**7th UNWTO ASIA/PACIFIC EXECUTIVE TRAINING PROGRAM ON TOURISM POLICY AND STRATEGY**

**3-7 JUNE 2013, BUSAN, REPUBLIC OF KOREA**

**Minutes and Conclusions**

**Prepared by Peter Semone, Anchor Consultant**

The 7th Asia/Pacific Executive Training Program on Tourism Policy and Strategy was organised by United Nations World Tourism Organisation (UNWTO) in collaboration with the Ministry of Culture, Sports and Tourism of the Republic of Korea from 03-07 June 2013. The City of Busan served as the venue and its Municipal Government contributed generously to the ultimate success of the event. The training program was attended by 23 tourism sector executives representing 20 member states. The recently opened Park Hyatt Hotel served as an elegant venue for the plenary and breakout sessions.

**OPENING SESSION:**

In his opening remarks, ***Dr. Taleb Rifai, Secretary General of the UNWTO***, expressed his sincerest appreciation to the Government of the Republic of Korea and the Busan Metropolitan City for generously hosting the 7th UNWTO Executive Training Program on Tourism Policy and Strategy. He also recognised the great support of the Ministry of Culture, Sports and Tourism for working alongside the UNWTO since 2006 to organise this annual event.

Dr. Rifai noted that we live in exciting times for tourism as it continues to grow into serving as a driver of economic growth, job creation and socio-cultural development. This important role of the tourism sector has occurred against many odds and obstacles such as a faltering global economic situation, as well as natural and manmade disasters.

He explained that in 2012 international tourism achieved an important milestone as one billion international border crossings were registered in a single year. In 2000, Asia and the Pacific accounted for an impressive 16 percent of all international tourist arrivals; today the region has leapt to 23 percent; and by 2030, the UNWTO forecasts that the region will represent a massive 30% of all global tourist arrivals.

Dr. Rifai attributed several factors to these ambitious projections for Asia and the Pacific region. In particular, the growth of the region’s economy has led to the rise of the middle class and the availability of resources to travel and invest in tourism. Other key factors include the fact that Asia is the most open region in terms of visa policies according to a UNWTO study and a leader in the use of new technologies in tourism.

The Secretary General also pointed out that in these rapidly changing times, there is a need to re-examine marketing and branding strategies in an increasingly fiercely competitive environment fuelled by technological advances. This is the reason that the 2013 UNWTO Executive Training program is dedicated to the topic Tourism Branding and Communications. He outlined that in a diverse, interconnected and complex modern day operating environment, the network of information and ideas has changed and the big question to ask is ‘how does your destination stand out among the rest’. Dr. Rifai explained that with innovation at its peak, never before has there been a greater need for creative thinking, branding and communications for tourism destination marketers. Clever, innovative uses of social media in the travel arena are essential in these highly competitive times.

Dr. Rifai encouraged all participants to proactively interact and network amongst one another and to take this opportunity to gain invaluable insight and learning from one another as well as the UNWTO experts. He concluded by reminding everyone that only by working together can we become better and devise effective communication strategies that support the growth of what is undoubtedly one of the most promising and influential sectors of our times.

***Mr. Cho Hyun Jae, Vice Minister of the Ministry of Culture, Sports and Tourism of the Republic of Korea*** warmly welcomed participants and stated that despite the global recession, the tourism industry continues to grow (international tourists reached 1 billion), particularly in Asia, for both inbound and outbound. As a result the 7th UNWTO Executive Training Program is more meaningful as a platform for the region’s decision-makers to share policies and experiences to respond to such growth and is a good opportunity to learn how to strengthen the competitiveness of the Asian tourism market. The government of the Republic of Korea will continue to support exchanges and assistance among UNWTO members and Member States.

***Mr. Kim Jong Hae, Vice-Mayor for Administration of Busan Metropolitan City*** extended his congratulations on the opening of the UNWTO Asia/Pacific Executive Training Program and emphasised that UNWTO has achieved much to date in developing global tourism. He noted that tourism contributes to economic growth and makes life more prosperous for those that it touches. Busan is hosting various events to feature its attractiveness to tourists, and developing many facilities to become a tourism city that attracts global visitors. He re-asserted Busan’s commitment to providing full support for the successful implementation of the Training Program.

**PLENARY SESSION 1:**

***Mr. Peter Semone, Anchor Consultant and Chief Technical Adviser of the Lao National Institute of Tourism and Hospitality (Lanith)***, kicked off the Plenary Session 1 with a presentation entitled Branding and Communciations in Tourism.

Mr. Semone explained that in 2013, there is an overwhelming abundance and variety in tourism supply and at the same time an increasingly more knowledgeable and discerning travelers driving expectations from the demand-side. This convergence of market forces has created an extraordinarily competitive operating environment for the tourism sector in Asia and the Pacific.

He outlined that in tandem with the changes in the breadth and size of the tourism sector, have come massive advancements in information, technology and communications (ITC). Bill Gates and Steve Jobs were born in 1955 and at their respective peaks produced huge change in the way people learn, communicate and think. Ted Turner did the same when in 1980 he founded the Cable News Network (CNN). Meanwhile Tim Berners-Lee quietly instigated the world-wide-web so that in the 21st century people like Mark Zuckerberg could establish the era of social media.

Mr. Semone estimated that the evolution of ICT has moved much faster than tourism in re-inventing itself and striving for innovation and continuous improvement in a rapidly changing business environment. Information technology has become a crucial factor in promoting tourism destinations, products and activities.

Competitiveness and technology are converging and placing increasing pressure on tourism leaders to continuously evaluate, monitor and re-invent their approaches to the branding and communications of their destinations. It is essential in today’s operating environment that public sector tourism executives possess a fundamental understanding of conventional and modern media and information technology. Only with this foundation will they be able to convey the powerful messages that are required to capture the consumer’s attention and inspire them to visit their respective destination.

He explained that branding and communications is an art form, which many destination marketing organisations (DMOs) have mastered, while others have yet to refine their skills in this area in order to allow them to reap the full benefits of tourism. With the complete visitor economy attributing 6.6 trillion dollars or 9 percent of global GDP and 1 in 11 of the world’s jobs there is no wonder that countries are scurrying to engage in the tourism phenomenon. In addition to contributing to global economic growth and job creation, tourism can bolster the efforts of developing countries for societal development and poverty alleviation.

