

## Marketing Factors that Influence ASEAN Tourists Travelling

### Outside ASEAN Region: Case Study in Germany

#### ปัจจัยทางการตลาดที่มีอิทธิพลต่อนักท่องเที่ยวอาเซียนเดินทางท่องเที่ยว นอกภูมิภาคอาเซียนตะวันออกเฉียงใต้ กรณีศึกษาในประเทศเยอรมนี

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#### บทคัดย่อ

งานวิจัยนี้มีวัตถุประสงค์ในการศึกษา เพื่อ 1) ศึกษาระดับความพึงพอใจของนักท่องเที่ยวอาเซียนที่เดินทางท่องเที่ยวนอกภูมิภาคอาเซียนตะวันออกเฉียงใต้ และ 2) ศึกษาปัจจัยที่มีผลต่อการตัดสินใจในการท่องเที่ยวนอกภูมิภาคอาเซียนตะวันออกเฉียงใต้ โดยการศึกษาประกอบด้วยการวิจัยเชิงปริมาณและการวิจัยเชิงคุณภาพตามหลักวิธีการวิจัย ส่วนประสมการตลาด 7P's และทฤษฎี Voice of Customers (VOC) โดยมีการใช้แบบสอบถามและการสัมภาษณ์จากนักท่องเที่ยวอาเซียนที่เดินทางไปเมืองมิวนิค ประเทศเยอรมัน ในช่วงเดือนตุลาคมถึงเดือนธันวาคมปี 2557

ทั้งนี้ ผลการวิจัยแสดงถึงระดับความพึงพอใจและปัจจัยที่มีอิทธิพลต่อการตัดสินใจโดยแสดงระดับคะแนนสูงสุดในด้านหลักฐานทางกายภาพ เช่น ความปลอดภัย ซึ่งเป็นส่วนประกอบที่แสดงถึงความมั่นใจในคุณภาพของผลิตภัณฑ์ทางการท่องเที่ยว และยังกระตุ้นให้เกิดการท่องเที่ยวในภูมิภาคอาเซียนตะวันออกเฉียงใต้เพิ่มขึ้น

ข้อเสนอแนะเพื่อการนำไปประยุกต์ใช้ ผู้ที่เกี่ยวข้องควรมีการพัฒนาแผนงานทางการตลาดเพื่อส่งเสริมการท่องเที่ยว เช่น ในระดับภูมิภาค หรือระดับท้องถิ่น โดยพิจารณาปัจจัยด้านหลักฐานทางกายภาพที่ผู้บริโภคให้ความสำคัญสูงสุดเป็นส่วนประกอบในการสร้างกลยุทธ์เพื่อเพิ่มระดับความพึงพอใจของผู้บริโภค ทั้งนี้ การศึกษาในอนาคตควรมีการวิจัยทางการตลาดสำหรับตำแหน่งทางการตลาด การรับรู้ของนักท่องเที่ยวและกลยุทธ์ทางการตลาดเพื่อตอบสนองความคาดหวังของผู้บริโภคได้อย่างมีประสิทธิภาพ นอกจากนี้ ผู้จัดยังสามารถศึกษาในรายละเอียดหรือเจาะลึกเพิ่มขึ้นได้ เช่น การศึกษาการเพิ่มรั้งความพึงพอใจของในห้องเที่ยวในอาเซียน หรือ การกระตุ้นให้นักท่องเที่ยวอาเซียนกลับมาท่องเที่ยวในภูมิภาคอาเซียนและตะวันออกเฉียงใต้เพิ่มขึ้น เป็นต้น

คำสำคัญ: นักท่องเที่ยว อาเซียน The 7Ps of the marketing mix The Voice of Customer (VOC) level of satisfaction

#### Abstract

The purposes of this research are to study satisfaction level of ASEAN tourists who travel outside ASEAN countries and examine influencing factors that impact their decision to travel outside Southeast Asia. Quantitative and qualitative approach being used regarding research methodologies, the 7Ps of marketing mix and the Voice of Customers (VOC) with questionnaires and in-depth interview from ASEAN travelers who traveled in Munich, Germany from October to December 2014.



