series of policies and procedures for the creation of annual budgets for implementing the ATSP through the ASEAN NTOs Fund and other resources, monitoring the use of resources, and initiating post ATSP 2011-2015 planning initiatives. The TIBC continues to monitor and report on the development of a single visa initiative for the ASEAN region in the Member States through Member States reports at TIBC meetings.<sup>10</sup>

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<sup>10</sup>The ATSP's single visa initiative has been limited to an advocacy, and monitoring and evaluation role only.

## ATSP 2011-2015 MILESTONES

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

Action Program	Activities	Status
1.1 Develop and implement a tourism marketing strategy for the ASEAN region	1.1.1 Develop an ASEAN tourism marketing strategy which will create a brand, target markets, communication strategy, distribution approach and implementation structure	<ul style="list-style-type: none"> <li>Completed the ASEAN Tourism Marketing Strategy (ATMS) 2012-2015 endorsed by 35th ASEAN NTOs and 15th M-ATM during ATF 2012 in January 2012 in Manado, Indonesia.</li> <li>Establishment of the aseantourism.travel web site (<a href="http://www.aseantourism.travel">www.aseantourism.travel</a>).</li> <li>Design and implementation of the China market digital campaign based on <a href="http://www.dongnanya.travel">www.dongnanya.travel</a> with social media marketing by sinoweibo.com and search engine marketing through Baidu.com.</li> <li>Experiential and creative market campaign based on cuisine, festivals, and provision and updating of an event calendar.</li> <li>Establishment of Public/Private sector distribution partnerships based on collaboration with the “PATA Love Campaign”, the “ASEAN Tripper Magazine”, and Digital Innovation Asia.</li> <li>Piggybacking on the marketing activities of the AMS NTOs and ensuring that the ASEAN logo “Southeast Asia: feel the warmth” is included in their marketing collaterals as well as on their websites.</li> <li>Development of the ASEAN for ASEAN campaign.</li> <li>Development of the Business Travel Campaign, particularly on the recommendation to focus the campaign on MICE.</li> <li>Implementation of the adventure travel campaign including enhancing that part of the web site, producing more articles, stories, and collaterals, and collaboration with the Adventure Travel Trade Association (ATTA) or other organisations.</li> <li>Design of a marketing campaigns for senior and long stay markets.</li> <li>Implementation of activities to assess the effectiveness of the Brand (Southeast Asia Feel the Warmth) based on a passenger exit survey (PES) to be conducted by the ASEAN Tourism Market Research Group.</li> <li>Implementation of a Public Relations Program coordinated with target markets and activities of NTOs and use of social network media to access markets directly.</li> <li>Further elaborating the ASEAN Tourism Communication System by including a crisis communication component through an “Advanced Seminar on Tourism Crisis Management and Communication”.</li> </ul>

	1.1.2. Establish a market research group to provide analytical information on tourism trends and situation on a regular basis	<ul style="list-style-type: none"> <li>Establishment of the ASEAN Tourism Market Research Group that also covers the assessment of the effectiveness of the Brand (Southeast Asia Feel the Warmth) through the aforementioned PES.</li> </ul> <p>Completed and implemented the study titled “Small Regular Passenger Exit Survey (PES) on ASEAN Brand Awareness” in 2012 and secured adoption by the 38th Meeting of ASEAN NTOs held on 4 July 2013 in Myanmar.</p>
1.2 Develop experiential and creative regional/sub regional circuits and packages together with investment strategies •	1.2.1 Develop product packages for regional corridors, circuits and clusters for nature-based tourism.	<ul style="list-style-type: none"> <li>Completed (continuous measure): Working relations with UNEP as one of the nature-based organisations, has been established through several events, i.e., The Global Partnership in Sustainable Tourism 2012 and A Global Partnership on Sustainable Tourism: Opportunities for the ASEAN Member States in 2010</li> </ul> <p>With Malaysia as Lead Coordinator, completed work plan and detailed activities for the development of ASEAN nature-based tourism product and produced coffee table book on ASEAN Parks and Gardens</p> <p>Completed the ASEAN Ecotourism Strategic Plan is being developed and the TOR for this Strategic Plan was adopted by 38th NTOs.</p>
	1.2.2 Develop regional corridors, circuits, clusters and product packages for cultural and heritage tourism (tangible and intangible)	Completed (continuous measure): With Indonesia as Lead Coordinator, prepared workplan and completed detailed activities for the identification of heritage tourism products and the development of ASEAN cultural and heritage tourism product and completed the Project titled “ASEAN Culture and Heritage Tourism Product Development in ASEAN Member States” that sets out a strategy and work plan for developing cultural heritage packages, developing cultural & heritage travel packages, conducting a familiarisation trip based on the “Trail of Civilization” circuit/corridor, organising a Oldtown/Colonial home-stay fair, and ASEAN Traditional Cuisine Coffee Table Book.
	1.2.3 Develop regional corridors, circuits, clusters and product packages for community-based tourism	Completed (continuous measure): With Cambodia as Lead Coordinator, completed work plan and detailed activities for the development of ASEAN community-based tourism product and identification of community-based tourism products

	<p>1.2.4 Develop regional corridors, circuits and itinerary for cruise and river-based tourism</p>	<p>Completed (continuous measure): With Singapore as the Lead Coordinator of cruise tourism, completed an International Cruise Workshop and a Special Meeting of ASEAN Cruise Tourism Sub-working Group Meeting were held in Bali, Indonesia on 12-13 April 2012 and continuously working together with Cruise Line International Association (CLIA), Asia Cruise Association (ACA), Asia Cruise Terminal Association (ACTA) and Asia Cruise Terminal Operators Network (ACTON).</p> <p>Completed the ASEAN Cruise Work Plan 2014-2015, which includes successfully co-locating ASEAN member States together under the Southeast Asia umbrella at the largest Cruise Event in Miami; promoting the region as one single cruise destination; launching the SEA Cruise Newsletter in August 2014 targeting the trade and which is self-sustainable today; facilitating the meetings and port visits between AMS and cruise lines operators; and partnered with Japan under the ASEAN-Japan Cruise Promotion Strategy that includes working together to develop cruise under 6 policy pillars.</p> <p>Positive impacts include new and more deployments to SEA and cruise lines exploring fresh itineraries.</p> <p>Ongoing initiatives on the development of a SEA Cruise Map and common SEA cruise branding to raise awareness of the region's cruise potential.</p> <p><u>River Cruise</u> Working together with UNWTO for the technical assistance on "River-Based Tourism Development in ASEAN" that aims to propose river-based tourism corridors, circuits and clusters that can be feasibly developed.</p>
	<p>1.2.5 Develop regional corridors, circuits and product packages for Health and Wellness Tourism</p>	<p>With Thailand as Lead Coordinator, completed the ASEAN Health and Wellness Tourism product template is being developed with close consultation with the Spa Association and its Ministry of Public Health.</p>
	<p>1.2.5 Work with CCI/CCS in reducing barriers and encouraging investment in product development</p>	<p>Completed (continuous measure): At the 2nd Meeting of ASEAN Tourism Product Development WG (PDWG) held on 3 October 2011 in Brunei Darussalam, the PDWG agreed that the consultation with CCS and CCI would be organised in case-by-case basis. The information paper on tourism investment was also presented to the 55th Meeting of the ASEAN Coordinating Committee on Investment (CCI), held on 11 – 13 January 2012 at the ASEAN Secretariat, Jakarta, Indonesia</p> <p>Workshop on Investment in Ecotourism for ASEAN and GCC Countries held on 19-24 August 2013 in Chiang Mai, Thailand</p>