Mr. Semone outlined that in a technologically advanced global environment, tourism marketers face extraordinary challenges in capturing the attention of a public audience the vast majority of which are already suffering from information overflow. He shared how well thought out branding plans that combine traditional communication channels with modern day information technology is a formula for success. He highlighted that today’s destination marketing professional must understand the nuances of branding and communication through a variety of media including: print, television, website-based portals and the increasingly dynamic social media technologies that are continuously being refined and advanced. He also asserted that a multi-stakeholder engagement was a critical success factor to any branding and communications strategy, especially through public private partnership.

Following his presentation, Mr. Semone invited representatives of the Republic of Korea, Bangladesh, Bhutan, Laos, Maldives and Myanmar to share their respective country’s experience in the area of destination branding and communications.

Representing the Republic of Korea, ***Mr. Byungchae Yu, Director, International Division, Ministry of Culture, Sports and Tourism*** shared the experiences of Korea in recent years. He explained that over the past decade there has been a near doubling of visitor arrivals to Korea and that there is an integrated approach to branding and communications that includes the whole of government including the Korea Tourism Organisation, local government, the private sector and his ministry. He described how in the past Korea’s tourism brand *Korea, Sparkling*, launched in 2007 was associated with Korea’s national brand *Dynamic Korea*. The goal of that campaign was to attract 10 million visitors by 2010, which was almost achieved. A new logo and slogan – *Korea, Be Inspired* was introduced thereafter and is meant to create emotional dynamism, which he describes as aspiring to experience authentic Korean culture, people and place. The goal of this campaign is to attract 20 million visitors by 2020, which will bring Korea to an advanced tourism nation status. He also outlined the Ministry’s efforts to shift from Korea 1.0 (hardware oriented tourism and quantity focused) to Korea 2.0 (diverse tourism contents and quality focused). The Psy phenomenon has also been used to help brand Korea through various campaigns such as Psy’s Wiki Korea which are features on various social media such as YouTube.

Representing Bangladesh, ***Mr. Kabir Akhutaruz Zaman Khan, Chief Executive Office, Bangladesh Tourism Board*** explainedthat *Beautiful Bangladesh* had been adopted as the new destination brand of his country, which is an emerging tourist destination with a reputation for great value. At the centre of the destination DNA of Bangladesh is its people who are enterprising and friendly. The country also has a rich heritage and culture, including numerous festivals, events and what he describes as a ‘food culture’. Mr. Kabir also described Bangladesh as a ‘school of life’ due to its talented people who welcome visitors to learn pottery and other crafts from them. He noted that his tourism board has established a communications strategy which includes a variety of traditional and social media

Representing Bhutan, ***Mr. Damcho Rinzin, Head, Promotion, Brand and Communications Division, Tourism Council of Bhutan*** indicated that his country is known for a unique concept called gross national happiness or GNH in which happiness is the key measure and indicator of development. Tourism to Bhutan started in 1974 and until 2005 the country had no tourism related brand. However, its destination DNA enjoys an international reputation for being mysterious, undiscovered, expensive and exotic. Then from 2005 - 2010, the Bhutan brand encapsulated the tagline *Land of the Thunder Dragon*. And since 2010, the brand has evolved into *Happiness is a Place*, which positions Bhutan as a place of deep personal experience satisfying the higher needs of individuals as defined in Maslow’s heirarchy. He explained that there were many interations of the logo before one was commonly agreed upon by the majority of stakeholders. The logo’s blue poppy is meant to celebrate the country’s national flower and express happiness. The brand is being communicated through collaterals, promotional films, TV, posters and print media. He explained that challenges for Bhutan remain, including: budget, misinterpretation of the fixed tarrif tourism system, and abuse and lack of registration of the tourism industry branding due to unclear copyrights.

Representing, the Lao People’s Democratic Republic***, Mr. Lithisack Vorarath, Head of Unit, Tourism Promotion Division, Tourism Marketing Department, Ministry of Information, Culture and Tourism*** described Laos as a geographically unique country with five shared borders with Cambodia, Myanmar, Thailand, China and Vietnam. The country has enjoyed rapid growth in tourism arrivals with 3.3 million recorded in 2012. He noted, however, that revenues were still low at a mere 512 million and this phenomenon required attention. Due to the country’s rich culture, history, traditions and friendly ‘down to earth’ people, its tourism brand is *Lao Simply Beautiful*. The logo depicts its nature, culture and history through the use of the dok champa (national) flower and the iconic That Luang temple. Mr. Lithisack also explained that a tourism marketing board had been established in Laos to bring together the public and private sectors in partnership. He noted the great assistance from GIZ, LuxDev, JICA, NZ Aid, ADB and other international donors for their assistance in helping his country to develop a sustainable and vibrant tourism sector. It was also noted that Laos was considering charging a 2 dollar levy on each tourist to help fund national marketing activities.

Representing the Maldives, ***Mr. Ali Shinan, Assistant Director, Ministry of Tourism Arts and Culture*** shared the fact that his country is comprised of 1000+ islands and is fascinating, mesmerizing, breathtaking, relaxing, peaceful, memorable, spectacular, magnificent, intriguing and soothing. Tourism to the country started in 1972 with 1,097 arrivals recorded and a single (270 bed) Kurumba Village Resort. In 2012, just under one million visitors were recorded with some 30,000 bed on offer in 104 resorts. This dramatic growth has lead to tourism becoming the largest employer and most powerful engine for GDP growth (34%). Initially, the Maldives Tourism Promotion Board (formed in 1988) was responsible for destination marketing and communications. However, in 2010 the Maldives Marketing and PR Corporation was formed in 2010 by special presidential decree with the vision to promote Madives as a premium tourism destination. Initially, the *Sunny Side of Life* was adopted as the destination brand. This was later changed to *Always* *Natural* and then reverted back to the *Sunny Side of Life* due to political change in the country. This raised the question of how to create a stable brand. He explained that the Maldives Marketing and PR Corporation actively engages in marketing and promotional activities, including: promotional fairs, road shows, familiarisation trips for media, global advertising, joint promotions and social media campaigns.

