



Surveys on ASEAN Community Building Effort 2012



one vision
one identity
one community



The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam. The ASEAN Secretariat is based in Jakarta, Indonesia.

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Background

The objective of this study is to provide knowledge for ASEAN to develop outreach strategies that can ensure the ASEAN Community Building initiative enjoys a more effective method of communications with both ASEAN general public and the business sector. In-depth interviews with industry associations and Civil Society Organizations (CSOs) as well as surveys from general public and the business leaders, were conducted in the capital cities of the ten ASEAN Member States. The study was divided into two phases:

1. Literature reviews on three pillars - ASEAN Political-Security Community (APSC), ASEAN Economic Community (AEC), and ASEAN Socio-Cultural Community (ASCC) - and in-depth interviews with 83 industry associations in 11 priority sectors and 161 CSOs in 8 groups as shown in Table 1 below:

Table 1: List of different verticals for Industry Associations and CSOs

Industry Associations - 11 verticals	CSOs - 8 verticals
Agro-based Products	Political and Legal System
Air Travel	Human Rights
Automotives	Environmental
e-ASEAN	Peace
Electronics	Education
Fisheries	Labour and Social Welfare
Healthcare	Healthcare
Rubber-based Products	Media and Others
Textiles and Apparels	
Tourism	
Wood-based Products	

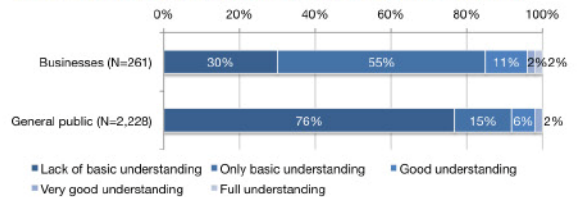
2. In-depth interviews with 261 business leaders in 11 sectors and surveys with general public comprised of 2,200 respondents split across the ten ASEAN Member States.

This study seeks to measure current effectiveness of ASEAN Community Building Efforts, issues and concerns to ASEAN citizens, as well as key communication channels for reaching key targeted audience. This report also includes recommendations on outreach strategies to develop an effective communication strategy for ASEAN Community.

Effectiveness of ASEAN Community Building Effort

Amongst the surveyed general public in the capital cities of the ASEAN Member States, while 76% lacks a basic understanding about ASEAN, 81% is familiar with the ASEAN name. In other words, only 19% has never heard about the ASEAN. The percentage significantly surpassed the expected public awareness. Meanwhile, businesses amongst these cities have relatively a better understanding with a handful of them in the process of preparing themselves with activities related to the promotion of ASEAN integration.

Figure 1: Level of Understanding about ASEAN Community



In terms of perceptions, businesses and the general public both perceive ASEAN integration as having positive impacts to ASEAN. Businesses express a view that AEC will improve the overall ASEAN economy and this will aid them in competing within the global arena. The general public, on the other hand, believe that the integration will create more employment opportunities and allow them to travel more freely within ASEAN. Furthermore, they believe moving towards ASEAN Community will help bring peace and security throughout the region.

However, there are some negative perceptions of ASEAN integration. Businesses and the general public are afraid that labour migration might be intensified to the extent that it could cause local employees to lose their jobs. Another concern is that local producers could face greater competition from companies of other ASEAN countries and beyond.

Issues and Concerns of ASEAN Citizens

Issues and concerns are mostly centered on the development gap. Many businesses and the general public are concerned with the differences in overall competitiveness. The majority of surveyed businesses perceived that the more developed countries would take advantage of the less developed ASEAN countries, culminating in high competition and a widening of the development gap, particularly among the CLMV countries - Cambodia, Lao PDR, Myanmar and Viet Nam. CLMV countries express concern that they will not be able to compete with other ASEAN countries, due to less development of infrastructure, limited technologies, and lower levels of education of their citizens.

“Amongst key success factors, free flow of goods and infrastructure development are considered the most important factors”

CSOs also offer what might be a valuable insights about environmental concerns from having excessive tourism after 2015. The integration will help attract more people from all around the world, not only ASEAN citizens. Excessive number of tourists may lead to undesirable levels of environmental damage. Some view this risk as being significant. This is the main area of concerns by the Designated Area for Sustainable Tourism Administration (DASTA) in which they are striving for more creative and low-carbon tourism in order to have a sustainable tourism industry for the entire ASEAN Community.