<p>1.3 Enhance the External Relations Policies and Procedures of ASEAN tourism</p>	<p>1.3.1 Create a public relations policy and program to publicize and promote objectives of the ASEAN NTOs</p>	<p>Completed: The MCWG through its ASEAN Tourism Marketing Strategy (ATMS) 2012-2015 had developed the basic PR initiatives to promote ASEAN tourism. The PR program for 2012 had been endorsed by the 35th ASEAN NTOs and 15th M-ATM during ATF 2012 in January 2012</p> <p>Completed: Press Releases on various themes of ASEAN Tourism Cooperation have been launched to International Media in 2012 and 2013</p> <p>Completed (continuous measure): PR Organisations have been hired to work closely with the ASEAN Tourism Marketing Coordinator in developing ASEAN tourism Press Releases</p>
	<p>1.3.2 Develop policies and procedures for cooperating with dialogue partners to support the implementation of the ATSP</p>	<p>Completed : ASEAN Plus Three Tourism Cooperation Work Plan 2013-2017 covering quality tourism, skills development, joint tourism marketing and promotion, cruise tourism, and tourism crisis communications in line with ATSP was adopted by 12th M-ATM+3 held on 21 January 2013 in Vientiane, Lao PDR. Activities with India also included on the signed ASEAN-India MOU on Tourism Cooperation</p>
	<p>1.3.3 Develop policies and procedures for cooperating with international organizations to support the implementation of the ATSP</p>	<p>Completed (continuous measure): ASEAN Member States had consultation with UNWTO and related partners in every M-ATM. At the 2nd Meeting of TIBC held on 5-6 October 2011, TIBC discussed and agreed that cooperation and proposed projects with dialogue partners and international organisations could be identified along with the progress made by the working groups and sub-working groups in conducting activities and projects to implement related measures in ATSP 2011-2015. In this regard, the proposed cooperation with dialogue partners and international organisations would depend on the recommendation of respective ASEAN tourism working groups and sub working groups.</p> <p>Completed (continuous measure): collaboration with PATA, WTTC and UNWTO is regular activities carried out by ASEAN NTOs</p>
	<p>1.3.4 Develop Communication system and policies for communicating with essential private sector stakeholders</p>	<p>Completed: ASEANTA as key private sector stakeholder participates regularly in the ASEAN NTOs Meeting. Meeting of ASEANTA is held in conjunction with the meeting of ASEAN NTOs</p> <p>Completed: the ASEAN Tourism Communication System was endorsed by 35th ASEAN NTOs and 15th M-ATM during ATF 2012 in January 2012 as part of ATMS</p> <p>Completed (Continuous measure): ASEAN Member States conducted consultation with ASEANTA in regular basis.</p>



In addition to the above ATSP 2011-2015 product development program, the PDWG has pursued the following product development projects: (a) collection of statistics on ASEAN cruise tourism, tourism investment, and existing ASEAN tour packages; (b) production of an ASEAN Traditional Cuisine Coffee Table Book; (c) ASEAN Networking on MICE; (d) proposal for a “101 Best Beaches Asia” publication; and (f) development of Product Manual on ASEAN Food Trail.

**2.2 Strategic Direction 2: Strategically increase quality of human resource, services and facilities in the region**

Action Program	Activities	Status
2.1 Develop a set of ASEAN tourism standards with a certification process	2.1.1 Revise and develop an ASEAN Green Hotel Standard with a certification process	With Thailand as the Lead Coordinator, completed: (1) ASEAN Green Hotel Standard with the Green Leaf Foundation (2) Manual Audit Checklist for ASEAN Green Hotel Standard to certify ASEAN Green Hotel and secured adoption by the 37th Meeting of ASEAN NTOs on 18 January 2013 in Lao PDR (3) “Workshop on ASEAN Tourism Conformity Assessment and Certification Process for ASEAN Green Hotel Standard” on 17 September 2013 in Pattaya to discuss the details certification process including the certification body and the training for the assessors (4) “Workshop on ASEAN Tourism Conformity Assessment and Certification Process’ for ASEAN Green Hotel Standard” on 17 September 2013 in Pattaya (5) Audit Process and design of the certification body by 39th ASEAN NTOs (6) Completed the “Workshop for ASEAN Green Hotel Standard and ASEAN Spa Services Standard Auditor Training” on 1-3 December 2014 in Bangkok, Thailand.
	2.1.2 Revise and develop an ASEAN homestay standard with a certification process	With Malaysia as the Lead Coordinator for the development of ASEAN Homestay Standard, completed: <ul style="list-style-type: none"> <li>• Work Plan as endorsed by 35th Meeting of ASEAN NTOs A Special Meeting on ASEAN Homestay Standard to discussed the Manual Audit Checklist for certifying the Homestay was held on 14 December 2012 in Penang, Malaysia. The Manual Audit Checklist was adopted by 37th Meeting of ASEAN NTOs in Lao PDR on 18 January 2013. Special Meeting on ASEAN Homestay Standard Audit Process and Design for Certification Body was held on 10 – 12 September 2013 in Putrajaya, Malaysia.</li> <li>• Final Draft of ASEAN Homestay Standard Audit Process and Design for Certification Body as endorsed by 39th ASEAN NTOs</li> <li>• “Training of Trainer ASEAN Master Auditors/Assessors for ASEAN Homestay Standard” on 18-20 August 2014 in Port Dickson, Negeri Sembilan, Malaysia.</li> </ul>

	<p>2.1.3 Revise and develop an ASEAN public toilet standard with a certification process</p>	<p>With Brunei Darussalam as the Lead Coordinator for the development of ASEAN Public-toilet Standard, completed:</p> <ul style="list-style-type: none"> <li>• work plan for the development of ASEAN Public Toilet Standard</li> <li>• Special Meeting to discuss the Manual Audit Checklist including certification process was held on 9 January 2014 in Brunei Darussalam. The Criteria and Requirements of ASEAN Public Toilet Standard including the Audit Checklist and Certification Process have been developed.</li> <li>• Draft of ASEAN Public Toilet Standard Audit Process and Design for Certification Body as endorsed by 39th ASEAN NTOs;</li> <li>• Capacity Building to Train Auditors &amp; Pilot Testing on August 2014 and reported at 8th Meeting of QTWG held on 9 October 2014 in Manila, the Philippines.</li> </ul>
	<p>2.1.4 Develop and ASEAN spa service standard with a certification process</p>	<p>With Thailand as the Lead Coordinator for the development of ASEAN Spa Service Standard, completed:</p> <ul style="list-style-type: none"> <li>• Project Group Meetings on ASEAN Spa Standard were held in March and September 2011 to identify the major criteria and requirements. The major criteria and requirement of ASEAN Spa Standard endorsed by to the 35th ASEAN NTOs and 15th M-ATM</li> <li>• Work Plan for ASEAN Spa Service Standard is already identified endorsed by the 35th ASEAN NTOs and 15th M-ATM</li> <li>• Special Meeting on ASEAN Spa Service Standard was held on 26-27 July 2012 in Thailand to discuss the Manual Audit Checklist. The Audit Checklist was adopted by 37th Meeting of ASEAN NTOs on 18 January 2013 in Lao PDR. Special Working Group Meeting on Designation and Conformity Assessment for ASEAN Spa Standard was held on 17 September 2013 in Pattaya, Thailand</li> <li>• Special Working Group Meeting on Designation and Conformity Assessment for ASEAN Spa Standard was held on 17 September 2013 in Pattaya, Thailand. The Design of the Audit Process and Certification Body have been endorsed by 39th ASEAN NTOs.</li> <li>• “Workshop for ASEAN Green Hotel Standard and ASEAN Spa Services Standard Auditor Training” was held on 1-3 December 2014 in Bangkok, Thailand.</li> </ul>