Representing the Republic Union of Myanmar, ***Mr. Kyaw Soe, Manager, Ministry of Hotels and Tourism*** shared the rapid growth phenomena occurring in his country. He explained that Myanmar has been branded *The Golden Land* due to its golden pagodas, rich land and wealth of agricultue, minerals and natural resources. While the tagline has been established, no logo has yet been created. He noted that through the assistance of the Norwegian Government and the ADB, a tourism master plan is being created which will also include advice on marketing and promotion of the country. He said that a nation brand *Let the Journey Begin* would be launched at the World Economic Forum and that lots of sub-national brands are being considered for various sectors such as tourism. He noted the importance of the establishment of the Myanmar Tourism Federation, which together with the Ministry of Hotels and Tourism through public private partnership would promote the country in the near future. He outlined the challenges for the country, which include: limited budget, lack of funding for international promotions and no overseas offices. Internally, there are some programs going on to inform locals of the do’s and don’ts of tourism and create better awarenss among members of civil society.

In the early afternoon, participants were divided into five groups to provide ‘peer consultation’ to Bangladesh, Bhutan, Lao PDR, Maldives and Myanmar. Each group later reported their findings in the closing session of the plenary.

For Bangladesh, participants recommended conducting a market survey, opening of a sales agent and involving embassies and consulates in the promotion of the country.

For Bhutan, it was suggested that a communications strategy was necessary to complement the new branding and as money is limited the coutnry should focus on a social media campaign in which people (especially satisfied visitors) could communicate the brand on behalf of the government. This might come in the form of an incentivised campaign.

For Laos, a number of grey areas were identified including: low per visitor spend of some 150 USD (compared to nearly 1000 USD for neighboring countries such as Vietnam and Thailand), low prioritisation of tourism by the government, an over reliance on cross border traffic and improved infrastructure and private sector participation.

For Maldives, political unrest and climate change were seen as imminent threats and it was recommended that the country should focus on a single brand and drive it through the brand continuum.

Finally, for Myanmar it was recognised that the country is going through dramatic change and that improvements in tourism laws, infrastructure and human capacity were critical to meet the enormous pent up demand for visitation to the country.

It was also noted in the closing session that sub-brands can work when there is synergy between federal and state efforts for which examples include *Incredible India* and *Malaysia Truly Asia*. Funding and money for tourism branding and communications remains a challenge as does techniques to to unite various stakeholders around a brand and combined efforts. Finally, it was noted that getting power/influence at the highest level of government is essential for any destination branding exercise to succeed.

**PLENARY SESSION 2:**

***Mr. Duncan Morris, Vice President of Research for Turner International*** started the Plenary Session 2 on the second day with a presentation entitled the Role of Media in Tourism Promotion. He explained that media can accelerate the process of conversion from interest to booking, which happens along the brand continuum. Destination advertising is the message and media is the amplifier of that message and the trick is to reach the right people, numbers, mood, time, location and frequency with the right message. No single medium can do all of this and each choice has its own strengths, including: television, online, print, outdoor, mobile/tablet and social media. It is important to remember that media platforms are tools, not strategies. It is also essential to choose the right partner once the platform has been selected, particularly when it comes to television. A key measure for this type of media is audience delivery, which should be balanced between quality and quantity. The major drawback for media such as television is the high risk of wastage, which occurs when messages are conveyed to the inappropriate audience.

Morris explained that there are two ways to measure television audiences. One is known as peoplemeter panels, which help to measure/rate television programs. These systems are usually installed in homes and in the new enviornment, they may underrepresent the international traveler. The other tool is syndicated surveys of media consumption among targeted populations (ie. PAX). These are easier to reach more mobile populations, however unlike peoplemeter panels, they are non-continuous and recall-based, which results in flaws and recollection challenges. While advertising environment is key, creative excellence is also an important criteria for selecting media. So is accountability. Unfortunately, it is still very hard to measure return on investment for destination advertising. To measure effectiveness, it is important to know how many people saw the campaign, how often and at what cost. There are also intangibles to consider such as whether or not the media vehicle offers the right brand fit. Also does it present obvious and compelling sponsorship. And in this day and age, it should be multi-platform, ie. traditional, web-based and social.

In short, Mr. Morris explained that these are challenging times in which there is much fragmentation and relentless competition. The role of media is about aplifying messages and media brand choices should be based on things such as audience delivery, creativity, accountability and intangibles.

A discussion ensued in which it was reiterated that it is very difficult to measure the relationship between advertising and actual visitors that eventuate through media promotion. This creates a challenges as to how to allocate resources. When asked why *Incredible India* and *Malaysia Truly Asia* are so successful, Morris attributed longevity as a key factor. It is important to remember that travel advertising has a long lead time and consistency of message, look and feel, over a period of time will lead to visibility. It is important to use media to engage all of the senses, which creates memorable messaging.

Representing the Republic of Korea, ***Mr. Park Chul Hyun, Director, Brand Marketing Team, Korea Tourism Organization (KTO)*** gave an impressive, well thought out presentation on measurement and media planning. He explained that between 2007 and 2012 annual growth rates reached 12 percent with demand from Japan and China leading the way. Market research showed that the dominant group of travellers are in their 20s and that female tourist outperform males by 2 to 1. KTO conducts consumer surveys to establish campaign results and their perception of Korea. It turns out that media where consumers see the advertisement most is internet which results in making decision for travel. Half of the consumers that participated in the survey stated that they were affected by the KTO advertisements and that local media is quite influencial. Good research also helped to determine the factors effecting tourist arrivals to Korea, for example October 2010 to Sepetember 2012 data collected and analysed showed that simplification of visa processes attracted more Chinese. On average for every 1000 USD spent 48 Chinese were attracted, while 1000 USD resulted in 72 Japanese tourists. TV proved to be the best advertising vehicle, but expensive so one needs to find ways to improve the efficiency and carefully monitor costs. Increasingly, the website is taking centre stage of KTO campaign activities with paid media supporting the campaign. It is important to find a healthy balance between paid media and owned media (such as websites) and earned media (such as blogs and editorials). For KTO, half of its budget is invested in paid media.

