

Deloitte.

AJBM Rebranding Digital Experience

2023 Nov. 3rd



Introduction

Presenters



Takuya Shiotani

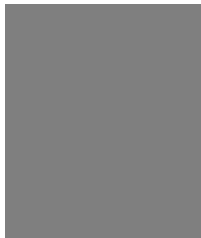
Deloitte Consulting SEA
Customer & Marketing Unit JC team lead
Partner



TBD

TBD

Panel discussion moderator



Yoko Komura

Deloitte Consulting SEA
Customer & Marketing Unit
Manager

Panelists



Kasemsit Pathomsak

Merchant Partners Limited; Executive Chairman
Merchant Partners Securities Plc.; Merchant
Partners Asset Management, Merchant Capital
Pathomsak Holdings; President



Raja Hamzah Abidin

RHL Ventures
Co-Founder, Co-Managing Partner



Gan-Low Mei Leong

Iskandar Regional Development Authority
(IRDA)
Head, Economics & Investment



JP Representative

TBD

Agenda

- | | |
|---|--------|
| 1. Outlook of Tourism in ASEAN/JP markets | 15 min |
| 2. Case studies of sustainable tourism | 20 min |
| 3. Panel discussion | 50 min |

1. Outlook of Tourism in ASEAN/JP markets

Goals & Key themes of “Digital experience redesigning”

Our workstream’s goal is to encourage the transformation into a sustainable economic, by utilizing digital to redesign the user experience of our selected target*.

* Target industry/company/service/product will be defined based on discussion with each country’s representatives.

Qualitative trendに合わせて文言
調整予定

“Sustainable tourism leveraging digital”

“Create tourism eco-system for user to enjoy & *continue* enjoying”

- e.g 1. **Design the E2E customer journey** for transportation – accommodation – destination, and **create the tourism eco-system**
- e.g 2. Establish the cycle for visitors to **re-visit, re-experience online/offline**

“Create the global digital communication hub for region/industry/company/product branding”

- Transform MICE sites and **establish system to support brand発信 leveraging digital**

“Re-brand a suburb city for enterprise attraction to generate new employment and contribute to regional revitalization leveraging digital”

Approach & Where we are

Based on the desktop research + discussion with each country, today we will share the quantitative / qualitative trend of tourism in ASEAN, JP market. In addition, we will have our panelist join us to discuss and share the locally unique trends, challenges and how we can overcome them as team

DONE

AJBM@SG
11/3



- Discuss high-level theme of Digital experience rebranding workstream
w/AJBM board members
30th June SG 14:30- 16:00

- Discuss focus theme for each country, and identify the potential collaboration partners
w/Each country AJBM boards
7th Aug. SG 16:00- 17:00
21st Aug. SG 11:00- 12:00

- Discuss To-Be of the selected theme

- Initiate discussion on realization

Goal of Digital Team

"Redesigning digital experience"
Redesigning the user experience of a country or company by utilizing digital to encourage sustainable economic

- "Create tourism eco-system for user to enjoy & continue enjoying"
交通・宿泊・観光目的をE2Eで繋ぐDigital customer journeyを構築。観光エコシステムを構築。ユーザーがスムーズに観光を楽しむだけでなく、Online/Offlineで再訪し続けるサイクルを整備。
• 交通・宿泊・観光目的をスムーズに繋ぎ、ユーザーの観光計画立案時から帰宅するまでのデジタルカスタマージャーニーに付随する体験を強化。
• ロイヤリティプログラムの導入等、観光後も継続的にOffline/Onlineで体験し続ける 為の仕掛けづくり
- "Create the global digital communication hub for region/industry/company/product branding"
MICEでDigitalを活用した、各地域・産業・企業・製品のブランディング情報発信支援
• 既存Assetを再-brandし、各地域・産業・企業・製品のDigitalを活用した情報発信支援
• 誰もがターゲット顧客に対して、観光ニーズに合わせた最新のテクノロジーを駆使したコミュニケーションを実施できる設備の整備
- "Re-brand a suburb city for enterprise attraction to generate new employment and contribute to regional revitalization"
デジタルの力で地方都市・地域をブランドし、企業を誘致することで、その土地の雇用創出を促すだけでなく、地方発のDXを推進し、他地域への展開を目指したい





Future of tourism [Discussion]
For the growth of tourism in Singapore, 4 segments were identified to be tapped. Key values analyzed for each segment is the key when guiding them to come to Singapore, and again.

