

Regional Tourism Development in Southeast Asia

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Abstract: The purpose of this paper is to address the role of tourism to the regional economic development of Southeast Asian economies. The assessment was accomplished by investigating the state of tourism development and by determining the drawbacks of tourism industry existed in Southeast Asia. This paper also explores strategies required to develop tourism collectively in order to achieve gains through establishing favourable environment and mobilizing endowed strategic resources. The assessment suggests the need to give attention on formulating transparent objective, implementation and integration of these objectives into national plans, participation of community people, tourism entrepreneurship and co-operation and integration of governments in developing tourism. Successfully overcoming the difficulties of regional tourism development, Southeast Asian tourism industry has the potential to reap benefit from the economies of scale.

Keywords: Regional tourism, collaboration, policy, strategy, economies of scale, Southeast Asia

1. Introduction

The significance of regional tourism to the Southeast Asian nations is on the rise in recent decades as a development tool at regional and local level. Therefore, as assessment of regional tourism is required in understanding more insights with respect to the significance of tourism to the regional economic development of Southeast Asian economies. The specific purposes of this paper are three-fold: to examine tourism with respect to Southeast Asian regional economic development, to consider decisive factors that might encourage and slow down its development, and to draw implications from the analysis in an attempt to support tourism policy initiators in the region in the direction of further progress and development of this intangible industry. To attain the above mentioned objectives, the relevant points are structured into the following three concerns. The first part devoted to reviewing the general figure, pattern and performance demonstrating the importance of tourism at Southeast Asian regional level. Part two attempts to identify and explore several critical issues related to tourism development as a means for regional and economic development in the Southeast Asian region. And in the last part, emphasis is given in dealing with policy aspects to regional tourism development in the Southeast Asian context. In addition, the challenges and prospects of tourism in Southeast Asia are also addressed in this paper.

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There are existences of distinct literatures that addressed the relationship between tourism and regional development (Dimitrovski *et al.*, 2012); the significance of regional tourism development (Wang *et al.*, 2012); the role of tourism as an instrument for regional economic development (Kauppila & Karjalainen, 2012; Hall *et al.*, 2009; Müller & Jansson, 2007; Hall & Boyd, 2005; Blake & Gillham, 2001). However, despite Southeast Asian nations are giving continuous effort to develop cooperation of tourism (Wong *et al.*, 2011a) the studies related to ASEAN tourism collaboration attained little attention from the researchers (Wong *et al.*, 2011b). Most of the literature on ASEAN collaboration have emphasized on FTA in trading goods and services. As tourism yield valuable foreign exchange earnings to this region, a number of Southeast Asian economies, to a large extent, depend on income from tourism. Although significance of tourism is on the rise in Southeast Asia, there is a vibrant lack of research in the field of regional collaboration planning, policies and strategies. This paper, thus, attempted to fill the above research gap to progress our understanding on the dynamics of Southeast Asian tourism collaboration. This study bears significance, due to the fact that; Southeast Asian nations are vying for total-cooperation – socio-economic, geo-political collaboration – in order to attain sustainable economic development, in which tourism is an important component of consideration.

The studies of Rogerson (2004) and Chang (1998) mentioned that the greater expansion and economic impact of tourism rely on how countries within the region cooperate and support each other rather than competing. Regional development through tourism will be obvious and occur where regional countries are prepared to collaborate, cooperate and support as partners. The proposition is that developing countries compete with each other in terms of attaining competitive advantage on the trade and development of traditional commodities; which is found to be absent in the case of tourism. This prediction contradicts with tourism because the current trends of tourism since tourism products and attributes are unique in nature among countries of the world. Therefore, there is a scope for the countries to extend their cooperation when seeking development⁴ through tourism. Considering the significance of Southeast Asian regional tourism development, it is imperative to formulate a distinctive regional tourism policy; strategic development scenarios have been taken into consideration when formulating policies to overcome delicate areas on a priority basis.

2. Tourism and economic development

Immediately After the Second World War, tourism was considered to be an alternative industry for foreign exchange earnings to developed countries. Later, it became a tool of economic development for developing countries. It was only after 1970s when tourism started gaining recognition as a panacea for the developing Southeast Asian countries to mitigate their macroeconomic disparities. According to Erbes (1973), developing countries are increasingly giving emphasis on the earnings from tourism as the sector becomes a cushion and contributes to lessen the burden of foreign currency disputes. To a large extent, this view has widely supported by the respective stakeholders of tourism. Though the outcome of this particular debate was a matter of concern, since then, Erbes' point of view and research accrued attention of researchers (Mazumder *et al.*, 2011; Sinclair, 1998; Jenkins, 1994; De Kadt, 1979; Archer, 1976; Armstrong *et al.*, 1974; Archer *et al.*, 1974; Archer & Owen, 1971) who emphasized on the extensive

⁴ The term “development” described in this paper translates an improvement of existing quality of life and opportunities by encouraging tourism.

implications of tourism (for instance, its advantages, contributions, as well as limitations of tourism's development).