In terms of costs and benefits to the ASEAN citizens as a whole, many businesses view that multi-linguals, younger generation, and private-sector employees, and managers, are significant groups that will benefit most from the integration because they have the necessary skills and knowledge. From CSOs' perspectives, they also hold the view that younger generations have

more advantage because they are more flexible and adaptive to changes and new environments. CSOs also believe that there would be significant benefits for human development by raising the level of education for ASEAN citizens.

Amongst key success factors, free flow of goods and infrastructure development are considered most important factors to be able to compete in the global market. This is a view held by both businesses and industry associations. Free flow of goods, following the elimination of Non-Trade Barriers (NTBs) and trade facilitation is seen as one of the important policies for the AEC to create a genuine ASEAN single market. This would lead to all goods being traded in every ASEAN country with tariff exemptions. However, there are some concerns centered on an ability to manage product quality so that products could meet the accepted global standard.

This study also brings out opinions that, to be successfully achieving the implementation of a free flow of goods policy, the development of infrastructure is necessary to facilitate business needs for smooth logistic. This is seen by some respondents as a critical issue to be addressed. Poor infrastructure will likely impede economic growth and slow down other strategic developments. Thus, businesses and industry associations consider these key factors essential for achieving full ASEAN integration. The ten ASEAN countries currently have significant variations in their country's development stage and infrastructure sophistication. The ability to address these issues would determine the level of success after the integration.

When we look specifically at CSOs, they are typically concerned with the APSC for differences in legal systems and the ASCC in human rights, human development, development gap, and



social welfare areas. These are key challenges that need to be prioritised for a successful integration.

Sources of Information and Communication Channels

In terms of promoting awareness and receiving feedback about the ASEAN Community, the use of traditional mass media, such as TV and newspapers along with modern internet related channels (with support of social media) are considered key communication channels. Traditional media should be used to raise awareness and provide further source of information about the ASEAN Community. Modern channel, specifically the internet, should be used to provide support for disseminating more precise information, and tailoring messages to specific target groups. Another effective channel stated by respondents is public seminars. They can be used to get messages to local citizens in rural areas, particularly in CLMV countries. Public seminars, in addition, will provide ASEAN citizens with an opportunity to ask questions directly.

The internet is one of the preferred channels to communicate and receive feedback about the ASEAN Community, as people nowadays use the internet more often. This is true within businesses, where people spend more of their time online. The internet penetration in ASEAN is increasing rapidly, including in the CLMV countries. Internet is identified as an essential tool for providing information throughout the entire ASEAN region. A prerequisite for the internet is that ASEAN communication strategy makes full use of the ability to communicate to citizens in their local language, in addition to English - the official language of ASEAN. This will help to address and overcome language barriers that still exist.

Key challenges for an effective communication include infrequent intervals for promotional activities, inability to get the right message to



the right target group, and ensuring that the right channels are used for each communication message. Businesses feel that currently there is not enough promotional activities to stimulate interests and awareness available through the media. Part of this is probably due to messages not specifically created for that specific group. Business people prefer to have clear specific messages about ASEAN economic issues delivered to them. They feel that they are more familiar with these matters in which the impacts are more directly related to their every day life. In addition, both businesses and the general public feel that channels being utilised at present are not effective enough to reach extensive numbers within the target audience. This results in the low awareness about the ASEAN Community amongst ASEAN Member States.

As previously mentioned, language skills and level of knowledge are also important factors in creating a successful communication strategy, particularly within the CLMV countries. As ASEAN comprises a strong and diverse community, the communication languages need to be sufficient to meet the needs of all ASEAN citizens. Another important point of view expressed by the general public is the differences in the levels of education. This viewpoint is relatively high among CLMV countries. There is an implication that messages should be applied in different manners both for and within each ASEAN country. This will help ensure compatibility with the required communication style of local ASEAN citizens, both urban and rural.

Conclusion

The overall level of understanding for both businesses and general public is still low, because of a general lack of interest alongside an ineffective use of the available communication channels. However, it is good to note that the overall perception and attitude towards the ASEAN Community is positive. The general public's perceptions of ASEAN are mainly centered on peace and security issues, as well as improvement of economic conditions that would provide a better living standard and quality of life. Most people believe the integration will bring a brighter future both economically and mentally.