<p>1st time visitors; Gen-Z WHO: Late 10- Early 20s</p> <p>VALUE</p> <ul style="list-style-type: none"> • "Local experience", "Unique experience" • Loves nature • Has more time than money • Brand is not important, low loyalty <p>HOW?</p> <ul style="list-style-type: none"> ✓ Provide access to local experiences of Singapore ✓ Encourage visitors to share their experience to acquire new visitors 	<p>1st time visitors; Business person WHO: Early 30s - 40s</p> <p>VALUE</p> <ul style="list-style-type: none"> • Efficiency • Functionality (for remote working, co-creating) • Effortlessly, Seamlessly • Providing good experience for family <p>HOW?</p> <ul style="list-style-type: none"> ✓ Provide seamless experience from airport to destination and back ✓ Encourage visitors to come back again w/ family
<p>Repeater; Seniors (From Non-SEA country) WHO: 60+</p> <p>VALUE</p> <ul style="list-style-type: none"> • Luxury • Taylor made, "Special" treatment • Routines, Stability, Safety • Local culture appreciation <p>HOW?</p> <ul style="list-style-type: none"> ✓ Provide one-of-a-kind personalized experience of SG ✓ Encourage visitors to love Singapore more, and re-visit the country 	<p>Repeater; Fellow SEA country families</p> <p>VALUE</p> <ul style="list-style-type: none"> • All age, families whom visits from other SEA countries • Low cost • Casual • Good food, beverage • Insta-worthy, "Wants to share", Urban-ness <p>HOW?</p> <ul style="list-style-type: none"> ✓ Provide sense of urban experience through scenery, share daily information on how to spend time in SG ✓ Encourage visitors to repeat for new experience



cf) Discussion session participants

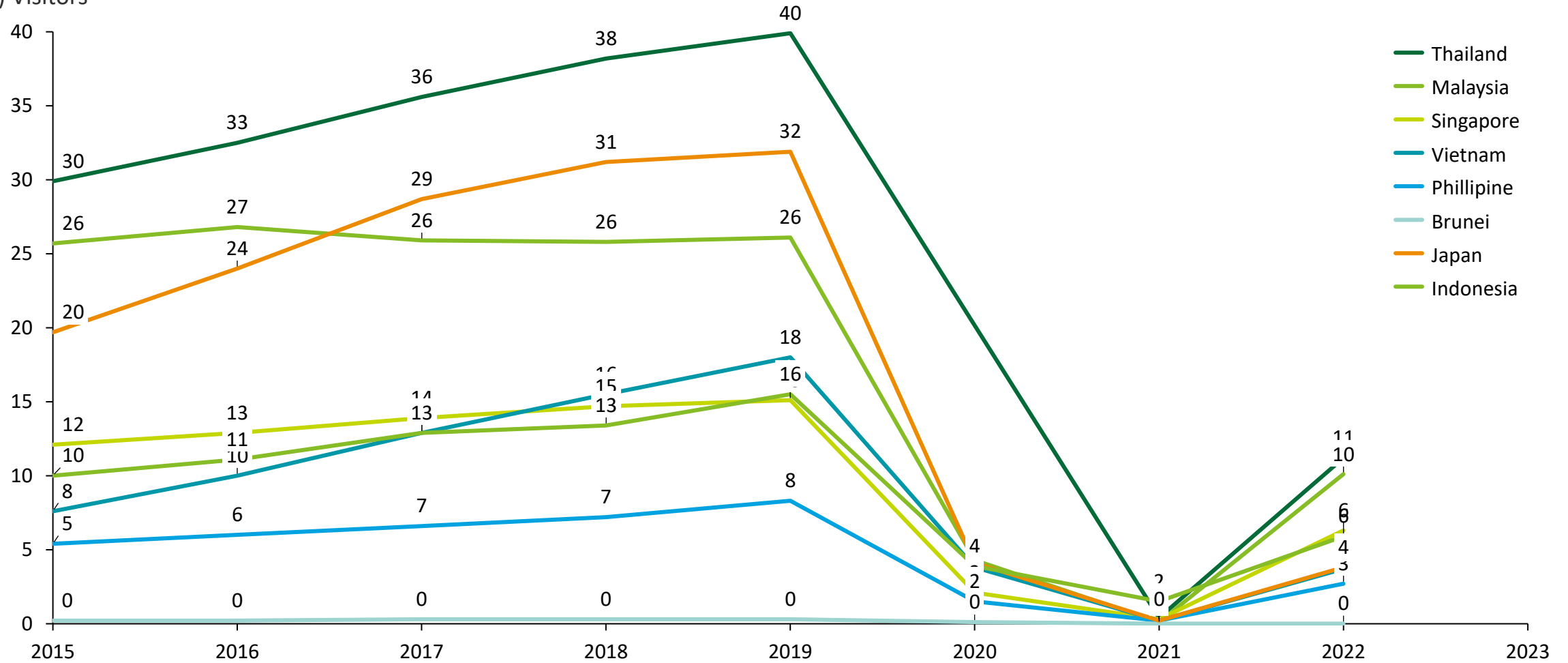
Thank you so much for your cooperation !

