



SPREAD THE WARMTH

TEAM SG 500

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EU-ASEAN TOURISM POLICY BRIEF

This policy brief is a submission for the EU Centre in Singapore's EU-ASEAN Tourism Policy Challenge. The views expressed in this policy brief are those of the authors and do not necessarily reflect the views of the institutions or organisations that they represent, or the views of the EU Centre and its partners.



Centre in Singapore

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About the Policy Challenge



The EU Centre in Singapore, with the support of AirAsia and the ASEAN Foundation, launched the inaugural *EU-ASEAN Policy Challenge* in July 2015. This Policy Challenge aims at encouraging students to reflect on the challenges of economic integration and to come out with concrete policies that would help in the building of an ASEAN Community.

This inaugural Policy Challenge focused on the issue of Tourism. Tourism is a priority sector for the ASEAN

Economic Community, and intra-ASEAN tourism is also seen as an important avenue for promoting people-to-people connectivity. Tourism is therefore seen as an important driver for socioeconomic development, creating jobs and employment, generating investments and other spin-off benefits. However, tourism also has its challenges and can have negative impacts on environment, on the preservation of heritage sites if the tourism industry is not well planned and managed with the right degree and type of regulations that will ensure sustainable tourism.

What could be done to promote ASEAN tourism and make ASEAN an attractive destination for tourists – both from within the region and from Europe, and at the same time, ensure the sustainable and quality growth of the tourist industry? ASEAN youths aged 17-30 were invited to come up with a proposal that can be translated to specific, implementable measures to realise the potential of the tourism sector as a driver of socioeconomic development in ASEAN. In doing so, the policy challenge encouraged participants to think through the whole process of policy-making, from defining the problem or challenge, offering policy solutions, weighing the pros and cons, to considering the implementability of the measures and mitigating potential problems or consequences of the measures.

A total of 45 teams submitted their entries on or before the 14 September 2015, and four teams have been shortlisted for the final. These four teams were asked to further develop their draft proposals to a comprehensive policy brief of 20 - 25 pages, and made a 20 minute presentation at the final event on 12 November 2015.

Team SG500 – consisting of Pung Jing Yi, Mr Jason Tey and Mr Mayer Tung, students from NUS – emerged as the best team in this competition, winning the grand cash prize of S\$1,500. This policy brief is their final submission for the competition containing some specific ideas on promoting ASEAN Tourism.

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0. Executive Summary

The Association of Southeast Asian Nations (ASEAN) was established as a regional bloc to further cooperation amongst countries in Southeast Asia. One of the recent long term goals of ASEAN is to establish an ASEAN Economic Community (AEC) to create a single market and production base and build a competitive region well integrated into the global economy. In the AEC blueprint, Tourism has been identified as one of the priority sectors for integration.



Our policy paper draws inspiration from the successes of tourism initiatives in Europe and seeks to learn from these initiatives how we can promote ASEAN tourism with a unique ASEAN flavor. We start off by identifying the strengths, opportunities and challenges of the region in the tourism industry. The strengths include the diversity of the region and the relatively low cost advantage. An ageing population with spending power and an increase in size and affluence of the middle class are opportunities we can leverage on. Challenges like underdeveloped infrastructure, distressed public health environment' security concerns, ineffective stakeholder management and industrial restructuring brought about by tourism are important considerations in the formulation of our recommendation.

Our strategic goal is to boost the competitiveness of tourism in the region by implementing sustainable and quality tourism in view of the strengths, opportunities and challenges identified. Our overall strategy takes into account the fundamental ideals and principles we stand by in developing tourism in the ASEAN.

With that in mind, we have concocted three innovative recommendations. They are first, to market the unique seasonality of ASEAN; second, to launch an ASEAN Connect pass; and lastly, introducing the ASEAN free riding tour series. We make a case on how the infusion of ideas on sustainable and quality tourism into our action plan will be a great leap forward in ASEAN tourism development. The progress and result of the implementation will be kept in check by a set of annual performance indicators and 5 years' deliverables. In short, our paper seeks to provide a well-defined and convincing development plan to boost ASEAN tourism competitiveness. Most importantly, we hope that our plan will excite the sense of adventure and raise curiosity of the ASEAN people to travel around the region, and in the process build greater awareness of the region and instill a sense of ASEAN community amongst the people in the long run.

1. Introduction

1.1 Objective of the Brief

Our policy brief aims to provide a case towards enhancing and strengthening the Association of Southeast Asian Nations (ASEAN) tourism competitiveness in the next five years. Our goal is to promote ASEAN's attractiveness and develop ASEAN capabilities as a choice destination for regional tourism.

We begin by providing a background of ASEAN, and then analyse the strengths and opportunities with regards to ASEAN Travel & Tourism (T&T), as well as identifying some of the major challenges. We then introduce our strategy which aspires to synergize the complementarities and ideals of 'Quality' and 'Sustainable Tourism', themes upon which, our ideas and recommendations are based on.

1.2 Background

The Association of Southeast Asian Nations was established as a means to maintain peace and stability in Southeast Asia. Through ASEAN, the member countries seek political cooperation to manage intra-ASEAN relations and ASEAN's external relations with major powers and dialogue partners. Over the years, it also looked into various fields of cooperation and the last decade has seen a concerted effort toward deeper economic cooperation to achieve the goals of ASEAN community building (ASEAN).



Figure 1. ASEAN Logo (ASEAN Logo, 2015)

The debacle caused by the Asian Financial Crisis in 1997, served as a poignant reminder to ASEAN leaders on the need for cohesive and decisive

action in order to maintain the region's economic stability and prosperity (Wong, Mistilis, & Dwyer, 2011). Following which, landmark strategic plans and agreements were launched with the long term goal of establishing an ASEAN Economic Community. Tourism was identified as one of the specific areas of cooperation within the ASEAN general economic framework (Athanasopoulou, 2013).

Since then, there have been numerous T&T projects launched and implemented by ASEAN as well as individual member countries. The ASEAN Tourism Agreement was also conceived at the ASEAN Summit in 2001 to strengthen the member countries' unity and to enhance competitiveness, and to increase tourist flows.



Figure 2. ASEAN Summit 2001 (Thailand MFA)

More recently, in 2007, the 12th ASEAN Summit saw the reaffirmation by ASEAN leaders to accelerate the establishment of an ASEAN Economic Community (AEC) based on four pillars, as the goal of regional economic integration by 2015.

AEC: Transform ASEAN into a region with free movement of goods, services, investment, skilled labor and a freer flow of capital

4 Pillars of AEC			
A single market and production base	A highly competitive economic region	A region of equitable economic development	A region fully integrated into the global economy

Table 1. Pillars of AEC (Athanasopoulou, 2013)

This was then closely followed with the implementation of the ASEAN Tourism Strategic Plan (ATSP) from 2011 to 2015, identifying three strategic directions in order to enhance and promote regional tourism.

