MEASURING THE COMPETITIVENESS OF MALAYSIAN TOURISM CITIES THROUGH THE APPLICATION OF MULTI DIMENSIONAL SCALING ANALYSIS

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ABSTRACT

Tourist destinations contain many desired or expected attributes by travelers. At the same time, the image of a destination has been identified as an influence factor of tourist's travel decision-making, cognition and behaviour at a destination. Thus, it is important for destinations to compete and provide highly diversified and value added tourism products for tourist to experience. This paper explains the concepts of competitiveness of urban destinations in Malaysia; observed from five main elements namely tourist attractions, facilities and services, infrastructure, cost and hospitality. This paper aims to analyze the perceived image of 15 selected destinations from 757 valid responses among foreign and domestic tourists, tourism stakeholders, tourism academics and tourism postgraduate students; based on online and group administered surveys. Respondents were required to assess 40 attributes of destination competitiveness that were grouped according to five main themes as mentioned previously. This study also attempts to evaluate the satisfaction level of tourists towards the visited destinations. Data obtained were further analyzed using reliability test, correspondence analysis and multidimensional scaling techniques. The findings indicate that respondents perceived all destinations to be competitive in accommodation (μ = 3.87), scenery/natural resources (μ= 3.84), food and beverage facilities (μ= 3.75), food/cuisine (μ= 3.74) and variety of tourist attractions (μ= 3.72). In overall, Kuching was perceived to be the most attractive vacation city as compared to other destinations listed in the study. The respondents perceived the images of Kuching to be wonderful cultural heritage, unique natural attractions as well as interesting local arts and crafts. In terms of destination competitiveness, this study has identified five significant competitive indicators of Kuching that include culture and ethnicity, scenery and natural resources, history, food or cuisine and the friendliness of local people. Besides that, the results from a multidimensional analysis indicate that all destinations are found to differ significantly with respect to destination attractiveness and images. In conclusion, the difference in tourism development zones shall concentrate on different packages of tourist's products to take full advantage of their resources and locational advantages. A good planning standard is necessary to maximize the competitiveness of Malaysian tourism cities in a developed country.

Keywords : tourism destination, competitiveness, cities

INTRODUCTION

Tourists travel to particular destinations for many reasons. Tourists will not visit destinations that have nothing to offer. Thus, it is important for a destination to provide highly diversified and value added tourism products for tourists to experience. A successful site attraction or destination requires a critical mass of compatible products which have market viability and appeals (Pearlman, 1989). At the same time, destination image plays important role in influencing decision made by a traveler in deciding which destination to visit (Hunt, 1975; Ashworth, 1990; Goodall and Ashworth, 1998; Goodall, 1991; Kotler, Haider and Rein, 1993). The image influences tourist to condition the after-decision-making behaviors including participation (on-site experience), evaluation (satisfaction) and future behavioral intentions (intention to revisit and willingness to recommend) (Ashworth & Goodall, 1988; Bigne et al., 2001; Cooper, Fletcher, Gilbert, & Wanhill, 1993; Lee et al., 2005; Mansfeld, 1992, Chen and Tsai, 2007). Furthermore, Ahmed (1996) emphasized that tourists perceived many images of their destination and the images influence their attitudes and behavior. Several studies above confirmed the positive correlation between destination image and visitation intention of tourist.

A destination depends on distinctive tourism products and clear image to continue attracting tourist to visit it. Consumers are likely to make comparisons between facilities, attractions and service standards of other destinations (Laws, 1995). According to Pritchard and Havitz (2006), tourists were more likely to give positive ratings to destinations they visited when their expectations were met. Mayo and Jarvis (1981) argued that a consumer selects a destination amongst alternatives and evaluates each alternative considering its potential to serve the benefits he looks for. 'The choice of a particular good or service is the result of a comparison of its perceived attributes with the person's set of preferences' (Fishbein and Ahjen, 1975 in Laws, 1995, p. 113). Laws (1991), however, has stressed that each tourist has the opportunity and freedom to choose amongst a set of destinations.

Different factors may have an influence on destination choice. Telisman-Kosuta (1989) insisted that tourist's decisions are determined by two fac-

tors that is the destination's potential for performance and the perception of its personality or image. Therefore, to sustain good image and to attract more tourists, a destination must be able to provide an overall attractiveness and quality experience that are better than those of the alternative destinations for the specific markets. This paper intents to analyze the competitiveness of 15 selected Malaysian tourism destinations among tourists and tourism stakeholders. This paper discusses the methods and approaches utilized in identifying the destinations' position relative to each other based on destination competitiveness attributes. The paper also attempt to measure tourists' overall satisfaction level towards the quality and image of tourism products offered at the destinations.

