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Regional Tourism Collaboration in the Pearl River Delta, China

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ABSTRACT

Macau's gaming boom and the planned construction of the Hong Kong, Macau, and Zhuhai (HMZ) Bridge present good opportunities for the three destinations to develop tourism. However, developing tourism without regional coordination and collaboration could result in overcapacity and cut-throat competition among HMZ and dampen the healthy growth of tourism in the region. This study investigates the HMZ tourism cooperation issue by conducting in-depth interviews with government officials, industry practitioners and tourism researchers in HMZ. The question it seeks to answer is: How should the three destinations join hands to develop the region's tourism in a cooperative way? Based on the interviews, strengths, weaknesses, opportunities, and threats (SWOT) analyses were conducted with a focus on HMZ's internal relationship and threats from external competitors in tourism development. Policy recommendations that could benefit HMZ as an integrated region were made based on the analyses.

Key Words: Hong Kong, Macau, Zhuhai, tourism cooperation, SWOT analysis, integrated destination.

INTRODUCTION

Macau's casino gaming industry has witnessed rampant growth since Macau opened its door to foreign casino operators in 2002. According to Gaming Inspection and Coordination Bureau (GICB) (2008) of the Macau Special Administrative Region (SAR) in 2006, Macau generated US\$7.08 billion gaming revenue, replacing the Las Vegas Strip as the No. 1 gaming destination in the world. In 2007, Macau's gaming revenue climbed to a new height, US\$10.38 billion, a 47% jump over its 2006 achievement. Analysts have predicted that Macau's gaming revenue will reach US\$16 billion by 2012 (Mellen & Oakda, 2006).

However, Macau's fast gaming growth is not without concern. With a geographic area of just 28 square kilometers and a population of only half million (Statistics and Census Service, 2008), Macau is severely constrained by available labor force and land in its endeavor to become a Las Vegas type entertainment Mecca (Gu, 2004). Hong Kong, the other SAR of China, boasting a population of 6.9 million and a land area of 1,104 square kilometers, is about an hour from Macau by ferry. According to the Hong Kong SAR Government (2008), tourism is a pillar industry of the city's economy with inbound tourists totaling 28.2 million and expenditure amounting to US\$16.8 billion in 2007. Highlighting the importance of the tourism industry, *Hong Kong Economic Times* ("Tourism internal and external problems," 2007) claimed that the industry accounts for 5% directly and 12% indirectly of Hong Kong's economy and provides about 400,000 job opportunities.

Zhuhai, Macau's other neighbor on the Chinese mainland, is located on the southwest coast of Guangdong Province with a population of 1.3 million and an area of 1,653 square kilometers and is within walking distance from the north border of Macau. In 2007 tourist arrivals in Zhuhai totaled 17 million and tourism receipts amounted to US\$900 million (Macau Government Tourist Office, 2008). However, self-identified as a "Romantic City", Zhuhai has its unique features. According to Meisheng Zhang, Deputy Director of Zhuhai Tourism Administration, Zhuhai's car race, international air show, hot springs, golf, and overseas Chinese cultures are tourism resources complementary to the gaming and entertainment of Macau and the MICE and shopping attractions of Hong Kong (Macau Government Tourist Office, 2008).

Since the sovereignty of Hong Kong and Macau returned to China in 1997 and 1999, respectively, economic and trade cooperation between the two SARs and the Chinese mainland has been on the rise and tourism collaboration has also been brought on the agenda. In 2003, the Closer Economic Partnership Arrangement (CEPA) was signed between Chinese mainland and Hong Kong and Macau.

There has long been discussion on building a Hong Kong—Macau—Zhuhai (HMZ) Bridge connecting the three destinations in the PRD to promote the region's economy. Scholars applauded the project as one that would yield significant political and economic impacts on the region ("Scholars: The HMZ Bridge," 2008). In summer 2008, the three parties reached an agreement on the Bridge financing and decided that the construction should be started no later than 2010 and be completed by 2015 ("Macau HMZ Bridge," 2008). The Bridge will cut the travel time from Hong Kong to Macau and Zhuhai by half and significantly speed up the tourism traffic among the three destinations. With Macau emerging as a new world entertainment center and the HMZ Bridge soon to be built, how to coordinate and harmonize tourism development in the three destinations is becoming an urgent issue that deserves attentions from the governments, industry and scholars in the three destinations.

