

# Island Tourism Development Strategies - Implications for Jeju

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## 도서지역 관광개발전략: 제주도에 대한 시사점

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**Abstract:** Generalizations relevant in island tourism development-insularity, vulnerability, sustainability, globalization, localization, environmentalism, and innovation-are examined initially. Drivers and threats that are controllable and non-controllable in tourism development by island destinations are then highlighted. A changing island tourism strategy is illustrated by Singapore. Jeju's quest as an international city and its tourism development strategies are then assessed in the light of the discussion on the strategies, drivers, threats, and relevant examples.

**Key Words:** sustainability, environmentalism, island tourism, tourism development, tourism strategy.

**요약:** 본 연구에서는 먼저 도서지역 관광개발과 관련한 일반화된 내용으로 도서지역의 편협성과 취약성, 지속가능성, 그리고 세계화, 국지화, 환경보호론, 혁신 등이 검토된다. 다음으로 도서지역 관광개발에서 통제 가능한 추진체와 위협, 통제가 불가능한 추진체와 위협이 함께 검토된다. 또한, 변화하는 도서관광 전략의 예로 싱가포르의 경우가 제시된다. 마지막으로 국제도시 제주의 추진계획, 관광개발 전략이 전략적 측면, 추진주체, 위협요소 및 각각의 사례들에 대한 논의에 비추어 평가된다.

주요어: 지속가능성, 환경보호론, 도서관광, 관광개발, 관광전략.

### 1. Introduction

There are islands and islands...and they hold a long-standing fascination for many, particularly to the tourists (Royle, 2001; Baum, 1997; King, 1993). This paper examines some generalizations on island tourism development and significant factors that islanders should be aware when developing tourism.

Singapore is one of the most successful islands in the Asia-Pacific area in island tourism development. Its recent change in tourism development strategies illustrates the need to respond to changing needs in the modern competitive world.

A critique of tourism development of Jeju is then carried with reference to the implications of the above generalizations, drivers, threats and relevant island examples.

### 2. Generalizations on island tourism development

Although research on islands by geographers started much earlier, within the past decade, much has been written on island tourism development (Douglas, 2006; Ghosh *et al.*, 2003; Gössling, 2003; Apostolopoulos and Gayle, 2002; WTO, 2002; WTO, 2001; Lockhart and Drakakis-Smith, 1997; Conlin and Baum, 1995). These collective works provide the basis for examining a half dozen general statements and concepts that have a strong bearing on island tourism development strategies.

#### 1) Insularity

The first common general statement is that it is not easy to define an island. Islands can be variously

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defined involving basic concepts of scale and isolation to island economy, biophysical character, society, autonomy and independence (Wong *et al.*, 2005). The varying definitions would have implications in the context of island sustainable development (Kerr, 2005).

Although islands differ greatly they share several characteristics that unify them as a distinct category and their overall vulnerability. Islands, particularly small islands, share a commonality of insularity (Royle, 2001) or 'isola effect' (Wong *et al.*, 2005). Small island states (SIDS), in particular, experience more specific challenges and vulnerabilities (Berenger, 2004).

## 2) Vulnerability

A second general statement is that islands are vulnerable and many have a strong dependency on tourism as the main choice of island development strategy because of other constraints (Sasidharan and Thapa, 2003). They also face other physical vulnerabilities such as climate change and sea-level rise (Nurse *et al.*, 2001).

## 3) Sustainability

Island economies have also not been spared the burden of 'sustainability'-a concept that has been applied to nearly all forms of development activities (Maul, 1996; Apostolopoulos and Gayle, 2001). In 1992 at the Earth Summit in Rio de Janeiro, Brazil, tourism was identified as one service sector that could contribute to sustainable development. This provides the context of one definition: "sustainable tourism development involves development of environmentally and culturally positive and socially responsible tourism that should bring economic and social benefits to wide segments of society" (Yamakawa, 2001)

There are various approaches to sustainable island tourism (Apostolopoulos and Gayle, 2002). For example, in Bahamas, sustainable development has meant that livelihoods must be planned and based on the principles of (1) participation with a broad base for people to involve in development strategies to material needs; (2) self-reliance, without always dependency on

foreign investment; and (3) equity or sharing wealth (*The Nassu Guardian*, 12.1.2004).

