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Abstract

The concept of globalisation, as mooted by the West, is based on the assumption that a borderless world provides endless opportunities for the mobility of goods, humans, and capital. China has made a new initiative using the concept of "Globalisation" under the name "New Economic Belt of the Silk Road" and the "21st Century Maritime Silk Road" popularly known as the "One Belt One Road" (BRI) initiative. This initiative, which covers 65 countries, spanning over 60% of the world's population, intends to expand connectivity through infrastructure development. As compared to "Globalisation", BRI was an initiative by China to encourage trade among Asian countries by tapping the land bank and building the service and tourism industry by leveraging on China's expertise. This chapter examines the benefits and challenges of BRI to destinations in ASEAN by concentrating on the indirect effect of globalisation on destination marketing strategy of ASEAN countries.

Keyword: Destination marketing; diplomatic relation; disruptive technologies; globalization; integrated transportation; One Belt One Road

Introduction

One of the rapidly developing regional cooperation bodies, the Association of Southeast Asian Nations (ASEAN), has shown steady progress in economic and social development, with many positive views on the upcoming cooperation on many fronts. The recent decision by ASEAN countries to submit a joint bid to stage the 2034 World Cup has caught many by surprise. During the 34th ASEAN Summit, the announcement demonstrated that ASEAN discussion on regional cooperation encompassed various regional issues, including the most popular sports in the world, football. ASEAN seeks to promote intergovernmental cooperation in economic, military, security, educational, and other common interests towards the development of the ASEAN region.

During the early post-independence era, agriculture and mining were the top two industries in the ASEAN. The crops and raw materials were then exported to the western countries for manufacturing purposes. Realising the potential of intraregional economic collaboration, ASEAN has formulated a policy known as "Towards One Economic Community" that aims at achieving four pillars, specifically (a) single market and production base; (b) competitive economic region; (c) equitable economic growth; and (c) integration into the global economy (ASEAN, 2017). This formula has resulted in a more connected community where total tourist arrivals in ASEAN has increased, with half of the arrivals being intra-ASEAN.

Since 1967, ASEAN has initiated Frameworks for Regional Cooperation that aims at different outcomes, namely science and technology, private sector engagement, energy, tourism, transport, finance, and agriculture. Tourism was among the first measures taken in making ASEAN a world marketplace. It was formulated in 1976 by forming a sub-committee on tourism that promotes travel within the region. This was made easier with a structured nation-building effort to revolutionise infrastructure as well as basic accommodation and travel facilities like airports, hotels, immigration bureau, and banking systems.

Malaysia was among the first countries to promote inter-regional tourism with the foundation of the Tourist Development Corporation in 1972 under the Ministry of Trade and Industry (Tourism Malaysia, 2018). Malaysia was also among the first countries in ASEAN to have a structured tourism campaign with a "Visit Malaysia 1990" campaign. Later, the Visit ASEAN Campaign

(VAC) was launched to promote brand building for regional tourism. VAC aims to establish an aggressive promotional campaign in advertising ASEAN as a single destination. Nonetheless, there is no clear indication of the outcome of these efforts, especially the “Visit ASEAN@50” golden jubilee (1967-2017) campaign (Scott, 2007).

In recent years, tourism has exploded in Indonesia, and it is now one of the country's primary sources of foreign currency earnings. As reported by the Organisation for Economic Co-operation and Development (OECD), tourism contributed US$37.4 billion to Indonesia's GDP or 4.1 percent of the country's total GDP and created 12.7 million jobs in the same year, accounting for 10.5 percent of total employment in 2017 (OECD, 2020). In the Philippines, government policies strongly impact tourism policy planning and growth, indicating a top-down approach, which means tourism policies and decisions are dictated by the government through a hierarchical and centrally controlled method (Capistrano & Notorio, 2020). Compared to other ASEAN countries, Thailand's tourism industry is highly significant, accounting for 16.6 percent of the country's GDP in 2015, which was higher than the global average of 9.8 percent (Ministry of Tourism & Sports Thailand, 2017). Tourism receipts have also been increasing at the rate of 15.6 percent per year since 2011 and the industry has employed over 4.2 million people, accounting for 11% of the total workforce in the country (Ministry of Tourism & Sports Thailand, 2017). For Singapore, the tourism industry recorded 3.3 percent growth in 2019, compared to the previous year, with 19.1 million arrivals and US$20.9 billion receipts (Heng, 2020).