In recent years, tourism appeared as a vital sector for majority of less developed countries (LDCs) to achieve economic development (Sinclair, 1998) because of its strategic importance. For these economies, tourism sector is considered to be a priority based sector as a result of its positive externalities that bring benefits for their delicate economies as these countries are facing the problem of meeting the scarcity of resources necessary for economic development (Mazumder *et al.*, 2009). The necessity of these resources is critical for these economies as they are the key components for achieving economic growth while maintaining budget surplus. The lack of these scarce resources would force these countries to depend on few agricultural, traditional exports besides aid from external sources to expand their economic development. The apparent benefits that tourism contributes to these economies are, therefore, the reasons of why Southeast Asian nations' governments are giving rigid support for the development of this sector.

Economic benefits of tourism are typically appeared in a national economy at two levels; first at national or macro level and secondly at sub-national or micro level. When tourism is deemed to promote economic growth through foreign currency earnings, it contributes to a rise in state revenue at the first or micro level. At the second level or macro level, there will be an expansion in citizens' well-being in the form of income and employment generation. In turn, this will eventually help in the distribution of income and balancing regional development. Hence, tourism has appeared to be the engine of growth and development for many developing countries, and Southeast Asian nations are not an exception. According to Bryden (1973), De Kadt (1979), Blackman (1991), and Bull (1995), tourism should positively affect economic growth and development for several reasons. First, tourism yields foreign exchange earnings used to import not only consumer goods but also capital and intermediate goods. Second, tourism facilitates the utilization of resources that are in line with the country's factor endowment. Third, tourism creates employment opportunities in the economy. Fourth, tourism promotes improvements in the country's infrastructure. Fifth, tourism serves as the conduit for transferring new technology and managerial skills into the economy. Finally, tourism has the potential for creating positive linkages with other sectors of the economy; particularly agriculture, manufacture, and other service industries. Considering all the above socio-economic attributes of tourism, it can be defined as an industry even though the sector does not exhibit unique production feature or fall into a particular sector.

Before proceeding to the further issue, it is important to mention that, when there is a rapid increase in the demand for tourism, besides enhancing linkages with other sectors in the economy (Mazumder *et al.*, 2009), it may develop some negative consequences in the form of economic, social, cultural and environmental costs. A well-managed tourism industry has the potential to minimize these consequences and maximize economic development.

However, it is essential to note that tourism is more than an economic activity (Dieke, 2003). It not only allows substantial interaction of people but also demands variety of services. To facilitate tourists', tourism sector requires facilities, and inputs. These requirements produce opportunities and challenges for the country offering tourism services in order to promote tourism. For these reasons, it is vital for the host country to effectively manage the growth of tourism sector. In addition, when managing this sector, it is essential to maintain precise strategic framework in order to confirm that the growth arising from tourism

is well-suited with the national objective while it encompasses the sectoral and national agenda. In this regard, policies that provide guidelines and the references which seek improvement of tourism sector are in need of periodical evaluation. It must be taken into consideration that tourism development produces burdens when local residents are unable to enter into the facilities and services built to serve tourists. Correspondingly, tourism development often receive criticism for worsening societies embedded problems which can be ranged from dismantling patterns of the society to destructing cultural and custom values the society (Dieke, 2003). In tandem, it also suppresses the neo-colonialist associations of exploitation and dependence from the environmental side while it creates inflationary pressure from the economic aspect (Dieke, 2003). When merits outweigh demerits of tourism development, it is considered acceptable whatever the positions of tourism development.

To focus on more reasonable observations, this article aimed to investigate the tourism development issues related to explicit structure pertaining to international tourism covering the state of Southeast Asian tourism outlook. It also analyzes the key factors that are influencing tourism development in Southeast Asia. The analysis will render policy directions necessary to take into account before Southeast Asian tourism researchers and policy makers take major decision to the corresponding field.

3. The growth of regional tourism

While world tourism has been growing at around 4% rate over the years since 1990, this growth has not been equally dispersed among the regions of the world. Tourists from North America and Europe have been contributing the significant portion of arrivals and tourists originating flows (Table 1). The rate of growth of recently industrialized countries of Southeast Asia has been increasing very fast as a result of economic development of those countries and diversification of world tourism destinations.

Table1. International tourist arrivals by region, 1990-2010

Region	Million arrivals				Market share (%)				Growth rate (%)		Ave. annual growth (%)
	1990	2000	2005	2010	1990	2000	2005	2010	90/00	00/10	90-10
Africa	14.8	26.2	34.8	49.7	3.40	3.89	4.36	5.29	7.70	8.97	11.79
Americas	92.8	128.2	133.3	150.7	21.33	19.02	16.68	16.03	3.81	1.76	3.12
Asia and the Pacific (except Southeast Asia)	55.8	110.1	153.6	204.4	7.95	10.98	13.15	14.31	9.73	8.56	13.32
Europe	261.5	385.0	440.7	474.8	60.11	57.12	55.16	50.51	4.72	2.33	4.08
Middle East	9.6	24.1	36.3	60.3	2.21	3.58	4.54	6.41	15.10	15.02	26.41
South-East Asia	21.2	36.1	48.5	69.9	4.87	5.36	6.07	7.44	7.03	9.36	11.49
World	435	674	799	940	100.0	100.0	100.0	100.0	4.81	4.60	7.02

Sources: World tourism organization, tourism market trends – 1990-2001; and revised updates released in 2011.