WMS Journal of Management

Walailak University

Vol.5 No.2 (May – Aug 2016): หน้า 68-76

The greatest influencing factors and level of satisfaction is a component of physical evidence such as safety, security and sanitation which is the outstanding element that ensures the quality of tourism product and motivates travels outside Southeast Asia region. Recommendations for implications, accomplice should consider establishing marketing plan and strategies in order to promote tourism in provincial area or local region base on physical evidence as mentioned to increase customers' satisfaction effectively.

For further research, it is an opportunity to conduct market research for product positioning, perceptual map and marketing strategies according to response customers' expectations more effectively. In other perspectives, researchers can study more in-depth and be more specific such as how to increase tourists' level of satisfaction in ASEAN countries, how to motivate intra-visitors to revisit in Southeast Asia.

**Keywords:** tourist, ASEAN, The 7Ps of the marketing mix, The Voice of Customer (VOC), level of satisfaction

**Paper type:** Research

## 1. Introduction

The study aims to understand travelers' influencing factors and satisfaction based on project assigned by Munich airport, Germany during internship program.

Tourism is an important economic activity in most countries as well as its direct and indirect economic impact, and induced impacts (WTTC, 2014b). For many countries, a significant source of income is tourism (Kasper, Helsdingen, & Gabbott, 2006, p. 38). In 2013, 9.5% of world GDP came from tourism activities, USD 7 trillion, and 4.7 million new jobs worldwide. It also generates national income, sustainable employment, investment and exports regarding economic development, and also increases level of social development such as preservation of cultural heritage, improves infrastructure and local community facilities (Blanke, J., & Chiesa, T., 2013)

In 2013, more than half of market share of international arrivals is in Europe with 51.8% (Federal Ministry of Economics and Energy, 2014, p.3). In Germany, number of international inbound tourists is more than 31 million which ranked 7th in the world. From 2009 to 2013, Germany arrivals increase with growth rate of 30% higher than France who has the highest number of arrivals with growth rate at 10% (The World Bank, 2015). Bavaria, federal state in Germany, is the most popular of overnight stays by foreign visitors with 22% (Federal Ministry of Economics and Energy, 2014, p.10). In 2014, by the Bavarian State Office (2015), number of international arrivals from Asia increases with 10.4% which is higher than average at 5.3%. Nevertheless other Asian countries grow at 15.1% as shown in table1.

**Table1:** Number of arrivals from Asia in Munich

Asia -- Arrivals	Number	+ - %
<b>Persian Gulf states</b>	176,276	11.9
<b>China &amp; Hongkong</b>	116,691	17.1
<b>India</b>	19,563	6.6
<b>Israel</b>	23,290	3.1
<b>Japan</b>	87,562	-6.9
<b>South Korea</b>	45,425	20.5
<b>Taiwan</b>	16,402	25.3
<b>Other Asian countries</b>	<b>94,186</b>	<b>15.1</b>
<b>Total Asia</b>	<b>579,395</b>	<b>10.4</b>
<b>Total international</b>	3,009,971	5.3

**Source:** The Bavarian State Office

On the other hand, regarding the Association of Southeast Asian Nations, or ASEAN consisting of Brunei, Cambodia, Indonesia, Lao, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam (ASEAN Secretariat, 2008, p.1), even though, the number of tourist arrivals in ASEAN countries increase every year, in figure1, the 1-year growth rate is continuously decreased from 12.3% of growth rate in 2010 to 10.1% in 2011 and to 9.8% in 2012. The tourist arrivals were 89,225 thousand arrivals in 2012 (ASEAN Secretariat, 2014) comparing with 617,165 thousand population of ASEAN countries in 2012 (ASEAN Secretariat, 2014).