	2.1.5 Develop ASEAN tourism security and safety standards	<p>With Indonesia as the Lead Coordinator for the development of ASEAN Tourism Security and Safety Standards, completed:</p> <ul style="list-style-type: none"> <li>• Work plan for development of ASEAN Tourism Security and Safety Guidelines that focus on hotel and resort facilities for 2011-2013 has been identified</li> <li>• Project to develop ASEAN Tourism Security and Safety Guidelines that focus on hotel and resort facilities was proposed by Indonesia and was implemented in 2012.</li> <li>• Online website (<a href="http://www.aseantssrc.org">www.aseantssrc.org</a>) launched during the ATF 2015 in Nay Pyi Taw, Myanmar.</li> </ul>
	2.1.6 Enhance the ability of ASEAN tourism to address the climate change issue	<p>With Philippines as the Lead and Vietnam as Co-Lead Coordinator for the development of ASEAN Tourism Standards in Responding to the Climate Change, completed:</p> <ul style="list-style-type: none"> <li>• work plan on project titled “Enhance the Ability of ASEAN Tourism to Address the Climate Change Issue” for 2012-2015 as endorsed by the 36th NTOs held on 27-28 June 2012 in Putrajaya, Malaysia;</li> <li>• “ASEAN Workshop on Climate Change and Tourism” held on 11-12 September 2012 in Legazpi City, Albay, the Philippines to discuss the parameters and extent of measures from which the ASEAN NTOs can develop regional action plan outlining cooperative programmes and activities in responding to climate change.</li> <li>• “ASEAN Climate Change and Tourism Measures and Parameters Development Workshop” on 7-10 April 2013 in Davao City, the Philippines.</li> <li>• Final Framework, Approaches, Parameters and Measures for Climate Change and Tourism in ASEAN as endorsed by the 39th NTOs</li> </ul>
	2.1.7 Develop ASEAN Clean Tourist City Standard and its certification process	<p>With Cambodia as Lead Coordinator, completed:</p> <ul style="list-style-type: none"> <li>• Training of Master Auditor and Pilot Testing of ASEAN Clean Tourist City Standard on 25-27 September 2014 in Phnom Penh, Cambodia.</li> <li>• ASEAN Clean Tourist City Standard and Guidelines as endorsed by the 41st NTOs</li> </ul>

	2.1.8. Develop ASEAN Community-Based Tourism Standard	<p>With Cambodia as Lead Coordinator, completed the:</p> <ul style="list-style-type: none"> <li>• ASEAN CBT Training of Trainers Workshop and Pilot Testing on on 12-14 January 2015 in Siem Reap, Cambodia.</li> </ul>
2.2 Implement the MRA on ASEAN Tourism Professionals and its Requirements	2.2.1 Develop tools and implement a human resources development programs for an ASEAN competency standard on housekeeping	<ul style="list-style-type: none"> <li>• Review and implementation of the Common ASEAN Tourism Curriculum for housekeeping</li> <li>• 48 toolboxes for housekeeping division have been developed through the AADCP II.</li> </ul> <p>Training of ASEAN Master Trainer had been implemented on 13 Nov - 3 Dec 2012 in Bali, Indonesia</p> <ul style="list-style-type: none"> <li>• Training of ASEAN Master Assessor had been implemented on 4-14 December 2012 in Bali, Indonesia.</li> </ul>
	2.2.2 Develop tools and implement human resource development program for ASEAN competency standards for front office, food and beverage services, food production, travel agencies and tour operation activities	<ul style="list-style-type: none"> <li>• “Feasibility Study for the Establishment of Regional Secretariat for ASEAN Tourism Professionals” supported by AADCP II</li> <li>• Development of 98 toolboxes for front office, food and beverage services, and food production supported by AADCP Phase II</li> <li>• Development of AQEM conducted through the project on “Gap Analysis on the Implementation of MRA on Tourism Professionals in AMS” supported by AADCP Phase II.</li> </ul> <p>On Going:</p> <ul style="list-style-type: none"> <li>• TOR for the establishment of regional secretariat for the implementation of ASEAN MRA on Tourism Professionals including its budget proposal</li> <li>• Development of toolboxes for travel agencies and travel operators</li> </ul>

	<p>2.2.3 Develop tools to monitor the tourism sector labor market situation in each ASEAN Member States that would support the implementation of MRA and tourism professionals</p>	<p>The Special ATPMC Meeting held on 1 December 2012 agreed on the possibility to collect the required information from Member States through regular submission in ATPMC meeting. ASEAN Member States submitted related data and information available in every ATPMC meeting.</p> <p>Prepared ASEAN Guide to MRA For Professionals/Guide to MRA Training Providers/Handbook of MRA for Tourism Professionals</p> <p>The ASEAN Member States submitted their related data and information available in every ATPMC meeting.</p>
<p>2.3 Provide Opportunities for increase knowledge and skill development</p>	<p>2.3.1 Establish policies and procedures for the development of capacity-building programs including assessment systems and the criteria to assess initiatives that will get ASEAN funding</p>	<p>Through activities of the ASEAN Tourism Resource Management and Development Network (ATRM) on Cruise (led by Singapore), Heritage (led by Indonesia), Ecotourism (led by Thailand), and Hospitality (led by Malaysia), these are ongoing initiatives to determine areas of priority and emphasis for ASEAN sponsored and supported training program and the establishment of a decision-making process to determine which training courses should be endorsed and supported by the ASEAN</p>
	<p>2.3.2 Develop a yearly human resources development plan based on regional priorities</p>	<p>The implementation of this measure specifically to develop yearly workplan and budget for capacity-building program was carried out through activities of the ASEAN Tourism Resource Management and Development Network (ATRM) on Cruise (led by Singapore), Heritage (led by Indonesia), Ecotourism (led by Thailand), and Hospitality (led by Malaysia) as ongoing activities.</p> <p>Numerous capacity building programme with dialogue partners were implemented by ASEAN-Japan Centre and ASEAN-Korea Centre (ASEAN Tourism HRD Program and Korean Language Training Course). GCC Countries was invited to ATRM Ecotourism</p>