MEASURING THE DESTINATION COMPETITIVENESS

In every industry and business, many tourist destinations are in competition with each other (Heath and Wall, 1992). This phenomenon makes tourism experts believed that tourism sector has become highly competitive market since these recent years. Bordas (1992) has emphasized that the competitiveness is established between destinations and tourism organizations rather than countries because of the different aspects and features of the destinations in a country. The concept of competitiveness can be observed from six different dimensions of strength and performance which are economic, social, cultural, political, technological and environmental strengths. The tourism sector cannot be reviewed with a single dimension because of its unique nature and multi-sectors. However, as to become a competitive destination, Poon (1993) has suggested four principles to be followed namely; (1) put the environment first, (2) make tourism a leading sector, (3) strengthen the distribution channels in the market place, and (4) build a dynamic private sector. Ritchie and Crouch (2003, p. 2) asserted that the true ability of a tourism destination to become competitive is *"its ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences and to do so on a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations"*.

According to Pearce (1997), a competitive analysis refers to comparative studies. Therefore, destination competitiveness can be evaluated both quantitatively and qualitatively (Kozak, 1999). Kozak (1999) suggested that the quantitative performance of a destination can be measured by looking at numbers such as annual numbers of tourist arrivals, amount of annual tourism receipts, level of expenditure per tourist and length of overnight stays. He, however, attempted to include the qualitative patterns of destination competitiveness, as these ultimately drive quantitative performance. There were 12 factors that Kozak (1999) considered can affect the success of the organization or the destination and its competitiveness in the marketplace; namely, (1) socio-economic profile of tourism demand and changes in market, (2) access to tourist markets (distance), (3) mature tourist destinations and consumer psychology, (4) influences of tourist satisfaction, (5) marketing by tour operators and their perceptions of destinations, (6) prices and costs, (7) exchange rates, (8) use of information technologies, (9) safety, security and risk, (10) product differentiation (positioning), (11) adequacy and quality of tourist facilities and services, and (12) quality of environmental resources.

There are many criteria/characteristics that can be employed to assess for the performance of tourist destinations. These criteria may be found similar to or different from other locations. As stated by Dwyer et al. (2003), there is no single or unique indicators that apply to all destinations at all times. The previous studies by Goodrich (1978), Haahti (1986), Calantone, Bendetto, Hakam and Bojanic (1989), Gartner (1989), Crompton, Fakeye and Lue (1992), Kim (1998), Botha, Crompton and Kim (1999), Kozak and Rimmington (1999), Andreu, Bigne and Cooper (2000), Uysal, Chen and Williams (2000), Chen and Uysal (2002), Kim and Agrusa (2005), and Gomezelj (2006) have utilized a variety of tangible and intangible features in determining a destination's position and competitiveness, potential and actual demand, levels of satisfaction and intentions to revisit, and positive word-of-mouth advertising.

METHODOLOGY

Destination competitiveness attributes

Since previous studies pertaining to competitiveness and positioning of Malaysian tourism destinations are found limited, a set of destination competitiveness attributes was developed. The identification of the attributes were based on a review of tourism literature on competitiveness model by Hassan (2000), Ritchie and Crouch (1993), Evans and Johnson (1995), Kozak (2001), De Keyser and Vanhove (1994) and Dwyer et al. (2003). As a result of the review, a group of 40 attributes was identified and be categorized in five themes namely attractions, facilities and services, infrastructure, cost and hospitality (Table 1). These attributes were included in the survey instruments and being presented on 5 point Likert scale where 1 was offers very little, 4 offers neither little nor much and 5 offers very much.

Table 1. Competitiveness attributes

Theme	Attributes
1. Tourist attractions	Scenery/natural resources, weather, culture and ethnicity, food/cuisine, history, accessibility of attractions, nightlife and entertainment, variety of tourist attractions, well-known landmarks, special events and festivals, local way of life, interesting architecture, safety at attractions.
2. Facilities and services	Accommodation, local transport services, sport facilities and activities, entertainment, shopping centers, food and beverage facilities, conference facilities, signage and direction to attractions, parking facilities at attractions, facilities at the airport, quality of destination information, quality of restaurants and bars, facilities for children.
3. Infrastructure	Telecommunication networks for tourists, health/medical facilities to serve tourists, streets/highways, security systems, hygiene and sanitation.
4. Cost	Value for money, accommodation prices, food and beverage prices, transportation prices, shopping prices.
5. Hospitality	Friendliness and helpfulness of local people, efficiency of staff at the airport/port/bus terminal, responsiveness to customer complaints, attitude of custom/immigration officials