In figure1, the growth rate of intra-ASEAN travelers had decreased from 8.4% in 2011 to 5.6% in 2012 (ASEAN Secretariat, 2014) and also impacted to the growth rate of total arrivals.



Source: ASEAN Secretariat, 2014.

**Figure1:** Rate of Growth of Tourist Arrivals to ASEAN by Group of Origin, 2010-2012 (in percentage)

It means the trend of tourist arrivals in ASEAN tends to continually decline (WTTC, 2014a), although the ASEAN National Tourism Organizations (NTOs) have attempted to promote tourism within their own regions (ASEAN Secretariat, 2012, p.10) under the theme "ASEAN for ASEAN". This impact on economic activity and new jobs in related industries such as hotels, restaurant, travel agencies, airlines business and other transportation services (excluding commuter services), and leisure industries directly supported by tourists (WTTC, 2014a).

Intra-ASEAN visitor is an important source of economic development and play a significant role to encourage greater intra-ASEAN people mobility (ASEAN Secretariat, 2012, p.10), therefore, to motivate ASEAN tourists to travelling in their own region, it is reasonable to investigate and understand which factors impact on the choice of destination and various dimensions of the travel experience and satisfaction. It is including the suggestions and managerial implications in order to increase the number of visitors travelling to Southeast Asia and visiting more than one country and develop the sustainability of Intra-ASEAN tourism services effectively.

## 2. Objectives

- (1) To study the level of satisfaction of ASEAN tourists who travel outside ASEAN countries.
- (2) To examine influencing factors that impact decision making to travel outside ASEAN countries.

## 3. Research instrument

The researcher conducts descriptive analysis, quantitative analysis and qualitative analysis method to provide different aspects of marketing factors that influence ASEAN tourists travelling outside ASEAN region in Germany.

## 4. Target sample, sampling procedure

The sample in this survey consists of ASEAN travelers, who travel in Munich, Germany from October to December, 2014. The entire sampling population of ASEAN people who travel outside ASEAN countries is too large; therefore a group of sample will be selected by a sampling size calculation from Yamane formula (Yamane, 1967) at 95% of confidential level,  $\pm 5\%$  precision. Systematic random sampling (Ken Black, 2014) is used for simplicity and periodic quality, in this case, by selecting every second person.

## 5. Data analysis

Data analysis is a process of evaluating data collected in order to find out results which address research assumption. For quantitative analysis, the descriptive statistical method has used in this research from questionnaires to investigate variables among observed and inferential analysis to make predictions of population from observation and analyze of a sample. For qualitative analysis, synthesis method has applied to understand the results from in-depth interview.

## 6. Literature review

In order to understand marketing factors that influence ASEAN tourists travelling in Southeast Asia region, this paper has studied documents, literatures, textbooks, and related researches. It is determined into three parts which are (1) the 7Ps of the marketing mix, (2) the Voice of Customer (VOC), (3) related research.

### 6.1 The 7Ps of the marketing mix

McCarthy, E.J. (1964) 4Ps of marketing mix is a realized concept of marketing theory. The modification of the 4Ps framework has mainly come from services sectors. Booms and Bitner's (1981) framework of marketing is extended from tangible product marketing to other areas of marketing especially for services industries. The 7Ps

framework has highly been accepted in widespread as a generic marketing mix (Rafiq & Ahmed, 1995).

#### 6.2 The Voice of Customer (VOC)

A process capturing customers' want and need is the Voice of the Customer (VOC). It produces a hierarchical set of customer requirements and expectation which prioritized choices, opportunities and issues relatively according to importance and satisfaction (Griffin & Hauser, 1993).

For tourism sector, gathering voice of traveler is crucial part of tourism services design and development (Gaskin, Griffin, Hauser, Katz, & Klein, 2011), in order to have strong components and significant outputs of design and marketing decision from tourism concept until making the concept into the reality services that fulfill travelers' requirements.