At present, about 67% of all international travellers visit a country in either Europe or North America. In 1950, 97% of international tourists went to Europe or North America (in fact, to just fifteen countries). In 1999, more than seventy countries received over a million international tourist arrivals. By 1999, the top fifteen tourist-receiving countries experienced their share decrease to less than two-thirds and some

traditional top destinations have been replaced by newcomers from Asia and Central /Eastern Europe (Neto, 2003). By 2000, the share of Europe and North America had decreased to 76.12%. In the mid-1970s, 8% of all international tourists visited East Asia and the Pacific. By the mid-1990s, the share of East Asia had risen to 15%. Globalization has also assisted in altering the dimension of tourism destinations while most of the benefits are accumulated by the Asia Pacific and Middle Eastern countries. In 1950 the top fifteen destinations of the world accounted for 97% of foreign visitor arrivals; in 1970 their share was 75%; in 1990 67%; in 2001 it had declined to 62%, and in 2011 their share was about 55%. While top tourism destinations were losing their market, the share of Asia and the Pacific continued to increase over the years revealed from table 1. According to World Tourism Organization, the share of international tourists travelling to Asia and the Pacific raised from just 1% in 1950 to 22.1% in 2011.

In a nutshell, the above trends of tourism can be explained by two trajectories. First, an overall rearrangement of world tourism activity appeared from which some regions are reaping the benefits of tourism development more than the others. These regions are experiencing comparatively higher geographical attention - both in terms of tourist arrivals and tourism receipts. The expansion of tourism to these regions also highlights the competition that exists and increased remarkably. The second explanation is that tourism in Southeast Asia has been experiencing a reasonably significant revival of tourism growth since 2000. Although this change in pattern does not necessarily mean that the region is at the optimum of controlling considerable share of total tourism market that might raise a number of questions. To be in the safe side, however, it would be interesting to investigate Southeast Asian tourism's up to date situation before making further comments.

4. Southeast Asia's international tourism: regional context

Southeast Asia is comprised of ten countries and most of the countries are endowed with islands blessed with natural flora and fauna. Tourism development in Southeast Asia has reached to a prodigious level due to new and rapidly changing opportunities of tourism that attract tourists' the most. Southeast Asian countries are endowed with improved tourist resources and attractions which are allowing these countries to present comparative advantage than others. These tourists' resources and attractions consist of several items, for instance, attractive beaches with pristine blue water, sunny and warm weather, inimitable tropical and wildlife a mixer of exotic and distinctive cultures. Southeast Asian nations have political boundaries but strong links in geographical, cultural, historical, archaeological and social similarities. A recent study (Chang, 1998) revealed that regional borders of APEC economies are flexible which is the result of cultural links exist with this economies. These countries also possess historical ties and trading interests which helped Asia-Pacific economies extend economic activities over APEC boundaries. A 'conventional [discriminatory] free trade area', in contrast, would provoke political stress between nations which may diminish growth of developing economies of Asia which are in transition (Garnaut, 1996). Therefore, an aggregated tourism development would be helpful for further progress of this region. Several types of tourism attractions are available in the Southeast Asian region that are complementary in nature, for which, if these economies develop tourism in an aggregated manner, the region will be an ideal place for huge turnover of tourist arrivals.

In summary, the scope and impact of international tourism in Southeast Asia has been explaining that Southeast Asian nations are benefiting most from the global redistribution of tourism pattern. Despite the

impact of SARS, Tohoku earthquake, tsunami in this region, Asia and the Pacific has outstripped the Americas in terms of international tourist arrivals and receipts in the year 2011 and established itself as the most popular destination after Europe. If we look at sub-regions of Asia and the Pacific, the highest growth of 10% increase in international tourist arrivals is found for the Southeast Asian nations, translating that these nations are benefiting from strong intra-regional demand. Most of the Southeast Asian nations experienced a double-digit growth including Myanmar (26%), Thailand, Cambodia (20%), and Vietnam (19%), Singapore, Brunei Darussalam (13%), and Philippines (11%).

The growth in the distribution of tourist arrivals by each of the Southeast Asian country during 2001-2011 is as follows (see Table 2). During the period in concern Malaysia received the highest number of visitor arrivals (203.2 million) followed by Thailand (145.5 million) and Singapore (93.8 million). Other countries share of visitor arrivals are Indonesia (62.7 million), Vietnam (35.8 million), Philippines (29.9 million), Cambodia (16.8 million), Lao PDR (13.5 million), Myanmar (2.5 million), and Brunei Darussalam (1.7 million). A pattern of tourism development can be observed from the above outline. Malaysia generated more than three times tourists' arrivals than Indonesia which experienced fourth largest tourist arrivals. Thailand also received more than two times visitor arrivals than Indonesia which is the largest country in Southeast Asia. In 2004, Malaysia conceded the most visited destination (as mentioned in Table 2), which attained 31% of total tourists arrival, subsequently neighbouring countries of Malaysia, Thailand (23%) and Singapore (16%). Malaysia has always experienced largest number of visitor arrivals throughout 2001-2011 among the Southeast Asian nations. In 2011, out of 79 million visitors, ASEAN 5 (Indonesia, Malaysia, The Philippines, Singapore and Thailand) received 67.6 million tourist arrivals while BCLMV (Brunei Darussalam, Cambodia, Lao PDR, Myanmar, Viet Nam) 11.4 million tourist. But the rate of arrivals growth is larger in BCLMV groups (8.57%) than ASEAN 5 (7.98%) during 2010-2011.