## 4) Globalization

Islands cannot escape from the transnational flow of wealth, people, knowledge, goods and services which results in increasing degrees of international integration, interaction and interdependency between countries and other economic agents in the world economy (Read, 2004).

Globalization has distinctive impacts on islands (Read, 2004). Although it brings certain advantages such increasing tourist volume and better efficiency, it poses a significant threat to successful island economies given limited room for manoeuvre. For example, globalization takes a toll on island tourism through rising production costs, loss of tourism value generated by the industry, and increasing competition based on prices (Croes, 2006).

At the same time, small states can take advantages of globalization if they can overcome some of the obstacles: aggressive branding and destination marketing; English language as an important link, importance of quality service, and associated IT in hotels, airlines and tour agencies.

## 5) Localization

For islands, an equally important and balancing force to globalization is localization (Hospers, 2003). Localization would not be evident in terms of a large region or country.

Localization would seem to be an opposing force but should preferably balance globalization in island tourism development. It has various meanings but is used here to refer to the efforts of local parties to promote tourism that builds upon locality-specific assets; the benefits to local stakeholders, and the bottom-up process. The development of island-specific assets offers opportunities for local involvement. Each island would have to find the best way to balance globalization and localization for the good of its environment and the people.

## 6) Environmentalism

In the last 20 years, the reassessment of the DWEP (dominant western environmental paradigm which viewed the natural environment as a resource to be exploited for human benefits) (Weaver, 2001) has led to a green paradigm where public attitudes are reassessing long-term costs of a deteriorating environment. In tourism, this has led to emergence of a new tourism - ecotourism - as a response to mass tourism.

Whether an island is rural, coastal, or a city state, the emphasis is for the distinctive environmental quality of island destination to remain and not further degraded as a result of tourism development. Phi Phi island in southern Thailand is one example where tourism development had overwhelmed the island leading to severe environmental degradation; this was ironically removed by the Indian Ocean tsunami of 26 December 2004. Strong environmental controls on islands, whether on small islands (e.g. Maldives) or larger islands with integrated resort development (e.g. Bintan, Indonesia) would benefit island tourism.

Like "island", ecotourism also has the problem of definition and covers wide range. When interpreted at the very extreme end of island economic development spectrum, ecotourism is localization and what tourists want to see in its natural state (natural environment and culture). Ecotourism as a development strategy has been successful on some islands, e.g. Bonaire. But it is a highly specialized form requiring special training, necessary resources and can be very unique, e.g. Galapagos Island (Kerr, 2005), Easter Island.

## 7) Innovation

Innovation has not given much attention in tourism (Cooper, 2006). Although strongly associated with technological innovation, it can refer to software, thinking, and related approaches and forms an important part of the development strategies for tourism destination (Poon, 1993; Hjalager, 1997).

Entrepreneurship is the heart of innovation

(Lordkipanidze *et al.*, 2005) especially in the context of localization. With easy access to knowledge and technology in today's world, many islanders can strive to be independent and innovative giving rise to a new generation with better quality of entrepreneurship.

## 8) Summary

In general, each island has its own tourism strategy and specific solutions (Yunis, 2001). At least, the difference is strong between island states and islands that are parts of larger countries. For island states, different tourism development exist, e.g. Singapore, with a broader base tourism and a less vulnerability to foreign airlines, Fiji with a more narrow based tourism and vulnerable to foreign airlines, and Kiribatis which is relatively undeveloped.

For islands linked to larger countries, there is also a wide variation in terms of degree or maturity of development. Successful ones include Bali, Hainan, and Okinawa. Some islands may be victims of their own success as the policies and decisions are taken from the central government. There is thus a need for decentralization and a higher degree of local decision making.

For sustainable development in practice, the real challenge is planning and management of tourism development to ensure that is sustainable. Two main points are important: to reduce the risks of environmental impacts and to consider the concerns of stakeholders.