Developing tourism without regional coordination could result in overcapacity and cut-throat competition among HMZ and dampen the healthy growth of tourism in the region. This study investigates the HMZ tourism cooperation issue by conducting in-depth interviews with government officials, industry practitioners and tourism researchers in HMZ. The question it seeks to answer is: How should HMZ join hands to develop the region's tourism in a cooperative way? Based on the interviews, strengths, weaknesses, opportunities, and threats (SWOT) analyses were conducted with a focus on HMZ's internal relationship and threats from external competitors in tourism development. Policy recommendations that could benefit HMZ as an integrated region were made based on the analyses.

OBJECTIVES, BENEFITS AND BARRIERS OF REGIONAL TOURISM COOPERATION

Tourism cooperation has been proposed as a means to solve regional political conflicts, such as the case of the partitioned Island-state of Cyprus (Sonmez & Apostolopoulos, 2000), but the main purpose of tourism regional cooperation is to create synergies and economies by neighboring destinations' working together – from educating and training to marketing and promotion (Tourism Intelligence International, 2008). According to Megwi (2003), tourism regional cooperation is a strategy to increase the competitiveness of the tourism industry of a region and has several objectives to be achieved. First of all, the objective is to promote the region as an integrated destination by capitalizing on the combined tourism strengths and in the meantime emphasizing the uniqueness of each individual destination. Second, the cooperation aims to develop the tourism industry in all involved destinations equitably and complementarily. Third, the cooperation should attempt to coordinate efforts in job creation and labor training across destinations to improve the entire region's tourism service standards and quality. Fourth, regional cooperation endeavors to develop infrastructure in the region via collective efforts from individual destinations. Finally, the cooperation seeks to facilitate travels within the region by easing or removing travel and visa restrictions.

Scholars have shown that tourism regional cooperation can benefit a region's tourism in many ways. The collective advantage of a region can create a combined tourism identity with a more powerful voice in negotiating with other competitive regions, international agencies, airlines, and even other countries on tourism related issues (Huxham 1996; Kotler, Haider, & Rein, 1993). Pretty (1995) suggested that tourism regional cooperation facilitates coordination of tourism policies within individual jurisdictions, thus increasing the acceptance of the resulting policies and ensuring the effective implementation of the policies. Tourism regional cooperation can broaden a region's market by integrating individual destinations' market shares.

Barriers to regional tourism cooperation, however, do exist. In particular, unequal development levels of destinations could deter cooperation. Thompson (1997) pointed out that unequal development creates different intergroup attitudes among partners. A more developed destination may be unwilling to collaborate with a less developed one because, in its perception, cooperation may only help the less developed destination to catch up, rather than benefit the entire region. Furthermore, destinations may also be reluctant to work with each other because of a lack of self-confidence or trust in partners (Araujo & Bramwell, 2002; Hall & Jenkins 1995).

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The biggest barrier to cooperation is each individual destination's pursuance of self-interest. While regional tourism cooperation is to bring together local, regional, and national interests within a regional development perspective and optimize the usage of resources within the region, it needs to balance the interests and benefits and requires sacrifices of independence and individuality on the part of the participants (Araujo & Bramwell, 2002; Gunn & Var, 1994; Inskip, 1994; Tosun & Jenkins, 1996).

RESEARCH METHODOLOGY

This study attempts to explore the issue using semi-structured interviews to identify the needs and ways for cooperative tourism development in HMZ. The focus here is how the region may take advantage of Macau's gaming boom and the forthcoming HMZ Bridge to develop the regional tourism collaboratively. Based on interviewees' opinions, this study applied SWOT analyses for the destinations individually and jointly and devised suggestions on how HMZ should develop their tourism collectively and cooperatively.