Representing the Kingdom of Cambodia, ***Mr. Bou Chan Serey, Deputy Director, Department of Planning and Development, Ministry of Tourism and Mr. Phalla Say, Deputy Director, Department of International Cooperation, Ministry of Tourism*** outlined how their country in 2012, attracted 3.58 million international visitors and earned an impressive 2.2 billion USD in revenues. They explained that media and tourism promotion remains quite limited due to small budgets. Despite this, the brand *Kingdom of Wonder* was disseminated broadly through television, newspaper, magazines and travel events. Overall, Cambodia spends about 2 million USD per year on tourism promotion and has allocated 10 million USD for a new promotion campaign. Cambodia broadcasts through CNN, the Arab News Network, CCTV, BBC, and many others. It also gets published in specialised magazines such as World Heritage. In terms of trade shows representation, they explained that Cambodia participates in the following: ATF, FITUR, BIT, AIME, GITF, New York Times Travel Show, ITB, ITM, KOTFA, JATA, ITM, and WTM. They also have established an active familiarisation program hosting media teams from Conde Naste Traveler Magazine and many other prestigious titles. The country’s strategy for the period 2012 to 2015 is to continue engaging with social media such as Google Street View, encourage movie production and actively participation in media where affordable. Challenges include: relatively limited budgets, weak human resources, low private sector participation, limited tourism promotion facilties in terms of quality and quantity, weak promotion via the internet, and a lack of representation offices in key source markets.

Representing the People Republic of China, ***Mr. Xikuan Zhang, Section-in-Chief, China National Tourism Administration (CNTA)*** explained that the new China tourism brand *Beautiful China* was finalised and established a few months ago. The logo uses the Chinese calligraphy image of travel and encapsulates the natural beauty of Chinese landscapes, culture and environment. Since 2008, there have been a number of slogans for Chinese tourism including: year of olympic tourism, year of eco-tourism, year of expo tourism, year of cultural tourism and in 2012 year of happy and healthy tourism. There are also a variety of provincial tourism logos, such as: Friendly Shandong, Dalian City of Romance, Colorful Yunnan and Dynamic Guangdong. In the future, provincial tourism slogans will link with the *Beautiful China* branding. Traditional media usage includes: newspaper, TV, outdoor, magazines and internet. CNTA has a budget of about 20-30 million USD for its operations which is not a big enough budget to launch extensive TV campaigns. However, with over 20 overseas offices, CNTA does have significant reach into key source markets. It is interesting to note that in many cases provincial and local tourism offices have bigger budgets for advertising campaigns. In promoting China it is necessary to justify budget usage. The State Council recognised tourism as a strategically important industry and 26 provinces see it as a pillar industry. In 2011, the first China Tourism Day was celebrated to increase awareness of tourism for increasing employment and social stability. It is important that civil society is engaged in tourism and able to deliver the feel that has been promoted. In 2013, a tourism law was passed. The law says that tourism promotion is important and well justified. Mr. Zhang admitted that as the national tourism brand has only recently been launched, there is much work needed to cultivate what *Beautiful China* actually is.

Representing India, ***Mr. Rajesh Talwar, Assistant Director General, Publicity, Event and IT, Ministry of Tourism*** outlined that India’s success in tourism has been impressive when one considers that foreign tourist arrivals were only 2.4 million in 2002 and 6.6 million in 2012. This is in large part due to the *Incredible India* campaign which envisaged India developing into a premier destination and moving from a low value to a high value marketing destination. *Incredible India* established a visual identity for the country by showcasing its rich culture and heritage. Notably, the **I** in India was always emphasized in all visual promotions. Internet marketing has been a key succuss factor with numerous videos uploaded. Outdoor campaigns in key markets have also been organised by India tourist offices, which also attend all major exhibitions. There are also ongoing campaigns, to promote India as a year round destination and the ‘find what you seek’ campaign depicts India as an experiential destination. The recently released film Life of Pi has also been utilised for marketing purposes. Domestic campaigns, such as “Go Beyond’ are used to encourage locals to visit places beyond the main tourist destinations. Notably, there are 800 million domestic trips recorded annually. Social awareness campaigns have also been introduced to sensitise the locals about the benefits of tourism, an example being Guest is God! This has brought about behavioral change and attitudinal change among Indians towards tourism. There is a generous budget of 73 million dollars for international tourism promotion and 25 million for domestic promotion. This money is spent on a variety of print media (including travel, lifestyles, and business magazines), television and online (such as Google and Facebook advertisements). Collaboration with internal and external stakeholders is a critical success factor and financial support to undertake study tourists and promotional campaigns is distributed generously. It is important to encourage the private sector to use *Incredible India* in their own promotions to nurture the brand. It is essential to continue to give life to the brand.

Representing Indonesia, ***Ms. Ratna Suranti, Indonesia Tourism Branding, Ministry of Tourism and Creative Economy*** explained how the *Wonderful Indonesia* brand has developed in recent years. Activities to promote Indonesia include heavy use of domestic and international print media. There is a focus on specific target markets every year as well as feature destinations within the country as Indonesia is so large.Electronic media is seen as an important tool, although this is all too often responsive rather than proactive and not based on research or other scientific methods.Indonesia has been extremely active at ITB Berlin, including being the country partner at the show. In terms of online media. Indonesia.Travel is still lacking in traffic when compared to other country sites. It has 8,000 visitors a day of which 60 percent are Indonesian and needs to expand in its traffic. She described a recent Indonesia Travel Quiz in which the prize was a trip to Komodo Island as a success. The program asked for the public to become active on the Indonesia Facebook page and answer five questions a day, the answers of which could be found in the content of the website. This resulted in an increase in traffic to the web and increased Facebook friends from 2010 (145,000) to 2011 (1.3 million). This was a great technique for getting people to drill down into the website content. She also explained efforts to invite well known bloggers to participate in a blogger competition to see which one could get the most distribution. While this was great exposure, she noted that it is not easy to engage well known bloggers as their agendas are full and one should plan on at least a 6-8 month lead time.

