



3rd Global Conference on Business and Social Science-2015, GCBSS-2015, 16-17 December 2015, Kuala Lumpur, Malaysia

Competitive advantage of geotourism market in Malaysia: a comparison among ASEAN economies

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Abstract

This study analyzes three major components of geotourism market in ASEAN: demand side, supply side and related agencies. It reveals potential competitive advantages for Malaysia such as its large market for geotourism promotion because of higher tourist arrival rate and increasing demand trend for nature-based tourism, its supply side with enormous possibilities due to the abundance of geoheritages specially, Langkawi Global Geopark – the first UNESCO geopark in Southeast Asia, established tourism infrastructures, and price competitiveness that makes Malaysia very affordable destination. The findings suggest that Malaysia should strategies geotourism promotion taking into account these advantages and further prioritize its tourism sector.

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Peer-review under responsibility of the Organizing Committee of the 3rd GCBSS-2015

Keywords: Geotourism; Demand; Supply; Competitive Advantage; ASEAN; Malaysia.

1. Introduction

Malaysia is recognised globally as one of the leading tourism destinations, ranking in the top 10 in arrivals and top 15 in global receipts (World Travel and Tourism Council (WTTC), 2010). Malaysia's tourism sector is among the forefronts of its economic development. Known as one of the national key economic areas, the tourism industry is a major contributor to gross national income (GNI), foreign exchange earnings and employment. It is the second largest foreign-exchange earner after manufactured good and the sixth largest component in the Malaysia economy in 2013,

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moving up one spot compared to 2012 with a contribution of RM51.5 billion to the GNI in 2013 (Ministry of Tourism Malaysia, 2013). In 2014, the country continues to see new records set, with tourism arrivals growing by 6.7 percent to 27.4 million and receipts at RM72 billion compared to RM65.4 billion in 2013 (Government of Malaysia, 2014). The tourism industry currently employs a significant number of workers – an estimated 14 percent of the total workforce. If this trend of tourism growth in Malaysia continues, it may surpass manufacturing sector, which, since 1987 has been the country's engine of growth. The revenue earned from international tourism has a pivotal role that directing Malaysian economy to higher growth (Sadi & Bartels, 1997).

However, tourism industry is changing rapidly as nature, heritage, and recreational destinations become more important, and as conventional tourism is forced to meet tougher environmental requirements (Global Development Research Center, 2009). In recent century, the need for sustainable tourism became apparent that would offer tourists to make positive impact on the environment, society and economy of the tourism destination while limiting their negative impact such as environmental degradation. Among several kinds of sustainable tourism, geotourism emerged in early 1990s. Through geoparks, geosites and geological monuments, it provides an opportunity to experience the aesthetic beauty of the unique landscape and engage in learning about the intrinsic value of geoheritage while at the same time contributing to geo-conservation by enabling sustainable development of the tourism destination. It is a natural area tourism that specifically focuses on geology and landscape which promotes tourism to geosites and the conservation of geo-diversity and an understanding of earth sciences through appreciation and learning (Dowling & Newsome, 2010). It is also particularly important in the context of sustainable development as promotion of geoheritage contributes to local and national economic development while providing an incentive to finance geo-diversity conservation for future generations by attracting an increasing numbers of tourists to the geoparks and geoheritage sites.

Nevertheless, the kind of the consumer, the pattern of their demand, the products, and services of geotourism varies from mass tourism and it is essential to explore this new dimension of tourism industry to identify the opportunities and competitive advantages for Malaysia. Therefore, this study aims to analyze the demand, supply and related agencies of geotourism market among eight larger ASEAN economies namely Indonesia, Thailand, Malaysia, Philippines, Singapore, Vietnam, Myanmar and Cambodia.

2. Comparative analysis: demand side

Demand of geotourism is associated with the demand for nature tourism since it promotes beautiful landscape of geoheritages. The positive sign is that the world demand is inclining towards nature tourism. World travel monitor (2009) reports that green consumerism will increasingly take centre stage due to the changes in demographics and lifestyles. Green consumerism refers to recycling, purchasing and using eco-friendly products that minimize damage to the environment and also includes the choice of environmental friendly products and services in tourism. Likewise, not only demand for green consumerism is increasing, but also tourists are increasingly willing to pay a premium for sustainability or environmental-friendly practices (WTTC, 2010). These indicate a hopeful prospect for sustainable tourism. Though there is no direct statistics available on the percentage of tourism who are conscious about the availability of sustainable tourism choices, it is identified by WTTC that 6 percent of the total number of tourists actually pay extra for these options and 34 percent would be willing to pay extra for them. Being a nature based sustainable tourism, the world demand for geotourism is likely to increase along 'green tourism' from a niche to a mass phenomenon. For instance, Carvalho and Rodrigues (2009) discussed in 8th European Geoparks Conference that the niche of tourism has been rising worldwide in the last years and nature tourists look for certified, high quality destinations, as are the ones being developed by the Geoparks under auspices of UNESCO. Therefore, it is possible to create competitive advantage using innovative cooperative partnerships to promote sustainable products and services of geotourism.

Comparing between ASEAN, Malaysia is notably top tourist recipient country with 27.4 million tourist arrivals in 2014 followed by 24.8 million in Thailand, 15.1 million in Singapore, 9.4 million in Indonesia, 7.9 million in Vietnam, 4.8 million in Philippines, 4.5 million in Cambodia, and 3.08 million in Myanmar (ASEAN, 2015). WTTC (2010) reports that Malaysia's major tourist attractions are its modern architecture, exotic jungles, lively historical ports, and ancient colonial heritage as well as the country's intercultural Asian atmosphere. Figure 1 illustrates the rate of tourist arrivals in ASEAN economies in past few years.

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