A purposive sampling method, which is typically used in exploratory research, was adopted to collect data from government officials, industry executives, and scholars in HMZ. Attempts were made to contact potential interviewees via mail, email, phone call, and face-to-face initiatives. For each destination, 10 individuals with expertise in tourism and hospitality who agreed to be interviewed were included in the study. In our interviewee pool, there were five senior government tourism officials. More than half of the interviewees were from the industry, including executives of hotels, casinos, travel agencies, and an exhibition promotion firm. Among the interviewed scholars, there were four directors of tourism and hospitality management schools or research institutes of universities and four professors engaged in tourism and hospitality teaching and research.

Field trips were made to HMZ by the researchers from October 2006 to February 2007 to conduct the interviews. One candidate in Hong Kong was eventually not interviewed due to unexpected time conflict. The final pool of interviewees included 9 individuals from Hong Kong, 10 from Macau and 10 from Zhuhai.

Based on the research aim and a review of academic literature and popular press, an interview guide was developed with nine open-ended questions. The first three questions attempted to gain knowledge of the planned direction of tourism development in each destination, perceived competitors of respondents' destination, and interviewees' SWOT analysis for each destination. The next two questions were designed to obtain the interviewees' opinions on HMZ tourism cooperation and their SWOT analysis for HMZ as an integrated destination, followed by a question on how HMZ collaboration should be pursued. Question 7 asked the interviewees to evaluate the substitutive and complementary relationships among HMZ. Question 8 was for interviewees to assess the current status of cooperation among HMZ. The last question was to identify barriers to HMZ tourism cooperation and ways to overcome them. Additional follow-up questions were asked during the interviews to encourage interviewees' elaboration and clarification on their responses.

All interviews were conducted face-to-face in interviewees' offices. On average, the interviews lasted about 90 minutes. The researchers took notes during the interviews, and the notes were supplemented with additional details right after the interviews based on researchers' immediate recall of the conversations. Data analysis followed mainly an inductive approach. The notes were read thoroughly and main categories of expert opinions were derived for each question.

RESULTS

Direction, Competitors, and SWOT Analysis for Each Destination

Findings from the first three questions are summarized in Table 1. They provide insights into each destination's planned direction, major competitors, and interviewees' SWOT analysis for each destination.

Necessity and Importance of HMZ Cooperation

Interviewees unanimously agreed that HMZ should cooperate with each other to develop the region's tourism. They had the following five main reasons to support the position:

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Table 1*International CHRIE Conference-Refereed Track, Event 12 [2009]***Direction, Competitors, and SWOT of Hong Kong, Macau, and Zhuhai**

	Hong Kong	Macau	Zhuhai
Direction	<ul style="list-style-type: none"> • International cosmopolitan city and finance center • Destination for business and MICE travelers • Dining, shopping • Long- and short- haul 	<ul style="list-style-type: none"> • Gaming leads development of multi-purpose destination 	<ul style="list-style-type: none"> • Hot spring, small islands, resorts, golf courses
Competitors	<ul style="list-style-type: none"> • Macau, Singapore, Shanghai, Bangkok, Guangzhou, Shenzhen 	<ul style="list-style-type: none"> • Hong Kong, Singapore 	<ul style="list-style-type: none"> • Shenshen, Xiamen, Guilin
Strengths	<ul style="list-style-type: none"> • Highly efficient cosmopolitan image • Aviation hub • World-class finance center • Tourism infrastructure • Talented manpower 	<ul style="list-style-type: none"> • Legalized gaming • Location • Chinese-Portuguese cultures • World Heritage by UNESCO 	<ul style="list-style-type: none"> • Mild weather, natural environment, low residential density
Weaknesses	<ul style="list-style-type: none"> • High costs • Lodging under-capacity • Lack of effective tourism strategy and policy • Becoming more “Chinese” 	<ul style="list-style-type: none"> • Land and labor shortage • Traffic congestion • Air pollution 	<ul style="list-style-type: none"> • Lack of tourism development funds • Shortage of tourism professionals • Lack of well developed attractions
Opportunities	<ul style="list-style-type: none"> • Gateway to China • HMZ Bridge • International business network • Repeat visitation 	<ul style="list-style-type: none"> • Government’s open-door policy to foreign developers • China as customer base • HMZ Bridge 	<ul style="list-style-type: none"> • Chinese vacation population • Macau’s development • Macanese day trippers • HMZ Bridge • Train to Guangzhou
Threats	<ul style="list-style-type: none"> • Macau, Singapore, Thailand, and other PRD cities’ MICE and aviation development • Talent drainage • HMZ Bridge 	<ul style="list-style-type: none"> • Singapore • Closure of small businesses • Slow infrastructure development 	<ul style="list-style-type: none"> • Lodging overcapacity