### 2.3 Strategic Direction 3: Enhance and accelerate travel facilitation and ASEAN connectivity

Action Program	Activities	Status
3.1 Advocate for a single visa for the ASEAN region	3.1.1 Support the development of common visa for the region by working with the relevant groups within ASEAN	<p>To monitor the situation of tourism-related visa issues in ASEAN, the following were completed and serves as continuous measure:</p> <p>“Study for an ASEAN Common Visa for non-ASEAN Nationals” carried out by SOM and are ready to work with other relevant bodies.</p> <p>The tourism-related visa issues in ASEAN was discussed regularly in TIBC Meeting.</p> <p>On-going. During the 4th TIBC Meeting, Brunei Darussalam informed the ASEAN Member States on the the draft Term of Reference (TOR) of the Joint Working Group on the ASEAN Common Visa (JWGACV) which was disseminated by its MOFA. The NTOs agreed to hold internal consultation with their respective MOFA for reviewing the TOR . 1st NTO-DGICM Consulation has been held during the 36th ASEAN NTOs Meeting on 27-28 June 2012 in Putra Jaya, Malaysia. On this consultation ASEAN NTOs are requested to regularly check their respective status visa development including ASEAN Common Visa and to share this information regularly in TIBC meetings.</p> <ul style="list-style-type: none"> <li>• Extension of visa free travel in ASEAN from 21 days to 30 days</li> <li>• Additional countries included in visa-free list</li> <li>• Implementation of visa on arrival for select markets</li> </ul> <p>3.2 Work with other ASEAN bodies to expand connectivity through air, water, rail and ground transportation</p> <ul style="list-style-type: none"> <li>• October 28, 2010, the ASEAN Leaders endorsed the Master Plan on ASEAN Connectivity (MPAC) during the 17th ASEAN Summit held in Ha Noi, Viet Nam</li> <li>•Ratification of ASEAN Protocols on Liberal Aviation Market</li> </ul>
	3.1.2 Work with other ASEAN bodies to expand connectivity through air, water, rail and ground transportation	<p>Collect information on the existing infrastructure and facilities that can support both ASEAN intra-regional connectivity and tourism</p> <p>Completed (Continuous Measure): On the 4th ASEAN NTOs-STOM Consultation taking place during the 31st STOM held on 24-26 May 2011 in Siem Reap, Cambodia, NTOs agreed to further support STOM undertaking in promoting enhanced connectivity within ASEAN Region and encouraged Member States to begin collecting information on existing obstacles related to infrastructure and transportation that would hinder ASEAN intra-regional connectivity and tourism.</p> <p>Identify obstacles and opportunities on transportation linkages and share with STOM</p> <p>Completed (Continuous Measure): regular collaboration/ consultation is taken based on needs, e.g., Consultation with MTWG on Cruise Tourism</p> <p>Organise a meeting with relevant bodies to discuss issues related to connectivity and tourism</p> <p>Completed: 4th ASEAN NTOs-STOM Consultation was held taking place during the 31st STOM held on 24-26 May 2011 in Siem Reap, Cambodia.</p>

## **Appendix 2**

### **Terms of Reference of ATSP Committees**

#### **1. ATSP 2016-2015 Committees**

##### **Number of Committees**

The overall implementation of the ATSP following the implementation guidelines and timelines will be the responsibility of the following committees:

1. The ASEAN Tourism Competitiveness Committee (ATCC);
2. The ASEAN Sustainable and Inclusive Tourism Development Committees (ASITDC),
3. The ASEAN Tourism Resourcing and Monitoring and Evaluation Committee (ATRMEC);
4. The ASEAN Tourism Professional Monitoring Committee (ATPMC).

##### **Roles and Responsibilities**

The Committees will be responsible for:

1. preparing the terms of reference (TOR) and work plan based on the action guidelines provided in the ATSP implementation timeline,;
2. establishing the sub-committees to implement the activities;
3. arranging resourcing and establishing the monitoring and evaluation system through the ATRMEC;
4. supervising the implementation of the activities by the sub-committees;
5. presenting the results to the NTO, the Secretariat and the Ministers.

##### **Membership**

Each committee should be composed of Senior NTO decision makers as well as relevant representatives from the private sector, and the development partners. To implement their action plans, the ATCC, the ASITDC, the ATRMEC and the ATPMC will create one or more ASEAN tourism sub-committees each led by one AMS NTO. These sub-committees would be responsible for:

- (1) preparing a two-year phased rolling work plan for the implementation of their area of responsibility based on the ATSP timeline for the related activities;
- (2) identifying expertise input requirements, TOR and budgets and supervising the production of related outputs;
- (3) undertaking the implementation of the work plan;
- (4) completing a score card and preparing reports on the results of each phase of the rolling work plan; and
- (5) presenting reports to the Committees and making adjustments as required to complete the work.

##### **Chairmanship**

The Chairman of each Committee shall be elected and rotated among Member States with the tenure of two years. The Vice-Chairman shall be the next Chairman based on alphabetical order. In the absence of the Chairman, the Vice-Chairman shall serve as Chairman.

## **Frequency of Meetings**

The Committees will meet at least twice a year (every 6 months).

## **2. Transition Arrangements from ATSP 2011-2015 to ATSP 2016-2025**

The transition from the ATSP 2011-2015 implementation arrangements to the ATSP 2016-2025 arrangements will be led by the current Working Group on the formulation of the ATSP. To minimize the transition period, it is envisaged that the Working Group will supervise the transition to the new implementation structure by 30 June 2016.

Between the time of approval of the ATSP 2016-2025 at the January ATF and June 30 2016, it is envisaged that:

1. The existing Marketing and Communication Working Group, the Products Development Working Group, and the Quality Tourism Working Group will be merged into the new ASEAN Tourism Competitiveness Committee (ATCC).
2. The new ASEAN Sustainable and Inclusive Tourism Development Committee (ASITDC) will be formed.
3. The Integration and Budget Committee will be renamed as the ASEAN Tourism Resourcing, and Monitoring and Evaluation Committee (ATRMEC).

During this period, any immediate tasks under the ATSP in the first half of 2016 should be taken up by the formation of the appropriate Project Team selected from existing working group participants and outside specialist representatives from the private sector, academe, NGOs and development partners. The selection of AMS NTO representatives for each of the three Committees and the Project Teams should be finalized on or before 30 June 2016 based on a mid 2016 meeting of the Working Group.



## ATSP Committee and Sub-Committee/Working Group Structure Responsibilities

- 1.0 Competitiveness Tourism Committee**
- 1.1 Tourism Marketing**
  - 1.1.1 Enhance the ASEAN tourism statistical framework
  - 1.1.2 Expand the ASEAN regional destination-marketing program
  - 1.1.3 Implement the “Visit ASEAN Year 2017”
- 1.2 Product Diversification**
  - 1.2.1 Complete the ongoing and identify new product development and marketing approaches
  - 1.2.2 Support the development of ASEAN sub-regional destinations/corridors targeting more inclusive tourism outcomes
- 1.3 Tourism Investment**
  - 1.3.1 Prepare an ASEAN Tourism Investment Program that identifies investment corridors where there the convergence and consolidation of investments in tourism infrastructure and products will take place
  - 1.3.2 Promote further liberalization of tourism services
- 1.4 Tourism Human Resources Development**
  - 1.4.1 Continue the implementation of the ASEAN Mutual Recognition Arrangement (MRA) on Tourism Professionals
  - 1.4.2 Prepare and implement the ASEAN Tourism Human Resources Development Plan in coordination with the ASEAN Tourism Resources Management and Development Network
- 1.5 Tourism Standards**
  - 1.5.1 Promote the adoption and implementation of the ASEAN tourism standards certification system into the policy and regulatory tourism HRD frameworks of the Member States
  - 1.5.2 Identify and implement new ASEAN tourism standards system
  - 1.5.3 Develop ASEAN tourist protection guidelines
- 1.6 Tourism Connectivity and Destination Infrastructure**
  - 1.6.1 Enhance ASEAN air connectivity by supporting implementation of the ASEAN Single Aviation Market
  - 1.6.2 Promote the development of cruise and river tourism including its infrastructure for sea and river cruises
  - 1.6.3 Implement the Agreement on the Recognition of Domestic Driving Licenses Issued by ASEAN Countries to promote drive/overland tourism across ASEAN
  - 1.6.4 Promote the development of road connectivity along major tourism corridors
- 1.7 Tourism Travel Facilitation**
  - 1.7.1 1.7.1 Prepare White Paper to implement the facilitation of intra-ASEAN and international travel (Article 2 of ASEAN Tourism Agreement 2002)