 <p>Japan</p>	<p>Miwako Date (AJBM Sustainable tourism team, MORI TRUST President & CEO) Tatsuma Murase (AJBM Sustainable tourism team, MIXI Director, Senior corporate officer)</p>
 <p>Thailand</p>	
 <p>Malaysia</p>	<p>Dr Ahmad Shahir Abdul Aziz (InvestPerak, Senior manager) Cik Rozy Abd Rashid (Iskandar Regional Development Authority, Economics & Investment Assistant Vice President) Shahazana binti Shaari (Export-Import Bank of Malaysia, Head of Information Technology Department) Aini Naqiah binti Ahmad (Malaysia Tourism Centre, Deputy Director) Dr Anir Syazwan bin Sharbin (Malaysia Heritage Studios, Chief Technology Officer/GM) Mior Luqman (RHL Ventures, VP) Hazuarie Zulkiflee (ACES/ECERDC, Manager) Teh Sook Ling (Selangor Human Resource Development Centre, Executive director)</p>

Trend of tourism (1/4)

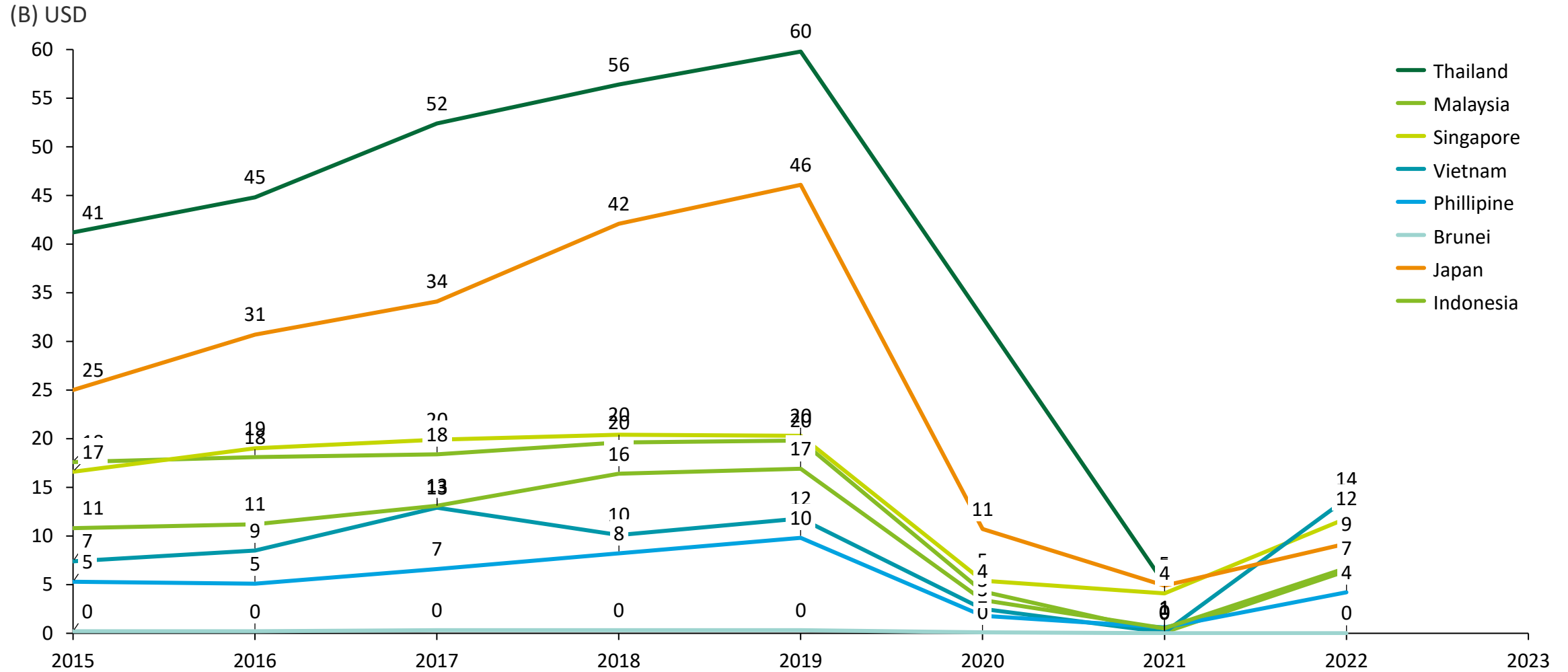
Trend of total number of visitors in each country