Table 2. Visitor arrivals by country of destination, 2001-2011 (in million)

Destination	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Brunei	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.2
Cambodia	0.6	0.7	0.7	1.0	1.3	1.6	1.9	2.0	2.0	2.4	2.6
Indonesia	5.2	5.0	4.5	5.3	5.0	4.9	5.5	6.2	6.3	7.0	7.8
Laos	0.2	0.2	0.2	0.4	0.7	1.2	1.6	1.7	2.0	2.5	2.8
Malaysia	12.8	13.3	10.6	15.7	16.4	17.5	21.0	22.1	23.6	24.6	25.6
Myanmar	0.2	0.2	0.2	0.2	0.2	0.3	0.2	0.2	0.2	0.3	0.3
Philippines	1.8	1.9	1.9	2.3	2.6	2.8	3.1	3.1	3.0	3.5	3.9
Singapore	5.9	5.9	4.7	6.6	7.1	9.8	10.3	10.1	9.7	11.6	12.1
Thailand	10.1	10.9	10.1	11.7	11.6	13.8	14.5	14.6	14.1	15.9	18.2
Vietnam	1.6	1.8	1.7	2.0	2.4	3.6	4.2	4.2	3.7	5.1	5.5
ASEAN	38.5	40.0	34.7	45.3	47.4	55.7	62.5	64.4	64.8	73.1	79.0
ASEAN 5	35.8	37.0	31.8	41.6	42.7	48.8	54.4	56.1	56.7	62.6	67.6
BCLMV	2.7	3.0	2.9	3.7	4.7	6.9	8.1	8.3	8.1	10.5	11.4

Source: Euromonitor International from World Tourism Organisation (WTO)/national statistics.

Table 3 represents the amount of tourism receipts obtained by Southeast Asian nations. The total tourism receipts of Southeast Asian nations were amounted to \$73.5 billion in 2011. Out of this total, available tourism receipts earned by ASEAN 5 were \$70.70 billion against BCLMV countries tourism receipts of \$2.80 billion. The pattern of receipts is almost similar (as indicated in Table 2), with Thailand the leading earner (28.84%), followed by Singapore (27.34%), and Malaysia (25.58%). However, although Indonesia and Vietnam attracted considerable numbers of tourists, The Philippines, Cambodia, Lao PDR, Brunei Darussalam, and Myanmar has the potential to earn more from tourism.

Table 3. International tourism receipt of Southeast Asian nations, 2001-2011(in billion \$)

Destination	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Brunei	0.10	0.10	0.10	0.20	0.20	0.20	0.20	0.20	0.30	0.30	0.30
Cambodia	0.40	0.50	0.40	0.60	0.80	1.00	1.10	1.20	1.20	1.30	1.40
Indonesia	5.30	5.30	4.00	4.80	4.50	4.40	5.30	7.40	5.60	7.00	7.70
Laos	0.10	0.10	0.10	0.10	0.10	0.20	0.20	0.30	0.30	0.40	0.40
Malaysia	6.90	7.10	5.90	8.20	8.80	10.40	14.10	15.30	15.80	18.30	18.80
Myanmar	0.10	0.10	0.10	0.10	0.10	0.00	0.10	0.10	0.10	0.10	0.10
Philippines	1.70	1.80	1.50	2.00	2.30	3.50	4.90	2.50	2.30	2.60	2.90
Singapore	4.60	4.40	3.80	5.30	6.20	7.50	9.10	10.70	9.40	14.20	20.10
Thailand	7.10	7.90	7.90	10.00	9.60	13.40	16.70	18.20	16.10	20.10	21.20
Vietnam	0.30	0.30	0.30	0.40	0.50	0.50	0.60	0.60	0.60	0.60	0.60
ASEAN	26.60	27.60	24.10	31.70	33.10	41.10	52.30	56.50	51.70	64.90	73.50
ASEAN 5	25.60	26.50	23.10	30.30	31.40	39.20	50.10	54.10	49.20	62.20	70.70
BCLMV	1.00	1.10	1.00	1.40	1.70	1.90	2.20	2.40	2.50	2.70	2.80

Source: Euromonitor International from World Tourism Organisation (WTO)/Eurostat/national statistics.

The contribution of tourism as percentage of GDP is found to be higher in most of the ASEAN 5 countries than BCLMV countries during the period of 2001-11 (Table 4). Important to note that the contribution of tourism receipts to GDP of Cambodia, one of the BCLMV countries, was found to be significantly higher compared to individual ASEAN 5 countries GDP contribution. It is imperative to note that the contribution of tourism to GDP of BCLMV countries was almost similar to ASEAN 5 countries during 2005-06. However, not much diversity exists in terms of tourism contribution to GDP between ASEAN 5 and BCLMV countries. Therefore, it can be concluded that regional disparities are minimally present between ASEAN 5 and BCLMV blocks. The importance of tourism earnings is appeared to be critical for both regions of ASEAN. Thus, countries of both blocks will be benefited immensely if there is an existence of strong co-operation between the countries. The correlation between tourists' arrivals and tourism receipts are also found to be positively related to tourism contribution to GDP.

