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SOUTHEAST ASIA AS A SINGLE DIGITAL MARKETING AREA: A CONTRIBUTION FROM TOURISM GLOBAL VALUE CHAINS

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Abstract: The article analyzes the possibility of making Southeast Asia a unified space of digital marketing by developing tourism global value chains (GVCs). On revealing major consumption trends in Southeast Asia, the authors discuss the extent of maturity of the digital consumer mindset in the region to finally turn to assessing the process of tourism GVC establishment and the expediency of supporting them digitally. In the authors' opinion, as the ASEAN member states have not built producer and consumer GVC in which only their enterprises would participate, the development of tourism GVC and their promotion by digital marketing tools is a logical and timely step. To substantiate, these GVC and digital tools to support them will pioneer the establishment a unified digital marketing area in Southeast Asia, which will bring a tangible consolidating component to intra-ASEAN cooperation and, consequently, the achievement of the objectives of ASEAN Economic Community 2025. Attempts to search for new consolidating components of intra-ASEAN cooperation in the year of the establishment of the ASEAN Community 2025, given that this project is work in progress, are timely and account for the relevance of the topic. The article concludes by considering implications of moving towards a unified digital marketing area in Southeast Asia for ASEAN-led multilateralism, which remains under-conceptualized in the scholarly literature.

Keywords: *Southeast Asia, ASEAN, integration, consumer trends, digital transformation, global value chains, tourism, digital marketing*

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Научная статья. Исторические науки

ЮГО-ВОСТОЧНАЯ АЗИЯ КАК ЕДИНОЕ ПРОСТРАНСТВО ЦИФРОВОГО МАРКЕТИНГА: ВКЛАД ГЛОБАЛЬНЫХ ЦЕПОЧЕК СТОИМОСТИ В СФЕРЕ ТУРИЗМА

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Аннотация: В статье проводится анализ возможности превращения Юго-Восточной Азии в единое пространство цифрового маркетинга посредством развития глобальных цепочек стоимости (ГЦС) в туристическом секторе. Выявлены основные потребительские тренды в Юго-Восточной Азии, рассмотрена степень зрелости цифрового мышления потребителей государств региона, дана оценка процессу формирования туристических ГЦС и целесообразности их оснащения цифровыми инструментами. С точки зрения авторов, поскольку страны АСЕАН не создали ГЦС, ориентированных на производителя и на потребителя, с участием только собственных предприятий, развитие ГЦС в сфере туризма и их продвижение при помощи инструментов цифрового маркетинга представляется логичным и своевременным шагом. Основная причина состоит в том, что такие ГЦС и цифровые инструменты их поддержки станут первым шагом на пути создания единого пространства цифрового маркетинга в ЮВА, тем самым привнеся ощутимый консолидирующий компонент в асеановское сотрудничество, а следовательно – достижение целей Экономического Сообщества АСЕАН до 2025 года. Актуальность темы определяется своевременностью поиска новых консолидирующих компонентов сотрудничества между государствами Ассоциации в год формирования Сообщества АСЕАН 2025, учитывая, что этот проект получит продолжение. Выводы статьи дают оценку последствиям формирования единого пространства цифрового маркетинга в ЮВА для асеаноцентричных многосторонних форматов, т.е. вопросу, который остается недостаточно глубоко проработанным в научной литературе.

Ключевые слова: Юго-Восточная Азия, АСЕАН, интеграция, потребительские тренды, цифровая трансформация, глобальные цепочки стоимости, туризм, цифровой маркетинг

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As the deadline for the establishment of the ASEAN Community is approaching, the association has to think about new milestone achievements to strengthen its position as a unified manufacturing and doing business area attractive to extra-regional companies. Against this backdrop, an important priority relates to making Southeast Asia a single marketing area as an enabler of the single market and the single production base.

In Southeast Asia, advanced digital commercial practices are in overabundance. As a result, the digital consumption has reached a maturity level. In light of that, a timely task is to carve out a new niche of intra-ASEAN digital cooperation with a strong unifying component. Arguably, the establishment of trans-boundary global value chains (GVC) in the tourism sector across Southeast Asia, as well as their digital support, might be an appropriate step.

Major Consumption Trends in Southeast Asia

Southeast Asia is an area of burgeoning commercial activity enabled by expanding consumption. Regarding the latter, long-term prospects are promising. This assessment is premised on several factors.