<b>2.0</b>	<b>Sustainable &amp; Inclusive Tourism Development Committee</b>
<b>2.1</b>	<b>Community and Private Sector Participation</b>
2.1.1	Develop and implement the strategy on participation of local communities and private sector in tourism development
<b>2.2</b>	<b>Tourism Safety &amp; Security &amp; Heritage Protection and Management of Sites</b>
2.2.1	Work with official bodies and organizations in support of safety, security, and protection of key destinations in ASEAN.
2.2.2	Work with official bodies and organizations in support of the protection and management of heritage sites.
<b>2.3</b>	<b>Environment &amp; Climate Change</b>
2.3.1	Work with official bodies and organizations to address environmental, and enhance climate change responsiveness
2.3.2	Prepare a manual of guidelines for incorporating environment and climate change mitigation, adaptation, and resilience

## **Terms of Reference for the ASEAN Tourism Competitiveness Committee**

### **Background**

In addition to requiring that ASEAN tourism is sustainable and inclusive, the vision for the development of ASEAN tourism also requires that it is highly competitive, relative to competing regions such as Europe, the UAE, the Caribbean, MERCUSOR, and South Asia, and quasi-regions such as China and the United States that market themselves as single destinations. The ATSP 2016-2025 has identified seven core areas affecting the competitiveness of ASEAN as a single tourism destination: (1) enhancing the marketing and promotion of ASEAN as a single tourism destination; (2) diversifying ASEAN's tourism product; (3) attracting tourism investments; (4) raising the skills and service standards of ASEAN tourism human resources; (5) adopting and enhancing existing ASEAN tourism standards; (6) enhancing tourism air, sea and land connectivity; and (7) facilitating cross border movements by tourists to and within ASEAN.

### **Role and Responsibilities of ATCC**

**The ATCC shall have the following responsibilities:**

- Establish the sub-committees/working groups to be led by one AMS NTO and comprising public and private sector specialists in the related field;
- Prepare the project terms of reference (TOR) and work plan based on the action guidelines provided in the ATSP implementation timeline;
- Arrange resourcing and establish the monitoring and evaluation system through the ATRMEC;
- Facilitate the implementation of the activities of the project teams;
- Supervise the implementation of action programs and activities;
- Report its work progress to the ASEAN NTOs;
- Present the results to the NTO, the Secretariat and the Ministers;
- Such other functions and responsibilities that may be assigned to it by the ASEAN NTOs in the future;

### **Membership**

ATPCC shall be composed of representatives of ASEAN NTOs.

### **Chairmanship**

The Chairman of ATCC shall be elected and rotated among Member States with the tenure of two years. The Vice-Chairman of ATPCC shall be the next Chairman of ATPCC based on alphabetical order. In the absence of the Chairman, the Vice-Chairman shall serve as Chairman.

### **Frequency of Meetings**

ATCC shall meet twice a year. Special meetings of ATCC may be held whenever deemed necessary by the members. The ASEAN Secretariat shall notify all members of ATCC of the date and venue of the meetings of ATCC. The ASEAN Secretariat shall prepare the provisional agenda of the meetings, in close consultation with the Chairman.

### **Venue**

The regular ATCC meeting shall be held in conjunction with the mid-year ASEAN NTOs Meeting.

## **Terms of Reference for the ASEAN Sustainable and Inclusive Tourism Development Committee**

### **Background**

In addition to requiring that ASEAN tourism is highly competitive, the vision for the development of ASEAN tourism also requires that it is sustainable and inclusive,. The ATSP 2016-2025 has identified three core areas affecting the competitiveness of ASEAN as a single destination: (1) enhancing community and private sector participation; (2) promoting tourism safety and Security and heritage protection diversifying ASEAN; and (3) enhancing efforts to promote climate change adaptation and resiliency. To implement these strategic competitive initiatives, the AMS NTOs through the ASEAN Tourism Competitiveness Committee (ATCC) will establish seven project teams to be led by one AMS NTO and comprising public and private sector specialists in the related field.

### **Role and Responsibilities of ASITDC**

**The ASITDC shall have the following responsibilities:**

- Establish the sub-committees to be led by one AMS NTO and comprising public and private sector specialists in the related field;
- Prepare the project terms of reference (TOR) and work plan based on the action guidelines provided in the ATSP implementation timeline;
- Arrange resourcing and establish the monitoring and evaluation system through the ATRMEC;
- Facilitate the implementation of the activities of the project teams;
- Supervise the implementation of action programs and activities;
- Report its work progress to the ASEAN NTOs;
- Present the results to the NTO, the Secretariat and the Ministers;
- Such other functions and responsibilities that may be assigned to it by the ASEAN NTOs in the future;

### **Membership**

ASITDC shall be composed of representatives of ASEAN NTOs.

### **Chairmanship**

The Chairman of ASITDC shall be elected and rotated among Member States with the tenure of two years. The Vice-Chairman of ASITDC shall be the next Chairman of ASITDC based on alphabetical order. In the absence of the Chairman, the Vice-Chairman shall serve as Chairman.

### **Frequency of Meetings**

ASITDC shall meet twice a year. Special meetings of ASITDC may be held whenever deemed necessary by the members. The ASEAN Secretariat shall notify all members of ASITDC of the date and venue of the meetings of ASITDC. The ASEAN Secretariat shall prepare the provisional agenda of the meetings, in close consultation with the Chairman.

### **Venue**

The regular ASITDC meeting shall be held in conjunction with the mid-year ASEAN NTOs Meeting.

## **Terms of Reference for the ASEAN Tourism Resourcing, Monitoring and Evaluation Committee**

### **Background**

This Committee, known previously as the ASEAN TIBC in the ATSP 2011-2015, would be responsible for: (1) securing financial resources to support the implementation of the programs and projects of the ATSP 2016-2025, and (2) implementing monitoring and evaluation as well as reporting the progress of the Plan to the ASEAN NTOs and Tourism Ministers with assistance of the ASEAN Secretariat.

The Committee will play a crucial role in ensuring that the essential elements of the strategic plan are implemented. It will be faced with the reality that there are restricted funds to carry out the various activities that have been defined in the ATSP and will be identified as the work of the NTOs continue. It must be stressed that identifying funding sources is a collective responsibility but one that will be guided by the Integration and Budget Committee. As a primary task the Committee will develop a series of policies and procedures for the creation of year budgets for implementing the ATSP during the 2016– 2025 period as well as monitoring the use of resources.