(M) Visitors



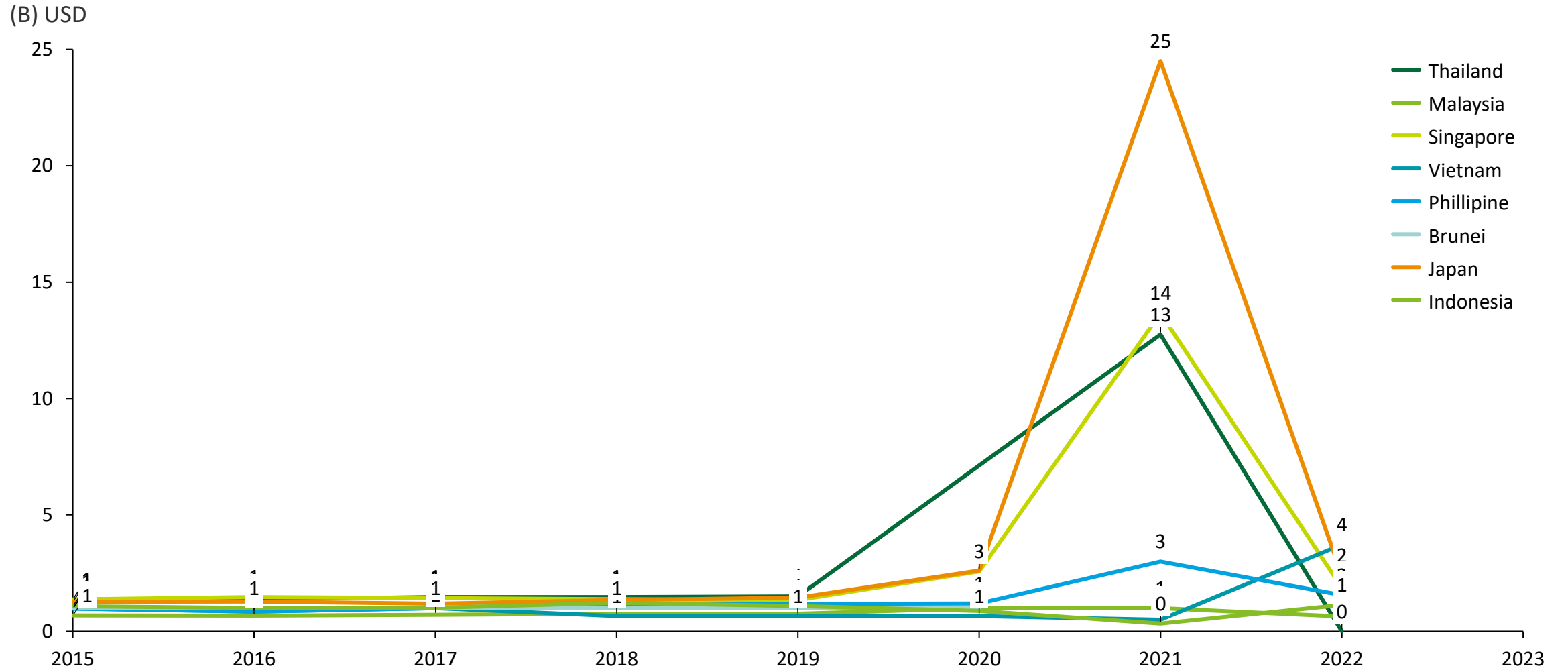
Trend of tourism (2/4)