1. The gaming boom in Macau has increased the tourist volume not only in Macau, but also in Hong Kong and Zhuhai. However, Macau’s casino hotels have drawn many hotel managers away from Hong Kong at higher salaries, causing a drain on the hospitality manpower in Hong Kong. Also, Macau’s aggressive expansion in meetings and exhibition facilities makes Hong Kong’s MICE industry nervous. Close cooperation among HMZ can increase the positive impact of Macau’s gaming growth on regional tourism and help resolve problems and conflicts resulting from the gaming boom.
2. Macau’s gaming development is attracting more Hong Kong and Zhuhai residents to visit Macau. Macau’s gaming boom is also making Macau residents wealthier and encourages them to go to Hong Kong and Zhuhai for shopping, dining, and entertainment. Each destination is becoming more important as an origin market for the other two.
3. The HMZ Bridge will greatly shorten the traveling time from Hong Kong to Macau and Zhuhai, making the intra-regional travel easier and quicker and increasing the attractiveness of HMZ as an integrated destination.
4. Cooperation and collaboration can help solve some problems for a destination that can hardly be solved on its own. In particular, the land and human resources bottleneck experienced by Macau in its gaming expansion can be better resolved with the help from Hong Kong and Zhuhai collectively.

5. Via tourism product integration, HMZ can achieve a synergy to make the region stronger than the sum of individual destinations each working on its own.

Macau’s gaming expansion may eventually turn Macau into a world-class entertainment capital like Las Vegas. However, when Macau’s gaming advantage is combined with Hong Kong’s strength in international aviation, shopping, MICE, and family vacation and Zhuhai’s rich resources for leisure and vacation, HMZ will emerge as an integrated destination more strongly positioned in the world’s tourism arena. The SWOT of HMZ as an integrated destination is summarized in Table 2.

Table 2
SWOT of the HMZ as a region

Strengths	<ul style="list-style-type: none"> • Centrally located in Asia • Each city has its own airport • Hong Kong’s international aviation hub – long haul • HMZ Bridge • Variety of experiences in a highly cost- and time-efficient manner
Weaknesses	<ul style="list-style-type: none"> • Tourism industries of Macau and Zhuhai are less developed • HMZ have fewer historical and cultural resources comparing to other Chinese destinations
Opportunities	<ul style="list-style-type: none"> • Geographical and cultural proximity to mainland China
Threats	<ul style="list-style-type: none"> • Singapore, especially if Singapore is to work together with Malaysia and Thailand to develop regional tourism • Self-interest pursuit and internal competition

Interviewees concurred that it was highly necessary to have a joint regional plan to develop and promote the HMZ tourism. Such a plan can coordinate tourism development policies in the three destinations to eliminate or reduce overlapping and substitutive projects and increase complementary projects, thus minimizing the intra-regional conflicts and competitions and maximizing the joint gains.

How Should HMZ Cooperate With Each Other?

Interviewees agreed that to turn HMZ into a harmonious integrated tourism region, the three should first of all coordinate their development plans. Each of the three needs to develop in a direction to complement rather than to overlap with the other two to minimize future competition. Secondly, the three destinations can bundle their tourism products and services into integrated packages and promote them jointly to potential visitors, especially long-haul visitors. In particular, interviewees came up with the following suggestions regarding how HMZ can work together to develop the region’s tourism:

1. The three destinations are recommended to make intra-regional travel frictionless to increase the efficiency of their tourism cooperation. At present, there are two passport control points, one on each side of a border. Travelers going through HMZ needs to be checked six times at three borders. As a first step, HMZ may combine the two check points at each border crossing. Eventually and ideally, HMZ may make just one check point for all the three destinations and make HMZ intra-regional travel as easy as in the European Union (EU).
2. HMZ should join hands in training tourism professionals to improve skills and raise service quality in the region. The tourism industries in Macau and Zhuhai are less developed than that in Hong Kong where services meet or exceed international standards. Therefore, Hong Kong can play a benchmark role in training for the entire HMZ region to lift the service standards.
3. Macau’s manpower and land bottleneck can be better resolved with the help from Hong Kong and Zhuhai. While Hong Kong can help Macau in terms of management talents and technical skills, Zhuhai may export service workers to Macau to ease its labor shortage. A solution to Macau’s land shortage in tourism development would be to jointly develop projects with Zhuhai on Zhuhai’s land bordering Macau.
4. Competitions between destinations in HMZ for manpower and clients have occurred in the past and may happen again in the future even once cooperation agreements are reached. While conflicts and competitions are unavoidable,

they can be managed and minimized. To do so, regulations regarding tourism product pricing and principles of conduct in manpower recruitment within the region must be instituted. Explicit ethical guidelines in cooperation need to be established and strictly observed by the tourism industries in HMZ. Furthermore, auditing and arbitration mechanisms, such as a committee composed of government officials and industry representatives, should be in place to resolve conflicts, if any, between destinations..

The interviewees overwhelmingly viewed the relationship among HMZ as complementary rather than substitutive and cited the following reasons to support their viewpoint:

1. In terms of tourism products and services, HMZ at present are regarded as mainly distinguishable from each other without significant overlap. However, as Macau is repositioning itself as a MICE destination and is catching up with Hong Kong in MICE capacity and operation, it may pose a serious substitutive threat to Hong Kong sooner or later.
2. The three destinations are also clearly differentiable from each other in terms of pricing. While Hong Kong is a high-priced international cosmopolitan city, Macau is regarded as a mid-price regional destination and Zhuhai offers a wide range of low-price products and services.
3. At present, Hong Kong is a destination with a good mix of short-, medium- and long-haul visitors, whereas Macau and Zhuhai mainly target short-haul and regional or domestic markets.
4. The very different histories of HMZ make each destination easily differentiable from the other in culture. In the past, Hong Kong was a British colony and Macau was ruled by the Portuguese. Zhuhai started as a fishing village in Guandong Province of China. Each destination has its own unique cultural heritage resulting from its past.

It is highly necessary for the three governments to jointly form a development strategy for the entire region and then coordinate their tourism development policies. On the other hand, to minimize the substitute effect between destinations, such as the effect of Macau's MICE development on Hong Kong, the involved parties should seek different market segmentations for the same product or service to reduce overlap.

The Governments' Leadership Role

The dominant opinion among interviewees was that the three governments of HMZ should play the leading role in tourism collaboration. First, governments are the policy makers and they make final decisions on tourism development plans. Therefore, the governments' intentions and desires will guide the direction of tourism development in each of the three destinations.

Second, political or administrative issues are often involved in regional cooperation. For example, the cross-border check point issue among HMZ is beyond the capability of the industry and must be solved between the governments. Also, any joint development by Macau and Zhuhai involving land use in Zhuhai must first be settled between the two governments. Furthermore, to finally resolve the check point and land issues, local governments may need to obtain permission from the Central Government in Beijing. Here, only the HMZ governments, rather than the industry, are in a position to negotiate with the Central Government. Finally, any supervision, arbitration, or disciplinary mechanisms designed to implement regional collaboration and cooperation plans would need the governments' involvement to be authoritative and effective.

Interviewees also concurred that the tourism industry should play a significant role in cooperation in terms of initiation, advising, implementation, and evaluation. While the governments provide a framework for cooperation, the industry, as the practitioners to carry out the cooperative policy, will add dynamics to cooperation and collaboration. According to interviewees, there is no official entity for HMZ tourism cooperation at present. The Tourism Collaboration Association of Hong Kong, Macau, and Guandong Province, which includes Zhuhai, is the only organization that handles cooperation issues in the HMZ region. The Association has held many meetings and initiated many discussions regarding cooperation but not many actions have been taken.

Major Barriers and How to Overcome Them?