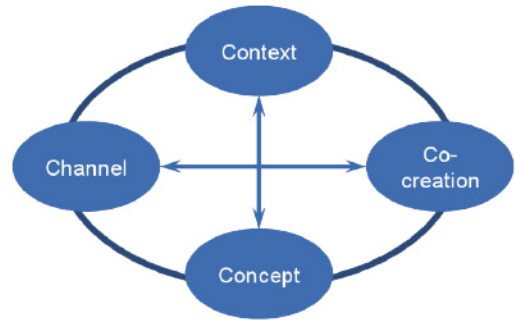
The preparation work for ASEAN integration done by businesses and the general public is rather minimal. Most surveyed businesses have never prepared any activities regarding the ASEAN Community or briefed their staff about the ASEAN Community and how it would link to their company's vision.

Traditional mass media are still vital for effective communication to both businesses and the general public. Internet channel is increasingly important for connecting to ASEAN citizens as well as being an effective communication channel for receiving feedback from the public. In addition to a perceived lack of frequent promotion of the ASEAN Community, language barriers and differences in the levels of education are given as potential threats to achieving comprehensive and effective communication between ASEAN and its citizens. As a result, communicating in local languages is highly recommended for use alongside the official ASEAN language. This will go some ways towards providing a clear and understandable message to ASEAN citizens in each country.

Recommendation

The recommended strategy employs the 4Cs framework to achieve effective communication between ASEAN and key stakeholders: Context, Concept, Channel, and Co-Creation.

Figure 2: 4Cs Framework



◆ Context

Language barriers and differences in educational level are clearly the main causes behind existing ineffectiveness in communication between ASEAN and its citizens. This results in low levels of understanding and awareness of the ASEAN Community. The recommended context for achieving effective communication strategy, therefore, should be under the banner of “One understanding in local language”. This is to create a unified and simplified understanding about the ASEAN Community. This context should not be limited to communicating in local languages only. The official ASEAN language should be used concurrently alongside local languages. It will take time for each ASEAN country to develop English proficiency levels that will allow English only communications to achieve the overall goal.

In addition, under the context of “One understanding in local language”, there are three key elements required to enhance the communication strategy:

1. to convey unfamiliar issues to become *closer-to-life* issues;
2. to move from a conceptual message to a *concrete* message; and
3. to demonstrate the real cost and benefit instead of a *nice-to-know* statement.

◆ Concept

The concept under the recommended context is to reach all ASEAN citizens with understandable

messages through effective communication channels in each country. With this concept, it is recommended to have common communication messages under an ASEAN communication platform. The common concept consists of three main components:

1. Basic understanding about ASEAN is mainly on the AEC while APSC and ASCC are regularly overlooked by ASEAN citizens.
2. ASEAN citizens' main areas of knowledge comprise the single visa, single market and the free flow of goods and services.
3. The most critical issue for ASEAN citizens as a whole is variation in level of competitiveness amongst ASEAN Member States.

However, each ASEAN Member State has different level of awareness and understanding, different concerns, and different critical issues, so the Concept needs to be expanded accordingly. There are three regional issues that need to be addressed:

1. Misunderstanding of people in Myanmar and Cambodia that skilled and unskilled labour will be allowed to move freely between countries.
2. Concerns of CLMV countries regarding their competitiveness within the ASEAN market given their large development gap.
3. English language deficiencies in ASEAN countries except Singapore, the Philippines, and Malaysia.

Furthermore, the communication messages need to be adapted to different types of audience. The key target audience can be divided into two groups - businesses and general public. Key messages will vary, according to their relevance to the target audience. In turn, the two groups of audience will pay more attention, as the messages will have real significance to them. The common issues and understandings for each target audience are as follows:

1. *Businesses* – a clear policy on the free flow of goods and services, differences in competitiveness among ASEAN Member States, and impact of the anticipated free movement of skilled labour
2. *General public* – bringing peace and security to all ASEAN citizens, improving the economic situation, and creating more job opportunities

◆ Channel

The right choice of channels is essential to relay messages to the target audience and achieve the most effective communication strategy. Both traditional mass media, such as television, newspapers and radios, should be used to create general awareness in combination with modern media like the internet to channel in-depth information to a more specific target group. Transmitting messages from CSOs and industry associations to their target groups is another important communication channel for achieving effective communication strategy since they have worked with their target groups closer than their national government, and have a comprehensive understanding of their needs. ASEAN should keep communicating with local CSOs and industry associations, given their effective connectivity with their target groups. Together with public seminars, this will be a particularly effective vehicle for communicating with CLMV countries and rural areas of other ASEAN countries.