Impact of Globalization on Destinations

Intraregional collaboration is not a new phenomenon anymore because almost every region has its economic cooperation. The most potent intraregional economic pacts, the European Union (EU) and North Atlantic Treaty Organisation (NATO) had promoted "globalisation” as a new economic order for the world. The main idea of globalisation is “free trade,” where there are no barriers to the movement of goods and services. This is commonly regarded as “the level playing field” market. With the advancement of information communication technologies (ICT), the relationship between continents and countries has become more dynamic, where people, business, materials, and information would get connected easily. The resistance to globalisation was witnessed by developing countries led by Nelson Mandela at the 1999 World Economic Forum held at Davos, where he argued the advantages of globalisation (World Economic Forum, 2013). According to

Mandela, globalisation will only benefit the financiers, investors, traders, and speculators but not low-income earners. According to Mohamad (2002), the challenge to attract multinational corporations was real, whereby for every 100 economic entities in the world, 51 are global corporations while the remaining are countries. The combined sales of the world's top 200 corporations exceed the combined GDPs of 182 nation-states (Mohamad, 2002).

Based on the theory of relative advantage, free trade will encourage more foreign direct investment (FDI) in developing countries and create a labour-intensive market for the host country. Still, many arguments were directed to this assumption, especially when other economic variables were put into the equation, particularly productivity, competitiveness, domestic political situation, fiscal policy, and automation. In other words, there is a disparity between demand-led economic (employment growth) against supply constraints (lack of infrastructures, skilled labour, and government participation) (Lee & Vivarelli, 2006).

The ASEAN Economic Community (AEC) is an initiative of ASEAN countries to turn ASEAN into a sustainable and resilient economic region in the global economy (ASEAN, 2013). According to Song et al. (2017), the globalisation of the tourism sector has resulted in the fragmentation of the tourism production framework and the trans-nationalisation of ownership systems, marketing agreements, service outsourcing, and knowledge transmission. Agus and Indra (2018) added that globalisation enabled previously unthinkable products such as slums and poverty to become commodities and cultural heritage. The emergence of digital media, such as the internet, has succeeded in shaping our current reality. For instance, "The Jakarta Secret Tour" uses the internet to spread the message of poverty around the world. In the case of "The Jakarta Secret Tour," the process of raising consciousness about poverty is linked to the destination marketing concept (Agus & Indra, 2018). Furthermore, globalisation contributed to the development of the modern global transportation system, allowing remote destinations to be reached easily and quickly, as well as the establishment of facilities such as airports, hotels, and resorts. Governments gradually streamlined structured procedures to facilitate the processing of increasing numbers of visitors (Cohen, 2012).

The new sharing economy mechanisms which fully utilise technologies to streamline transactions and make the property more available to owners and users worldwide are successful business models in the globalised world (Kostková, 2020). Even in a borderless society, technology allows for cross-border collaboration and sharing platforms that connect owners of underutilized resources with people who want to access or use them. Compared to the traditional hotel and accommodation business model, globalisation creates shared values, lifestyles, and spending habits, resulting in a universal rent-seeking culture (Zhou et al., 2019). In today's world, corporate and economic decisions are no longer made with a myopic view of fulfilling local restrictions but instead considering the influence of such actions on the global economy (Saint Akadiri et al., 2019). In essence, globalisation is progressively influencing how businesses are done, as enterprises now have access to global resources rather than relying on local resources, as was the case previously.

Globalisation has been a hot topic in destination research, with researchers debating the impact of globalisation on lifestyles, economic growth, and society's health and social wellbeing due to climate change (Balsalobre-Lorente et al., 2020). The global crisis brought on by the coronavirus pandemic has profoundly altered the worldwide tourism business. As a result, there was a need to re-evaluate how the tourism business did its typical operations. Perhaps, there will be a new generation of destination marketing solutions that focus on how virtual solutions and remote work may thrive in the age of digital technology and reduced global mobility (Kyrylov et al., 2020).

ASEAN Tourism in an Era of Globalisation

The West mooted the idea of globalisation at the end of the Cold War period. The free market will encourage mobility of goods (cheap raw materials), expertise (transfer of knowledge), capital (foreign direct investment), socio-economic development (improved income), and mobility (movement of people) in a single marketplace. From the literature review, lots of discussions were directed at the effect of globalisation toward ‘openness’ in the form of the economy, ‘sharing’ in the form of expertise, ‘equitable’ distribution of wealth, and ‘free’ movement of goods and people. Nonetheless, the effect of globalisation on the travel and tourism industry received considerably less attention during the 1990s. As mentioned by the United Nations (2004), regional development was the key to tourism progress in the globalisation era. ASEAN, for instance, has pledged to mutually cooperate in the tourism sector with the formation of a sub-committee composed of ministers and experts.