ATSP: Develop a blueprint defining the policies, programs and projects of the ASEAN National Tourism Organisations (NTOs) in the areas of marketing, product development, standards, human resources development, investment, and communication, among others

3 Strategic Directions of ATSP

Develop experiential regional products, creative marketing and investment strategies	Strategically increase the quality of services and human resources in the region	Enhance and accelerate travel facilitation and ASEAN connectivity
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Table 2. ATSP Strategic Directions (ASEAN, 2011)

As we move forward from 2015, we seek to build upon what the AEC has achieved in the last decade, and improve the tourism landscape in ASEAN in the next five years.

1.3 Statistical Trends

We observe that Travel & Tourism (T&T) has an increasing stake in the ASEAN economy. In 2014, T&T contributed 12% of the total GDP, as well as 9.7% of the total employment in the ASEAN. These figures are expected to increase to 12.6% and 11% respectively in 2015 with an annualized growth rate of 5.6% and 2.7% respectively (World Travel & Tourism Council, 2015). It is thus clear that T&T play a significant role in ASEAN socio-economic development.

SEA	2014		2025	
	USD (bn)	%	%	Annual Growth
Direct GDP Contribution	117.9	4.8	4.9	5.4
Total GDP Contribution	291.8	12.0	12.6	5.6
Direct Emp. Contribution	11,262	3.7	4.3	3.0
Total Emp. Contribution	29,358	9.7	11.0	2.7

Table 3. Contribution of T&T (World Travel & Tourism Council, 2015)

In addition, we can also expect an increase in the number of tourists visiting ASEAN. From 2009 to 2013, the total tourist arrival in ASEAN as a region has increased by an average of 10% year on year (ASEAN, 2015)¹. This growth rate in tourist arrivals is projected to increase steadily to 17% in 2018 (Pacific Asia Travel Association, 2014). The top three country/regional sources of tourists are identified to be from ASEAN itself, China and European Union respectively (ASEAN, 2015)². It is evident that the ASEAN T&T industry should develop the necessary capabilities to capture the increased tourist flows as suggested by this trend in the next five years.

2. Regional Analysis

2.1 Strength

Diversity is one of the region's defining characteristics and this is an important aspect in T&T. Each country is made up of different people from distinct cultures with a long history. In addition, the region possesses some of the best landscapes and ecosystems with exotic wildlife and nature. Traditionally, the rural areas of ASEAN have contributed to the region's economic growth, from the rice fields in Vietnam to the fishing zone around the Mekong Delta. In contrast, developed cities such as Singapore and Kuala Lumpur, towering skyscrapers and bustling financial districts with modern attractions fill the landscape. Such

¹ Refer to Appendix A for chart

² Refer to Appendix A for chart

divergence can offer diverse experiences to different visitors.

Cost is another inherent strength of ASEAN. As a region, ASEAN countries remain relatively cheap by international standards, achieving the overall highest score in Pillar 10: Price Competitiveness in T&T Competitiveness Index (TTCI). This is a substantial reason to pull tourists from traditional markets such as Europe. Moreover, given the current global economy, affordability and price competitiveness is a major asset in T&T (Schwab & Brende, 2012)³.

2.2 Opportunity

In addition to the potential strengths identified above in *Statistical Trends*, we establish two supplementary trends that serve as a foundation for our strategy, which seeks to exploit these opportunities.

Firstly, shifting tourist demographics, where we observe an 'ageing tourist population' with spending power, as well as the emergence of younger travelers. It has been projected that the number of over-60s will rise to almost 1.4 billion by 2030 (Crotti & Misrahi, 2015). These tourists tend to demand higher standards of quality and refinement in their tourist experience, and at the same time have larger budgets as well.



Figure 3. Elderly tourist (Youmans, 2012)

On the other hand, the younger travelers tend to seek out exotic locations and

experiences, exploring the less known destinations of the country/region.



Figure 4. Backpackers (Destination 360)

Secondly, rising affluence of the middle-class, where we recognize the increasing purchasing power in emerging and developing economies. For example, China, one of ASEAN's largest sources of tourists as mentioned above, is the largest market in terms of international tourism expenditure and this market is still growing at a double-digit rate (Crotti & Misrahi, 2015). At the same time, countries like Brazil and India have also seen impressive rapid growth in terms of international tourism expenditure. ASEAN as a region, with much to offer stand to gain from this increased demand for travel experiences.

2.3 Challenges

The infrastructures in many areas of the ASEAN region are still largely underdeveloped. This is a major obstacle to the development of the T&T sector in ASEAN. Poor basic infrastructures impede physical connectivity, which is an essential factor in travel. The development of such infrastructures will take time and require a massive amount of capital investment from ASEAN members.

Take for example, air connectivity. Within the ASEAN region, we find good performing countries like Singapore, Malaysia and Thailand, ranking high in Pillar 6: Air Transport Infrastructure of the TTCI. At the same time, we also see poor

³ Refer to Appendix B for chart

performing countries like Vietnam, Philippines and Cambodia on the other spectrum. In addition, we observe an asymmetry in the number of direct flights from capital cities of ASEAN countries⁴. As such, there remains much room for improvement in connectivity (Schwab & Brende, 2012).

In relation to poor infrastructures, the public health situation in some ASEAN countries can also be daunting for tourists. The inadequate sanitation and low levels of hygiene can result in health travel hazard such as dysentery (ASEAN, 2014). Coupled with a hot and humid climate, there is also a high prevalence of communicable diseases such as bird flu, and diseases caused by mosquito bites such as malaria, dengue fever in many areas within the ASEAN region, all of which pose a major inconvenience for tourists (Schwab & Brende, 2012).

Security and safety is another related issue. ASEAN presents a mixed picture regarding Pillar 3: Safety and Security. The region remains susceptible to petty crimes like theft, pick-pocketing, and this is made worse by the perceived unreliability of the police force in some countries. At the same time, concerns of terrorism and violence is not unfounded, as news of bombing events in Bali, Bangkok and Manila raise fear amongst potential tourists.

Stakeholder management is also an important issue as the T&T industry faces rapid changes and continuous challenges. As the trend shows an increase in the numbers of tourists, additional efforts should be spent in providing for sustainable T&T. In order to achieve this, the interests of the current and future generations must be taken into consideration. Decision makers such as the government and tourism companies face the challenge of balancing between growth and

sustainability in particular with issues relating to preservation of heritage sites, and environmental protection. (Schwab & Brende, 2012).



Figure 5. Deforestation in Thailand (AsiaNews, 2013)

Relating to stakeholder management, there is also a risk that tourism development could lead to a loss of traditional jobs, such as farming or fishing, as workers move into the service jobs. At the same time, the income derived from tourism may not ultimately end up benefitting the targeted audience, resulting in unequal social and economic development. Hence, careful measures must be implemented to ensure the interest of each stakeholder is maximized (Athanasopoulou, 2013).

3. Strategy

Our strategy aims to marry the virtues of *quality tourism* with *sustainable tourism* to spark off an improvement in the regional competitiveness for tourism.

Quality tourism consists of “making tourism an important economic driver, job creator and instill dynamism by constant public engagement” (Singapore Tourism Board, 2014).

Sustainable tourism is defined as “tourism that respects both local people and the traveler, cultural heritage and the environment” (Fien, Calder, & White).

