

WHEN CAN THE SLEEPING ASIAN TIGER AWAKEN? INTERNATIONAL TOURISM DEVELOPMENT IN MALAYSIA

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The international market is very important for Malaysia's tourism industry. In the World Tourism rankings from 2005 till 2010, Malaysia was always ranked in the second place for international tourist arrivals in Asia and the Pacific region. However, in terms of the average tourism consumption of international tourist, Malaysia was in the last place. Nevertheless, if the average tourism consumption in Malaysia reaches 1862.20 USD, Malaysia could lead other nations in Asia and the Pacific region. Based on the experiences of international tourism development in Australia, India and Macao, this paper constructs a development pattern of international tourism for Malaysia based on existing conditions and the foundation of international tourism development.

Keywords: *International tourism, Malaysia, average tourism consumption, Asia and the Pacific Region*

JEL Classification: *L83, M1, O1*

INTRODUCTION

International tourism is an important earner of foreign exchange in many countries. According to Mak & White (1992), international tourism makes up 25% of the services trade in the world and almost 7% of the total value of world exports even with the exclusion of international transportation. In 2010, international tourist arrivals increased nearly 7% to 935 million and are expected to continue to grow at 4% to 5% in 2011 (UNWTO, 2011). Meanwhile, Asia has become the fastest growing region in international tourist arrivals with a new arrival record of 203.84 million in 2010, up from 181 million in 2009, which is about 21.8% of the



global international tourism market in 2010 compared to 12.6% in 2009 (Panakera et al., 2011; UNWTO, 2011). According to the World Tourism ranking compiled by UNWTO, 13 Asian countries were listed in the top 50, both by international tourist arrivals and international tourism receipts in 2010.

Therefore, due to the progress of international tourism in Asia, this article aims to explore the growth of international tourism in Malaysia. As one of the fastest growing economies in South East Asia (ASEAN), the tourism industry has significantly become an important sector in Malaysia and has surpassed other traditional commodities as well as the petroleum related industries. Thus, it is interesting to understand the significance of international tourism to the growth of the tourism industry in Malaysia.

RESEARCH BACKGROUND

Malaysia, situated in the central part of South East Asia, borders Thailand on the north, Indonesia on the west and Brunei on the east. Malaysia also shares maritime boundaries with Singapore, Vietnam and the Philippines. Malaysia consists of 13 states and 3 federal territories and has a total landmass of 329,847 square kilometres separated by the South China Sea into two regions, Peninsular Malaysia and Malaysian Borneo (Sabah and Sarawak) (Wikipedia, 2011). Since Malaysia is located in the tropical region zone, the climate is hot and humid throughout the year without distinct seasons (Khalifah & Tahir, 1997). In 2010, the population of Malaysia had reached 27.5 million and in purchasing power parity, Malaysia was ranked as the 3rd largest economy in the ASEAN region and also placed as the 29th largest economy in the world.

The history of international tourism in Malaysia can be dated back to the early 1970s, when it had become an important source of earning foreign exchange. At the initial stage, the Tourist Development Corporation of Malaysia (TDC), existing from 1972 to 1992, played an important role in promoting international tourism and developing basic infrastructures (Jenkins, 1994). Nowadays, after 40 years of development, international tourism in Malaysia has achieved great progress. For example, in 2006 and 2007, Malaysia was voted as the 'Best International Tourism Destination' by Global Traveller, a US-based travel magazine. Today, tourism has become the third largest income source from foreign exchange in Malaysia. However, Malaysia's tourism industry relies heavily on the international market. The arrival ratio between domestic tourists and international tourists in Malaysia is very low, just about 1 to

3. Therefore, the development of international tourism plays a crucial part for the growth of the tourism industry in Malaysia.

Figure 1 The Location of Malaysia



THE GROWTH OF INTERNATIONAL TOURISM IN MALAYSIA

The United Nations World Tourism Organization (UNWTO) regularly releases the “World Tourism Barometer” report, regarded as the most authoritative barometer for international tourism in the world. This report includes tourism ranking by both international tourism arrivals and international tourism receipts, which is an important official evidence to compare the relative tourism competitiveness among country and region. Previously, European countries absolutely monopolized the highest positions in both tourist arrivals and tourism receipts. Currently, European countries are gradually losing their domination in international tourism with the rapid growth of other regions. Among them is the Asia and Pacific region, which has become the fastest-growing region. In 2010, tourist arrivals to Asia and the Pacific region accounted for 21.8% of the total international tourist arrivals in the world compared to only 0.8% in 1990. This region’s share of tourism receipts has also increased to 27.06% in 2010 compared to 0.9% in 1990 (UNWTO, 2011).