Trend of total receipts from tourism in each country



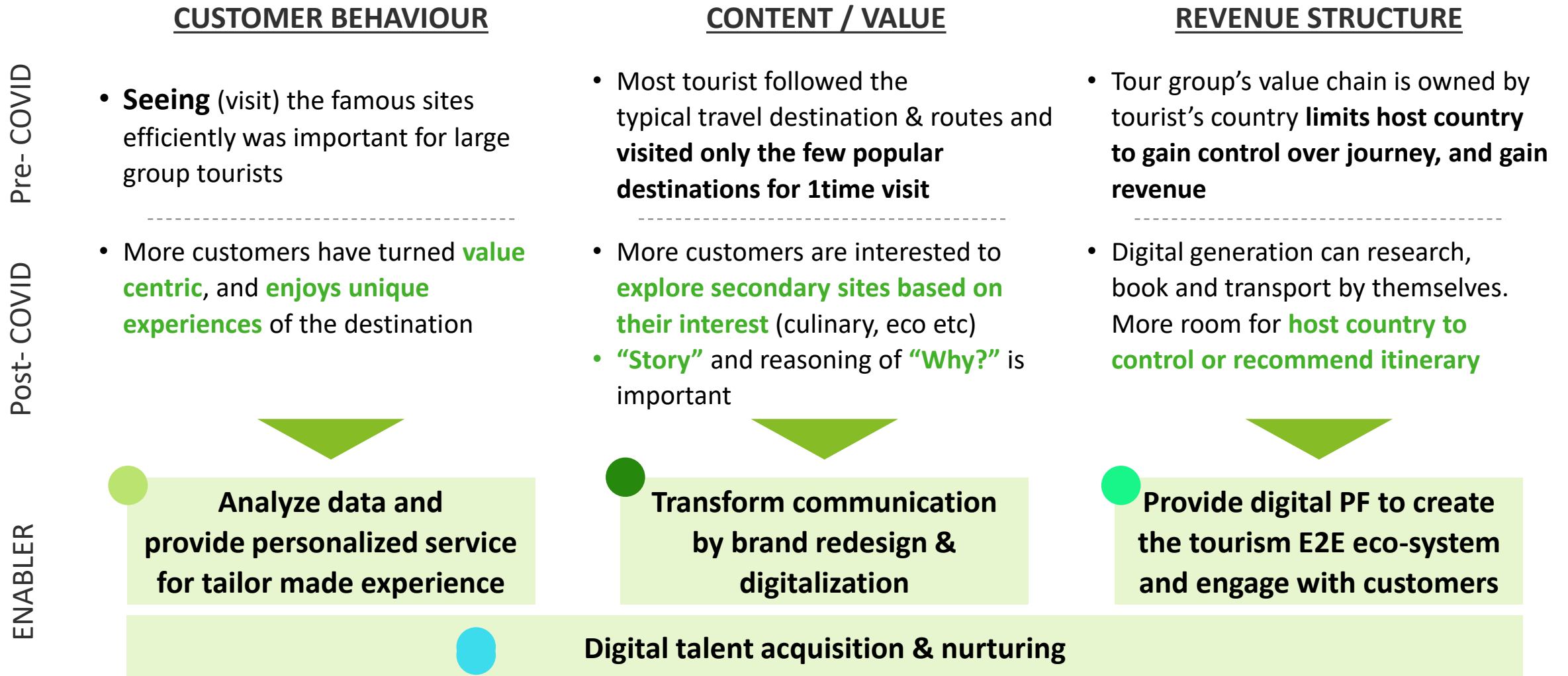
Trend of tourism (3/4)

Trend of receipt / per visitor



Trend of tourism (4/4)

In addition there were changes to customer behavior too. The destination country needs to be ready to host “Independent travelers” who can manage travelling themselves and/or prefer value centric contents during travelling.



cf) Pick-up voices from each country

In addition to the big common trend, each country have unique trends / challenges / iconic initiative to be shared

Malaysia already has many
skilful resource.
The headache is that many

イメージ

Issues or Key incentives that they are currently working
on を Pick up

For large tour groups, the **whole supply chain is owned by the host country** so destination country has limited control + limited revenue from them
- Thailand XXXX

2. Case studies of sustainable tourism

Rebranding a Theme park's website for a holistic user experience

マスキング作業中

Redesigning digital experience for the worldly famous transportation hub

マスキング作業中

Redesigning “experience” to generate new experience

マスキング作業中

Customer experience design to establish new tourism sites

マスキング作業中

3. Panel discussion

Panelists



Kasemsit Pathomsak

Merchant Partners Limited; Executive Chairman
Merchant Partners Securities Plc.; Merchant
Partners Asset Management, Merchant Capital
Pathomsak Holdings; President



Raja Hamzah Abidin

RHL Ventures
Co-Founder, Co-Managing Partner



Gan-Low Mei Leong

Iskandar Regional Development Authority
(IRDA)
Head, Economics & Investment



JP Representative

TBD

Key questions

Change in Customer Behavior

What are the key changes in customer behavior in your market ?
What are the key points when adapting to this change ?
What are/were the challenges ?