First, Southeast Asia has a demographic advantage, as its population is constantly growing. While 612.4 million people lived in ASEAN member states in 2013¹, their number increased to 676.6 million in 2023². The median age is slightly above 30³. In the decades to come, the number of middle-aged people (who are financially solvent and ready to expand consumption) will increase in overall terms⁴. It evidences that the anticipated increase in consumption is premised on a firm and, most importantly, an expanding basis.

Second, urbanization in Southeast Asia demonstrates an upward trend. According to the ASEAN Secretariat, 44.7% and 51.7% of the population of ASEAN member states lived in cities in 2010 and 2023 respectively^{5,6}. Generally, urbanization means a substantial change of consumption habits, with online shopping, from searching for products purchasing them, as an indispensable component of customer journey. Although there are disparities across Southeast Asia in terms of urban population share, as Singapore (100%) and Myanmar (30.4%) differ significantly⁷, nevertheless, the urbanization is a sustainable trend. One of indicators that substantiate this assessment relates to total fertility rate. From 2014 to 2023, it declined in all ASEAN countries⁸.

Mostly, ASEAN consumers are well-educated. According the World Bank, regarding the gross graduation ratio (tertiary, total), Singapore's fig-

ure accounted for 60.7% (as of 2022), while that of Laos' was 8.7% (2019)⁹. It means that they are increasingly choosy and have many sources of information about goods and services available.

Third, people in Southeast Asia have rising disposable incomes, although this indicator varies across the region. In 2024, while monthly income per capita in Singapore, Malaysia and Thailand was 5 957 dollars, 966 dollars and 560 dollars respectively, it accounted for 388 dollars, 331 dollars and 309 dollars in Indonesia, Vietnam and the Philippines respectively. For comparison, this indicator was 212 dollars and 1 117 dollars in India and China respectively that same year¹⁰. In the near future, intra-ASEAN income gaps are likely to remain significant, mostly, due to infrastructure and regulatory imbalances.

In this context, the marketing-related implications of the ongoing political trends must be discussed individually. On the one hand, Southeast Asia is a notable direction of China's Belt and Road Initiative (BRI). According to available estimates, the share of Southeast Asia in China's FDI within the BRI framework rose from 7% to 20% between 2013 and 2021¹¹. This is enforced by strong diasporas of ethnic Chinese in ASEAN member states, as well as increasing popularity of Chinese brands, retail chains owned by Chinese entrepreneurs, etc. Logically, it means growing influence of Chinese media figures, opinion leaders, actors, pop-stars, etc. On the other hand, the corporate sector of ASEAN countries aims to hedge risks resulting from the ongoing Sino-American controversy over trade and technology issues, because of which companies relocate their production units from China to Southeast Asia. For the latter, it means additional diversification of business, including marketing, competences. Simultaneously, since the association portrays Southeast Asia as a unified doing business area, it becomes a focus of increased attention of extra-regional companies, once again, with marketing-related implications. Each of these factors individually, not to say about them all collectively, makes marketing practices in ASEAN member states more comprehensive and diversified.

The unemployment rate in Southeast Asia is decreasing, although this process is uneven. From 2014 to 2023, the share of unemployed people in Indonesia and the Philippines fell from 5.9% to 5.3%, and from 6.8% to 4.6% respectively. At the same time, unemployment grew in Malaysia and Vietnam from 2.9% to 3.4% and from 1.9% to 2.1% respectively¹².

Due to the factors discussed above, Southeast Asia is a burgeoning area of commercial activity. This is vividly exemplified by the retail sector, as the phenomenon of retailtainment (a mixture of retail and entertainment) is omnipresent. Practically, it includes experiential shopping, a hyper-

personalization of buying process, and entertainment as an indispensable component of customer engagement. The final objective is to increase the customer retention rate. As a result, shopping malls offer entertainments of all sorts. Examples include, but are not limited to, Legoland (family amusement parks with rides, shows and attractions), Kidzania (a chain of entertainment centers that help children to understand the specifics of various professions), Cooking Studios (special classes for learning cooking techniques), etc. This trend will merit watching in the years to come, as it has ample chances to continue due to increasing urbanization and growing interest in these practices from both regional consumers and the corporate sector.

Southeast Asian consumers use a seamless approach to shopping. It means close attention paid not only to the product per se, but to the overall product-related ecosystem (how it is advertised, packed, delivered, etc.). Remarkably, among the most important considerations for online purchase in Southeast Asia, shipping, free returns and mobile apps for online shopping rank the highest¹³. The consumer journey is based on an omni-channel choice, as consumers find new information about products from social media, marketplaces and the word-of-mouth (82%, 50% and 30% respectively in 2024)¹⁴. For this reason, the online and offline advertising expenses of companies operating in Southeast Asia are more or less equal (51% and 49% respectively in 2023)¹⁵.