Significantly, Malaysia has become one of the important countries in international tourism in Asia and the Pacific region. In the UNWTO

rankings from 2005 till 2010, Malaysia was ranked in second place by international tourist arrivals in this region with a growth rate of 4.2% in 2010, 7.2% in 2009 and 5.1% in 2008 (Table 1).

Table 1 International Tourist Arrivals (unit: million)

Rank Country	2010		2009		2008		2007		2006		2005	
	arrival s	ran k	arrival s	ran k	arrival s	ran k	arrival s	ran k	arrival s	ran k	arrival s	ran k
China	55.98	1	50.9	1	53	1	54.7	1	49.9	1	46.8	1
Malaysia	24.6	2	23.6	2	22.1	2	21	2	17.5	2	16.4	2
Hong Kong	20.09	3	16.9	3	17.3	3	17.2	3	15.8	3	14.8	3
Thailand	15.84	4	14.1	4	14.6	4	14.5	4	13.8	4	11.6	4
Macao	11.93	5	10.4	5	10.6	5	12.9	5	10.7	5	9.0	5
Singapore	9.16	6	7.5	7	7.8	7	8.0	7	7.6	6	7.1	6
South Korea	8.80	7	7.8	6	6.9	8	6.4	8	6.2	8	6.0	8
Japan	8.61	8	6.8	8	8.4	6	8.3	6	7.3	7	6.7	7
Indonesia	7.00	9	6.3	9	6.2	9	5.5	10	4.9	10	5.0	10
Australia	5.89	10	5.6	10	5.6	10	5.6	9	5.5	9	5.5	9
India	5.58	11	5.1	11	5.3	11	5.1	11	4.4	11	3.9	11
Taiwan	5.57	12	4.4	12	3.8	12	3.7	12	3.5	12	3.4	12
Vietnam	5.05	13	3.75	-	4.24	-	4.23	-	-	-	3.48	-

However, Malaysia was just ranked fourth, fifth and even sixth among the 13 top Asian countries in terms of international tourism receipts for the last 6 years (Table 2), which contradicted the large number of tourist arrivals as shown in Table 1.

The average tourism consumption of international tourist (ATCIT) in Malaysia is far lower than other Asia-Pacific countries. In the tourism industry, the average tourism consumption directly determines the tourism revenues especially on the condition that tourist arrivals do not change too much. Therefore, the question is how to increase the average consumption of international tourists in Malaysia in order to increase international tourism receipts. The average tourism consumption can be calculated by the formula below,

$$ATC = TR_i / TA_i \quad (1)$$

Where, ATC is the abbreviation of the average tourism consumption; TR_i is the tourism receipts of country i ; TA_i is the tourist arrivals of country i . The formula (1) could be applied to calculate the average tourism consumption of international tourists for the top 13 countries, as listed in Table 3.

Table 2 International Tourism Receipts (unit: billion USD)

Rank Country	2010		2009		2008		2007		2006		2005	
	receipt	rank	receipt	rank	receipt	rank	receipt	rank	receipt	rank	receipt	rank
China	45.81	1	39.7	1	40.8	1	37.2	1	33.9	1	29.3	1
Australia	30.10	2	25.6	2	24.8	2	22.3	2	17.8	2	16.8	2
Macao	23.62 ¹	3	19.16 ¹	3	16.8	4	13.1	6	9.4	6	7.8	6
Hong Kong	22.91	4	16.6	4	15.3	5	13.8	5	11.6	4	10.3	3
Thailand	19.76	5	15.9	5	18.2	3	16.7	3	13.4	3	9.6	4
Malaysia	17.82	6	15.8	6	15.3	5	14.0	4	10.4	5	8.8	5
India	14.16	7	10.6	7	11.3	6	10.7	7	8.6	8	7.5	7
Singapore	14.12	8	9.2	10	10.7	8	9.1	9	7.5	9	6.2	9
Japan	13.20	9	10.3	8	10.8	7	9.3	8	8.5	7	6.6	8
South Korea	9.77	10	9.4	9	9.8	9	6.1	10	5.8	10	5.8	10
Taiwan	8.65	11	7.0	11	5.9	11	5.2	12	5.1	11	5.0	11
Indonesia	6.98	12	6.3	12	7.4	10	5.3	11	4.4	12	4.5	12
New Zealand ²	4.86	13	4.59	13	5.0	-	5.4	-	4.8	-	5.2	-
Vietnam	4.45	14	3.05	-	3.93	-	3.75	-	-	-	2.3	-

Notes:

1. The figure is calculated according to the average growth rate of the past years' average in Macao and the overall current average in the North-East Asia region (respectively 50% significance), as there is no the statistical figure in the UNWTO report.