## 3. Drivers and threats to island tourism

As tourism development of islands is subject to both external and internal factors it would be useful to obtain a fuller picture of these factors. Various frameworks are available for the analysis of tourism development strategies of islands (Kim and Uysal, 2003). One useful framework is provided by Kerr (2005) who identified the drivers and threats to island tourism development. Note that some threats can be controlled

Table 1. Drivers and threats to island tourism development.

Exogenous drivers	Threats - controllable	Threats - non-controllable
- Global economic growth	- Environmental degradation	- Competing locations
- Improved transport	- Population growth and migration	- Recession in major markets
- Changing fashion and taste	- Tourist infrastructure	- Changing tastes
- Over-exploited tourism resources elsewhere	- Fiscal and investment policies	- Security issues and other hazards

Source : adapted from Kerr (2005).

and some are beyond the control by islands (Table 1).

Some conditions in Table 1 are similar to those for attracting capital investment to tourism in Jeju (Kim, 2002). For example, Jeju can implement an investment strategy for public-private partnership, but attracting funds depends on economic growth internally and also externally.

The World Tourism Organization considers certain conditions essential for sustainable tourism (Yunis, 2001) and these are controllable by the destination. These include local community participation, institutional leadership, skilled technical backing, private sector coordination and a long-term plan.

As island tourism is heavily dependent on external markets or is strongly influenced by external factors, it is also paramount to have a contingency strategy to deal with unexpected events or crises (Glaesser, 2003).

#### 4. Singapore: changing island tourism strategies

There are many examples of successful island tourism development. Singapore is one example with changes in island tourism strategies to meet demands, anticipating further changes, and efforts to increase tourist arrivals.

The island's success in tourism development stems from a number of factors. Most important is the high degree of government involvement and regulatory climate with the national airline playing a key role in making Singapore accessible and projecting a favourable image of the destination (Low, 2002; Wong, 1997). Except for shopping, there was a lack of

attractions. The short length of stay has been a problem and one solution is to provide more attractions. Sentosa, an island, became a successful attraction after years of development and is now also tied to waterfront property development and a proposed integrated resort. Singapore continues to rely on an increasing convention traffic.

Faced with competition and globalization, Singapore after two years of debate, has taken the decision to have two integrated resorts as an economic development strategy and as a strategy to increase tourist numbers. Each integrated resort (IR) includes a casino which reversed an age-old ban on casino gambling. The first IR has been awarded in May 2006 with a completion date by 2009 (Straits Times, 27.5.2006). It is expected to add S\$2.7 billion or 0.8% to the country's annual GDP, and 30,000 jobs, including 10,000 within the resort by 2015. At that time, the expected tourist arrivals would reach 17 million tourists.

#### 5. Jeju: assessment of tourism development

Jeju is a volcanic island of 1850 km<sup>2</sup> with a population of more than 560,000. It is noted for its tourism, marine products and tangerines. Nearly 30% of local gross production is dependent on tourism, a dependency that is comparable to some small island states ([www.jdcentre.com](http://www.jdcentre.com)). The main tourist attractions are the island's natural scenery, beaches and offshore islands. The island is a favourite for honeymooners and in recent years as a location for Korean movies (thus attracting the "set-jettlers"). Like mini-theme parks, the

problem is that movie-sets go out of fashion with the movies and dramas.

The prospects of tourism development on Jeju have been well stated by Choi (2002). Basically, Jeju has been heavily dependent and benefited from a closed tourism market when Koreans were not allowed to travel abroad freely. Foreign tourists have not increased fast, and Jeju has to compete with other popular island destinations in the Asia-Pacific region. The development of new tourism products has also brought damage to its natural environment which is the main attraction.

In 2002 with the declaration of the Jeju Free International City, the provincial government plans to develop the entire island into an "international free area" compared to Singapore and Hong Kong as it is meant to activate the island's economy and improves the quality of residents' life. The plan implemented to 2010 is "to develop Jeju not only as an environmentally friendly tourist and recreation city, but also as a comprehensive functional city for business, advanced knowledge, logistics and finance" (*Korea Trade and Investment*, 1.2.2002).