As the ATSP 2016-2015 focuses upon achieving specific target impacts, outcomes and outputs, there is a need to further clarify and quantify the baseline indicators and targets, and to develop a monitoring and evaluation system for measuring progress against base line indicators, reporting results and recommending course adjustments to the strategy.

The supervision of the overall design and operation of the M&E system would be the responsibility of the Committee. The system should rely on existing data sources and be as simple as possible to implement. The M&E system will generate a report on the results, give a diagnosis as to the reasons for results that are below target against the baseline, and recommend appropriate course of actions.

The ATRMEC plays a crucial role in ensuring that the strategic actions of the ATSP are implemented, marshaling the resources required to carry out the various activities, developing a series of policies and procedures for the creation of annual budgets for implementing the ATSP through the ASEAN NTOs Fund and other resources, monitoring the use of resources, and initiating post ATSP 2025 planning initiatives.

### **Roles and Responsibilities**

The Committee would have the following responsibilities:

- To review project proposals and budgets from the Committees.
- To recommend the annual budget and work plan to the ASEAN NTOs.
- To identify the sources of funding required to implement the ATSP.
- To monitor and report on the implementation of the ATSP for the NTOs.
- To supervise the overall design and operation of the M&E system of the ATSP.

### **Membership**

The ATRMEC shall be composed of representatives of ASEAN NTOs.

## **Chairmanship**

The Chairman of the ATRMEC shall be elected and rotated among Member States with the tenure of two years. The Vice-Chairman of ATRMEC shall be the next Chairman of ATRMEC based on alphabetical order. In the absence of the Chairman, the Vice-Chairman shall serve as Chairman.

## **Frequency of Meetings**

The Committee shall meet at least twice a year. Special meetings of the Committee may be held whenever deemed necessary by the members, or upon directive of NTOs/ Meeting of ASEAN Tourism Ministers.

The ASEAN Secretariat shall notify all members of the Committee of the date and venue of the meetings. The ASEAN Secretariat shall prepare the provisional agenda of the meetings, in close consultation with the Chairman.

## **Venue**

The regular ATRMEC meeting shall be held in conjunction with other Committee meetings.

## **Role of the ASEAN Secretariat**

The ASEAN Secretariat shall assist the Committee in carrying out their functions including technical advisory support and assistance in the supervision, coordination, implementation and monitoring of cooperation programs, projects and activities in their respective sectors. The ASEAN Secretariat shall also assist the Chair in organizing meetings of the ATRMEC.

## Terms of Reference for the ASEAN Tourism Professional Monitoring Committee

### Background

The establishment of the ASEAN Tourism Professional Monitoring Committee (ATPMC) is in pursuance of Article 5 (3) – Responsibilities, of the ASEAN Mutual Recognition Arrangement (MRA) on Tourism Professionals adopted by the ASEAN Tourism Ministers during their 12th Meeting on 8 January 2009 in Ha Noi, Viet Nam.

With the adoption of the ASEAN MRA on Tourism Professionals, the Ministers tasked the ASEAN NTOs to prepare and establish the MRA follow-up requirements including the capacity development for members of related organisations under MRA at the regional and national level.

The MRA follow-up implementation requirements, including the capacity development for members of related organisations under MRA at the regional and national level was endorsed by the 13th Meeting of ASEAN Tourism Ministers held on 24 January 2010 in Bandar Seri Begawan, Brunei Darussalam. In expediting the implementation of those requirements under MRA, the Ministers agreed to the convening of the First ATPMC meeting in 2010.

### Role and Responsibilities of ATPMC

- The ATPMC shall have the following responsibilities:
- Create awareness and disseminate information about the MRA on Tourism Professionals within ASEAN;
- Promote, update, maintain and monitor the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) and the Common ASEAN Tourism Curriculum (CATC);
- Notify promptly the concerned Tourism Professional Certification Board (TPCB) upon receipt of feedback from National Tourism Professional Board (NTPB), in case a foreign Tourism Professional is no longer recognised by the host country;
- Facilitate the exchange of information concerning assessment procedures, criteria, systems, manuals and publications relating to this Arrangement;
- Report its work progress to the ASEAN NTOs;
- Formulate and update necessary mechanisms to enable the implementation of the MRA on Tourism Professionals;
- Such other functions and responsibilities that may be assigned to it by the ASEAN NTOs in the future;
- Recommend, as appropriate, to the ASEAN Tourism Ministers through the ASEAN NTOs measures to improve and/or amend the Agreements; and
- Resolve any differences among ASEAN Member States concerning the interpretation or application of the MRA on Tourism Professionals and to settle them in an amicable manner.

## **Membership**

ATPMC shall be composed of representatives of ASEAN NTOs and appointed representatives from the National Tourism Professional Boards (NTPBs).

## **Chairmanship**

The Chairman of ATPMC shall be elected and rotated among Member States with the tenure of two years. The Vice-Chairman of ATPMC shall be the next Chairman of ATPMC based on alphabetical order. In the absence of the Chairman, the Vice-Chairman shall serve as Chairman.

## **Frequency of Meetings**

ATPMC shall meet once a year. Special meetings of ATPMC may be held whenever deemed necessary by the members.

The ASEAN Secretariat shall notify all members of ATPMC of the date and venue of the meetings of ATPMC. The ASEAN Secretariat shall prepare the provisional agenda of the meetings, in close consultation with the Chairman.

## **Venue**

The regular ATPMC meeting shall be held in conjunction with the mid-year ASEAN NTOs Meeting.

## **Secretariat of ATPMC**

A Regional secretariat shall assist ATPMC in its functions and responsibilities under the Agreements, and in particular, in the monitoring and reporting the progress of the implementation of the Agreements.

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## Terms of Reference For The Preparation Of The ASEAN Tourism Human Resource Development Strategy And Action Plan

Whilst the MRA competency standards are potentially applicable to all tourism HR in ASEAN, MRA accreditation is likely to affect only a small fraction of the total tourism HR sector. However, there is a need to raise the quality of the vast majority of ASEAN tourism human resources to a level that is more competitive with other world tourist regions such as Europe, the Caribbean and the Gulf States among others. The draft TOR for the ASEAN Tourism HR Strategy and Action Plan is set out below:

1. Analysis of the ASEAN tourism manpower in each AMS segmented by subsector (accommodation, food and beverage, tourism transportation, tourist guides, etc.) by main occupation types divided by front-line and back of house occupations, and forecast of segmented Tourism HR between 2016 and 2025.
2. Analysis of the current suppliers of tourism education and training services in each AMS in terms of ownership (public or private), types of courses and degree/diplomas/certificates offered, annual graduates across the courses offered, course curriculum and curriculum standards; and number, types, qualifications and experience of academic staff/teachers/trainers; and forecast of additional course and academic staff/teachers/trainers requirements between 2016 and 2025.
3. Review and evaluation of the minimum competency standard targets that should be set for 2020 and 2025 across the occupational groups in the ASEAN tourism HR, assessment of the current ASEAN tourism HR occupations against the minimum competency standard requirements, and conclusions and recommendations for cooperation in the coordination of standards among the AMS.
4. Review and evaluation of the basis of competency standards being applied and the occupation certification, accreditation and auditing institutional arrangements in each AMS country with conclusions and recommendations on possible areas for cooperation and coordination.
5. Identification of best approaches and practices, and lessons learned in developing, implementing and sustaining tourism HR occupation certification, accreditation and auditing systems with conclusions and recommendations for the approach that the AMSs could take in the tourism HR area having regard to institutional and resourcing capabilities.
6. Preparation of a position paper on the results of (a) to (d) including setting out and evaluating options, and conclusions and recommendations for developing, implementing and sustaining an ASEAN-wide tourism HR occupation certification, accreditation and auditing system.
7. Circulation of the position paper and holding a series of AMS in-country consultative workshops with public and private sector stakeholders to consider, discuss and agree the strategic approach to be adopted for developing, implementing and sustaining an ASEAN-wide tourism HR occupation certification, accreditation and auditing system.
8. Preparation of an action plan to adopt, resource, implement and monitor and evaluate the ASEAN tourism HR occupational certification, accreditation and audit system.
9. Circulation of the strategy and action plan at consultative workshops in the AMS countries and holding of an ASEAN-wide forum with public and private sector stakeholders to consider, discuss and agree the strategy and action plan.
10. Publication of the strategy and establishment of its implementation framework at the AMS country and ASEAN level.