Representing Pakistan, ***Mr. Arif Elani, Secretary, Tourism Department, Government of Sindh, Karachi*** described the difficulties experienced by his country in promoting international tourism. This despite significant cultural, spiritual, heritage and religious sites many of which are identified by UNESCO. Tourism, by any stretch of the imagination remains underdeveloped in Pakistan. This is due to perceptions of the country which have resulted from an ongoing war. This has been a major inhibitor to the development of tourism. He noted a need to focus on media and to try and change the the image of Pakistan, which is quite negative particularly by western media. There are travel advisories and insurance costs that also contribute to low visitor arrivals. He observed optimistically, that the only way forward is to go up; the country has reached rock bottom from an image perspective. He explained that there is untapped opportunity, particularly within several resorts near the Keenjhar Lake near Karachi. Gorakh Hill is another unique destination that has huge potential for development with its temperate climate. The focus is not and should not be on foreign tourists at the moment but rather for encouraging tourism demand among locals. A major take away for Mr. Arif from the training program is that public private partnership is essential and that Pakistan could really benefit from enhanced private sector investment. Capacity building is also a key element for growth, particularly as it related to crisis media and communications. He noted that the budget for tourism promotion was small at 1 million USD, but a good starting point for inducing domestic demand.

Representing the Kingdom of Thailand, ***Mr. Pasit Poomchusri, Director of Bureau of Tourism Services Development, Department of Tourism, Ministry of Tourism and Sports*** explained that the government allocated 170 million USD in marketing the country in 2012 and saw a return on investment of 31 billion USD in tourism revenues with some 20 million visitors (12 percent increase in 2012). There was also an impressive number of domestic visits recorded at 133 million. This money is spent on a variety of traditional media channels, publications, radio, television, billboards, and person to person promotion. New media channels include FB, Twitter and movies. There are also websites established and maintained in many languages including: English, Russian, Japanese, Spanish and Chinese. Thailand participates in tourism fairs around the world and also promotes to niche markets such as medical tourism. His ministry along with the TAT also invite the media to Thailand frequently and also arrange tour operator groups. It is critical to promote safety and service standards to tourists. He also noted that tourist satisfaction needs to be high so that people come as repeat visitors, a key strategy for Thailand. He noted that there is enough demand in Thailand and gave the example of the airport which is already over capacity with as many as 45 million users a year. The key for Thailand is the refinement of supply. Mr. Pasit noted the need to do more to evaluate the effectiveness of tourism promotion and the desire to conduct more tourist satisfaction surveys. The promotion of regional cooperation is also important as the Greater Mekong Subregion grows in importance internationally. He concluded by noting that Thailand is at a stage in the brand continuum where satisfying visitors is the critical success factor.

Representing the Socialist Republic of Vietnam, ***Mr. Bui Duy Hung, Senior Offical/Deputy Head of Overseas Marketing Division, Vietnam National Administration of Tourism*** explained that in 2012 the country received 6.8 million international visitors and recorded 35 million domestic tourists. Combined revenues amounted to some 65 million USD. Key source markets include: China, Japan, Korea, Thailand, Laos, Russia and the UK.Vietnam’s tourism logo and tagline has changed several times in recent years, including: *Destination of the New Millennium*, *Welcome to Vietnam, The Hidden Charm* and *Timeless Charm*. The new campaign *Timeless Charm* depicts a lotus flower (the national flower) and seven colors representing various tourism products. There is an official website and five sub-websites. Promotion is aired on national television channels and international channels including CNN, BBC and Discovery as well as being published in newspapers***.*** He noted that there may not be sufficient evidence of return on investment through traditional media, which was viewed my many of his associates as being expensive with limited feedback.Vietnam tourism also uses diplomatic channels to launch tourism products and promotes tourism cooperation with other countries. It also actively participates in Trade Fairs such as ITB, JATA and CITM. He noted that a key challenge was to maintain the quality of product to protect the brand of Vietnam.

Following the country presentations, a robust discussion ensued. There were questions concerning the merits of using an advertising/media agency and the challenges of public procurement of funds. It was concluded that there is a need for better tender specifications and terms of reference when bidding for these services. There was also a question as to how to protect intellectual property rights for taglines. The example of China and Bangladesh both having the same tagline was mentioned. No clear answers were provided on how to best protect a national brand. It was also noted that harnessing private sector support was critical. The example of India and its various assocations being supported financially and encouraged to go overseas to showcasing India was recognised as good practice. There was also the recognition that regional cooperation in marketing is important and examples from the Greater Mekong Subregion and southern China (Macao, Hong Kong and Guangdong) were noted. It was also noted that crisis management is important to overcome negative media that may occur.

A peer consultation session took place in the afternoon in which four groups were formed to discuss how select countries would spend 1 million USD on marketing and communications. The discussions are summarised as follows:

For Pakistan a focus on domestic tourism is a good short term strategy in which creating saleable products is at the core. It was proposed that market research would be conducted and that seminars inclusive of all stakeholders would be held. Media tours to change perceptions would be organised. And in order to target the local business community to consume and invest in tourism, promotion through brochures, television and outside billboards would be arranged.

For Vietnam it was proposed that the 1 million USD would be given to a media buying company. The objective would be to encourage business development and investment in infrastructure and services. International hotel chains would also be asked to organise food festivals and cultural festivals in other countries where they operate featuring Vietnam. Regional promotion would be focussed on Thailand, Cambodia and Laos with joint promotion for multicountry circuits. And long haul tour operators and front liners would be exposed and educated on the Vietnam tourism product through speciailist programs. Finally, with any remaining funds, consumer promotions for key markets would be undertaken.

For Indonesia the target groups of Singpore, Malaysia and Australia were identified. Air Asia’s in flight magazine would be used to promote various destinations in Indonesia. There would also be the promotion of a special event in Bali through various Australian media. An outdoor campaign using taxis in Singapore would also be organised.