As early as the 1960s, there was a discussion to develop four major transport corridors to connect Asia and Europe through the Northern Corridor (Korean Peninsula to Europe); Southern Corridor (South-East Asia to Europe); Indo-China and ASEAN sub-regions; and North-South Corridor

(Northern Europe to the Persian Gulf). In addition, the Pacific Islands Forum 1998 action plan has outlined cost-effective airspace management as one way to boost tourism. In the early days of globalisation, connectivity through air and land transportation, national security and sovereignty, as well as national and cultural identity became the subject of discussion, with less attention for duration and cost of travelling.

International tourism in the 1990s was dominated by European travellers who accounted for 60 percent of the international tourist arrivals. The Americas was the second-largest segment (21 percent), followed by Asia and the Pacific (8 percent). Statistics showed that the number of tourist arrivals had increased by 38 percent from 435 million in 1990 to 674 million by the year 2000 (UNWTO, 2011). With an increment of more than 15 percent annually, the tourism industry has changed its status from a mere peripheral industry to be among the top three industries in ASEAN. Tourist arrivals correlated positively with tourism receipts, whereby there was a significant improvement by 375 percent from US$104 billion (1980) to US$495 billion (2000) (UNWTO, 2011). The positive performance of the tourism industry had prompted ASEAN countries to spend more on attracting international hotel brands into the country.

Table 1: Visitor Arrivals to ASEAN by Country of Origin and Year during 1995 - 1999

Country of Destination	1995	1996	1997	1998	1999
ASIA					
Japan	3,295	3,664	3,652	3,070	3,346
Taiwan	2,141	2,262	2,031	1,646	1,747
South Korea	1,120	1,388	1,267	596	1,018
Rest of the World					
USA	1,443	1,441	1,577	1,637	1,748
Australia	1,084	1,201	1,457	1,387	1,602
United Kingdom	1,032	1,056,	1,114	1,231	1,304

NB. Figures are in a million

Source: ASEAN (2013)

In the 1990s, tourist arrivals in ASEAN accounted for less than seven percent of the total international tourist arrivals. Malaysia, Singapore, and Thailand were the key tourism markets in ASEAN, where they held more than 20 percent of tourist arrivals in the region. Malaysia is the key for intra-ASEAN tourism, with more than 40 percent tourist arrivals. During the globalisation era, extra-ASEAN tourism contributed about 60 percent of the tourist arrivals during the same period (ASEAN, 2013).

In the early globalisation phase throughout the 1990s, the top three extra-ASEAN markets came from Japan, Taiwan, and South Korea, while the rest came from the United States, United Kingdom, and Australia (Table 1). ASEAN showed a steady increment in tourist arrivals despite inadequate facilities like smaller airports, lack of integration in public transportation, shortage of star-rated accommodation, and lack of coordination in the operation of tourist facilities. Despite the lack of a modern and integrated transportation system, international tourists had no problem visiting tourist spots with the popular conventional modes of public transportation like coach, minibus, taxi, and locally made vehicles like *Tuk-tuk* (Thailand) and *Angkot* (Indonesia). Furthermore, group travellers were more popular than fully independent travellers (FIT) during the 1990s. The breakthrough of the ASEAN tourism industry occurred in the mid-2000s, with the revolution in low-cost carriers, particularly AirAsia, Cebu Pacific, and Lion Air. Expensive airfares and small travel options are a thing of the past in ASEAN, thanks to the emergence of low-cost carriers. ASEAN's low-cost carriers have reshaped the region's aviation landscape, bridging national borders and making travel more accessible to the masses (The ASEAN Post, 2021). ASEAN’s seat size has more than doubled in the last decade, rising from just over 200 million seats in 2008 to nearly 530 million seats in 2018 (Centre for Aviation, 2019). In addition, ASEAN has consistently grown in the high single digits or low double digits, making it one of the fastest-growing regions on the globe (Center for Aviation, 2019).