Table 4. Contribution of tourism receipts to the GDP (%) of Southeast Asian nations, 2001-2011

Destination	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Brunei	1.8	1.7	1.5	2.5	2.1	1.7	1.6	1.4	2.8	2.4	1.83
Cambodia	10.0	11.6	8.5	11.3	12.7	13.7	12.8	11.5	11.5	11.6	10.94
Indonesia	3.3	2.7	1.7	1.9	1.6	1.2	1.2	1.4	1.0	1.0	0.91
Laos	5.9	5.6	5.0	4.2	3.7	5.7	4.8	5.7	5.4	6.0	4.88
Malaysia	7.4	7.0	5.4	6.6	6.1	6.4	7.3	6.6	7.8	7.4	6.53
Myanmar	1.5	1.5	1.0	0.9	0.8	0.0	0.5	0.3	0.3	0.2	0.17
Philippines	2.2	2.2	1.8	2.2	2.2	2.9	3.3	1.4	1.4	1.3	1.29
Singapore	5.2	4.9	4.0	4.7	4.9	5.2	5.1	5.6	5.0	6.1	7.57
Thailand	6.2	6.2	5.5	6.2	5.5	6.5	6.8	6.7	6.1	6.3	6.13
Vietnam	0.9	0.9	0.8	0.9	0.9	0.8	0.8	0.7	0.6	0.6	0.49
ASEAN	44.5	44.3	35.1	41.4	40.6	44.1	44.2	41.4	41.9	42.9	40.7
ASEAN 5	24.4	23.1	18.3	21.5	20.3	22.1	23.7	21.8	21.3	22.1	22.4
BCLMV	20.1	21.2	16.7	19.8	20.3	22.0	20.5	19.6	20.6	20.8	18.3

Source: Euromonitor International from national statistics/Eurostat/OECD/UN/
International Monetary Fund (IMF), International Financial Statistics (IFS)

5. Consolidation of the facts

As tourism is contributing significantly over the years to the Southeast Asian countries economic development, therefore, it becomes intuitive to investigate Southeast Asian regional countries tourism industry. This investigation is important for at least two reasons. At first, for the last three decades or so, this region is experiencing remarkable regional economic cooperation among ASEAN nations. Second, tourism is considered as a tool of comprehensive thought in the regional development and strategic planning since the region possesses one of the major tourism destinations in the world. Ghimire (2001) postulated that Southeast Asian nations view tourism as an important industry in generating foreign exchange earnings, income, and employment. The facts and figures are presented in this paper confirm a number of conclusions. First, the statistics presented above illustrate the state, extent and pattern of international tourism in Southeast Asia. It also addresses the importance of tourism to the associated countries of Southeast Asia. It is clear from the scenario that Southeast Asia's tourism is heavily driven by the augmented economic development of its associated countries. Secondly, the extent of tourism development in Southeast Asian region varies considerably among the member countries where some countries, to some extent, have achieved efficiency in tourism development and are dominating over the other late starters in the theoretical field of tourism development. A number of Southeast Asian countries (e.g. Thailand, Singapore, Malaysia and Indonesia) have been appeared as successful tourism destination where tourism products are comparatively well-established. On the other side, countries, such as The Philippines, Viet Nam, Cambodia, and Myanmar have enormous potential for developing their tourism industry although, up till now, tourism development to these countries is still at its infancy. Thirdly, the scenario illustrated above also highlights the approximate explanations of why tourism development in some countries of Southeast Asia attained substantial attention than others.

One explanation of the rise of tourism development in Southeast Asian countries is importantly lies on the cultural proximity as well as economic cooperation that exist in most of its associated countries. As a number of countries were successful in attracting FDI, thus, the presence of these foreign firms became a source in booming the tourism industry. Britton (1982) pointed out that a country's tourism industry would extend and gain more from tourism development if there is a presence of foreign enterprises. This also explains why some countries of Southeast Asia are, in tourism terms, given ample opportunities to foreign firms of tourism industry through different measures of incentives (i.e. tax exemption, tax holidays etc.). Therefore, the amount of FDI in the Southeast Asian tourism industry is increasing in recent years. This FDI inflow represents new dynamics to the tourism industry of this bloc which is posing some challenges for its development. To meet these challenges, there is a need to put emphasis on some policies; 1) to train qualified tourism workforce in the technical field, 2) to support innovation, 3) to venture capital, and 4) to design infrastructure in order to witness positive impact on competitiveness (Caballera, 2012).

Some reviewers often argued that the problems that the Southeast Asian countries are facing in developing the tourism industry are linked to the structural differences remain in the overall pattern of tourism development. The lack of precise strategies for tourism development in some of its member countries against others is clearly reflecting the lack of integration and implementation due to hindered progress. As a result, tourism development has appeared as insufficient for some countries, for example Myanmar, Laos, while tourism development is defined to be reached at its excessive level in some of its associated countries (for example, Singapore). Although some of the member countries have taken initiative to reform the tourism sector, the full realization of this reform needs time to mobilize the resources in the face of resource constraints. The lack of institutional support and inadequate resources is, sometimes, engendering lack of profitability to the tourism enterprises in many cases. The structure of tourism industry also needs to be refined and linked to all the tourism stakeholders. The promotion of tourism to attract tourists is yet to be initiated in some countries. Considerable dependence on foreign staffs and the lack of skilled human resources are also appeared as drawback for the progress of tourism development. Leakages and lack of inter-sectoral linkages are also needed to be taken into consideration to progress further. Above all, tourism's economic impacts are not fully realized at the community level of many Southeast Asian nations. Inadequate training is also a major setback in successful tourism development in the region.