2. New Zealand is excluded in the research because it is not listed in the top 50 by international tourist arrivals in spite of its relatively high international tourism receipts.

Table 3 Average Tourism Consumption (billion USD)

Rank	2010	2009	2008	2007	2006	2005
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Country						
Australia	5110.36	4571.43	4428.571	3982.14	3236.36	3054.55
India	2537.634	2078.43	2132.08	2098.04	1954.55	1923.08
Macao	1979.97	1842.31	1584.91	1015.50	878.50	866.67
Singapore	1541.485	1226.67	1371.80	1137.5	986.84	873.24
Japan	1533.10	1514.71	1285.71	1120.48	1164.38	985.07
Taiwan	1552.96	1590.91	1552.63	1405.41	1457.14	1470.59
Thailand	1247.48	1127.66	1246.58	1151.72	971.01	827.59
Hong Kong	1140.37	982.25	884.39	802.33	734.18	695.955
South Korea	1110.23	1205.13	1420.29	953.13	935.48	966.67
Indonesia	997.14	1000	1193.55	963.64	897.96	900
Vietnam	881.19	813.33	926.89	886.52	-	660.92
China	818.33	779.96	769.81	680.07	679.36	626.07
Malaysia	724.39	669.49	692.31	666.67	594.29	536.59

Table 4 International Tourism of Malaysia in Asia and the Pacific Region

Rank Country	Tourist arrivals		Tourism receipts		Average tourist consumption	
	arrivals (million)	rank	receipt (billion USD)	rank	average	rank
2010	24.6	2	17.82	6	724.39	13
2009	23.6	2	15.8	6	669.49	13
2008	22.1	2	15.3	5	692.31	13
2007	21	2	14	4	666.67	13
2006	17.5	2	10.4	5	594.291	12
2005	16.4	2	8.8	5	536.59	13

As shown in Table 3, Malaysia was ranked in the last place among 13 countries in Asia and the Pacific Region in terms of ATCIT from 2005 to 2010. In 2010, Malaysia's ATCIT was just 724.39 USD, which was far below the average level of the Asia-Pacific countries (1220 USD). Table 4 compares Malaysia's ranking in tourist arrivals, tourism receipts and average tourist consumption. It is obvious that the excellent performance in tourist arrivals sharply contrast the very poor ATCIT (Table 4).

THE POTENTIAL OF INTERNATIONAL TOURISM IN MALAYSIA

Nevertheless, from a different perspective, the low performance of ATCIT actually reflects a huge potential for international tourism in Malaysia. Since the growth of tourist arrivals in Malaysia is lower than other countries in Asia and the Pacific region in 2010 (3.9 % < 12.7%), the practical and effective way to improve tourism receipts in Malaysia is by increasing the ATCIT.

The expected ATC (average tourism consumption) can be calculated by putting the 2010 data into the formula below,

$$ATC^E = TR_j / TA_i \quad (2)$$

Where ATC^E is the expected ATC ; TR_j is the tourism receipts of country j , which it expects to reach; TA_i is the tourist arrivals of country i .

As China was ranked in the first place for international tourism receipts in 2010, the $ATC_{Malaysia}^E$ can be calculated based on formula (2),

$$ATC_{Malaysia}^E = TR_{China} / TA_{Malaysia} = 4581000000 / 24600000 \approx 1862.20$$

This means, if Malaysia's ATCIT could reach 1862.20 USD in 2010, it would surpass China in terms of international tourism receipts, making it the highest earning country in Asia and the Pacific region. This can be used to positively argue about the potential of international tourism in Malaysia. However, this potential can only be materialised if effective measures are taken to increase the ATCIT of Malaysia.

DEVELOPMENT EXPERIENCES OF INTERNATIONAL TOURISM

International tourism is an integrated system that includes dining, accommodation, travel, shopping, amusement, investment, marketing and management. To improve the ATCIT, Malaysia should systematically adopt the development experiences in international tourism from the relatively developed countries and regions (Australia, India and Macao were chosen for the purpose of this research), rather than just take measures to extend the residence time of international tourists.