⁴ Refer to Appendix B for Chart

Our strategy coincides with the new ASEAN Tourism Strategic Plan (ATSP) 2016 – 2020 theme, *One Community for Sustainability*, which will work towards not only the development and growth of the region's tourism, but also ensures that this growth is grounded on responsible, sustainable, and inclusive tourism (ASEAN, 2014). Quality tourism can be achieved through the framework that consists of both hardware and software, quality service and positive experience. Furthermore, this will be complemented by placing focus on environmental, economic and social sustainability in order to achieve sustainable tourism.

The hardware aspect of our strategy consists of two elements. Firstly, we hope to stimulate an increase in investments by private stakeholders through a holistic plan. Secondly, we need a platform for engaging the different stakeholders to develop a holistic, coordinated ASEAN tourism plan. Our software seeks to integrate sustainability, dynamism and technicality as the fundamentals for ASEAN's tourism projects.

Despite having the hardware and software in place, a dynamic planning framework will also be required to leverage on future trends and stay relevant. Competition from other tourism hubs will intensify as more nations look to develop tourism as a key driver of economic growth. As such, we think that the ability to anticipate future trends and leverage on the opportunities identified will be crucial in improving the tourism competitiveness of the region.

3.1 The Hardware

A well-defined plan for improving regional tourism competitiveness is instrumental in attracting private stakeholders and investments. At the same time, to develop a holistic and sensible plan requires engagement and consultation of the different players and stakeholders. This will form the hardware of our policy as we seek to tackle the

lack of private stakeholders' participation in translating the generic guideline in the ASEAN Tourism Strategic Plan 2011-2015 to feasible projects and proposals (Wong, Mistilis, & Dwyer, 2009). Our plan will consist of clear markers and metrics to ensure a standardized measurement for progress. We will identify the necessary stakeholders involved to make our plan successful. The clarity and potential of future gains illustrated will attract private investors to have an active stake in the plan.

Given the closure of ASEAN tourism information center in 1996, uncoordinated initiatives might be disruptive to the net development of tourism. Hence a platform for coordination has to be developed along with the proper incentives to overcome financial, institutional and organizational bottleneck.

3.2 The Software

How to weave in principles of sustainability and inject quality into our tourism plan is an important "software" aspect of our plan. The software needs to encompass dynamism, technical sophistication and *sustainability*. These three complementary qualities will develop sustainable tourism in a holistic manner. Sustainability takes into account the triple bottom line by ensuring profitability as well as environmental and social sustainability. Dynamism allows the policy to be adaptable to the different socioeconomic and be sensitive to different cultural conditions. ASEAN member states can "personalize" the implementation and improvement without compromising on the quality of the intended result. Technical sophistication filters the robust solutions from the inferior ones. Stringent checks via data and index will identify the viable solution which maximizes the returns for resources invested. Deliverables will be incorporated to ensure due diligence. Dynamism and technicality enhances the sustainability of the plan by allowing

relevant improvements, checks and balances to take place in tandem. Hence we hope to incorporate all these three complementary qualities to bring about the optimal result.

4. Recommendations

The recommendations proposed in this paper draws lessons from the EU's success and adapt some of the initiatives for the ASEAN context. Against the backdrop of changing socio-economic trends as discussed in *Opportunity* above, the recommended actions are conceived with our aim of creating a sustainable quality tourism within the region and to enhance the competitiveness of ASEAN T&T.

In the three recommendations below, a summary of the concept's origin in the European context and its applicability in ASEAN is first presented, before we identify the stakeholders and the various incentives for them to participate. We then substantiate our recommendations with further cost-benefit analysis before rounding up our discussion with the potential for future development.

4.1 For Each, a Season

Spring in the Swiss Alps, Summer in the French Riviera, Autumn in Munich for Oktoberfest, Winter in Sweden's Ice Hotel, and for the Christmas markets all around Europe - there seem to be always a reason to be in Europe at any time of the year; can we say the same for ASEAN?

Thailand's Songkran or Laos' Thingyan in April, off-monsoon scuba diving in Indonesia or the Philippines in the hotter summer months, Cambodia's Siem Reap and Vietnam's Ha Long Bay in the cooler autumn months, and Laos' Luang Prabang in December for the H'mong New Year; indeed, the diverse cultures in the ASEAN countries are able to offer equally much throughout the year.

In fact, with the rising demand for "hands-on tourism" engaging the community (*voluntourism*) or the nature (*ecotourism*) that brings along new interest in the rustic rural areas of the region, seasonal changes that cater to these forms of travel will further substantiate this need for seasonal promotion.



Figure 6. For Each, a Season (clockwise from top-right): (a) diving in maritime ASEAN; (b) Angkor Wat in Siem Reap; (c) Songkran, the Thai new year; (d) H'mong New Year in Vietnam and Laos; (e) World-renowned Halong Bay in Vietnam; and (f) Rice harvest in rural Thailand

4.1.1 Action Plan

In view of increasing use of mobile apps and rising influence of social media by travellers to plan and organize their trips, our group proposes the following to capture this seasonal effect and turn it into an advantage for ASEAN.

(a) Working with Crowdsourcing Website

Disintermediation that drove self-guided tour in the tourism industry was made possible and spiked in the turn of the 21st century because of the proliferation of the internet, where individuals no longer rely on tour agencies for itinerary and booking of accommodations or transportation. Crowdsourcing websites such as TripAdvisor provide itinerary suggestions that are not only useful but, with its varied sources coming from anyone who has been or lived in that country, suited to individual's travel preferences. While suggestions and places of interest on these websites are ranked and displayed based on popularity (votes), it is possible to negotiate with these online companies to create informational filters that display traveling options based on seasonal practicality. For one, it improves the interaction interface of the website to enhance consumer satisfaction, and secondly, this can be done at a relatively low cost of adding additional filters. Real effort involved in this stage by ASEAN is to convince these crowdsourcing websites of such an informational demand by the tourists to know "when best."

(b) Crowd-contributing Promotional Video

Not any promotional video but a major hyper time-lapse video that moves throughout the region from one season to another, showcasing the varied activities available within each time-frame and the changes that comes along with it. This video should be uploaded to YouTube

and be allowed to be shared on social media platforms such as Facebook and Instagram. The difference between this video and others that have been done by ASEAN previously is that this video will be a continuous project. Once the video has been uploaded, a monthly (or quarterly) online contest may be set up to encourage tourists who have been to the region to contribute their own time-lapse videos of the region, and when their video has been selected for the period, a prize such as air ticket or hotel vouchers will be given to the person who made the video. By having these different time lapse videos, we aim to promote beyond the repetition of recurring seasonal change; we aim to create an impression of a differentiated season, one that *returns with a different experience*. Been here this summer? Come back the next one to find new discoveries! In essence, from "*Feel the Warmth*," we aim to "*Spread the Warmth*."

4.1.2 Key Players

(a) ASEAN Tourism

Current effort by ASEAN to promote ASEAN tourism provides a very encouraging foundation for our proposal. With a catchy tagline and a functional website, it also has a section on "Explore ASEAN" describing the various activities available within the region. However, a few clicks on the website and one will immediately notice the lack of maintenance and an absence of useful information. Indeed, the 19000-odd followers of the *Tourism ASEAN* Facebook page suggest a lack of publicity for the official webpage for a region of over six hundred million inhabitants. Since money has been spent in developing these promotional avenues with arguably little to show, our group proposes diverting these funds into crowdsourcing what tourists are interested in, from their point-

of-view, as set out in our action plan above.