6. Development issues and challenges

The governments of Southeast Asian nations need to play the leading role in formulating precise policies and implementing them in a manner similar to the countries that developed tourism industry considering the industry as one of the key means to achieve economic development. The governments might adopt these policies on a priority basis by considering it as a political agenda. It is evident that the private sector has become the driver of development, investment, and management of tourism sector. This private sector is found to be initiating the lead in taking necessary initiatives for tourism development. Anyone might presume that perhaps a small number of South Asian nations have rendered cautious deliberation to the type of tourism that may benefit them the most. . It is necessary for these countries to identify the type of tourism they want. In addition, it is also vital to analyze to what degree their stated aims, purposes or

objectives are the matter-of-fact for future tourism development. Otherwise, tourism development will remain a matter of concern and might not see the full fruit of what was aimed.

Through this concise background knowledge, it is now possible to determine, at least, a number of issues related to Southeast Asia's tourism development. Translating these issues bears importance, last but not least, because they are critical factors in order to maximize the contribution of tourism through which regional economic development is one possible way to realize well-off Southeast Asian nations.

6.1. Issues for the Southeast Asia's tourism industry

The issues related to the development of Southeast Asia's tourism industry are discussed in the following section. First, there is a need to prepare a framework demonstrating the relative performance, role, and that extent that private local and foreign tourism enterprises are organized in formulating developmental aspects of tourism management decisions in the region. Particularly, the decisions that are crucial for the benefit of tourism industry are in the decision of operation, investment, management and marketing of tourism products. The vital issue, here, is that all concerned stakeholders of tourism industry need to understand the undertaken development decisions which should bring greater economic consequences to Southeast Asia. Therefore, it carries significance to stress that tourism stakeholders need to infer the implications resulting from their actions by taking into consideration the overall interest of tourism sector that must grow with long-run economic sustainability.

Second, one of the main challenges for the Southeast Asian tourism industry, as mentioned before, is the lack of skilled human resources. Therefore, tourism industry should give more emphasis on developing human resources to ensure the quality products and services rendered to tourists. Specifically, local human resources as well as indigenous workforce should be given priority in upgrading the comprehensive skills necessary to better serve the tourism industry. At the same time, when emphasizing these objectives it is also important to ensure the proper utilization of local resources so that it will enhance productivity of local suppliers and broaden the inter-sectoral linkages among the enterprises of tourism industry. In this aspect, the repercussion effects of tourism receipts will obviously ensure that foreign exchanges will not leakage from the economy, rather; more income through multiplier effect would be generated.

The Southeast Asian tourism industry is characterized by the presence of large number of SMEs which is the third major issue. SMEs are at the forefront of tourism development in the Southeast Asian context. SMEs provide crucial positive functions to tourism industry in the form of integrating remote business, developing linkages with other sectors of the economy and integrating personal services. Albeit SMEs are at the heart of Southeast Asian tourism, most of them are facing the problem of every day struggle. In addition, many SMEs are continuing their operation at the marginal point of survival. The lack of operating tourism businesses through capitalization of modern management principles is the reason of why SMEs unable to maximize their profit. In turn, this is meaning that these SMEs are incompetent to take advantage of economies of scale arising from uncompetitive opportunities delivered by nature of tourism demand. Further, limited resource base of these SMEs makes it difficult to attain these objectives.

6.2. Issues for South Asian governments

Formulating policies for the tourism industry is the usual and conventional role of Southeast Asian government. This traditional focuses need a change because of changing priorities or the materialization of niche consumer interests to facilitate international tourism. Therefore, the task of national governments is to be integrated by not limiting it only by formulating policies for the tourism sector but also providing deliberate facilities to the local enterprises as well as enforcing policies to develop infrastructure in order to assist tourism development. All of these efforts are to be taken for the benefit not just for tourism but for the whole economy. Financing tourism infrastructure through devising feasible and effective options is the last policy issue needed to be linked for greater interest of tourism. There are also some other aspects of policy needed to refocus covering length of stay and repeat visit intention of tourists to extending entrepreneurship development initiatives. Eventually, it is also inevitable to distinguish and devise the appropriate approaches so that the gains from tourism are spread more uniformly throughout the economy.

Essentially, tourism is now considered as an export-oriented international economic activity. The view of Ong Keng Yong, the Secretary-General of ASEAN, is instructive this regard. He emphasized that “Tourism is an important sector of our economies...tourism provides employment, helps to improve the quality of lives and promotes friendship, to create networking and widening of the perspectives among nations. This sector is important not only in generating valuable foreign exchange revenues but also in assisting to showcase the diversity and richness of the various cultures and peoples in Southeast Asia.” This paper thus identifies and analyses some factors of those strategies that are consistent to achieve the long-term sustainable tourism development in the context of Southeast Asian economies. Due diligence is to be paid to these facts due to their importance in organizing, and shaping tourism industry in Southeast Asia in order to realize a coordinated and supportive tourism development policy in practice.