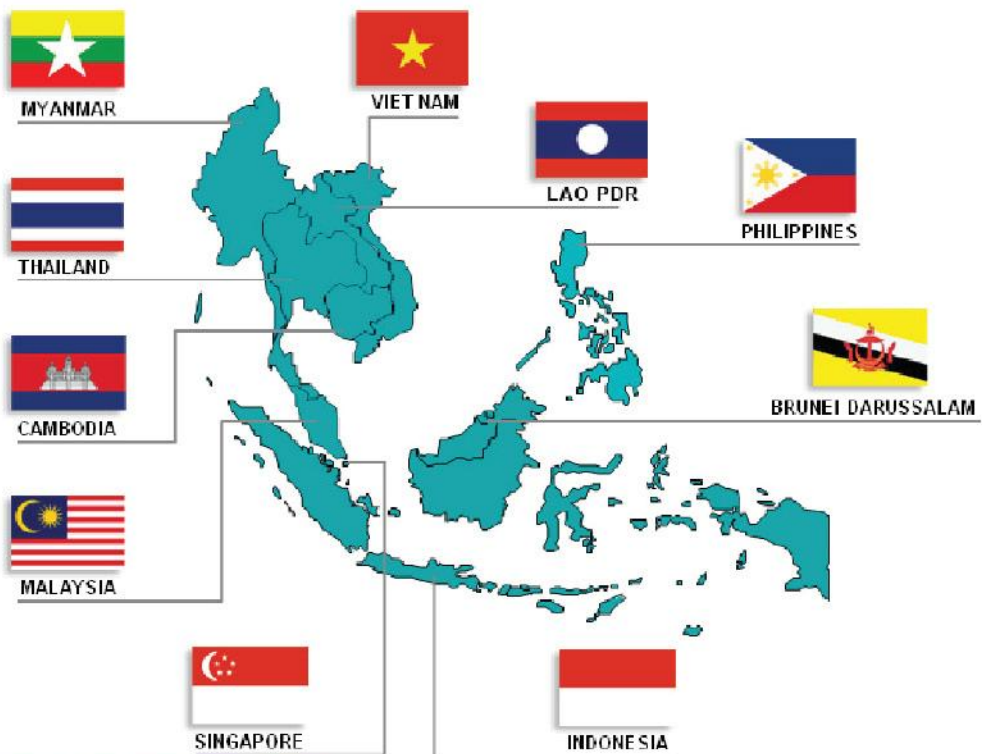
◆ Co-Creation

Last but not least, the collaboration amongst all stakeholders - Public & Government, Private, and People - within each country and among all ten ASEAN Member States is critical to successfully transmitting key messages to all ASEAN citizens. The recommended platforms to promote interaction amongst ASEAN citizens are social media and partnership with local CSOs and Industry association. Given differences in concerns and interests among ASEAN citizens, leveraging social media will give ASEAN greater flexibility to customise communications to each audience group in each ASEAN country. For instance, it may wish to create a facebook fan page to boost familiarity with local citizens in a specific area.

In summary, the recommended communication strategy for ASEAN Community building is to convey customised messages for each target audience group – businesses and the general public – observing a concept of common issues

and assumptions applying across all ASEAN Member States, as well as the development of country-specific communications that will provide “closer-to-life” messages to citizens in individual countries.

Communication strategy requires simultaneous execution at country level and at the overarching ASEAN level. As the bulk of current awareness relates to the AEC, that area should be the short-term focus for messages in order to maximise audience attention. In the longer term, messages relating to the APSC and ASCC should come into focus so as to complete a holistic view of issues relating to the ASEAN Community. Recommended key communication channels comprise both traditional media and the internet. Traditional media should be used for raising awareness of ASEAN and indicating further sources of information. The internet and social media should be used to provide more detailed information, and to create a two-way communication portal for ASEAN citizens.



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