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Interviewees agreed that conflicts of interest resulting from selfishness are a major barrier to HMZ tourism cooperation. A typical example here is the border closing time between Macau and Zhuhai. While Zhuhai is willing to have the border open for 24 hours a day, Macau is reluctant to do so because the latter wants to keep visitors staying in Macau instead of going to Zhuhai for less expensive hotel rooms.

Another barrier, as recognized by many interviewees, is the different development stages of the three destinations. Hong Kong is a well established destination with a mature tourism industry and good international reputation. On the other hand, the tourism industries in Macau and Zhuhai are less developed with low or no international recognition. Many interviewees felt that the benefits of cooperation would accrue more to less developed Macau and Zhuhai but less to more developed Hong Kong. Previous studies on regional tourism cooperation have found that unequal tourism development creates different intergroup attitudes among partners (Thompson, 1997) and destinations at different development stages may be reluctant to work with each other closely because of lack of self-confidence or trust in partners (Araujo & Bramwell, 2002; Hall & Jenkins, 1995).

Structural and cultural gaps between destinations were perceived as another barrier to cooperation by interviewees. Among HMZ, each destination has its own unique history and culture. While this uniqueness enriches a visitor's experience in HMZ, it has led to differences in administrative structure, business perceptions, and management style, thus posing barriers to cooperation.

Interviewees unanimously held that the best solution to intra-regional conflicts is to develop each destination's tourism in a direction that does not duplicate the directions of its partners. An appropriate policy that steers development in a direction compatible rather than competitive with its partners is in itself a proactive measure to prevent conflicts from occurring. Interviewees all agreed that if HMZ are to cooperate to develop tourism, they need to establish an entity that is powerful enough to coordinate development policies and formulate a joint plan that will be followed by each party. This entity must be authoritative and can make decisions to guide or influence government tourism policies. This entity should also be highly operative and active in solving problems resulting from different developmental stages and structural and cultural gaps.

CONCLUSIONS AND RECOMMENDATIONS

Interview data have lead us to conclude that it is highly necessary for HMZ to cooperate in tourism development. There are many reasons why they should work together. But first and foremost, they have already had a good foundation in existence for the cooperation. That foundation is their high complementariness resulting from their histories, cultures, economies, and social and natural resources plus their close vicinity to each other that will become even closer after the HMZ Bridge is built. Via cooperation, HMZ will be able to provide visitors with a rich variety of tourism experiences cost- and time-efficiently, making themselves highly competitive as an integrated destination in Asia and in the world.

Macau's gaming boom is presenting a good opportunity for boosting tourism in the entire HMZ region, but it has also brought in conflicts and problems among the three, with destination positioning and manpower as the most imminent issues. Developing tourism without considering its impact on neighbors will increase substitution and lower compatibility and complementariness, leading to cut-throat competition and endangering the healthy tourism development in the region. Without sincere cooperation among the three, it would be impossible to solve these conflicts and problems.

Based on expert opinions, this study has derived several recommendations for HMZ to cooperate in developing the region's tourism. First, each city should position itself in a direction that is more compatible rather than competitive with the other two to minimize potential competition. While Hong Kong needs to focus on its shopping, dining, family vacation and MICE tourism, Macau should keep gaming as its "dragon head", supported by entertainment and mixed Chinese-Portuguese culture tourism. With overcapacity worsening in the PRD's MICE market, Macau may need to give its ambitious MICE expansion plan a second thought. Endowed with abundant natural and environmental resources, Zhuhai should remain a leisure and vacation resort city.

Secondly, HMZ should integrate their tourism products and services and promote them jointly to visitors, especially long-haul visitors from international markets. Thirdly, HMZ can pool their resources together to jointly grow tourism business in the region. Hong Kong's capital, Macau's legalized gaming status, plus Zhuhai's land and labor can be ideally combined to develop tourism projects. Fourthly, a joint HMZ regional plan is highly needed. Such a plan is not merely a tourism promotion plan but more importantly, a tourism development plan. The plan should not only coordinate tourism development policies and strategies among HMZ but also guide the three to compete with rivaling destinations in Asia and in the world. Finally and most importantly, an authoritative and functional entity or organization must be established to formulate the regional plan and supervise the implementation of the plan.

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