Remarkably, the consumption pattern “Better for You” is increasing in popularity across Southeast Asia. It includes a feedback for the consumer (better for the buyer due to the personalization of purchase), for the society (support for the local manufacturers) and for the planet (ecologically-free consumption). At present, 92% of millennials and Z-generation consumers are attracted to this practice¹⁶. More to the point, people are ready to pay a premium price for this consumption pattern. While at present mostly food and beverage, beauty and personal care, as well as health and wellness, are the focus of “Better for You” practices, within three or five years, fintech, edtech, travel and hospitality, and the car-making industry are expected to embrace them. This factor is exemplary of the high degree of consumption maturity in Southeast Asia.

All factors considered, it is fair to conclude that Southeast Asia is a promising consumption area with growing customer expectations and sophisticated buying and selling practices. An emphasis on a seamless shopping is likely to strengthen, as convenience-related factors matter a lot. Apart from functional characteristics, social implications grow in im-

portance. Ample evidence suggests that this trend will gain momentum in the years to come.

The Digital Transformation of Regional Consumption

Across Southeast Asia, the digital transformation is gaining momentum. It is seen at all levels, from projects and initiatives of economic regionalism, as well as increasing attention paid by the governments of ASEAN member states to digitalizing intra-country processes, to the grass-root perceptions. The latter include the digital transformation of consumption habits. Several factors are at play behind this trend.

First, social media and content platforms are growing in popularity. In fact, citizens of ASEAN countries spend more time in social media than people in other Asia-Pacific countries do¹⁷. In 2024, YouTube (blocked in Russia), Facebook (forbidden in Russia), Tik Tok (operates with restrictions in Russia), Instagram (forbidden in Russia), Twitter X (blocked in Russia) and LinkedIn (blocked in Russia) were the most popular social media and content platforms in Southeast Asia¹⁸.

Remarkably, e-commerce logistics is rapidly developing across the region. The present rise in interest is premised on expanding sales on marketplaces, increasing access to internet services, and rising consumer expectations about quick delivery. The corporate sector is receptive to these trends. Revealingly, Shopee has adopted a multi-dimensional approach to logistics, with convenience, affordability and flexibility as key components. It cooperates with carriers like Poslaju, J&T Express, operates its own Seller Center, develops Shopee Supported Logistics that integrates the platform and third party logistics companies for fast and reliable delivery. Another notable example is Lazada, a company that places a strong emphasis on cutting-edge technological solutions. Its logistics service, the integrated end-to-end logistics solution FBL (Fulfilled by Lazada), includes storing, packing and shipping to make its goods deliveries quick and convenient.

A supplementary, but a very important factor behind maturing digital experience of consumers across Southeast Asia relates to the development of smart cities. Their objectives include, but are not limited to, strengthening public security, improving the efficiency of public services, and increasing citizen engagement. Collectively, they are aimed at implementing advanced, sustainable and integrated solutions by combining technological and social innovations. Practically, it means smart urban governance, smart transportation systems, smart housing utilities, etc. Apart from individual examples, the ASEAN-wide initiative the ASEAN Smart City Network,

with an emphasis on producing comprehensive innovative urban digital solutions, has been implemented since 2018. As a result, consumers in ASEAN countries become increasingly familiar with digital devices as part of a broad and constantly expanding digital ecosystem.

Second, influencers of all sorts play a conspicuous role. In 2024, 55% of regional consumers (the average indicator of Thailand, Vietnam, Indonesia, Malaysia, Singapore and the Philippines) followed recommendations from influencers for making purchase decisions. Celebrities, mega- and macro-influences mattered the most, while micro- and nano-influencers played a secondary role¹⁹. Notwithstanding this, the impact of micro- and nano-influences who are oriented to MSME must not be underestimated, as MSME account for 97.2% – 99.9% of total establishments in ASEAN countries²⁰.

Third, emerging martech practices in Southeast Asia deserve mentioning. Regional marketers see martech as a tool to monitor the social media contents, trace the dynamics of consumer sentiments, make videos, banners, etc. There are multiple opportunities of using AI in Southeast Asia. In fact, the use of AI tools for producing the omni-presence effect, generating pictures, videos, music, predictive analytics based on the previous customer journey, etc. is commercially rewarding. Revealingly, 29% of Southeast Asia consumers (vs 21% globally) trust advertising generated by AI²¹.