First, When tourism industry develops, the nature of it becomes complex. Therefore, a framework of strategic management requires – the absence of which may jeopardize the objective of developing tourism industry. This strategic management process should be delineated to mitigate and minimize the adverse impacts to ensure that tourism development is supporting national policy objectives, thus, the aim of maximizing the benefits is realized. In addition, the tourism development should be backed by marked influx of foreign financial and personnel resources. But governments need to be conscientious regarding foreign injections. This is because too much foreign involvement may have an adverse impact on the host country government’s decision-making sovereignty. This may lead to intimidating the long-term sustainability and economic viability of the tourism sector. Correspondingly, it is hoped that the function of government organizations and policymakers may not create any trouble in advancing tourism sector so that the economic impacts of tourism are to be felt at all levels of the economy.

Secondly, considering the anticipated future of international tourism in Southeast Asia, it is important for the corresponding government to ensure that the industry is not treated trivially than it warrant while it should not be delicately kept apart. In spite of the rising concern on the adverse impacts of developing tourism in a region, there is rising evidence that the positive developmental aspects of tourism have influenced strongly to Southeast Asian governments to promote this industry as part of their economic development strategy. Hence, merits of tourism have been included in the national economic development plans of most of the Southeast Asian nations.

The previous two points creates the raise of third point of tourism development perspective, the scenario explicitly revealing that it should not be viewed separately from other aspects of the economy. It is inevitable that there is a need to create institutions at regional, sub-regional and national level for the planning purposes. The lack of political reconciliation, enough resources and proper allocation of these resources in the tourism industry will eventually make the formation of those institutions ineffective. Specifically, many difficulties that arise from developing tourism in the region are the result of unsuccessful mandated policies. The potential advancement of tourism in the region is largely depending on this issue.

The forth issue is the need to empower the Southeast Asian tourism. There is multiplicity of ways to accomplish this issue: by generating awareness about the benefit of tourism, by permitting those to exploit the entrepreneurial opportunities offered by this sector. Gender inequality is another issue that has adverse effect on the spirit of state capitalism. The aim of the Southeast Asian tourism policy should reflect these deficiencies.

6.3. Intra-ASEAN co-operation for tourism development

Smith (1989) mentioned that tourism regions are formed for, and simply for, with the objective to achieve some larger intentions, otherwise, they do not exist in themselves. This proclamation reflects the purposes and needs for tourism in economic development of the Southeast Asian region. These purposes include cooperative and integrated approach of developing, planning, managing, and promoting tourist destinations. In an attempt to define the role that tourism play, Pearce (1989) cited that regional tourism development reduces the economic and social imbalances that exist between different localities within a region.

A region is formed when different localities, cities, or countries are linked together, thus, regional development can be considered as an integration process. The regions are formed with the aim of better outcome. Ohmae (1995) defined this formation as a 'region state' or a borderless area developed with the aim of economic benefit. Therefore, the major reason of regional co-operation is to create a new geographic and economic alliance. Southeast Asian nations are also benefiting from this regionalisation not only from the economic viewpoint but also from the geographic aspects. Tourism provides opportunities for some of the Southeast Asian nations to transcend their geographic limitations (such as Singapore) as other contiguous countries are endowed with adequate resources to necessary to deem the local demand of leisure. Regional cooperation will also help reduce risky competition between destination areas and empower tourism development to reach to a greater height. Similarly, some of the Southeast Asian nations have comparative advantage in well-organized tourism infrastructure (for example, Singapore) and resources (for example, Malaysia) from which other countries can be benefited.

As cited by Secretary-General of ASEAN Ong Keng Yong in the tourism conference in Korea (2005)- "Tourism, however, is a very tenuous industry. It is very sensitive to environment changes and challenges. The outbreak of communicable diseases, for example, SARS, as well as terrorism and natural disasters can easily hurt tourism very quickly" (ASEAN, 2005). This statement reveals that tourism is sensitive to international events. Emerging developing economies are delicate to the adverse international events i.e. recent financial crisis (Gauri & Qureshi, 2013), hence, the Southeast Asian nations do face a downturn in

terms of international tourists' arrivals and receipts albeit not that shocking. Among the other features of tourism, International tourism faces severe downturns with international events while intra-regional and domestic tourism are not that prone to international events. The positive growth of tourists' receipts in Southeast Asian nations during these international events is the support of this fact. Hence, it can be pointed out that intra-regional tourism is less vulnerable than international tourism in the viewpoint of international events. In this aspect, intra-regional tourism is a cushion for developing economies of Southeast Asia although tourism is fragile to international events. It is evident that because of the strong growth of this intra-regional tourism among the Southeast Asian economies, the effects of international events, such as 9/11, Iraq invasion, tsunami, on the tourism industry in this region was less severe than other regions of the world. Intra-regional tourism also constitutes a significant portion of tourist arrivals within the Southeast Asian economies. For example, in 2004, intra-ASEAN visitor arrivals were 23 million (ASEAN NTO's) which constituted 46% of total visitor arrivals.