The instrument

Questions and variables used in the questionnaire are derived from past research especially Dwyer et al. (2003), Go and Govers (1999), Kozak and Rimmington (1998), Mill and Morrison (1992), Laws (1995), Goodall and Bergsma (1990), McLellan and Fousher (1983), Pyo et al. (1989), Selby and Morgan (1996) and Sirakaya et al. (1996). The questionnaire consists of three sections. The first section discovered the respondent's demographic background such as age, gender, employment and main transportation. The second section measured respondents' perceptions of competitiveness attributes of destination visited. The third section required respondents to state their level of agreement on destination image on a five-point Likert scale, ranging from 1 (strongly

disagree) to 5 (strongly agree), with a neutral position in the middle. Respondents were asked to rank their visit on a scale of 10 (from poor to excellent). The questionnaire was prepared in both Malay and English, and each questionnaire took about 8 to 10 minutes to be completed.

Study areas

As time and financial are become major constraints, the selection of study areas are being limited to only 15 destinations. The destinations of choice were determined by the popularity of the places as top and potential tourist spots among domestic and international travelers. These destinations are well represents all region in peninsular Malaysia and east Malaysia (Table 2).

Table 2. The selection of study areas

Region		Towns and cities
West Malaysia	North	Kuala Kangsar, Taiping, Lumut, Penang, Ipoh, Kangar
	West/Center	Port Dickson, Kuala Lumpur and Seremban
	South	Malacca
	East	Cameron Highland, Kota Bahru, Kuala Terengganu
Sabah & Sarawak		Kota Kinabalu, Kuching

Sample and data collection

The survey was conducted between October 2007 to April 2008 (seven months duration) and the sample involved respondents aged above 18

years old from the groups of tourists (both local and international), visitors and tourism stakeholders. The group of stakeholders consists of tourism industry stakeholders, government officials, tourism school academics, and postgraduate

students on tourism courses. The researchers under-took two methods in distributing the questionnaire forms. First, the researchers delivered hundreds of questionnaire forms to selected tourism schools in Malaysia and requested the assigned lecturers to distribute the forms among their students. The completed forms were mailed back to researchers once the task was completed. The second method was by using online questionnaire. As to ensure high response rates, the researchers employed snowball techniques. Email message was first sent to all possible contact of researchers. Respondents were required to answer the online questionnaire that can be accessed at http://www.hbp.usm.my/tourism/mtc. Then, they were requested to forward the URL to all their contacts. Most returned questionnaires were usable, only 5.3% were incomplete and therefore were discarded.

The respondents consist of 42.14% male and 57.86% female, with an average age of 32 years old. The biggest age group was respondents with age below 25 years old (34.58%), followed by group at the age between 26-35 years old (32.5%). Majority of them are Malaysian (94.6%). 69.48% work in the public sector, 23.97% work in the private sector, while another 6.55% are self-employed. Sixty three percent of the respondents were Malay, followed by Chinese (23.21%), Indian (1.93%), Bumiputera (4.97%) and others (6.48%). The majority of the respondents were single (52.97%).
Data analysis

Obtained data was entered and coded onto SPSS program. Data cleaning and crosschecks were performed during the data entry process. Responses from open-ended questions were re-coded to allow meaningful descriptive analysis to be performed. As the first step of the analysis, the reliability test was performed on a 40-item destination competitiveness scale using Cronbach Alpha. The reliability value found was 0.943, which is an indication of strong item homogeneity. All items appeared to be worthy of retention which the greatest increase in alpha would come from deleting item 1 (scenery/natural resources), item 2 (weather) and item 29 (streets/highways), but removal of these items would increase alpha only by 0.001. The researchers also employed multidimensional scaling analysis to identify the competitiveness of Malaysian tourism cities from various dimensions by producing perceptual maps indicating the selected destinations and respondents' perception of each destination attributes.

FINDINGS

Identification of close competitors

Respondents perceived all destinations to be competitive in accommodation (μ = 3.87), scenery/natural resources (μ= 3.84), food and beverage facilities (μ= 3.75), food/cuisine (μ= 3.74) and variety of tourist attractions (μ= 3.72). The responses were measured on a 5-point Likert-type scale. The respondents were asked to rate their vacation destinations according to their preferences and satisfaction on the scale of 10-point. Among the destination, Kuching was perceived to be the most attractive vacation destinations as compared to 14 other destinations listed in the study (Table 3). Kota Bahru and Kota Kinabalu are positioned at second and third. Our renowned heritage cities; Melaka and Penang, are only ranked at fifth and sixth places.