Change in Content/Value of Visit

How have the interest of customers changed ?
What iconic initiatives / tours are planned to accommodate this change ?

Change in Revenue Structure

How have the touch point with customers and revenue point changed ?
What are the counter measures ?
What are some challenges ?

Enabling Digital Resource

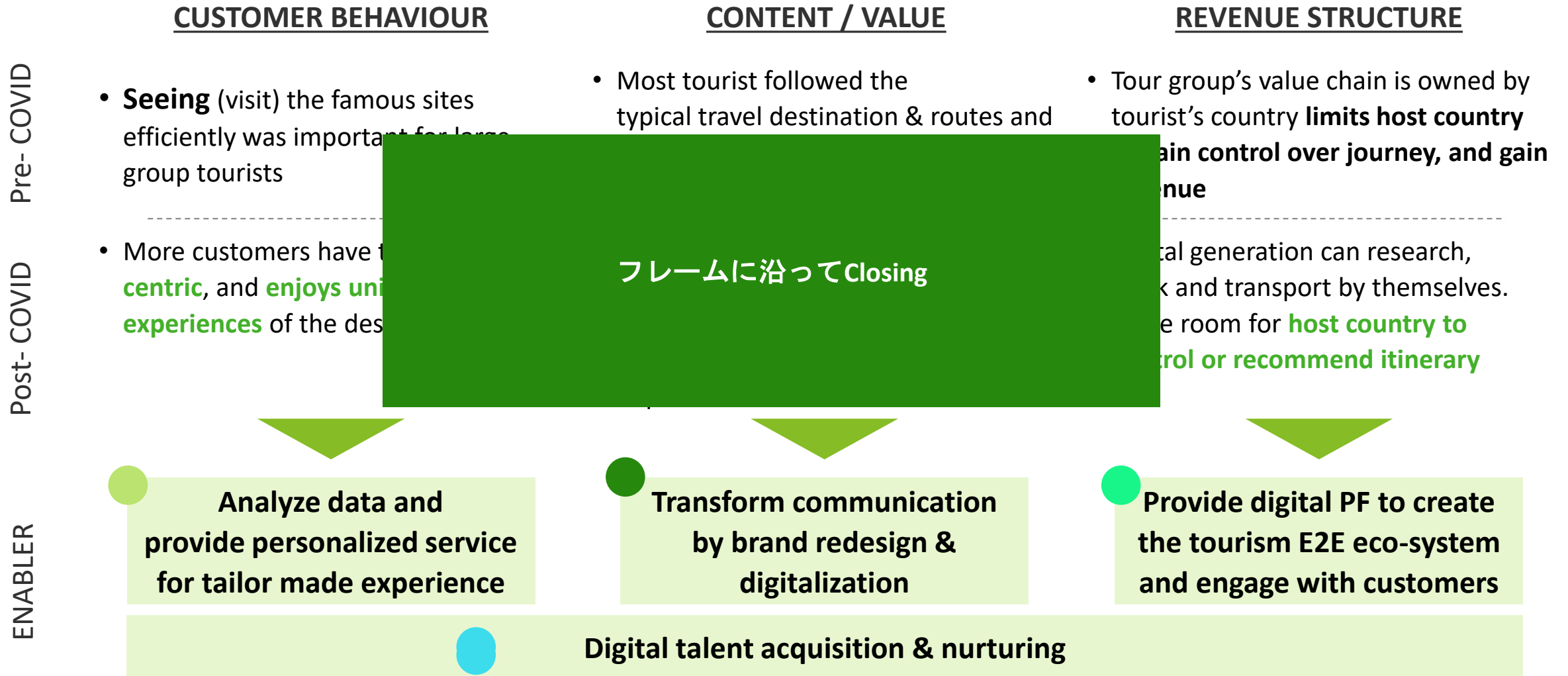
How can we prepare skillful digital resource to drive these initiatives ?
How should we educate ?

Accelerator (AJBM Collaboration)

How can ASEAN and JP countries collaborate to drive sustainable tourism in our markets ?

Key take aways

XX



How can we move forward together ?

ASEAN-JP 連携方法イメージの共有

Deloitte.