Australia

Tourism is already the second largest source of foreign exchange earning in Australia from 2007 till 2010, after the mining industry. The ATCIT in Australia is the highest in Asia and the Pacific region since 2005 until 2010, where it reached 5110.36 USD. The rapid development of international tourism in Australia mainly resulted from 11 positive factors (Table 5). These experiences are widely distributed in many aspects, specifically including festivals, catering, souvenirs, investment, marketing, promotion, pricing, infrastructure, management, policy, supervision, public participation and sustainable ideas.

Table 5 Development Experience of International Tourism in Australia

Experience	Aspect
Lots of international tournaments and festivals	Festivals
Multicultural cuisine	Catering
Tourism souvenirs of local culture	Souvenirs
Multiple sources of investment	Investment
Penetrating old markets and developing new markets	Marketing
Systematic tourism promotion and marketing	Promotion
Cheap or free entrance tickets	Pricing
Humanized tourist services and infrastructure	Infrastructure
Government support at both state and federal levels	Management
The wide involvement of the public and other associations	Public participation
Sustainable development principles	Sustainable ideas

Note: These experiences were summarized from the related literature of Platt et al. (1991), Griffin & Darcy (1997), HPPCOD (2009), Isacson et al. (2009); Song (2009), Zhang (2009), and Zhu (2011).

India

In India, international tourism is regarded as an important entry level industry of earning foreign exchange. India's international tourism develops rapidly and by 2010, India had received 5.58 million international tourists with a growth of 9.41%. Furthermore, India's ATCIT has surpassed 1900 USD from 2005 to 2010. In 2010, it reached a high of 2537.634 USD. In overall, the prosperity of international tourism in India mainly benefited from the positive efforts in product, transportation, investment, pricing, support infrastructure, official management and policy as well as proper management (Table 6).

Table 6 Development Experience of International Tourism in India

Experience	Aspect
Developing more healthy products for the markets	Product
Matured and distinctive traffic network	Transportation
Investment pattern of public-private partnership	Investment
Double-track pricing system	Pricing
Making preferential policies on infrastructure	Infrastructure
Complete tourism policies	Policy
Effective management and supervision	Management

Note: These experiences were summarized from the related literature of Richter (1989), Petea (2009), Utravels (2010), and CVIN (2011). Vinay & Suvidha (2009)

Macao

International tourism is the main source of income to Macao. Since the return of Macao to China in 1999, the influx of tourists from mainland China have readily offered Macao's tourism with huge vitality and impetus. Since then, Macao has become an enormous entertainment centre for international tourists in the world, consisting of gaming tourism, cultural tourism, vacation tourism, MICE tourism, sightseeing tourism, shopping tourism and cuisine tourism.

Table 7 Development Experience of International Tourism in Macao

Experience	Aspect
Many international festivals and events	Festival
Multiple and abundant catering cultures	Catering
Sustainable investment policies	Investment
Strongly depending on the old tourist markets	Market segmentation
Complete service facilities for tourism	Infrastructure
Huge support from the Macao government	Supporting policy

Note: These experiences were summarized from the related literature of Zhang (2001), Tong (2006), Wikipedia (2010), and Fang (2011).

In 2010, the gaming industry alone contributed 23.51 billion USD to Macao with a year-on-year growth of 58%. Macao was still the number one in the world in terms of gaming industry revenue, which was four times as great as that of the city of Las Vegas, United States in 2010 (Fang, 2011). Table 3 shows that the ATCIT of Macao has reached 1979.97 USD in 2010. In general, the development experiences of

international tourism in Macao mainly involved 7 aspects, specifically festivals, catering, investment, marketing, supporting infrastructure, policy and management (Table 7).

Summary

The development experiences of international tourism in Australia, India and Macao can provide the most relevant references for international tourism in Malaysia. All these three nations have seriously focused on product and festivals, tourism infrastructure, investment, policy and management as well as marketing. Besides these, Australia has also achieved great success on other aspects, such as souvenir design, public participation and sustainable development. Taken as a whole, these experiences on international tourism can be classified into 19 types, involving four fields: tourism product, tourism market, tourism management and development principle (Table 8).