(b) Tourists and Locals

In order for the official organization to crowd-source the making of their marketing video, there must first be a “crowd” and this crowd must be incentivized to participate. Prizes such as a return air ticket attracts people who are enthusiastic about the region to participate, and this self-selection “bias” precisely attracts the kind of people ASEAN Tourism will need: those who actively promotes the region through their social media channel. A second-tier prize, perhaps a paid local staycation, may also be set up to encourage locals to explore their own city and allow them to play a part in promoting their own cities and regions.

(c) Crowdsourcing Websites

With many online companies profiting through advertisement revenue, hit-rates for their content will be of critical importance. The companies offering such filtering capability that better suits consumer needs will thus be able to attract greater usage and consequently, advertisement revenue. In fact, ASEAN Tourism may even contemplate advertising the seasonality element on these websites to generate its own demand for a “when is the best time to travel to the region” search. On the website’s front, they will thus be able to gain from both improved visitor hit-rate and advertisement revenue, and if possible, endorsement from official ASEAN Tourism organisations. This will add credibility and benefit both advertisers and consumers.

4.1.3 Cost Benefit Analysis

As mentioned, the cost to support this project will come from diversion of previous advertisement effort and thus no additional cost in excess of current expenditures should be necessary. Benefits of the project, on the other hand,

are aplenty, and our group summarizes them as follow:

(a) Promotion of Multiple Visits

Since it is unlikely for regular visitors to stay on for the whole year to experience the different flavors of each season, it is likely for an individual to have repeated visits into the region upon learning its varied festivals and events all year round. This is arguably one of the main reasons for return visits to different parts of Europe and at different seasons.

(b) Reduce Cannibalization of Potential Tourists

Through identification and promotion of country-specific events within the region, countries can jointly-promote a common festival within the sub-region or work together to offer a series of back to back events that will entice tourist for a longer stay in the region. This allows mutually beneficial outcome, instead of creating excessive competition and tension between countries. One such example is during the Songkran festival in Thailand when Singapore attempts to hold a similar celebration named “Celebrate Singapore”, the Tourism Authority of Thailand tried to claim exclusive rights for the event. With a collaborated effort to promote individual country’s niche, such conflict may be avoided.

(c) Word-of-Mouth Marketing (WOMM)

WOMM has proven its worth in the 21st century due to the prevalence of the social media and its effectiveness of reaching the masses in a relatively short span of time. With the involvement of public stakeholders, that is, the tourist, WOMM will be part of the gains as they share their unique experiences through social media. This will greatly reduce the cost of marketing and yield more than proportionate gains by replicating the “viral effect” if the videos attract widespread public attention.

4.1.4 Possible Future Development

Possible future development could include joint promotion of seasonality with the greater Asian community or to leapfrog the region to collaborate with the established European counterparts, conditional on non-cannibalization. Inter-

regional blocs' collaboration is also not entirely unforeseeable given the rate of globalization and how the world gets increasingly compact.

4.2 ASEAN Connect Pass



Figure 7. EuRail Pass (Author's own)

EuRail Pass in Europe is a pre-paid pass where tourists are able to use one pass for various participating national railways across the continent. The near-absolute flexibility of such a pass, where tourists have autonomy to change their travel plans at the last minute, and at absolutely no additional fee, is the main reason for its popularity.

4.2.1 Action Plan

Transplanting the original idea of a railway pass wholesale into ASEAN will not be possible as firstly, there is a lack of supporting infrastructure in the existing stage, and secondly, it is not physically possible to connect with the maritime parts of ASEAN via a train system. Our group thus modified the EuRail concept to an ASEAN Connect Pass that could comprise both an ASEAN Rail Pass and ASEAN Air Pass.

(a) ASEAN Rail Pass

As with the original model from EU, the ASEAN Rail Pass will allow near-absolute flexibility for user, hopping on and off

trains without having to worry about ticket purchase. A selection of different types of passes will be available, varying in the number of countries the pass is valid in (2 or 4 countries or the whole region), and the number of days of validity (5, 6, 8, 10 days) and the price increases with the coverage and length of validity. Our group proposes to further customize our scheme to better fit the ASEAN story we want to paint, that is, to add in an element of seasonality: say for example, the *Songkran/Thingyan Pass* during Thailand, Myanmar, and Laos' Water Festival; grouping countries with similar festivals in the same period under one Seasonal Pass.

(b) Complementing ASEAN Air Pass

As mentioned, our group recognizes the geographical constraint of the region, and do not intend for our rail pass to perfectly substitute the existing transport options available in the market. Indeed, we understand that AirAsia has recently launched the ASEAN Pass for flexible air travel within the region working on a

credit-based system, and similarly the group of airlines under the Star Alliance has had their Asia Air Pass for the wider Asian region; and our group aims to supplement these existing air passes. This complementary relationship does not stem solely from geographical constraints but also provides mutual benefits for the airlines selling the air pass, as we aim to attract greater inflow of tourists who may have both intra- and inter-regional transport needs. A potential tourist from, say, Australia, will likely purchase the air pass to get into the region and the maritime parts of ASEAN, and the rail pass to go around continental ASEAN for its ease and value-for-money.

(c) Software Support

As with the EuRail Pass, a smartphone application should be developed to complement the ASEAN Connect Pass usage. The app will function predominantly as a planner, with train and connecting flight information, route suggestions, and most importantly a step-by-step guide to the Pass usage. One further extension from the EuRail support system is to allow comparison of transport cost for the consumers with and without the Pass. Currently, travel cost comparison within the EU requires tourists to search through many websites to obtain relevant information, which proves to be a turn-off.

(d) Hardware Development

Infrastructural development is perhaps the most crucial piece to a successful Connect Pass within ASEAN: without a reliable railway system, tourists are unlikely to even consider a flexible pass that comes along with constant breakdowns en-route. Our group argues that both government investment in the national railway tracks and private companies' investment in reliable and efficient train system will be needed. We discuss the incentives for these two major groups to participate in our plans to the next section on the key players involved, as we had in previous action plans.

(e) Facilitation for a Single Visa

A regional agreement is in place, and adopted by most ASEAN countries to allow tourists to move freely between member countries once admitted by one of the participating countries, with the exception of Myanmar. One of the major reasons for the success of the EuRail Pass is the promise of hassle-free transit when changing trains to get to different cities or even when the journey requires crossing of national borders. Our group understands that much effort has been put into the realization of a visa-free intra-regional travel and will thus save on the elaboration for this aspect. We adopt the assumption that visa conditions within ASEAN will improve in time to come to further enhance travel hassle-free.

4.2.2 Key Players

(a) ASEAN Infrastructure Fund (AIF)

With an aim "to provide loans of around \$300 million a year to finance infrastructure investment projects in the transport, energy...and social infrastructure sectors," the AIF is one avenue where funding can be obtained to pursue the infrastructural development plans. ASEAN governments thus need to consider how they can make use of the AIF in promoting physical connectivity.