## Terms of Reference For The Preparation Of The ASEAN Tourism Marketing Strategy (ATMS) 2016-2025

The ATMS 2012-2015 set the framework for the marketing of ASEAN as a single destination under the ATSP 2011-2012. The ATMS main goals were to maintain international arrival growth to ASEAN, leverage AMS NTO resources and impacts, and contribute to the socioeconomic goals of ASEAN. To achieve this, the strategy identified four thematic product lines built around nature, tangible and intangible cultural heritage, communities, and marine based products. The thematic product lines were to be packaged in the form of clusters, circuits, and trails. The product lines were matched to seven target markets: experiential travelers, creative travelers adventure travelers; extended long stay travelers; generic and mass travellers; business related travelers; and ASEAN for ASEAN travelers. ASEAN was to be branded as “Southeast Asia” with the earlier developed logo, “Southeast Asia feel the warmth” with the recommendation that the effectiveness of this brand and logo be evaluated in the period 2014-2015. The product distribution strategy depended upon a strong public-private sector stakeholder partnership approach towards regional product development and marketing, piggybacking on the activities of the NTOs, use of an interactive website and e-marketing channels. The strategy anticipated that the programs for the mass market, experiential and creative, adventure, business, and ASEAN for ASEAN segments would be designed by 2013 and campaigns progressively implemented through to 2015, the design and implementation of the seniors program beginning in 2013; the adventure and business market programs rolled out in 2013 with campaigns implemented in 2014 and thereafter. The institutional structure for implementing the ATMS centered on the ASEAN Tourism Marketing Working Group (AMCWG) supported by a marketing coordinator and working closely with the ASEAN Product Development Working Group (APDWG) and ASEANTA. The marketing coordinator was to be supported by a research group and a public private sector partnership (PPP) group. The AMCWG reports to the NTOs and through them, to the ASEAN Secretariat. While there is little doubt that the strategy to date contributed to stated objectives or outcomes, it is not possible to determine the specific contributions of the 2012-2015 marketing programs as there were no baselines and targets provided in the strategy. Moreover, the existing strategy was not informed by detailed market research while the positioning and branding strategy remains unclear.<sup>2</sup>

The marketing strategy 2016-2025 is envisaged to have a short-term component covering the period 2016 to 2018, and a longer-term component covering the period 2019-2025. The short-term component from 2016 to 2018 will focus on developing and implementing a “Visit ASEAN Year 2017” (VAY17) campaign action plan. The VAY17 action plan will seek to target ASEAN’s internal markets as well as its external markets in Asia, Europe, North America, the Middle East and emerging markets such as South America, Eurasia and Africa. The campaign will seek to: (a) raise awareness of ASEAN as a single destination, promote ASEAN’s thematic destinations and sub-regions, and present a range of attractive experiential products based on its unique natural and cultural heritage to its target markets. The longer-term strategy will seek to consolidate ASEAN’s position in its markets as a quality destination consistent with the overall vision of the ATSP. Both the transition and longer-term ASEAN marketing strategies shall be research-based.

The current ATMS expires in 2015 and there is a need to prepare a new ATMS to take the marketing initiatives to 2018 and beyond. The marketing strategy is envisaged to have a transition component covering the period 2016 to 2018 which would be centered on a “Visit ASEAN Year 2017” campaign, followed by a longer-term more research-based strategy. The 2016-2018 Strategy will seek to target ASEAN’s internal markets as well as its external markets in Asia, Europe, North America, the Middle East and emerging markets such as South America, Eurasia and Africa. The strategy will seek to raise awareness of ASEAN as a destination, promote ASEAN’s thematic destinations and present a range of attractive experiential products based on its unique natural and

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<sup>2</sup>Both the “ASEAN” brand and “Southeast Asia feel the warmth” brand have been used together in promotional activities and materials that may lead to brand confusion. As a clear positioning and branding of ASEAN as a single destination is crucial to effective marketing, it is crucial to clarify these with market research.

The draft TOR for the ASEAN Tourism Marketing Strategy is set out below:

1. Undertake a market research program in ASEAN's intra-regional and inter-regional markets to:
  - a. Establish the current market profile, pattern and likely future interest in visiting the region.
  - b. Confirm the target markets and regional and sub-regional destinations and products that should be presented to the target markets.
  - c. Clarify how ASEAN should be positioned and branded as a quality destination consistent with the vision of ATSP 2016-2025.
  - d. Identify realistic targets given the overall expected impact and outcomes of the ATSP 2016-2025.

It is expected that the market research program will be conducted in ASEAN's main intra-regional and inter-regional markets based on:

- a. International visitor exit surveys at key exit points in the AMS countries to establish the profile (demographic, socio-economic and place of residence) and current pattern of travel in ASEAN by intra-regional and inter-regional markets (including main purpose of the trip, main transportation used to travel to the region, total duration of trip in days, and countries visited during the trip including: (i) activities undertaken, (ii) accommodations used, (iii) transportation used to travel to and within the country, (iv) use of travel agents (traditional and OTAs), (v) sources of information about the visit, (vi) length of stay and expenditure in each country visited, (vi) awareness of the positioning and branding of ASEAN/Southeast Asia Feel the Warmth as a destination, (vii) perceived strengths and weaknesses relative to other regional destinations outside ASEAN, and (viii) interest in returning for a visit during VAY17.
  - b. Focus group discussions in ASEAN's main intra-regional and inter-regional markets target markets (consumers) to explore in more detail: (i) how ASEAN is perceived as a quality destination and to test the current market positioning and branding approach, (ii) identify the types of products that would interest the target market (theme, length, activities and willingness to pay) and explore target market interest in FIT and GIT modes of travel, (iii) gauge the relevance of web sites for information on destinations and over the counter and on-line travel organizations for arranging travel, (iv) assess the importance of digital marketing platforms such as social media, (v) identify strengths and weaknesses of ASEAN as a single destination, (vi) assess the extent of interest in visiting ASEAN in the future given appropriate product including likely trip duration and number of countries likely to be visited, and (vii) assess the level of interest in visiting ASEAN during VAY17 during VAY17.
  - c. Undertake market research in the travel trade of the main intra-regional and inter-regional target markets (travel trade) to explore in more detail: (i) travel trade perceptions of ASEAN as a single destination together with perceived strengths and weaknesses, (ii)
2. In light of the market research results:
    - a. Recommend adjustments to the current positioning and branding approach to ensure that it is clear, differentiated and reflects the vision of ASEAN as a quality destination.
    - b. Recommend revisions to the current digital marketing platform for promoting and connecting ASEAN to its markets.