In the mid-2000s, the demand for ASEAN tourism saw a changing pattern from the major Asia market. There was a drastic change in visitor arrivals in ASEAN, where China accounted for 40 percent of all Asian travellers. A giant leap was evident in 2011, with a 35.1 percent annual increment from Chinese visitors. It is also worth noting that India has accounted for nine percent of the total Asian travellers. In this new environment, it is worth mentioning that China has to make a big wave in the ASEAN market. From the statistics published by ASEAN, the top three ASEAN markets for China travellers are Singapore, Thailand, and Vietnam (ASEAN, 2014).

The unexpected influx of China travellers into the ASEAN market is a result of the country's rapid economic progress, rising individual wealth, and softer travel restrictions (Tawil & Al Tamimi, 2013). Furthermore, the improved diplomatic relation with ASEAN has contributed to the strong relationship between China and ASEAN. As touted by Prime Minister Wen Jiabao, China considers itself a "gentle and friendly elephant" to its smaller counterparts (Chen, 2006). China and ASEAN need each other for a trade alliance. China has economic power while ASEAN has an abundance of untapped resources in land, people, and technology. The strong ties between ASEAN and China were the primary reason for massive capital funding to the ASEAN market by the government of China under the "One Belt One Road" initiative.

One Belt One Road Initiative (China and ASEAN)

A "borderless" world required a comprehensive and integrated transportation system. ASEAN has successfully executed the "ASEAN Open Skies Policy" since 2015 that intended to increase regional and domestic connectivity and enhance regional trade by allowing airlines from ASEAN countries to fly freely throughout the region under a single, unified air transport market (ASEAN Briefing, 2015). Fifty years before implementing the ASEAN Open Skies Policy, the idea of developing transport corridors was already in the pipeline, with four gazette routes that connect Europe and Asia through China as the primary access. The idea has not yet been implemented, but China has made a bold initiative under the "New Economic Belt of the Silk Road" and the "21st Century Maritime Silk Road" famously called the "One Belt One Road" initiative (BRI) in the Asian countries. This initiative, which will ensure connectivity through infrastructure development, covers 65 countries and involves over 60% of the world's population.

BRI is a grandmaster plan to (a) tap the land bank or reserved land of developing countries and (b) build the manufacturing industry and facilities by leveraging China's expertise. China has pledged more than US$5 trillion of funding to build landmarks, infrastructure, and facilities that include transport, energy, roads, bridges, gas pipelines, ports, railways, and power plants (Huang, 2017). For ASEAN, BRI will accelerate the ASEAN Master Plan for Connectivity (AMPC) and help to fund the mega transport projects that will boost the productivity and accessibility of its member countries. This initiative will increase the bilateral trade between China-ASEAN from US$472.2 billion in 2015 to US$1 trillion by 2020. The work-in-progress includes a new railway (HSR) line from China to Singapore through Laos and Thailand. A 150km HSR is also being constructed between two major cities in Indonesia (i.e., Jakarta & Bandung). Less-developed ASEAN members, comprising Cambodia, Laos, and Myanmar, will see the development of the railway, power plant, and property that will change the economic outlook for those countries. Thus far, the "New Economic Belt of the Silk Road" has been progressing quite well but not the "21st Century Maritime Silk Road." There are disputes over sovereignty in the South China Sea that led to a tense relationship between China and Vietnam. However, Malaysia and the Philippines have an agreement over maritime cooperation that will give China a territorial advantage against the U.S. Another issue surrounding BRI is its execution, whereby the construction team, materials, and technology must come from China to ensure the big infrastructure projects are completed (Jetin, 2018). This condition will not help ASEAN to tackle the high unemployment rate, especially at the supervisory level.

Most of the initiatives taken under BRI concentrated on the manufacturing industry, with a lack of emphasis on the tourism industry. BRI will create a new environment for developing countries where transportation will no longer be an issue for travel. The duration of travel will be reduced, and the cost of travel will reduce as compared to other modes of transportation. The initial report noted that infrastructure, trading, and financing would get the most from BRI, with the food industry being among the top beneficiaries, through better product flow within the Asian communities. In other words, local products could be transported easily to China and vice versa. This situation could adversely affect local food establishments that sell food to Chinese tourists who visit South-East Asia (SEA), where due to the availability of Chinese food, demand for local food has declined. Gastronomic experiences of tourists constitute an emerging segment for both countries, where it contributed 10-15 percent to the food and beverage (F&B) segment. Adopting a single currency will be an interesting issue for Asian nations to overcome over-dependency on the US dollar in trading activities. However, it is not clear whether Asia could replicate the European model of introducing a single currency for the benefit of all trading partners.