Apart from presenting an opportunity for infrastructural development, our group also proposes a reviewing of the criteria for loans from AIF to include strict environmental protection, provisions for rural development and improvement on societal conditions.

(b) Governments

Governments of individual ASEAN member countries are first and foremost responsible for translating their commitments or plans to reality. And for the obvious gains in economic growth that comes along with enhanced transport infrastructure and tourism dollar, there is every incentive for governments

to be a part of the development plan. If governments in the region and the AIF partners are able to cooperate to make these development plans a reality, we argue that prosperity for individual country from various sectors of the economy, beyond the tourism industry, will be a matter of time. In fact, this is the ultimate aim underlying our proposal for greater connectivity within the region: to use tourist revenues as a catalyst for further infrastructural development, and thereby enhance the economic efficiency and connectivity throughout the region. For this very reason, the ASEAN-Connect Pass part of the overall scheme of pushing for the realization of an ASEAN Economic Community.

(c) Railway Companies & Private Investments

The infrastructural developments to develop and upgrade rail connections require also the buy in of railway companies and private investors. Furthermore there is need to convince them of the feasibility and profitability of the ASEAN Connect Pass. Given the relative success of the EuRail Pass, our group is confident that the ASEAN counterpart will see the potential profit from a similar project, given optimal infrastructure and governmental support, as discussed above.

(d) AirAsia and Star Alliance

Moving beyond the EU model, our group proposed to combine private railway companies with private airline companies for the Connect Pass. This yields the benefit of having hassle-free travel via train between nearby cities while allowing a comprehensive all-inclusive pass that covers both the continental and maritime ASEAN. We propose to also allow discounted rates on the Connect Pass for tourists flying into the region via one of the partner airlines. With these discounts and a calculated assumption that T&T is still considerably luxurious with price elastic demand, this decrease in price will ensure higher-than-

proportionate increase in quantity, thus yielding higher revenue for participating firms. In fact, by integrating land and air transport, established airlines in the market can enjoy first-mover advantage, capturing greater market share within the region with the increased demand.

4.2.3 Cost Benefit Analysis

Costs for the Connect Pass aspect of the proposal are mainly borne by potential private companies (and government owning national railways) who will conduct individual profit analysis before commitment to the project. As explained, this project is economically viable based on our simple yet realistic assessment. The pre-project support in the form of infrastructural development has been consistently undertaken by individual countries within the region, funded either by local government or through loans from AIF; we argue that such development will continue with the increased interest in a united ASEAN economy, and with the implementation of a Connect Pass, more countries will be incentivized to hasten their railway development. The air service and infrastructure aspect of the project has already been going on for at least a few months (in the case of AirAsia ASEAN Pass), if not years (Star Alliance Asia Air Pass) and thus additional cost involved will mainly revolve around administrative and legal aspects of the collaboration.

(a) Seasonality

Tying in coherently with *Part A* of our *Recommendations*, just as the EuRail pass offers a variety of passes catered for tourists looking for different adventures, the ASEAN Connect Pass can offer its own version of customization, grouping countries with similar festivals in the same period under one "Seasonal Pass"

(b) Promotion of Regional Travel

One obvious advantage of having a regional Connect Pass is the promotion of regional travel as opposed to attraction-

based country-hopping or one-stop visits. With a bulk discount encouraging tourists to exploit the pass across more national boundaries (that is, passes have diminishing increment in price for each marginal increase in country number), a more coherent ASEAN story can be told. Also, with a greater pool of options, there is a greater pull into the region.

(c) Environmentally-friendly Option

With increased environmental and social consciousness among tourists around the world, train has increasingly become a preferred mode of transport for cross-border travels. This is especially poignant in a region where airfares are steep (compared to intra-EU airfare) and airport access to cities is not perfect as mentioned in *Challenges*. While it is recognized that aviation alternatives are, at the moment, indispensable due to the lack of overland options to maritime ASEAN, a viable and sustainable complement on continental ASEAN is necessary to cope with anticipated increase in tourist arrivals.

(d) Two-tiered Price Discrimination

Just like the EuRail model, youths below the age of 26 can be charged a lower price. With a similar aim to capture the potentially different income groups traveling around the ASEAN countries as mentioned in *Opportunity* (youth versus the older and more affluent), taking into consideration the rise of BRIC and the ageing population of the Western nations, ASEAN Connect Pass should adopt a similar model. A more scenic route passing through the less-explored areas, with more spacious seats and “in-train” service and entertainment will allow a premium fee to be charged to capture the affluent group’s higher propensity to spend. On the other hand, direct routes of “economic class” equivalence will serve the backpacking population who aims to cover-it-all within a short span of time.

4.2.4 Possible Future Development

As discussed earlier, new extension of Pass coverage may be included when new airports are established in upcoming cities or when railway tracks are extended from existing network. Our group proposes to leave the future development to the free market mechanism, where countries and private companies will invest in developing the supporting infrastructure.

Of course, our group recognizes the possible detriment caused by rapid indiscriminate expansion and thus proposed ASEAN and the AIF to act as counter-measures to prevent such occurrence. Referring to above, we urge AIF to tighten loans criteria to include socio-economic impact of the projects they are funding, and to allow future lending based on societal improvement of past projects by the same country. This allows a more regulated and sustainable growth that takes into consideration living standards, on top of economic prosperity, and ensures that continuous effort is being put in by all parties to develop all parts of their country. On the technical aspect, ferry systems, cross-country bus services and even private transport services (such as 4-wheel drive service) may be included in the Connect Pass, should the economic opportunity to do so arise; this last form of transport services will be discussed further in the next section.

4.3 ASEAN Free-Riding Tour Series



Figure 8. Sandemans' Corporate Philosophy

Founded in 2004, Sandemans New Europe Tour has now spread to 18 cities all around Europe. While there are several paid tours available, Sandemans' main draw is in its "Free Walking Tours" where tourists, regardless of budget, join a professionally guided tour and pay in the form of tips, based on their budget constraint and utility.

While walking from place to place is possible with concentrated attraction sites in the EU, distance may pose a challenge if the business model is adopted wholesale into ASEAN (think walking from temples to temples in Cambodia). However, one advantage ASEAN presents is its abundance of cheap, and importantly, unique, semi-private transportation such as the trishaws and tuk-tuks.

4.3.1 Action Plan

(a) Free Riding Tour

Extending the Free Walking Tour model to a Free Riding Tour turns the region's weakness into strength: combating ASEAN's disadvantage of large distance between attractions by incorporating our own local flavor of unique semi-private transportation. While the tour remains "free" (tip-based remuneration) the transport cost will be borne by tourists themselves (issue of prices will be discussed below); this is in fact common even in Europe where the site of visit is away from the city center: tourists will

gather at the meeting point and move off to the site of interest together, while bearing their own transport cost. In fact, even transport costs for making their way to the meeting point will be borne by tourist. To compensate for this need to pay for transport cost, our group propose to enhance the whole service by including pick-ups at accommodation at a discounted rate should the tourist choose to and book in advance. Otherwise, tourists are still able to appear at the meeting point and grab a tuk-tuk or trishaw/rickshaw on-the-spot to join the tour.