- c. Develop effective baselines and targets to measure the effectiveness of the marketing strategy in contributing towards the expected impacts and outcomes of the ATSP 2016-2025.
3. Taking into account the recommended positioning and branding of ASEAN as a quality destination, and given the market research results, marketing targets and baseline indicators, design the VAY17 Campaign setting out the following:
    - a. **Target Market Strategy:** Identify the intra-regional and inter-regional target market segments that the campaign should target.
    - b. **Destination and Product Development Strategy:** Identify the regional and sub-regional destinations and products that should be matched to the target markets.
    - c. **Promotion Strategy:** Prepare a two-year (24 month) promotions plan (2016-2017) for communicating about VAY17 and its destination and product offerings to consumers, the travel trade, travel media and social networking platforms in the target markets.
    - d. **Distribution Strategy:** Identify the way in which the specific destinations and products to be offered during VAY17 will be sold to the target markets including traditional and digital-based sales outlets.
    - e. **Public Private Sector Partnership Strategy:** Set out the destination and product development, promotion, distribution and financing roles and responsibilities of the ASM NTOs and the private sector at the national level such as transportation, accommodation, tour operation, financial services and telecommunications organizations, and at the regional level, ASEANTA as well as major regional transportation, accommodation, tour operation, on-line-travel agents (OTAs), financial services and telecommunications organizations.
    - f. **Baseline Indicators and Targets:** Identify baseline indicators and targets for measuring raising awareness of ASEAN as a single destination, promoting ASEAN's thematic destinations and sub-regions, and developing, promoting and distributing a range of attractive experiential products based on its unique natural and cultural heritage, and the related monitoring and evaluation mechanism.
    - g. **VAY17 Campaign Budget:** Prepare fair estimate of the monthly budget requirements by specific activity line to implement VAY17, and based upon discussions with public and private sector partners identified in (e) above, recommend how this budget might be resourced.
    - h. **Preparation of VAY Budget Pitch Presentation:** Prepare a high quality presentation designed to solicit financial and in kind support from the public and private sector partners.
    - i. **Institutional Arrangements:** Establish a VAY17 Committee and secretariat to present the VAY17 to funding partners in the public and private sector, supervise the implementation of VAY17, and monitor and evaluate and report on its results.

4. Lay out an indicative longer-term strategy 2019-2025 in terms of:
  - a. Main objectives of the marketing strategy and related baseline indicators and targets.
  - b. Target market segments to be developed.
  - c. Destinations and products to be developed and offered to the target markets.
  - d. Distribution of products to target markets.
  - e. Public Private partnership participation program.
  - f. Consumer, trade, media and social network promotion strategy with guidelines for preparing one year rolling marketing action plans.
  - g. Annual marketing budget requirements and public private sector resourcing strategy.
  - h. Monitoring and evaluation and annual reporting mechanism based on the baseline indicators and targets.
  - i. High quality presentation designed to solicit financial and in kind support from the public and private sector partners.

## **Terms of Reference for the Design and Implementation of the ATSP 2016-2025 Program Monitoring And Evaluation System**

As the ATSP 2016-2015 focuses upon achieving specific target impacts, outcomes and outputs (See attached Design and Monitoring Framework), there is a need to further clarify and quantify the baseline indicators and targets, and to develop a monitoring and evaluation system for measuring progress against base line indicators, reporting results and recommending course adjustments to the strategy. The ATSP 2016-2025 has one core impact: *“Tourism is making a significant contribution towards the sustainable socio-economic well-being of the ASEAN people”*; with the main outcome being: *“ASEAN is a highly competitive destination offering a unique, diverse, ASEAN tourism experience, with strong commitments to a culture of responsible, sustainable, balanced, and inclusive tourism development”*. The M&E system will cover the monitoring and evaluation requirements for the periods 2016 to 2020 and 2021 to 2025 covering:

1. The overall impact and outcomes of the ATSP 2016-2025; and
2. The following outputs:
  - a). Extensive marketing of highly attractive and diversified ASEAN thematic tourism destinations and products.
  - b). Strong public and private sector investment in tourism infrastructure and superstructure.
  - c). ASEAN recognized as a quality destination.
  - d). Well developed and expanding connectivity and destination infrastructure.
  - e). Well developed cross border arrangements facilitate the movement of international tourists to and within ASEAN.
  - f). Local communities especially in the less developed destination subregions of ASEAN participate significantly in the tourism value chain at the destination level.
  - g). The safety and security of tourists is prioritized and enhanced.
  - h). The heritage of ASEAN important to tourism is well protected and maintained.

The supervision of the operation of the M&E system would be the responsibility of the ASEAN Tourism Resourcing and Monitoring and Evaluation Committee (ATRMEC) with actual day-to-day operation of the system outsourced to a private firm. The system should rely on existing data sources and be as simple as possible to implement. The M&E system shall take quarterly measurements of the target indicator results against the baseline indicators. The system will generate a report on the results, give a diagnosis as to the reasons for results that are below target against the baseline, and recommend an appropriate course of action.

## **M&E Design Phase:**

The design of the M&E system will involve the following tasks:

1. Identification and/or confirmation of the baseline indicators for the above eight (8) outputs and related outcomes and impacts of the ATSP 2016-2025.
2. Measurement of the baseline indicators at the impact, outcome and output level.
3. Identification/recommendation/confirmation through consultations of the output, outcome and impact indicator targets.
4. Development of simple to use, existing data sourced-based metrics for measuring impact, outcome and output indicators.
5. Review and evaluation of the existing ASEAN Tourism Statistical Data Templates being used and recommend improvements to enhance these to reflect the additional data requirements under the ATSP 2016-2025 M&E System.
6. Design of a digital-based data capture system for inputting and evaluating results against baseline impact, outcome and output indicator metrics and tabular reporting structure including exploring and recommending ways in which the system can be direct-linked to other data source systems to automate the M&E activity as much as possible.
7. Provide specifications for the equipment requirements and budget to set up the M&E System, prepare related procurement documents, and assist ATRMEC in the procurement process.
8. Develop an ATSP 2016-2025 M&E System Operational Handbook.
9. Provide training for ATRMEC and AMS NTO staff in operating the ATSP 2016-2025 M&E system
10. Assist ATRMEC in preparing the TOR for outsourcing the operation of the system.

## **M&E Implementation:**

The day-to-day implementation of the M&E system covering data collection, input, processing and quarterly reporting shall be outsourced to an independent contractor such as a ASEAN-based University Institute that will work closely with the ATRMEC to ensure smooth implementation of the system. This will involve:

1. Finalizing the TOR for outsourcing of the system and budget and seeking tenders for the service.
2. Reviewing and evaluating the proposals and selecting the best bidder based on capability, quality and price criteria.
3. Appointing the best bidder to undertake the operation of the M&E system on an annual basis with renewal subject to satisfactory.
4. Supervision by the ATRMEC of the work of the outsource firm.

The design and implementation of the system is envisaged to take 6 months to complete.