It also can be used as a technique to develop and improve products or services by collecting ideas from customers' want and in multi-sources platform focusing on their requirements and expectations through discussion or interview, surveys, focus groups, customer specifications, observation, warranty data, field reports complaints logs, and etc. (Burns & Bush, 2003).

#### 6.3 Related research

By Furukawa, Jin & Kamata (2012) examined the Evaluation of Japan as a Tourist Destination – Case of East Asian people who have been to Japan. Their preferences were firstly considered on the destination area and then the type of tour or contents.

Besides tourism destination and satisfaction, Salleh, Omar, & Yaakop, (2013) emphasized the importance of tourism industry to stimulate economic growth in Malaysia. The components that impact on travelers' decisions are scenery, culture, hospitality, local food and people. The level of tourists' satisfaction can be improved with continuous efforts due to impact on their attitudes to revisit the country.

Another study by Muala & Qurneh (2012) has found that four important impacts on tourist satisfaction are product, price, place, and person in the 7Ps concept. In Jordan, the tourists are satisfied by experienced the products with good quality, price and delivery of tourism products. Price competition will drive the tourists decide to buy other products in the same area or in another country. Employees with continuous training are well equipped and also with

using technology. Meanwhile, promotion, process and physical evidence are not significant.

### 7. Conceptual Framework

Based on the research and literature review of the 7Ps of the marketing mix and the Voice of the Customers, the paper has developed a model to examine in tourism service sector. The 7Ps concept is adopted as theoretical framework bringing all of the different components into the scope of study including people, product, price, promotion, place, process, and physical evidence in order to create marketing strategies and tourism products which are effective and aligned with accessible tourism needs. Furthermore, VOC is a tool to access and apply the 7Ps of the marketing mix to leverage perceptions, and find business opportunities, marketing program and reaction of tourism services.

Therefore, the framework of this research covers the 7Ps of the marketing mix as the scope of investigating customers' satisfactions and the VOC as the method to reach the customers, then the marketing strategies that influence ASEAN tourists travelling outside ASEAN countries as the outcome of the study.

### 8. Result Summary

Findings according to the objectives in this research are results from reviewing concerned literatures and then receiving voice of customer through questionnaire which is related to the 7Ps of the Marketing Mix.

#### 8.1 The influencing factors that impact decision making to travel outside ASEAN countries.

The influencing factors can be classified into seven categories regarding the 7Ps concept as shown in the percentage of respondents who answered in each choice relatively shown in table2.

**Table2:** The influencing factors

When I have chosen travelling country or destination, I mainly focus on _____?	Percentage
Cultural and Heritage Tourism	65.63
Nature-Based Product and Experience	53.13
Community-based experience	15.63
<b>Product1</b>	<b>33.59</b>
My travel interests concerns _____? Percentage	
Holiday period	62.50

Shopping	43.75
Sightseeing	53.13
<b>Product2</b>	<b>19.67</b>
The factors which I consider for the Budget plan are _____?	Percentage
Air Ticket	75.00
Accommodation	53.13
Travelling cost/Sightseeing	40.63
<b>Price2</b>	<b>39.06</b>
I most likely to get the travelling ideas and information from _____?	Percentage
Tourist center of the country	15.63
Tourism company or branches	18.75
Internet/ Social media	84.38
<b>Channel1</b>	<b>21.88</b>
I most likely proceed to use tourism services in following channels _____?	Percentage
Personal contact, face to face	34.38
24H-travel hotline service	15.63
Electronic distribution channels	65.63
<b>Channel2</b>	<b>38.54</b>
I most likely to feel excited or interested when I face _____?	Percentage
Advertising media eg. television, newspapers	28.13
Publicity and public relations	37.50
Sales promotions	53.13
Promotion	28.13
People who deal with tourism services (e.g. airlines, hotels) should have _____?	Percentage
Good country's knowledge	62.50
International language	56.25
Service mind	65.63
<b>People</b>	<b>51.79</b>
I consider Tourism services are well-planned and more convenient for tourists by _____?	Percentage
Accessibility	46.88
Quality of site management	50.00
Readiness for international tourism	37.50
<b>Process</b>	<b>35.42</b>
For physical evidence, I always think of travelling atmosphere in terms of _____?	Percentage
Safety, security and sanitation	87.50
Hospitable, friendly host atmosphere	43.75

Comfortable visitor services: food, toilets	62.50
<b>Physical evidence</b>	<b>48.44</b>

Source: Author's calculations.