Figure 9. Tuk-tuk service (Angkor TukTuk)

(b) Collaboration with Local Transport Operators

What happens if there is a lack of transport available when too many tourists turn up at the meeting point? Our group proposes for the coordinating company (such as Sandemans) to collaborate with the local transport

operators to ensure sufficient supply of transport near the meeting point especially during the peak tourist seasons. We explore the incentive for these operators to participate in the plan, and the benefit of incorporating them to the economy as a whole, and finally suggest a possible future development for this aspect in later sections.

(c) Paid Tour Extension and Ecotourism

The European model of Free Walking Tours restricts itself to the history and architectural wonders of the main city areas but offers many peripherals paid tours that are heavily promoted during the free guided tours. These paid tours include, for example, a Tapas tour to taste the different types of tapas and to understand the origin of tapas in Barcelona; or a trip out of Berlin to the Sachsenhausen Concentration camp; or even an adult-only tour around the Red Light District in Amsterdam that includes an optional Peep Show segment. Each of these tours highlights the different unique flavor that attracts tourist to the city. In the ASEAN context, the Cu Chi tunnels from the Vietnam War, the Khmer Rouge genocide in Cambodia, the Death Railway in Myanmar during the Japanese Occupation and the numerous other significant key events in the region are some of the possible extension tours. In fact, to go a step further, our group proposes to exploit yet another unique flavor of ASEAN -- our rustic rural and its natural environment.



Figure 10. Cu Chi (Vietnam Apple Travel)

With an experienced guide, hop on a tuk-tuk to explore the limitless rice fields in Thailand, or employ a 4-Wheel Drive to enter the unbounded grassland of Cambodia's Tonlé Sap during the dry season to hunt down some Bengal Florican with a binocular, or take a trip to the rows of palm trees in West Malaysia and understand the detrimental impact these economic plantations have on the biodiversity in the region. These natural environments are losing their place in a regional economy focusing on growth-at-all-cost but the interest on ecotourism and the revenue they potentially bring in to these natural areas will provide the governments with one strong economic reason to conserve the natural environment and local biodiversity. Hopefully, some day, they will develop into a unique charm of the region.

(d) Tour Series

The final piece to the puzzle of our grand master plan connecting the dots we have drawn is that the provision of these Free Riding Tour should run in conjunction to where the Connect Pass brings our tourists to; and not only so, the tours will also react according to the seasonality factor we have discussed thus far. In the Chinese New Year months our Season Pass will bring tourists to the Chinese world within ASEAN where Free Riding tour on the local trishaw/rickshaw will introduce fascinated tourist on a heritage trail through the various Chinese communities within the region. Come April, the Thais, Laotians and Burmese will flood the Northern ASEAN region with their warmth during the Water Festivals, and Free Riding Tour guides will bring along ponchos in the tuk-tuks for unprepared tourists arriving via train with their *Thingyan (Seasonal) Pass*. The same goes for later in the year during the Hari Raya months in the Muslim part of ASEAN, and then Christmas in December in the Philippines to end off one cycle of the seasons in this exciting and multi-religious region of the world. Next year comes along, and the same tourist can come

back to volunteer his/her time at the local orphanage they visited while learning about landmines in Cambodia, or schedule a different trip to follow the migratory bird's resting, or do a cross-country scaling of mountains in different parts of the region during the off-monsoon season. The series never ends, and new extensions are constantly being innovated and developed by ASEAN.

4.3.2 Key Players

(a) Coordinating Companies

Our group proposes to invite established coordinating companies such as Sandemans into the region to develop the "Free Walking Tour" concept based on our adaptive model. Sandemans has been expanding their business throughout Europe to include new city of interest whenever demand from tourists and supply of guides are feasible; their reach today goes as far as Tel Aviv in Israel. Expansion into new region provides diversification of their products and enhances the company's brand exposure to a rising region. In fact, with severe competition in the European ground, Sandemans has been unable to extend their reach into some parts of the continent, such as the Northern European countries. This emergence in new region steering away from the saturated European market thus provides fresh market base for the company to explore. While franchising is a possible and potentially safer alternative, direct entrance has the added benefit of rotational opportunity for guides trained under the company (which currently has existing policies to rotate their guides). Benefits of such include cultural exchange and injection of new perspectives within the organization.

(b) Local Guides

Local guides under this coordinating company will legally be bosses of their own working as freelance guides while paying a small fee to be under the flagship of the company (which will bring

them customers). This factor has several benefits which our group will discuss further in the next section. We envision strong collaboration with existing firms and even social enterprises such as Backstreet Academy to provide the potential for scale and increase their social impact. Social enterprises may be able to provide the necessary tour guide training to locals, as well as engage in joint promotion of the Free Riding Tour, appealing to the socially conscious tourist. Funding for the first batch of guides' training may also be made available by ASEAN; upon the take-off of the industry, our group postulate that visible profitability from such a scheme will induce others to take up the trainings at their own cost in order to enter the lucrative tourism market.

(c) Existing Travel Agencies

Our model does not intend to displace the currently existing travel agencies provided paid-tours but aims to be a low-cost alternative for free-and-easy tourists coming into the region. While existing travel agencies targets the more affluent, family travelling together, and tourists who prefers a tailored tour, the Free Riding Tour Series offers the more independent tourists who are generally younger and travelling on a shoestring to not miss the opportunity to learn more about the region. Added advantage is for these people to have the desire to know more and return for a guided trip in the future with their family; in this sense, existing travel agencies and our proposed form of guided tours are complementary in nature.

4.3.3 Cost Benefit Analysis

Cost for the project has been individually explained in the previous segment and will largely be borne by private companies or private service operators. We believe the complementary relationship with existing stakeholders in the market and the absence of similar model in the industry meant little, if any, societal welfare will be loss.

(a) Disintermediation in a Corrupted Environment

The traditional business model in the industry of travel agencies involve consumers paying the agencies for tour guides under their flag; however, it is not known how much of a cut individual guides are getting from this transaction. By changing the dynamics where guides pay a fixed fee to an agency, whose role now becomes one of publicity, and consumers pay directly to the guide through tips, it can enhance the livelihood of these guides working on the ground, instead of allowing potentially corrupted middle-man companies to keep the profits. Established intermediaries of this form, such as Sandemans, can be brought in to aid the industry by using its trustworthy reputation and expertise while allowing the company to expand its reach to this part of the world, creating a win-win situation.

(b) Empowerment of Citizens

Building on to the previous point and as mentioned before, guides are now freelance, which also means they are the owner of their own business. This brings about potential incentives to upgrade themselves by attending training courses or English classes -- because at the end of the day, how much they will earn (through tips) depends on how good their service is.

(c) Economic and Environmental Sustainability

The beauty of the whole plan, however, lies in its self-propulsion upon the initial onset. Once people witness the profitability, more will be induced to train themselves with relevant skills to cope with the rising demand as discussed in *Opportunity* (Russian or Chinese) so as to join the industry. Guides who stayed on and gained sufficient experience from the tourism industry, and now armed with relevant skills, can move on to other related sector such as providing

peripheral services or go into training professions; in this sense, constant renewal is possible, leading to a sustainable model for the industry as a whole. The potential benefit to include eco-tours, as explained, enhances environmental sustainability of the region through the tourism channel as well.