Table 3. Respondents' ranking of Malaysian vacation destinations

Ranking	Destination	Mean rank	Standard error	Willing to revisit the destination	Will recommend the destination to others
1	Kuching	7.16	1.719	90.0%	96.0%
2	Kota Bahru	7.08	2.181	87.2%	89.7%
3	Kota Kinabalu	7.00	1.550	96.0%	95.0%
4	Kuala Terengganu	6.94	1.453	90.0%	95.0%
5	Malacca	6.89	1.524	87.0%	93.5%
6	Penang	6.86	1.571	93.8%	95.0%
7	Kuala Lumpur	6.79	1.508	96.7%	91.2%
8	Cameron Highland	6.77	1.462	91.6%	91.9%
9	Lumut	6.63	1.962	87.5%	93.3%
10	Taiping	6.53	1.642	73.3%	78.6%
11	Port Dickson	5.63	1.500	68.8%	56.3%

Scores of mean rank ranged from 1(poor) to 10 (excellent)

Although Kuala Lumpur was perceived as less attractive than Kuching, however, the percentage of willingness to revisit is higher than Kuching. As Kuala Lumpur has excellent networks of accessibility besides offers various opportunities for business, trade, education and others, thus it becomes a frequently visit destination among Malaysian travellers. In overall, majority of respondents have high positive overall satisfaction levels with the destinations. They also show high tendency to revisit the destination in the near future and recommend the destination to family members and friends.

This study has compared the image of Kuching to Kuala Lumpur (Table 4). Kuala Lumpur was chose as a benchmark, due to its position as the largest metropolitan city in the country. The images of Kuching were perceived as wonderful cultural heritage followed by unique natural attractions as well as interesting local arts and crafts. Meanwhile, the urban tourism elements like shopping paradise, good nightlife and entertainment and skyscrapers significantly reflects the image of Kuala Lumpur according to the respondents.

Table 4. The image of Kuching and Kuala Lumpur as perceived by respondents

Image of Kuching	Image of Kuala Lumpur
1. Wonderful cultural heritage (92%)	1. Shopping paradise (85.4%)
2. Unique natural attractions (88%)	2. Good nightlife and entertainment (73.4%)
3. Interesting local arts and crafts (86%)	3. Skyscrapers (71.9%)

This research also has identified five significant competitiveness indicators of Kuching and Kuala Lumpur as perceived by respondents (Table 5). The culture and ethnicity becomes the most significant competitive indicator in Kuching followed by scenery and natural resources, history, food or cuisine and the friendliness of local people. Kuala Lumpur however, is a dynamic and sophisticated city environment where the competitive indicator is perceived to be its shopping

centres, followed by food and beverage facilities, nightlife and entertainment, accommodation and urban entertainment. The result illustrates that Kuching offers various unique tourism products that might not be available in other towns and cities in Malaysia. Among Kuching's unique product are such as Cat Museum, Fort Margheritta, the Astana and so on. Surrounded with clean environment, therefore, the willingness to recommend Kuching as vacation destination is higher than

Kuala Lumpur. Moreover, as Kuching is located on the Borneo Island, numerous natural attractions are located near Kuching such as the National Parks (notably Bako and the Kuching Wetlands National Park) and the Semenggoh Wildlife Center which places orang utan orphanage and rehabilitation program. Being the largest city in Borneo, Kuching becomes one of the main entrances to explore the heart and beauty of Borneo.

Table 5. Five significant competitiveness indicators of Kuching and Kuala Lumpur

Kuching				Kuala Lumpur			
Indicator	Mode	Mean	SD	Indicator	Mode	Mean	SD
1. Culture and ethnicity	4	4.12	0.849	1. Shopping centers	5	4.60	0.744
2. Scenery and natural resources	4	4.10	0.735	2. Food and beverage facilities	5	4.46	0.844
3. History	4	3.86	0.808	3. Nightlife and entertainment	5	4.34	0.964
4. Food/Cuisine	4	3.86	0.833	4. Accommodation	5	4.32	0.868
5. Friendliness and helpfulness of local people	4	3.72	0.930	5. Entertainment	5	4.29	0.896

Scale: 1 (Offers very little) − 5 (Offers very much)

Table 6 shows the elements that need to be improved at destination. Accommodation and attractions becomes the most required elements to be improved in Kuching and Kuala Lumpur respectively. The provision of accommodation in Kuching should be ranged from luxury to budget hotels to cater the demands of tourist from various segments. Meanwhile the attraction for both cities can be enhanced by emphasising more on marketing and promotion. Other elements that need to be improved for both cities include events, event facilities tourist services and sports facilities.