According to product, most of travelers prefer to travel and focus on cultural and heritage tourism (65.6%), or natural-based product and experience (53.1%). However, in order to consider the tourism products or destination area, the travelers give priority to their interests for holiday (62.5%) and sightseeing (53.1%). Next regarding price or budget plan, air ticket is the most important factor (75.0%) when thinking of expenditure, followed by accommodation (53.1%). However, in table3, the travelers understand and accept the difference of living cost between countries in Europe and countries in Southeast Asia.

**Table3:** Comparison results from quantitative and qualitative approach

Component	Quantitative approach	Qualitative approach
Product	Cultural and Heritage Tourism Holiday period Sightseeing	Scenery and holiday period
Price	Air ticket Accommodation Travelling cost/Sightseeing	Traveling and living cost
Place	Internet/Social media for information Electronic distribution channels for processing services such as the Internet to deliver tourism services	Online
Promotion	Sales promotions such as gifts, discounts, competitions Publicity and public relations	Sales promotion, event, press
People	Service mind Good country's knowledge of attractions, transportation, etc International language: English, Chinese, Japanese, etc	Informative and suggestable, International communication
Process	Accessibility Reliability/quality of site management	Reliability/quality of site management Appropriate duration and capacity for carrying travelers Technology utilized
Physical evidence	Safety, security and sanitation Comfortable visitor services: food & beverage, parking, first aid, toilets	Travel atmosphere: safety and security

Source: Author's comparison.

For place or channel, nowadays, popular channel to communicate with travelers is internet or social media (84.4%) which give them the travelling ideas and information preferably. Moreover, electronic distribution channels (65.6%) such as internet to deliver tourism services are most useful for the travelers to proceed with tourism services as well. In terms of promotion or marketing communication, sales promotions (53.1%) such as gifts, discounts, or competitions have still been in travelers' interests and effective strategies to promote tourism. However, publicity and public relations (37.5%) are one choice of tourist's mind for integrated marking communication.

Next, almost all of choices in the questionnaire considerably deal with people who work in tourism area. It is important for these persons to have service mind (65.6%), good country's knowledge (62.5%) with international language (56.3%) such as English, Chinese, Japanese, etc and well qualified and trained interaction with customers. With considering process, tourism services should be well-planned and organized to serve travelers' needs. Reliability/quality of site management is considered to be the most important factor (50.0%) in terms of process to manage each part of tourism together. Lastly in physical evidence, safety, security and sanitation (87.5%) are virtual and essential to create travelling atmosphere obviously. It is also needed to arrange comfortable visitor services (62.5%) such as food & beverage, parking, first aid, toilets etc. to facilitate travelers.

#### 8.2 The level of satisfaction of ASEAN tourists who travel outside ASEAN countries.

In this study, the level of satisfaction can be divided into seven categories with four to six sentences by giving the range of score from one (1 if completely disagree) to five (5 if complete agree).

**Table4:** The level of satisfaction in the 7Ps of the marketing mix

Component	$\bar{x}$	S.D.
Product	3.52	0.97
Price	3.00	1.17
Place/ Channel	3.55	0.91
Promotion/ Communication	3.31	1.01
People	3.55	0.87
Process	3.61	1.00

Component	$\bar{x}$	S.D.
Physical evidence	3.83	0.84
All questions (7Ps) on average	3.48	0.91

Source: Author's calculations.