For Cambodia there was a recommendation to improve infrastructure and human resources. The Chinese market through CCTV was envisaged. There was also an idea to invite media and investors, particulary from long haul markets such as the UK, France and Germany. It was also suggested to have a special event program in order to diversify the product, maybe including a cultural performance series. Promotion of familiarisation trips for media (and celebrities) from China to tour Cambodia was also suggested to raise awareness of the country.

**PLENARY SESSION 3:**

***Dr. Chulwon Kim, Dean of the College of Hotel and Tourism Managmenet, Kyung Hee University***, kicked off Plenary Session 3 on day three with a presentation entitled Smart Tourism as a Tool of Destination Promotion.

Dr. Kim explained that tourism is an information intensive industry and therefore, it is essential to understand technological changes and how they are affecting tourism behavior. The evolution of travel related technology is quite staggering including: 1970’s CSR, 1980’s GDS, 1990’s Internet and 2000’s social media. During that time there has been a shift from institutional control (traditional media – one way communications) to consumer control (social media – two way communications). The trends in 2013 include: people are speaking online about their experiences; there is a need to be responsive and therefore train people to be able to respond; organisations must continue to refine their content strategy; and the number one marketing channel for promoting is now social media.

He explained that there are five important uses of smartphones during travel nowadays, including: taking photos, using map features, searching for restaurants, checking-in prior to flights and searching for activities/attractions. By 2015, nine out of ten consumers will have a mobile subscription and word of mouth recommendations along with consumer reviews will be the key drivers for attracting business in the tourism industry. In other words viral markting will be the name of the game and traditional ads will become increasingly less effective in attracting consumers.

Dr. Kim went on to define smart tourism as a new kind of tourism that is in real time and provides personalised service. It will contribute to enhanced productivity and competitiveness of tourism destiations. It is the era of ‘word of mouse’ and will allow for effective building of brand awareness and allow for powerful brand positioning. A staggering 87 percent of travelers now use the internet for the bulk of booking of their travel. He noted that the website [www.eyefortravel.com](http://www.eyefortravel.com) is a great resource for learning about social media trends and shared some relevant statistics reported there. He also explained that Trip Adviser has 64.6 million unique users and is having a great impact on tourism and noted that 93 percent of travellers say that ‘online reviews’ impact their booking decisions. Dr. Kim also noted that a number of destinations have developed their own APPS – such as Korea, Thailand and Australia – and that this would be a challenge going forward for destination marketing strategies.

Representing Fiji, ***Mr. Thomas Ray Valentine, Manager, Tourism Fiji*** told delegates that Fiji is the hub of the South Pacific Islands and that its the economy hinges on tourism for its survival. There were 675,000 visitor arrivals in 2012 contributing a billion USD in foreign exchange earnings.He noted that social media reaches as many as 1.2 billion people and that the opportunity for being involved in the social media trend is enormous.As an example of the power of social media he said that the average FB user has about 130 friends and if half of all Fiji’s visitors were on FB raving about their holiday the message would multiply out to 45 million people. Mr. Valentine described Tourism Fiji’s social media eco-system and noted that future visitors are more likely to listen to previous visitors views than Tourism Fiji’s marketing messages. Before Tourism Fiji worked in silos which lead to fragmentation, but now there has been consolidation into an integrated campaign. Tourism Fiji has 273,000 fans on its FB page. He talked about geotargeting, which allows for specific messages to be disbursed to specific target markets and segments. Tourism Fiji currently focusses on FB, Pinterest, Twitter and YouTube and tries to maximise return on investment and exposure with the end goal of conversion. He pointed out that social meedia needs to be complemented with other channels that allow for amplification of integrated campaigns and gave the example of the Happiness Test competition, which was meant to enhance Tourism Fiji’s consumer email database, expand exposure and increase fan base. There are plans to introduce a Tourism Fiji mobile APP. Tourism Fiji has a budget of about 12 million USD for branding and promotion and there is a need to invest this money very carefully with the goal of conversion. Notably, Tourism Fiji outsources their social media efforts to an agency as they do not possess the requisite talent in house.

Representing Japan, ***Ms. Noriko Kawai, Deputy Director, International Tourism Promotion Division, Japan Tourism Agency,*** talked about how tourism branding efforts after the great earthquake and nuclear plant meltdown, which had a massive impact on tourism arrivals in 2011. She noted that despite tourism being an emerging industry compared to manufacturing and other services Japan is serious about tourism and has set a goal of 18 million visitors by 2020. She described the campaign between 01 September 2012 and 15 February 2013 which was focussed on post earthquake branding. There was a program in which the public was asked to ‘share your WOW through SNS’ by transmitting information on what people think is amusing and cool in Japan by registering on the Visit Japan website and posting photos during their trip and sharing them with friends. 70,000 people participated with some 39,000 photos posted. Winners were invited to an awards ceremony in Japan held in the now famous discharge channel (surge tank) on 15 March 2013.She went on to share the *Discover the Spirit of Japan* campaign, which highlights three core values of Japan tourism – all of which encapsulate the country’s DNA : character (sincere, disciplined and well mannered), creation (encounter creations born of Japanese people’s meticulousness) and common life (enjoy simple pleasures the Japanese find in their common life). Notably, they used the UNWTO handbook on tourism branding and followed its recommendations. She shared several of the 150+ videos that have been developed to depict the three C’s values all of which are available online at the Visit Japan website.

Representing *Macao****, Ms. Wai Lan Betty Fok, Head of Destination Marketing Department, Macau Government Tourism Office (MGTO)*** explained that they received 28 million visitors 2012 from 8 million in 1995. There are currently 28,000 rooms in Macao now and lots of foreign investment. There is a focus on encouraging ‘family’ elements and not just adult entertainment.She shared her view of the DNA of Macao and how the many different campaign iterations have tried to encapsulate what Macau stands for, including: *Legacy for the Future*, *More than Ever, Macau is a Festival*, *Macau Welcomes You Passport Campaign*. *World of Difference, The Difference is Macau, Macau World Heritage Year, Experience Macau and Toucing Moments, Experience Macau.*She noted that in 2013, the emphasis was on promoting the 60th Grand Prix.The MGTO uses a lot of traditional media including all the normal channels and does not engage any media agent, but rather does everything in-house. Social media and information technology is a focus as can be seen through the MGTO website. Macau also uses technology to enhance visitor experiences such as free audio guiding service and smart phone applications. One challenge, however, is that there is only one-way information at the moment and there needs to be more responsiveness to the new two-way communication environment. However, she noted that this is not easy as it requires talented manpower 24/7 to answer all enquiries and comments.The MGTO has 14 overseas offices, each of which has its own mini-sights for short term region specific promotion. Use of social media platforms such as YouTube, FB and Twitter is an important element of the approach.