Table 6. Elements that need to be improved at destination

Elements that need to be improved in Kuching	Elements that need to be improved in Kuala Lumpur
1. Accommodation (46.2%)	1. Attractions (35.5%)
2. Attractions (43.6%)	2. Activities (27.2%)
3. Event facilities (35.9%)	3. Events (22.8%)
4. Tourist services e.g. car rental, tour bus etc. (35.5%)	4. Tourist services e.g. car rental, tour bus etc. (22.8%)
5. Activities (33.3%)	5. Sport facilities (20.7%)
6. Events (33.3%)	6. Event facilities (17.9%)

*Mapping the destination of choice*

The destination of choice was analyzed into perceptual map using multidimensional scaling (MDS). MDS is a set of data analysis to correspond to either similarity or dissimilarity data by spatial distance models (Takane, 2007). The analysis of the dimensions can lead to an understanding of fundamental processes to perceive the nearness of entities (Van Deun & Delbeke, 2000). Consequently, this paper attempts to observe the relation of selected variables on spatial presentation.

As shown in Figure 1, the first dimension (x-axis) is labeled according to the polarity between 'leisure' and 'adventure' in which 'leisure' represent the negative pole and 'adventure' as the positive pole. Under dimension 1, Seremban, Ipoh and Kangar are closely positioned to leisure interest. Besides, the results indicate Cameron Highland and Kota Kinabalu as the most preferred adventure destination among others. Meanwhile, destinations below the x-axis such as Kuala Terengganu, Kuala Lumpur, Penang and Malacca are representative as cultural/ heritage destination. On the other hand, dimension 2 (y-axis) shows that there are distinction between nature and cultural/heritage attributes which represent by Cameron Highlands and Kuala Terengganu. Cameron Highland offers very much scenery/natural resources, as it is surrounded

with green environment and fascinating geological features in contrast with Kuala Terengganu that offers variety of cultural/heritage attractions. In general, Cameron Highlands, Kota Kinabalu and

Kuching are attractive with natural resources with less competitive. Meanwhile, Seremban, Ipoh and Kangar are close competitors as they were indicated with similarity as leisure destination.

Derived Stimulus Configuration

Euclidean distance model
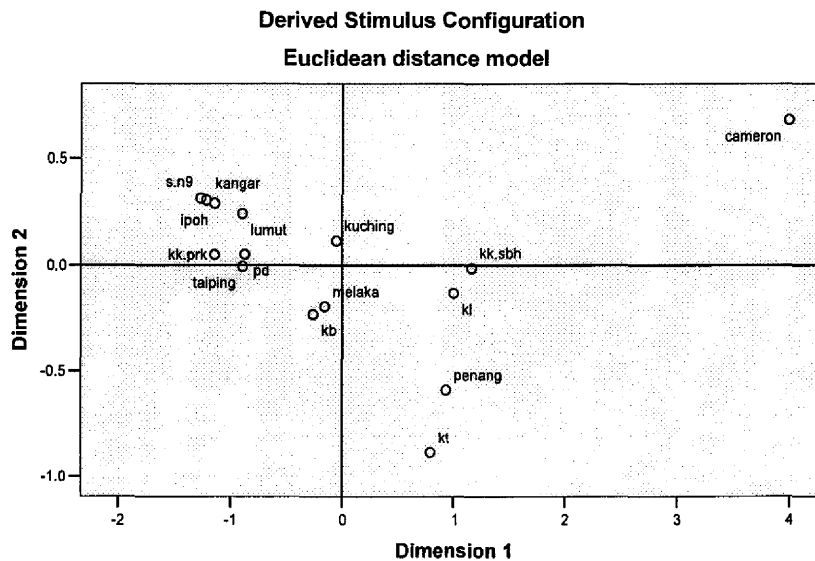
Legend: s.n9 = Seremban; kk.prk = Kuala Kangsar; pd = Port Dickson; kb = Kota Bahru; kk.sabah = Kota Kinabalu; kl = Kuala Lumpur; cameron = Cameron Highlands; Melaka = Malacca

Figure 1. The competitive position among 15 Malaysian tourism cities

CONCLUSION

The difference in tourism development zones shall concentrate on different packages of tourist's products to take full advantage their resources and locational advantages. A good planning standard is necessary to maximize the competitiveness of Malaysian tourism cities in a developed country. It is hoped that the outcomes of this study will help tourism planners and authority to be able to plan the physical development as well as to allocate appropriate budget and to direct policies pertaining the development.

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