A strong reason behind the digitalization of consumption practices in general, and of martech in particular, accounts for the expanding usage of augmented reality (AR) and virtual reality (VR) tools in the region. Shaped by a confluence of global technological megatrends and social processes in ASEAN member states, these tools have considerable commercial potential. According to available data, the expected annual growth rate of AR and VR revenue in Southeast Asia is 8.06% (the market volume is projected to be 1.9 billion) by 2029, while the number of AR and VR users is expected to be 296.7 million people²². There are promising AR and VR examples in retail startups in ASEAN member states, including Neso Brands, Argon, SKY Optimum, Castella, and AR Code²³. Brands and marketers try to use AR and VR tools to their full advantage, mostly, in shopping malls for interactive displays for trying on products, navigating offerings and walking through retail spaces virtually.

Although martech is gaining momentum, acute problems are in place. Suffice it to mention a damage to brand reputation due to possible plagiarism, hallucinations and prejudice of AI, breach of personal data safety, etc. Notably, regional marketers do not clearly understand how to use

AI tools. In their approach to martech, an emphasis on short-term gains to the disadvantage of long-term planning prevails.

In sum, the digital business practices across Southeast Asia are well developed and diversified. Because of this, the mentality of regional consumers is mature enough to be receptive to new and more advanced digital offerings, while regional producers are aware of this trend. Against this background, the digital marketing of tourism is a topic whose time seems to have come.

Tourism Global Value Chains and Their Digital Marketing Support: Assessing Main Implications

Southeast Asia is a popular tourism destination across the world. Although the number of visitor arrivals in ASEAN countries fell sharply in 2020 and 2021, it increased in 2022 and 2023 (although it did not reach the pre-pandemics level). According to the ASEAN Secretariat, the number of total visitors and intra-ASEAN visitors were 143.6 million persons and 51.7 million persons respectively in 2019, and 101.9 million persons and 43.2 million persons respectively in 2023. Thailand, Malaysia and Vietnam were most popular destinations with 28.150; 20.142 and 12.602 thousand visitor arrivals respectively in 2023²⁴. Tourism is an essential part of these visits.

ASEAN's interest in promoting tourism in Southeast Asia started in 1977 with the establishment of the Committee on Trade and Tourism. It was followed by the launch of ASEAN Tourism Forum in 1981²⁵. At present, this direction of ASEAN's policy is substantiated by many visionary documents, including ASEAN Tourism Strategic Plan 2016-2025, ASEAN Tourism Marketing Strategy 2021-2025, ASEAN Sustainable Tourism Toolkit, Guidelines on ASEAN Cultural and Heritage Tourism Travel Pattern and ASEAN Tourism Investment Portfolio, to mention the most illustrative examples.

ASEAN Tourism Marketing Strategy 2021-2025 outlines "Three Strategic Thrusts": to make the Southeast Asia brand story more compelling, to target a more selective set of markets and segment, and to sharpen the marketing delivery. Specific measure includes, among others, shifting more content creation to videos, aligning brands across channels, raising digital savviness and exploring new social media channels²⁶.

In the tourism sector, the ASEAN member states develop global value chains²⁷. This phenomenon relates to interconnected processes aimed at integrating efforts of suppliers, intermediaries and consumers of tourism services. The association attaches much importance to the development of

tourism-focusing GVC. Practical steps are made along two tracks. First, areas of tourism activity in ASEAN member states are developed. The construction of hotels and other tourism-related infrastructure objects is followed by building shopping malls, medical and recreation centers, supporting arts and crafts, etc. under the government supervision. Second, these practices are constantly expanded in order to embrace the whole Southeast Asia, with a simultaneous modernization of trans-boundary transport facilities, as well as areas of tourism-related competitive advantages of ASEAN member states (the festival tourism in Thailand and Indonesia, the ecological tourism in Laos and Brunei, etc.).

Arguably, the development of tourism GVC will possibly play an increasingly prominent role in the years to come. The reason is clear, as the implications are not only commercial, but also economic and social. The investment climate improvement, job creation, transport infrastructure modernization, a positive impact on social stability, the expansion of e-commerce, healthtech, insurtech, as well as other digitally enabled services, are likely.

Stating that Southeast Asia is a promising tourism area, while the association attaches much importance to increasing its attractiveness to visitors from the region and beyond, several considerations to give this collective effort an extra emphasis are timely.