A significant number of tourists in most Southeast Asian economies are comprised by regional visitors. Among the first six members of ASEAN, the Philippines appeared to be the only member country receiving relatively lower arrivals of regional tourists. This characteristic is obviously the result of deficiency in infrastructures to facilitate tourists as well as the lack of precise security needed for tourism development. The potential significance of regional tourism for the Southeast Asian economies was acknowledged soon after the formation of ASEAN. In the charter of ASEAN, regional tourism collaboration was given a particular place in an attempt to establish regional peace and progress. Although trade and economic development were the main targeted areas of Southeast Asian regional cooperation, tourism has recognized as an important tool to foster these activities. Nevertheless, until 1990s regional tourism received only insignificant importance for the Southeast Asian economies (Ghimire, 2001). During 1990s, the share of regional tourism within Southeast Asian borders was found to be somewhat low as most of the international tourists' arrivals had their transit through Thailand and Singapore. However, the scenario had started reshaping since the beginning of 2000. The emergence of low-cost carrier is also playing an important role to this regional growth of tourists' arrival. Given the evolving change, regional tourism has the potential, to a greater extent, for increased investment. This will certainly assist in generating income and employment for diverse segments of population. The importance should be given to intra-regional tourism development in that the economic benefits of regional tourism remain within the region. To ensure this, there is a need to undertake some initiatives as most of the initiatives to boost the regional tourism remain hypothetical. A repeated method of policy monitoring along with the critical evaluation of policy are to be devised in order to upgrade the current regional tourism strategies. This is analogous to the study of Ghimire (2001) in which the author mentioned that most of the activities remain either exhausted or stuck at the level of a declaration of good intentions and elaboration of policy strategies.

The development of regional tourism in Southeast Asia through cooperation is advocated not only due to that fact of achieving self-sufficiency but also to advance exchange of ideas and international trade within this region that could be implemented by constituting a unique tourism organization. Unlike other economic sectors, Southeast Asian tourism industry experiences a significant lack of tourism experts. Therefore, it is proposed that a Southeast Asian Tourism Experts Association (STEA) need to be formed. It would operate as a "think tank organization"- being the centre-portal for experts of various skills mandatory for regional tourism development to work closely with each other for achieving greater

economic benefit. Along with other activities, research programmes and consultancies would be a part of its activities.

Industrial linkages should be integrated and financial leakages in the form of import leakages or employing foreign experts (particularly by multinationals) arising from tourism development is to be minimised for the greater interest of Southeast Asian regional economies. Governments, the private sector, other stakeholders should work together in formulating policies and strategies to enhance the economic impacts to be felt at all levels of the economies. The importance of collaboration among stakeholders is also supported by the literature of (Wong et al., 2011a, 2011b).

7. Conclusion

The importance of tourism development in this region is not overstated in this paper because of the facts illustrated above. The issues and challenges presented in this literature reveals that tourism growth in the region is exclusively demand-led and endowed with a comparative advantaged tourism sector in all Southeast Asian countries. It is important to note that proper formulation and implementation of favourable policy of tourism development is required to enjoy the benefits of tourism. This is especially important for the countries where finished tourism products are yet at infant stage. The accessible economic resources should lead the policies of tourism development since they provide proper recognition of unique tourism products and operate their marketing. The available economic resources for tourism development will determine the scale of its integration into the local economy while they also account for the overall control of tourism sector. If any of the economic resources are insufficient, the success of tourism policies is uncertain. The following elements should be taken into consideration when formulating a unique Southeast Asian regional tourism policy:

- Integration and promotion of regional tourism cooperation.
- Considerations regarding regional tourism integration into national plans.
- Analysis of the objectives of the tourism development plan consistent with national policy.
- Well recognized and unambiguous but realistic tourism policy goals.
- Availability of proper and precise legal support for tourism.
- Tourism development by means of local and community participation.
- Enhancing the participation of women in the tourism sector.
- Prioritization and integration of intra-regional tourism developing firms within the region.
- Private-public sector partnerships in developing tourism.
- Expanding the investment opportunities and entrepreneurial initiatives of tourism sector.
- Formation of a destination image by means of promotional and marketing campaign.

In addition, it should be noted that the nurturing of tourism industry is critical for sustainable tourism development in this region as tourism industry is sensitive to external shocks, thus, requires quick response from all tourism stakeholders. Therefore, it needs intense attention due to changing realities occurring in the competitive international tourism market outlook. The pre-requisites for nurturing this industry are not only limited to cooperation required from all concerned bodies of the tourism industry, the industry is also in need of much integration among national governments, regional and international community through providing authentic support and political will.

This paper has penetrated into some insights of the tourism development but the task is not complete. Future research and investigation should be given to look at other relevant aspects of regional tourism to the broader context of international tourism. The suggestions that have been made in this paper are to clarify how some of tourism development difficulties can be successfully overcome. In order to achieve the most from regional tourism, some specific comments have been made concerning the need for Southeast Asian cooperation to get benefit from economies of scale. Otherwise, Southeast Asian regional tourism might face difficulties in its growth pace while maintaining to stay behind in an extremely vulnerable tourism industry.

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