4.3.4 Possible Future Development

In view of the rise of sharing economy in the transport scene (Uber, GrabTaxi), our group postulate that applications may be used to incorporate private vehicle owners or trusted third-party provider to join in the project to include a wider participation from the whole population. However, additional regulations and mitigation against unhealthy competition will need to be established before this extension is made possible to ensure efficient allocation of economic resources. We believe the issue of sharing economy will be addressed by individual country in the near future to regulate this rising force.



Figure 11. GrabBike in Jakarta (Karimuddin, 2015)

5. Performance Measurement

We have synthesized a list of annual performance markers and a list of deliverables unique to each action plan for a 5-year period.

The two different sets of performance measurement will provide a standardized matrix to evaluate the progress of tourism development. This will bring about a gradual and progressive improvement to the competitiveness of the ASEAN tourism without compromising on the values and ethics we propagate.

Furthermore, they provide a fair and transparent evaluation for member nations to track overall progress and improve accordingly.

The annual performance indicators are based on the TTCI as mentioned previously in *Regional Analysis*. We hope to be able to capture and measure the impact of our recommendations through the country's performance of the identified pillars under the TTCI (World Travel & Tourism Council, 2015).

The five-year key deliverables are based on the action plans in *Recommendations*.

5.1 Annual Performance Indicators

5.1.1 General Conditions

The general setting required to operate in the country

Factor	
Safety and Security	Determines the competitiveness as a tourist destination due to the cost incurred to maintain safety
Human Resources and Labor Market	Ensures that the tourist destination has the appropriate and qualified personnel to maintain a happy tourist population
Information and Communication Technology (ICT) readiness	The ongoing restructuring of the tourism business into an online platform means that tourist will demand IT

infrastructure be robust to support their travel requirements

5.1.2 T&T Policy and Enabling Conditions

The specific policies or strategic aspects that impact the T&T industry directly

Factor	
Prioritization of Travel & Tourism	Ensures that the industry receives enough funding and national policies for sustainable development
International Openness	Ensures that the tourist destination is globalized and open for tourist to make informed decision about their travel plans
Price Competitiveness	Ensures attractiveness of the country amongst various contender
Environment Sustainability	Ensures that the development is done in an environmentally responsible

5.1.3 Infrastructure

The availability and quality of physical infrastructure of each economy

Factor	
Ground and Port Infrastructure	Ensure the ease of access for intra and inter countries travel
Tourist Service Infrastructure	Ensure that there is sufficient accommodation, helpdesk etc. for a comfortable and hassle free holiday

5.1.4 Natural and Cultural Resources

The principal "reasons to travel"

Factor	
Natural Resources	Ensure competitiveness due to the unique and novel experience
Cultural Resources and Business travel	Ensure that the tourism is not lopsided and catered to a diverse kind of tourist

5.2 Five-Year Key Deliverables

Action Plan	
For Each, a Season	Creation of "seasonal filters" on collaborating crowdsourcing website
	Initiate competition for ASEAN tourism open-sourced promotional video
ASEAN Connect Pass	Creation of an ASEAN Connect Pass with railway companies and existing air pass service provider
	Creation of a smartphone tourism planner application
	Commitment by participating states for infrastructure development
	Completion of the single visa by roping in Myanmar participation
	Creation of new tourism forum that seeks to include public and private stakeholders
ASEAN Free Riding Tour Series	Attract established coordinating companies into the region
	Link up coordinating companies and firms/social enterprises regarding the training for tour guides
	Realignment of standards between firms/social enterprise and ASEAN to ensure standardization of services and quality
	Implementation of a dynamic feedback loop (reviews etc.) for constant improvement and volunteerism

future by leveraging on the complementary nature of Quality Tourism and Sustainable Tourism.

It can be achieved through our recommendations namely, *For Each, a Season*, *ASEAN Connect Pass* and *ASEAN Free Riding Tour Series*. By weaving the hardware and software element into our recommendation, we are able to structure a well-defined plan that can be executed relatively easily and cost-lite.

The marriage of technical sophistication of our recommendation and the idealism of our vision strives to achieve "more talk, more action". With sufficient will from the stakeholders, our vision can be realized. Our plan possesses the dynamism and flexibility to evolve over time by considering the future trends relevant to each recommendation. Improvements like better technology can be integrated to prevent them from being obsolete.

In short we hope that in the process of developing tourism as a key economic driver of the region via improvement in competitiveness, it will strengthen ASEAN regional identity through the sharing of gains in a sustainable way.

6. Conclusion

Our policy aims to achieve the single goal of an improved ASEAN tourism competitiveness by drawing inspiration from the success of EU tourism. Our vision is to create a seamless and positive travel experience for tourist visiting ASEAN in the

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Appendix A

Table 28

ASEAN Statistics

Tourist arrivals in ASEAN

as of 31 January 2015

in thousand arrivals

Country	2009			2010			2011			2012			2013		
	Intra-ASEAN	Extra-ASEAN	Total	Intra-ASEAN	Extra-ASEAN	Total	Intra-ASEAN	Extra-ASEAN	Total	Intra-ASEAN	Extra-ASEAN	Total	Intra-ASEAN	Extra-ASEAN	Total
Brunei Darussalam	77.7	79.7	157.5	109.9	104.4	214.3	124.2	117.9	242.1	115.9	93.2	209.1	122.7	102.2	224.9
Cambodia	692.8	1,468.8	2,161.6	853.2	1,655.1	2,508.3	1,101.1	1,780.8	2,881.9	1,514.3	2,070.0	3,584.3	1,831.5	2,378.7	4,210.2
Indonesia	2,101.8	4,221.9	6,323.7	2,338.5	4,664.4	7,002.9	3,258.5	4,391.2	7,649.7	2,607.7	5,436.8	8,044.5	3,516.1	5,286.1	8,802.1
Lao PDR	1,611.0	397.4	2,008.4	1,990.9	522.1	2,513.0	2,191.2	532.3	2,723.6	2,712.5	617.6	3,330.1	3,041.2	738.3	3,779.5
Malaysia	18,386.4	5,259.8	23,646.2	18,937.2	5,640.0	24,577.2	18,885.3	5,829.0	24,714.3	18,809.7	6,223.0	25,032.7	19,105.9	6,609.6	25,715.5
Myanmar	524.0	238.5	762.5	512.3	279.2	791.5	100.4	716.0	816.4	151.1	907.9	1,059.0	218.7	681.5	900.2
The Philippines	255.6	2,761.5	3,017.1	298.2	3,222.3	3,520.5	331.7	3,585.8	3,917.5	375.2	3,897.6	4,272.8	422.1	4,259.2	4,681.3
Singapore	3,650.9	6,030.3	9,681.3	4,779.6	6,859.0	11,638.7	5,372.2	7,799.1	13,171.3	5,732.7	8,758.5	14,491.2	6,114.7	9,453.2	15,567.9
Thailand	4,074.7	10,075.2	14,149.8	4,534.2	11,402.2	15,936.4	5,529.9	13,568.4	19,098.3	6,462.6	15,891.3	22,353.9	7,410.4	19,136.3	26,546.7
Viet Nam	318.9	3,453.3	3,772.3	688.7	4,361.1	5,049.9	838.4	5,175.6	6,014.0	1,363.8	5,483.9	6,847.7	1,440.3	6,132.1	7,572.4
ASEAN	31,693.8	33,986.5	65,680.3	35,042.8	38,709.8	73,752.6	37,732.9	43,496.1	81,229.0	39,845.5	49,379.8	89,225.2	43,223.6	54,777.0	98,000.6

Source: ASEAN Tourism Statistics Database (compiled from data submissions, publications/reports, and/or websites of national tourism organizations/agencies, immigration authorities, and/or national statistical offices)

Note: Details may not add up to totals due to rounding off errors.