Table 8 Development Experiences of International Tourism in Australia, India, and Macao

Field	Type	Feature
Tourism product	Product	Distinctive attraction
	Festivals	Multicultural meeting points
	Service	Professional humanized services
	Catering	Diversified cultures
	Accommodation	Strong local features
	Souvenirs	Variety and uniqueness
	Transportation	Tri-dimensional traffic
Tourism market	Investment	Multi-channel investment
	Market segmentation	Different market strategy
	Promotion	Mature promotion system
	Pricing	Different pricing strategy
Tourism management	Supporting Infrastructure	Developed system
	Official management	Effective management
	NGO supervision	Tri-dimensional supervision

	Industry supply chain	Systematic, supportive supply chain
Development principle	Tourism policy	Preferential, inclining policy
	Public participation	Wide, deep participation
	Sustainable ideas	Sustainable tourism
	Tourist needs	Concern on market preference

CONSTRUCTING THE PATTERN FOR INTERNATIONAL TOURISM IN MALAYSIA

Malaysia has many charming tourism attractions. The primary natural resources are mainly at the long stretches of sandy golden beaches in Penang, Langkawi, Pangkor, Tioman, Redang and Cherating-Kuantan. In addition to this, the tropical rain forest in Malaysia is one of the oldest, most complex and richest ecosystems in the world. The various ethnic groups in Malaysia have also accorded the country a diverse mix of architecture, events and lifestyle. However, these attractions in Malaysia are very similar to those in neighbouring countries, such as India, Singapore, Thailand and Indonesia (Khalifah & Tahir, 1997; Josiam et al., 2007; Marzuki et al., 2011). Additionally, the main sources of international tourists in Australia, India, Macao and Malaysia are basically similar, as most of them come from within Asia. These similarities can be considered to form the prerequisite for Malaysia to use and learn from the experiences in international tourism of these three destinations.

However, to establish the development pattern of international tourism for Malaysia, the uniqueness and characteristics of international tourism in this country can not be ignored. In terms of tourism resources, Malaysia is well famous in the world for its unique cultural heritage, fascinating natural beauty, tantalizing cuisines and diverse population. These present multiple cultures have not only made Malaysia a gastronomic paradise, but also enabled hundreds of colourful festivals to be held within Malaysia. In the aspect of tourism market, most international tourists to Malaysia were from Singapore, Indonesia, Thailand, China and Brunei, accounting for 88.09% of the total tourist arrivals (Table 9).

Table 9 The Top Ten Countries by Tourist Arrivals in Malaysia

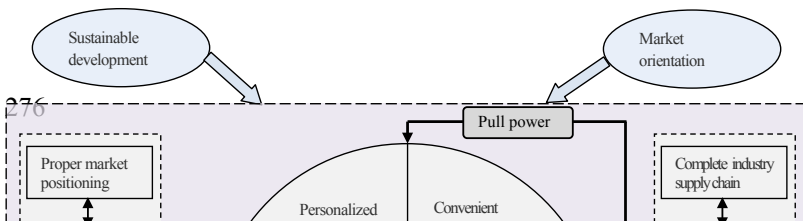
Country of Residence	Tourist arrivals		
	2010	2009	10/09 (%)
Singapore	13,042,004	12,733,082	2.4
Indonesia	2,506,509	2,405,360	0.2
Thailand	1,458,678	1,449,262	0.6
China	1,130,261	1,019,756	10.8
Brunei	1,124,406	1,061,357	0.9
India	690,849	589,838	17.1
Australia	580,695	533,382	8.9
Philippines	486,790	447,470	8.8
United Kingdom	429,965	435,091	1.2
Japan	415,881	395,746	5.1

Note: These figures were calculated according to the Malaysia Tourist Arrivals Report, issued by Tourism Malaysia with the cooperation of Immigration Department of Malaysia.

Deriving from the basis of development experiences and specific differences on international tourism, the development pattern of international tourism in Malaysia can be constructed (Figure 2). The development pattern consists of four sectors: development foundations, push factors, pull factors and development principles. The development foundations of international tourism in Malaysia should stem from its distinctive products, various festivals, multicultural cuisines, diversified hotels, abundant souvenirs, and convenient traffic system, which are the core tourism products or development conditions.

All international tourism stakeholders should actively participate in market positioning, product pricing, tourism marketing, tourism investment, infrastructure improvement, industry supply chain development, extensive supervision and effective management to form an important driving power for international tourism in Malaysia via push and pull factors (Yilmaz & Gunel, 2009; López-Guzmán et al., 2011). International tourism in Malaysia should also follow scientific development principles, such as government support, public participation, sustainable development and market-oriented development.

Figure 2 Development Pattern of International Tourism in Malaysia



CONCLUSION

The tourism industry in Malaysia relies heavily on international tourism. However, the international tourism receipt of Malaysia is relatively low although international tourist arrival is considerably high. Thus, a proposed development pattern for international tourism in Malaysia was eventually established through this research, consisting of four development principles, six development foundations and eight drive forces. It is argued that this pattern can help Malaysia to increase international tourism receipts and further develop the development potentials of international tourism. This development pattern can also provide a lot of references and guidance for international tourism especially for developing countries within Asia and the Pacific region.

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