First, it is expedient to strengthen traditional tracks along which tourism in Southeast Asia develops. For instance, the already mentioned festival tourism in Thailand and Indonesia, the ecological tourism in Laos and Brunei, as well as other directions, including medical tourism, must receive additional attention and support. No less importantly, ASEAN should concentrate on promoting professional tourism (as a function of enterprise-to-enterprise cooperation), the bleisure tourism (a synergy of business and leisure-oriented trips), sport tourism, etc. To increase the multiplier effect, these efforts must be synergized with traffic-generating events with an international resonance.

Second, AR and VR instruments must be integrated into efforts to promote trans-boundary trips across Southeast Asia. Individuals must be offered virtual journeys to pristine areas, demonstrated places of glory, etc. in various ASEAN member states. As a pioneer of this track, the Tourism Authority of Thailand offers virtual tours around Bangkok, Phuket, Chiang Mai and Surat Thani in an immersive format²⁸. Additionally, the development of regional traveltech startups, while selected examples are already operational²⁹, must be supported. These practices are on the track of sound progress. As the digital transformation of regional economic and social

processes gains momentum, they will increase in number and quality. Notwithstanding this, extra support is necessary.

Third and most importantly, the creation of digital marketing portfolios of ASEAN-wide tourism products, the upgrade of digital technologies of its marketing, the formation of pricing and brand management in the tourism sector, and the development of trans-boundary tourism GVC and their digital support are principal tasks. Smart tourism-focused R&D, personalized offerings, community management, peer reviews, digital innovations in supporting popular tourist destinations (for instance, based on AR and VR tools), as well as multi-field and multi-level platforms, databases and online aggregators of all sorts premised on client experience, are necessary. Additionally, forecasting the development of popular tourist areas by means of big data and socio-economic implications for those areas must be among ASEAN's major priorities.

Although these tasks are important, serious problems are in place. As the association encounters numerous developmental gaps, part of them relates to digital tourism. Specifically, digital tools aimed at fostering trans-boundary tourism flows are developed unevenly across the ASEAN member states. Lack of necessary competences is another problem to address. Since various ASEAN countries have different approaches to data localization, it hampers trans-boundary commercial activity, including that in the tourism sector.

Looking forward, global trans-boundary tourism GVC may be an appropriate direction of intra-ASEAN economic activity, since the ASEAN countries have not created producer GVC and consumer GVC in which only their enterprises would participate. In current circumstances, these GVC may be a good substitute for the missing types of GVC. Meanwhile, their digital support is within possibilities of Southeast Asian companies. If so, trans-boundary tourism and its digital marketing support might be a unifying agenda of real rather than declaratory cooperation between ASEAN member states.

Conclusions

The analysis of dynamics, state and prospects for developing digital marketing tools in the trans-boundary tourism exchanges in Southeast Asia in the context of consumption maturity and digital consumption habits in the ASEAN countries leads to several broad assessments.

Major consumption trends in Southeast Asia evidence that its consumers become not only more affluent, but also increasingly choosy. As exemplified by the regional retailtainment practices, the quality of goods

and services must be supported by supplementary factors, among which immersive experience and positive emotions matter all the stronger. Notwithstanding this, the consumption base is expanding, which makes South-east Asia an increasingly promising region from a commercial feedback perspective.

Concomitant with global trends, the consumer journey in the ASEAN countries is undergoing a profound digital transformation. At present, all the stages of the buying and selling process, from information search to post-purchase evaluation, include a digital component. As a result, digital consumption habits across the region are mature enough to be receptive to new and more sophisticated digital marketing practices.

As ASEAN does not possess GVC established and developed by enterprises of only its member states, the creation of GVC in the tourism sector is a timely step. The solution of this task has a solid foundation, as Southeast Asia is an attractive destination for both intra-regional and extra-regional tourists. It will lead to a single tourism area, the digital support of which will be maintained by Southeast Asian companies. The digital marketing dimension of this area will add an extra impetus to the digital transformation of tourism GVC.

In sum, the digital marketing as a tool for supporting ASEAN's efforts may be a new rationale for intra-ASEAN cooperation in order to make Southeast Asia a unified manufacturing and doing business area, as well as increase its commercial attractiveness. Even a partial achievement of this objective will produce a unifying effect on ASEAN-led projects and initiatives, to the best advantage of its member states, and strengthen ASEAN's international reputation. If so, it is both realistic and expedient to expect ASEAN's steps in this direction.

ИНФОРМАЦИЯ ОБ АВТОРАХ

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