According to product result, ASEAN tourists have satisfied to tourism product higher than average (3.52). However, the travelers have felt lower than average in one product which is food and beverage (2.88) when they travel outside ASEAN countries. Overall satisfaction for price is in average (3.00), nevertheless, it is shown as the lowest satisfaction and only price for travelling or sightseeing (3.31) is satisfied higher than average. The others are equal or lower which means travelers have still felt unsatisfied in price of product and service, air ticket, accommodation, and food and beverage when going outside ASEAN countries. The level of satisfaction in place or channel to interact with ASEAN travelers (3.55) is higher than average and each item also such as a variety of channels (3.81), booking system with both internet or e-mail and call center (3.75), and channels to contact and receive tourism services (3.69). The travelers have satisfied with promotion especially in sales promotions (3.75). Furthermore, marketers are able to communicate to ASEAN tourists by using advertising (3.41) as well.

ASEAN tourists consider people who deal with tourism services are important (3.84) relating with restaurants/ food shops (3.50), tour guide (3.56) or tourism officials and accommodation (3.31). The level of satisfaction in process (3.61) is over than average with high score when comparing in seven factors of marketing mix. The processes are well-planned and convenient with good technology (3.84) and quality system (3.63) to manage capacity, accessibility, and connection. The highest satisfaction has shown in physical evidence (3.83). In tourism services, safety, security and sanitation are extremely significant both in physical evidence and in marketing mix. The rest are important as well, such as well-decorated places and good tourism atmosphere and surroundings.

Overall, ASEAN travelers satisfied with score 3.48 of 5. The influencing factor basically considered is physical evidence such as safety, security and sanitation.

## 9. Discussion

From analysis and summary, the result would be discussed according to the 7Ps of the marketing mix by component as described in the paragraphs followed.

In terms of product, the level of satisfaction is high and this result is same as discussing in literature review. Salleh, Omar, & Yaakop, (2013) who studied tourist satisfaction in Malaysia mentioned two decisions of travelers are scenery and culture which related to the result of influencing factors in product. Furthermore, their study has revealed local food is one of travelers' decisions. This study has shown the preferable products as the cultural/heritage tourism and natural-based experience by considering product or destination countries from their holiday period and interesting sightseeing as well. However, in this result, food and beverage get low satisfaction; it is probably because these elements do not involve in travelers' decision. So it is acceptable for unfamiliar food and beverage in certain period of travel.

Even though the study through tourists satisfaction by Muala & Qurneh (2012) has mentioned that tourists decide to experience the product with good quality in the same country or in another region mainly depending on price, in controversy, the result in this study has illustrated the travelers felt moderate satisfaction in price when they traveled outside Southeast Asia especially in air ticket and accommodation. It is probably because they understand and accept for the difference in cost of living. It is supported by Sereettrakul (2012) who studied the local and foreign tourists' satisfaction with Bangkok tourism marketing strategies; foreign tourists are more satisfied with price strategy in Bangkok due to lower cost of living. On the other hand, Thai tourists from outside Bangkok with lower cost of living feel just moderate for price of service.

Next, tourists have given high satisfaction in place which is convenient and comfortable with a variety of channels to giving information and tourism services especially using internet and electronic distribution channels. It is supported by Chen, Peng, & Hackley (2008) with the study of evaluating service marketing in airline industry that for many customers in airline industry a user-friendly website was an important pre-requisite in order to allow travelers to purchase ticket. It is likely come from the growing importance of the internet which is easier to reach and suits for modern lifestyle.

Sales promotions are exciting and tend to be able to influence tourists when making travel decision; however, in general, communication or promotion strategy is not gotten high satisfaction supported by Muala & Qurneh (2012) who studied the relationship between marketing mix and loyalty through tourists satisfaction in Jordan that only four components, product, price, place, and person, are significant. The reasons maybe come from unsuitable period of promotions between service providers and travelers.

Then, the result in people is quite interesting due to high satisfaction in overall questions and also in the question "People to connect with travelers are most important for tourism services". It means travelers pay attention to service employees and accords with Muala & Qurneh (2012). The employees need to be trained to know basic knowledge and service personality in their fields or area. It is probably because they directly interact to travelers and possibly make them an impression.