Representing Sri Lanka, ***Mr. Nandana Dissanayake, Director, Sri Lanka Tourism Development Authority*** shared the importance of [www.SriLanka.travel](http://www.SriLanka.travel), which is to provide actionable content, destination information and a compelling case to travel to Sri Lanka.He pointed out that Sri Lanka focusses on each stage of the brand continuum including: inspiring interest through traditional media and e-channels, validating through discussion groups, planning through various on-line booking tools, facilitaing the experience through APPS and tourism information kiosks, and allowing for sharing platforms.He explained that keywords, such as travel ideas, best destination in Asia are used as an important element of e-marketing***.*** Sri Lanka’s digital marketing strategy includes: search engine optimisation, social media, paid social media adverts, banner ads, and even offline ads (eg. the London taxi promo). Sri Lanka uses FB, twitter google+ Linkedin for its promotions and carefully monitors comments on Trip Adviser and WAYNand noted the multipying effect of social media.He explained that social media efforts are integrated into the NTO website. Sri Lanka also offers technologies to service the visitor upon arrival in the country, including: tourism information kiosks at the airport and other places like shopping malls. There is also a 1912 tourist hotline, which delivers information to travelers and can be dialed from any phone. In addition there are several APPs that can be accessed and an interative voice response which delivers content to tourists if they need more information about a particular location/site. He noted that tourism officials are working closely with telecom operators to deliver these unique services. He concluded by expressing his view that digital marketing is the way forward and in the future will drive traffic to more advanced platforms such as a destination management system which will facilitate dynamic packaging.There remain obstacles of course including the fact that new media is not universally accepted by all. However, the economics are clear; Sri Lanka is getting a huge result from relatively little investment and an impressive 40 percent of visitors are using the technologies on offer.

Representing Malaysia, ***Ms. Zarina Md Yusuf, Principle Assistant Secretary, Strategic Planning and International Affairs Division, Ministry of Tourism*** explained that it is important for Malaysia to use social media and digital or smart tourism to advance its world famous *Truly Asia* brand. She noted that SMEs in the tourism industry are better able to promote themselves through social media because its easy to access and to get a picture of a place. There is a general trend in Malaysia to spend increasing amounts on social media because it is cost effective.In the past Malaysia spent as much as 300 million USD per annum on marketing and promotion of the brand, but social media has reduced the need for such a big budgets. For example, Tourism Malaysia spent only 600,000 USD on six FB campaigns and received an excellent response. There is also a move to heavily promote domestic tourism as this will help grow the economy: money spent inside the country, stays in the country. She shared a case study on rural tourism/homestays, which was a UNWTO award winning project. 138 villages across Malaysia were included with 3,424 homes. The objective was to keep locals in the villages and prevent them from moving to the big city. Social media was used for this program including: homestay e-marketing promotion. smartphone applications, social networks, SMS, advertising and YouTube. A special website for this was also developed [www.Go2homestay.com](http://www.Go2homestay.com). She pointed out that there are many ostacles and challenges associated with social media. While it’s the most powerful tool to develop a business, it can also be destructive. There needs to be a mechanism to monitor activities and experts to man the accounts and provide real time responses. The way forward is clearly that one cannot run away from the technology. One just has to move forward and over time increase the emphasis on social media. She felt that there would be a move away from the traditional way of communicating and to embrace the technology for Malaysia’s benefit. She noted that Tourism Malaysia is communicating more internally through social media and this allows each and every staff to deliver consistent services. Tourism Malaysia has a strategic partnership with Google, which has resulted in half a million visitors being driven to the website. ‘Think tourism act tourism’ is the internal slogan being used by Tourism Malaysia and it really works to translate Malaysia tourism to the outside world. She noted that a good team is the first priority within the Ministry and that each staff member is considered an ambassador for Malaysian tourism.

Representing Nepal, ***Mr. Mohan Krishna Sapkota, Joint Secretary, Ministry of Culture, Tourism and Civil Aviation*** shared the efforts of his country to brand and promote it as a tourism destination. He mentioned efforts to encourage repeat visitors and to position the tourism offer in a distinctive way to generate more revenues and create better alignment among stakeholder. Nepal has had many brands over the years, including: *Nepal for All Seasons, A World of its Own, Mt Everest and More, Mystical Kingdom and Naturally Nepal*. The overriding objective has always been to show value for money and to make Nepal top of mind by highlighting its friendly and welcoming people. The destination is meant to be adventurous and provide a once in a lifetime experience. Nepal uses two marketing approaches: prior to a visitor visiting to Nepal which is thinly spread to over 12 markets and avoids dependency on any single market. There is also post visit branding to keep Nepal in the minds of previous visitors. He noted that fees of 500 Nepal Rupies are collected from each visitor and used by the private sector and government to promote Nepal through strong public private partnership. There is a recognition in Nepal of the role of media and ICT is used intensively to communicate to outbound and inbound tourists. He said that there is still a need to develop modern media approaches and to become more serious in this area. One important thing is that the private sector is more active than the government in terms of social media.