BRI provides hope for ASEAN in five significant areas, namely (a) policy coordination, (b) connecting infrastructure, (c) unimpeded trade, (d) financial integration, and (e) people-to-people bonds (Lau, 2017). Policy coordination is a critical aspect of BRI because there is a risk of political instability affecting the execution of BRI. There should be a code of conduct to help avoid disputes resulting from the execution of the project. Fifty years since its inception, ASEAN has the experience to curb disputes over territorial ownership, especially in the South China Sea. Also, connecting infrastructure will bring alternative and perhaps cheaper cross-border options for people and goods. Connected and integrated infrastructure as in Europe will boost tourism and business activities within the vicinity of the transportation network. Apart from that, funding by China will help to resolve the issues of the inadequacy of public funding and accelerated project costs and avoid trade costs resulting from inadequate facilities and bureaucracy.

ASEAN can market the small and medium industry products to other parts of the world at a faster pace through multichannel transportation either by rail, sea, or air cargo. Besides that, financial integration can be executed through the regional banking system. There will be more mergers and acquisitions of financial institutions for investment and lending activities. Finally, BRI will create a large society that interacts with cultural and academic exchanges (Lau, 2017). People will have a chance to learn about other cultures through interaction with foreign employees that work for multinational organisations. This will also promote cultural interaction between students in the primary, secondary, and tertiary levels, resulting in a harmonious and tolerant community.

BRI and the Future Tourism Outlook of Asia

The tourism industry will reap the benefits of the "One Belt One Road" (BRI) initiative. Firstly, BRI will raise the GDP of ASEAN by more than five percent (WTTC, 2016). Chinese travellers will increase further with the accessibility of the ASEAN markets through integrated rail transportation that links Southern China to Singapore via Laos, Cambodia, and Thailand. There have been several concerns on the ASEAN market about the infrastructure constraints, especially in Myanmar, Laos, the Philippines, Vietnam, and Cambodia (WTTC, 2016). However, this will be resolved with the high-speed rail (HSR) projects funded by the government of China.

ASEAN countries must meet the demands of Chinese travellers for more personalised, authentic, and exclusive travel packages (ASEAN, 2012). Safety and security should no longer be an issue with the vast investment channelled into ICT and automation. Furthermore, BRI should be extended to investment in telecommunications and wireless facilities to allow cashless facilities. "Borderless" should come in the form of a single Asian pass for ease of travelling. Reform in the banking and financial system is inevitable in a borderless world. A joint venture or merger and acquisition will provide convenience for utilising banking facilities during travel. The world is evolving into a "cashless society" where transactions are completed without exchanging physical money. Lodging and food industries are the major industries that will benefit from the integrated online payment system.

Disruptive technology has changed the way people travel, whereby online travel agencies provide a one-stop centre for booking and reservation of rooms, airlines, and travel packages. With better accessibility, the sharing economy will be enhanced through point-to-point transfer services. People will no longer need a car for travelling. Mobile applications will play a more significant role in the BRI era. There is a high possibility of a spin-off effect for Grab Company (e-hailing services) to be expanded as "Grab Travel" in the future. In addition, rapid urbanisation may occur in the new cities that are located along HSR stations. Urbanisation has both positive and negative impacts from a socio-economic standpoint. Though urbanization will create more jobs for local people, it will also create social and environmental problems. ASEAN and China need to promote responsible tourism for their communities. As of now, BRI places tourism in a strategic role across 33 countries, with marketing and promotion, capacity building and destination management, and travel facilitation (Li et al., 2020).

Conclusion

BRI is an excellent globalisation initiative by China and ASEAN in realising a borderless world using an Asian approach. However, a strategic analysis of the tourism industry in the ASEAN market needs to be done to assess the real impacts of BRI on ASEAN and China. China can lead the initiative of making ASEAN + China the next important tourist destination by regularly engaging with experts and policymakers to assess the progress of BRI while discussing the potential threats of BRI to national and regional unity. ASEAN needs to develop more travel packages that can appeal to different traveller segments. In addition, renovation of rundown tourist facilities needs to be done right away before completing new state-of-the-art facilities. Also, the countries involved in the BRI project have different political and economic structures and different cultural backgrounds. There are numerous legal, political, and other threats. Finally, the only way for a destination to expand in size and power, reform, and evolve is through globalisation. Although the BRI initiative has the potential to create unprecedented opportunities like easy access to new investment and foreign talents in the coming decades, it also has the potential to create a growing threat of over-dependency to China in tourist arrivals and developing domestic tourism industry.

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