Process has high significant with tourists' satisfaction such as well-planned and convenient with good system, technology, and management. It is supported by Sarker, Aimin, & Begum (2012) that process is the second most significant element in their study. Including the result of interview, reliability/quality of site management, accessibility or connections, technology and community support are basic components to choose travelling destination. It is probably that process is one of the main drivers to perceive service quality and integrity of tourism services in achieving customers' expectation.

The physical evidence of tourism product is largely satisfied by travelers due to tangible attributes of the operations to ensure the quality of the product. It is supported by Asiegbu, Igwe, & Akekue-Alex (2012) concluding the effects of physical evidence on marketing performance. The safety, security and sanitation are tourism evidences with highest score of level satisfaction for positive relational and mentioned in in-depth interviews as one of their decisions. The reason is these elements give travelers confidence and ensures their life be happy and enjoyable aboard.

Overall, according to objectives in the study, satisfaction level of ASEAN tourists who travel outside ASEAN countries vary with components in the 7Ps of marketing mix which the highest score is in physical evidence with safety, security and sanitation as the most

significant influencing factors. As examined by Furukawa, Jin & Kamata (2012), the first consideration to plan oversea trip is destination area and followed by contents; however, this paper has contradicted to their study that all components are in different level of satisfaction and some elements, namely place, people, process, and physical evidence are more significant and satisfied than product. It should come from travelers having more choices of travels. Therefore, listening to the voices of customers helps businesses to understand what travelers' wants, in order to improve their strength and weakness through the 7Ps of the marketing mix. This is beneficial for all concerns to generate and develop activities among ASEAN countries to experience intra-visitors.

## 10. Suggestions

According to findings, this study has given suggestions into 3 views which are theoretical aspect, managerial implications and future research.

(1) Theoretical aspect, principles in this paper could be used as foundation or framework to study or research for constructing improvement or development plan in both educational and business sectors. It also can be used as model for travel service industry to increase customer satisfaction and improve their services.

(2) Managerial implications, all concerns in tourism services such as government, travel agents, etc. can use results in this paper regarding tourism factors and level of satisfaction to build marketing strategies and implementation plan. Tourism industry should consider physical evidence as the most important component to create satisfaction such as safety, security and sanitation atmosphere among ASEAN countries to ensure the quality of products. It is a critical gap to challenge management to develop regional standards when promoting the region. Furthermore, the processes or supply conditions in tourism services should be strategically prepared with suitability and availability for visitors with excellent planned system to provide conveniences and reach international tourism. Eventually, ASEAN people traveling outside their countries have to pay relatively high price to get high satisfaction in return. On the other hand, ASEAN countries should look into the opportunities for completing by improving quality of their tourism products, image, and trusts to increase confidence of travelers with competitively lower price. In accordance with marketing activities, sales promotion is an option to motivate people to travel in their

region. However, advertising and public relation are alternative materials to promote travel in Southeast Asia through social media or internet.

(3) Limitations and future research directions, even though this research has accomplished its objectives and made contributions to tourism services, some limitations are realized to improve for future research. First limitation to the scope of interest based on project to understand tourist's demand which was conducted during internship program. In order to cover more ASEAN tourists who travel outside their own region, the study should expand to other countries instead of specific only in Germany. Furthermore, in order to be more reliable and valid, method to distribute and collect data of questionnaires should be considered in various channels such as online survey, email, or website to achieve number of sampling size, sampling approach and target group. In addition, it concerns period of collection which should be gotten with respondents properly. Regarding this research's findings, it is an opportunity to conduct further market research for product positioning, perceptual map and marketing strategies according to response customers' expectations. It will make more specific and valuable contribution for tourism services that researchers can explore in other standpoints such as how to increase tourists' level of satisfaction in ASEAN countries, how to motivate intra-visitors to revisit in ASEAN countries.

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