And finally, representing the Philippines, ***– Ms. Jemimiah-Fay Legaspi, Head Executive Assistant, Philippine Department of Tourism and Ms. Verna Esmeralda Buensuceso, Director IV, Philippine Department of Tourism*** said that their country is the social networking capital of the world with 27 million registered FB users and 10 million Twitter users. In 2012 a new *It’s More Fun in the Philippines* brand was established and the Philippino people were asked to support tourism in a big way. The DNA of the Philippines is fun and all about the people. Their Tourism Minister asked one question, “why should people visit the Philippines”. And it was clearly established that it’s not just a place to see, it’s a place to be. The new brand is competitive, differentiates the country and is easily understood. It was built on the positive attributes of the country, which include warm, welcoming and upbeat people. Whatever you do, where ever you go, it’s the people that will make the difference.This was validated with exit strategies, which showed that the reason people like the country is because of the interaction with its people.They noted that there was not a lot of money, but the pride of millions of Philippinos has driven interest and energy. People were asked to post a photo and tell why its more fun in the Philippines, which resulted in 89 million hits on google.The costs were kept down and arrivals are at an all time high. It is noteworthy that the President of the country has backed the campaign and engaged seriously to encourage tourism growth.The Eye on the Philippines which featured on CNN has been a great boost and has resulted in Manila for the first time being included on the CNN weather report. The use of memes - an idea, behavior, or style that spreads from person to person within a culture was a powerful tool in the development of the new brand and included fun ideas like:sleepless nights, moving house, popping the question and parking – all of which are *More Fun in the Philippines*.The result is that arrival figures continue to grow and every Philippino is now an ambassador for tourism.They did caution that safety and security continues to be a challenge and something that the country has had to deal with.However, the image is improving and travel advisories are being lowered and/or lifted.

A discussion ensued and included issues such as: the human resources required to support smart tourism and the required maintenance of followers by engaging people. It was also noted that through social media countries are able to reach markets that are not usually part of any direct marketing campaign. The survival of travel agents and tour operators in light of the onslaught of social media and technology was also discussed and it was stated that there is a need to invest money to assist these stakeholders as technology is a reality that is not going away. There was also talk about the integration of social media with websites as being essential to maintain continuity. Negative aspects of social media were also discussed and it was noted that inexperienced travelers can often disperse wrong information. At present the only way to protect travelers (and NTOs) from intentionally distorted information is to constantly monitor the messages. The problem with real time remains that it can create damage and the only way to avoid this is to instantly answer in an authentic and transparent manner. It is important to draw traffic to the national website where the information is accurate and controlled. It was also suggested to monitor Google Alerts and that ontinuous involvement of a responsible person who can respond to the issue is essential to showing one’s commitment. Social media can ‘make or break’ a destination and it is important to have a communications crisis plan backed by someone with the authority to show that you are not hiding from negative complaints.

The afternoon group breakout session also highlighted challenges related to the new high tech environment we live in. Key challenges for all include the lack of trained human resources, especially among those involved in the IT sections. Outsourcing of these services was seen as an option to overcome the talent obstacle. There may be the need to provide social media courses/training, something the UNWTO might consider. There was also the idea that a study on enhancing competitiveness through social media should be organised, which would be a compendium on what member countries done and sharing of good practice. Public private partnerships were seen as an essential element of making social media to work. And where possible websites should be revamped to include social media platforms to better integrated marketing communications. In short, social media has to do with immediacy and this is an inevitable trend which will enhance competitiveness and productivity for destinations. It was noted that at present tourism productivity is low compared to manufacturing and other industries and technology is the means for changing this.

The program concluded with a closing ceremony, which was presided over by Mr. Harry Hwang of the UNWTO. A dinner was also hosted by the Ministry of Culture, Sports and Tourism at the Busan Paradise Hotel.

**FINAL RECOMMENDATIONS AND CONCLUSIONS:**

Based on an amalgamation of the various presentations and interactions that occurred during the three day workshop of the 7th UNWTO Executive Training Program, the Anchor Consultant suggests the following actions for future consideration and reference in order to improve the universal performance of UNWTO member states in the context of national branding and communication policies and strategies.

* Address future human resource challenges particularly in the area of smart tourism, which is a relatively new field for which there is still a limited supply of experts who can maintain the integrity and effectiveness of a myriad social media platforms. The numerous negative aspects of social media, such as the dispersal of incorrect product/destination information through user-based content and comments, requires a whole new set of active and passive communications skills. It is also important that NTO’s have a robust social media response to overcome negative media that may occur in the event of a disaster or other crisis. This action by UNWTO may be done in collaboration with its knowledge network and education/training affiliate members.
* The development of a paper/guidelines on the merits (or not) of using an advertising/media agency for marketing and communications efforts. This should include tips on overcoming the challenges of public procurement of services such as these. Development of a uniform set of terms of reference which national tourism bodies can refer to when seeking external assistance would also be helpful.
* Determine whether or not the UNWTO can serve as a conduit for better protection of intellectual property rights as they pertain to the use of slogans, logos, taglines and even advertising content in the tourism sector. Or at minimum provide some guidelines on how Member States can protect their intellectual property vis-à-vis destination marketing assets. This could greatly aid destinations in protecting their brand value (s) and bolster the importance of the UNWTO in the marketing/communcations arena.
* The UNWTO should find ways to provide social media courses/training for its Member States. This could be done in the form of regional seminars and knowledge sharing via electronic mediums, perhaps in partnership with regional organisations such as PATA.
* Research and develop stakeholder cooperative frameworks that encourage a more united approach to tourism branding and communications and also inspire participation from the highest levels of national, regional and municipal governments. Public private partnerships in destination branding, marketing and communications should also be considered with examples such as India and its various associations being supported financially and encouraged to go overseas to showcasing India is a notable good practice approach to public private partnership. It might be worth considering developing coordinated efforts with organisations such as WTTC in this area to better assimilate the public and private sectors.
* The UNWTO should, through its knowledge network, encourage studies focused on enhancing the competitiveness of tourism through various strategies, including: social media, public private partnerships, regional cooperation, destination/product development and marketing/communications. These papers and studies should also include Identification, sharing and promulgation of examples of a good practice in destination communications, media planning and impact assessments founded on either quantitative or qualitative approaches. Noteworthy examples for such further study include Korea Tourism Organisation’s research into media effectiveness and the Philippine Department of Tourism’s *It’s More Fun in the Philippines*. These could be in the form of short ‘case study’ papers, which could be published regularly in UNWTO media channels and disseminated through the knowledge network.

Overall, it can be surmised that the 7th UNWTO Executive Training Program provided evidence that Member States are still interested and in need of support and assistance in the area of tourism destination branding, communications and marketing.