A duty-free zone with no visas for foreigners can be implemented with ease. Institutional reform for creating an attractive investment environment, e.g. lowering corporate tax to levels below that of Shanghai, Hong Kong and Singapore, can also be implemented. Pushing English as its second language and offering high-level medical services by attracting world-class hospitals would be more difficult. Jeju still lags behind Hong Kong and Singapore in terms of infrastructure and financial services but has a clear advantage in its natural beauty. In the long-term, Jeju intends to become a "no-visa, no-tariff, no-regulation" zone with English as its lingua franca (*Chosun Ilbo*, 31.8.2005)

Jeju Free International City Development Center (JDC) was established to implement the development plan. As a government agency, it promotes Jeju and focuses on drawing investments into the island, unlike Temasek in Singapore which goes for overseas investments. The JDC may have to re-think on measures to attract foreign investments (Kim, 2002).

Of seven key projects planned for implementation by JDC, several are related to recreation and tourism : a resort-oriented residential complex, an ecosystem, myths and history park, and Sweogwipo tourism port. In addition, three resorts and 20 tourist sites are available for tourism. All these should push Jeju as a world-class city of tourism and recreation by 2010 with a projected volume of tourist traffic to 9.9 million (4.9 million in 2003) including 1 million foreign tourists (0.2 million in 2003) ([www.jdcenter.com](http://www.jdcenter.com)).

Also to increase tourist income, the provincial government is considering allowing construction of more casinos to complement the existing eight operating in major hotels. In addition, the national strategy is to capitalize on the island's pristine natural surroundings and natural amenities for a specialized zone for biotechnology industry.

An evaluation of Jeju's developmental strategies by Choi (2005) placed importance on sustainability, human-based strategy, local culture dominance, and resident-drive planning. Suggestions were made to implement the island's unique brand, cultural tourism, maximize industrial linkage and innovation capacity, be competitive, and refine institutional structures. In the light of above generalisations, drivers and threat, successes of other islands, and combined with the author's observations on the island, additional comments can be now made on a suitable tourism strategy for Jeju.

### 1) Globalizing tourism development

Globalizing the island's tourism development is one of Jeju's major problems. Of about 5 million tourists, less than 10% are foreign tourists and the bulk are Japanese and Chinese. The major issue is how to widen the tourist markets. Jeju has difficulty to attract the western tourists because of the language problem, its association with North Korea (which is portrayed negatively in international media) and its marketing strategy, e.g. Jeju as "Pacific Jewel" with a distinctive product quality and differentiation.

## 2) Accessibility by air

In theory, Jeju enjoys easy accessibility to major cities of East Asia - 5 cities with population of 10 million (Seoul, Tokyo, Beijing, Shanghai and Tientsin) and 10 cities with 5-10 million (including Osaka, Taipei and Qingdao) - all within 2-hour flying time of Jeju. This is comparable to most European-type connection to major cities in terms of flying time. But it has yet to tap this potential fully.

Until recently, Jeju was accessible through Seoul and other Korean cities. Flights through Seoul were dependent on two major airlines - Korean Air and Asiana. The Asiana pilots strike in 2005 proved Jeju's vulnerability to such dependency. Jeju now has its own airline in addition to other regional airlines and chartered flights but the volume is still a far cry from that of Hong Kong and Singapore although the new island airfares are about 30% lower. Previously, the high airfare has prompted Koreans to bypass Jeju and go to Phuket (Thailand) and Cebu and Borocay (Philippines).

Jeju wants at least 50% of tourists to be foreign and its length of stay to be lengthened. This means that it needs to penetrate into the markets of Southeast Asia, including Taiwan and Singapore, Australia and the United States as well as Japan and China. China is an important market because of its rapid growth of outbound traffic.

## 3) Conflicts on proposed development project

Some residents and environmentalists in Jeju are concerned about the damage to the island's scenery and disturbance to its serenity, e.g. the waterfront project of Sweogwipo city and Mt. Halla cable-car installation. This is part of the larger issue of environmental conservation vs tourism development. Environmental damage is one of the major causes weakening the identity of Jeju's tourism and ecotourism has emerged as an alternative tourism to minimize the impacts on the environment and its

emphasis on ecological sustainability.