¹ Table of Tourist arrivals in ASEAN (ASEAN, 2015)

Table 30

ASEAN Statistics

Top ten country/regional sources of visitors to ASEAN

as of 31 January 2015

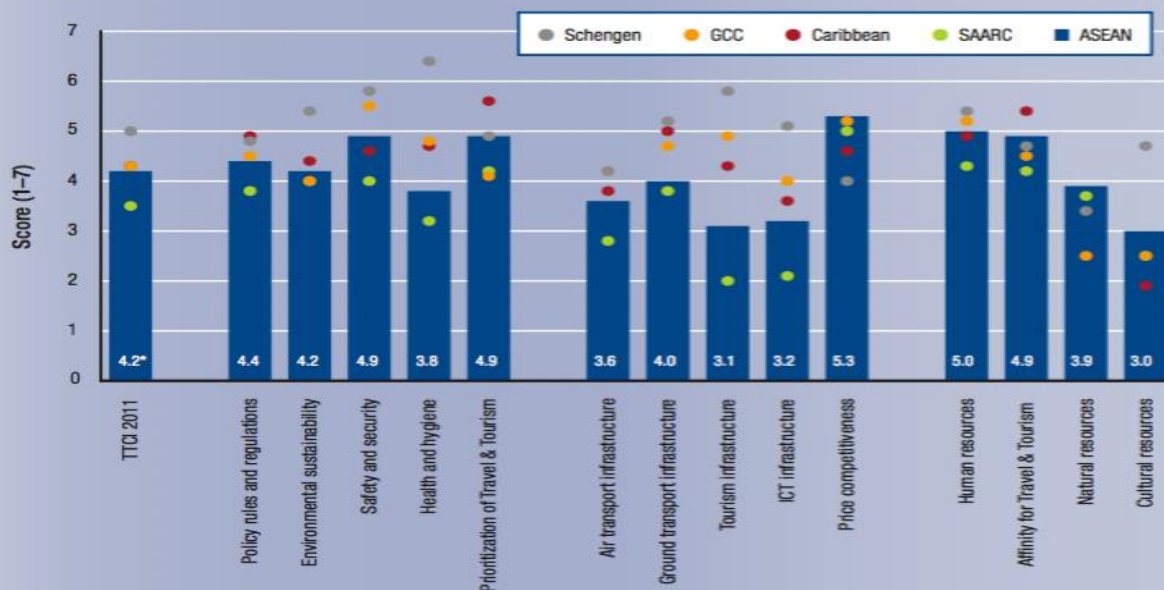
in thousand arrivals

Country of origin	2011		Country of origin	2012		Country of origin	2013	
	Number of tourists	Share to total		Number of tourists	Share to total		Number of tourists	Share to total
	thousands	percent		thousands	percent		thousands	percent
ASEAN	37,732.9	46.5	ASEAN	39,845.5	44.7	ASEAN	43,223.6	44.1
European Union 28	7,355.4	9.1	China	9,283.2	10.4	China	12,641.8	12.9
China	7,315.6	9.0	European Union 28	8,079.1	9.1	European Union 28	8,652.6	8.8
Australia	3,926.3	4.8	Japan	4,275.3	4.8	Republic of Korea	4,871.0	5.0
Republic of Korea	3,862.0	4.8	Australia	4,059.6	4.5	Japan	4,721.1	4.8
Japan	3,664.4	4.5	Republic of Korea	4,011.4	4.5	Australia	4,294.2	4.4
USA	2,838.0	3.5	USA	2,984.2	3.3	USA	3,174.0	3.2
India	2,711.3	3.3	India	2,839.6	3.2	India	2,921.7	3.0
Taiwan (ROC)	1,808.1	2.2	Taiwan (ROC)	1,846.0	2.1	Russian Federation	2,459.4	2.5
Russian Federation	1,299.1	1.6	Russian Federation	1,834.6	2.1	Taiwan (ROC)	2,058.2	2.1
Top ten country/regional sources	72,513.1	89.3	Top ten country/regional sources	79,058.4	88.6	Top ten country/regional sources	89,017.5	90.8
Rest of the world	8,715.9	10.7	Rest of the world	10,166.8	11.4	Rest of the world	8,983.1	9.2
Total tourist arrivals in ASEAN	81,229.0	100.0	Total tourist arrivals in ASEAN	89,225.2	100.0	Total tourist arrivals in ASEAN	98,000.6	100.0

² Table of Source of Tourist in ASEAN (ASEAN, 2015)

Appendix B

Figure 3.A: Performance of ASEAN and selected country groups in the TTCI 2011



³ Table of ASEAN Performance in Pillars of the TCII (Schwab & Brende, 2012)

Table 6.A: Direct routes from capital cities of ASEAN countries, regardless of frequency

Country of arrival city	Departure city									
	Bangkok, Thailand	Singapore	Kuala Lumpur, Malaysia	Manila, Philippines	Jakarta, Indonesia	Ho Chi Minh, Vietnam	Yangon, Myanmar	Bandar Seri Begawan, Brunei Darussalam	Phnom Penh, Cambodia	Vientiane, Lao PDR
Brunei Darussalam	1	1	1	1	1	—	—	—	—	—
Cambodia	2	2	2	—	—	2	1	—	2	1
Indonesia	4	16	14	1	35	1	—	2	—	—
Lao PDR	3	1	1	—	—	1	—	—	1	8
Malaysia	2	11	15	2	3	1	1	5	2	1
Myanmar	1	1	1	—	—	1	9	—	1	—
Philippines	2	4	2	36	1	1	—	1	—	—
Singapore	1	—	1	1	2	1	1	1	1	1
Thailand	23	6	6	1	2	1	2	1	2	2
Vietnam	2	3	3	2	1	19	2	—	1	1
Australia	4	6	6	4	3	2	—	1	—	—
China	17	20	12	6	6	5	3	2	4	1
India	9	11	8	—	—	—	2	—	—	—
Japan	4	4	2	4	1	4	—	—	—	—
Korea, Rep.	3	1	1	2	1	2	—	—	1	1
United Arab Emirates	3	2	2	2	2	—	—	1	—	—
United States	1	2	—	2	—	—	—	—	—	—
Others	54	31	32	11	8	11	2	4	3	2
Total non-stop routes	136	122	109	75	66	52	23	18	18	18
<i>of which to ASEAN</i>	18	45	31	8	10	9	7	10	8	6
<i>of which domestic</i>	23	—	15	36	35	19	9	—	2	8

⁴ Table of Direct Flights to and fro each ASEAN capital city (Schwab & Brende, 2012)