There is also debate on the casinos and its impacts. Despite the fact that the island's casinos are for foreign tourists, the locals are wary of the development of a gambling mindset among the public and do not see any linkage between tourist increase and foreigner-only casinos (*Korean Times*, 1.3.2006). The regional and worldwide picture on casinos is variable. Singapore, Taiwan and China are developing casinos in view of China's strong tourism growth. In the United States and Europe, the strategy is to link the casino to business tourism or convention business (*Korean Times*, 3.7.2004).

Small shop operators are also concerned with the influx of large shopping centres that could threaten their livelihood. Another concern is the proliferation of golf courses. Already with more than 40 golf courses, more are under development or being planned to meet the demands of Japanese tourists. However, as shown in Southeast Asia, golf courses are damaging to the environment in the long term.

## 4) Island's uniqueness

Jeju has successfully built its image as a symbol of peace through annual shipments of tangerines to North Korea and as a site for summit meetings of leaders. Historically, the island has been a place of exile and left the islanders to form an unique tradition and culture - a sort of "exile" heritage. It has rich cultural assets and folklore relating to clothing, food, house, art, oral traditions. Some annual ceremonies and rites are based on the island's agriculture, fisheries and stockbreeding. Apart from large-scale tourism parks, there is need to provide opportunities for tourists to experience the island's unique environment and culture on the basis of resources in fishing and farming villages and thus contribute directly to local incomes.

Jeju's natural beauty comes from the 360 volcanic cones ringing the island. In 2002, the UNESCO designated a 'Biosphere Reserve', centred on the core area of Mt. Halla National Park, which was gazetted in 1970, including three uninhabited islets. The biosphere reserve has a diversity of ecosystems with a core area of

15,158 ha and 83,094 ha of buffer and transition zones (UNESCO, 2005). About 7,500 people live in the transition areas and make their living from tourism, cattle-ranching and agriculture. Fishing and submarine tours take place in the surrounding buffer zones of the islets.

An application has been made recently to the UNESCO for the natural attractions of Mt. Halla, lava caves and tubes and volcanic areas to be included in the world natural heritage list. These sites totalled 9,475 ha with additional 9,370 ha as a buffer zone (Cultural Heritage Administration, 2005). This application, if approved, could form the backbone of tourism development strategy around which diversification can be developed.

Based on the author's field of the island's coasts, the beaches cannot be the basis of Jeju's tourism and are not comparable to those of Boracay, Cebu or Bali. However, they well complemented and provide diversification to the proposed heritage sites and other attractions on the island.

### 5) Planning and marketing

Sometimes too much controlled from a central government and the consequences of tourism success can lead to environmental degradation of island. Thus there is a need for more decentralization and solutions to increase sustainability of tourism on the island. "Tourism policy must avoid the mass tourism strategy of producing an interchangeable tourism product. By being unique and with a specific and irreproducible resource base and distinctive competencies, tourist destinations can position themselves at a relatively higher price level" (Croes, 2006 : 463). This should be applied to Jeju.

Marketing with Korea or marketing as Jeju is a question of strategy. Branding Jeju through regional promotion and marketing can be useful but is no longer sufficient in today's world of globalization. The importance of island branding is illustrated in the success of Bali, Cebu, Phuket and Koh Samui; for example, Cebu is marketed successfully to give an

impression that it is a South Pacific destination.

Also the provincial government has to create policies to support education, especially hospitality and tourism education. Foreign language skills are to facilitate innovation and enhance services.

## 6. Conclusion

Given the constraints and the opportunities of Jeju, the long-term strategy of island tourism development is to leverage its heritage sites plus moderated development for diversifying its economy, e.g. specialized agriculture, service industries, etc.

However, in any island tourism strategy, the following actions supported by the comments from Kim and Uysal (2003: 290) are still relevant :

- (1) Plan. "In the future, the bounded nature of small-island destinations need not hinder their prosperity if they can generate well-devised strategic plans for the future."
- (2) Monitor. "Continuous, thorough, and flexible monitoring of a region's micro and macro environmental levels must be established in order to ensure island destinations' current and future viability."
- (3) Be unique. "Small-island destinations should create their unique competitive advantages in order to compete effectively in the increasingly globalized world."
- (4) Be flexible. "Most important, island policy makers should realize that there is no one universal law of success in this turbulent environment of radical changes."

## Notes

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