

A PARADIGM SHIFT IN FOREIGN TOURIST ARRIVALS –
THE IMPERATIVE FOR PENANG HILL’S SUSTAINABLE
GROWTH

BY
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Abbreviation Definition

EPU

Economic Planning Unit, Prime Minister's Department Malaysia

MOTAC

Ministry of Tourism and Culture

PGT

Penang Global Tourism is the new state tourism bureau set up to work with key tourism players inside & outside of Penang, to promote the state through better forged ties, reliable data & feedback and synergistic activities.

PHC

Penang Hill Corporation is the latest Statutory Body of the Penang State Government responsible for the management, operation, and control, maintenance of the Penang Hill Railway service and overall management and development of Penang Hill.

PSTDC

Penang State Tourism Development and Culture is a Unit under EXCO YB Danny Law Heng Kiang office, responsible to promote Penang as a tourism destination

P&M

Promotions & Marketing Division of Penang Hill Corporation, responsible for the promotions and ridership of tourist to Penang Hill.

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Abstract

The emergence of tourism industry over the last few decades had tremendously contributed to the continued growth of Penang economy and lately the industry had a deepening diversification to become one of the fastest growing economic sectors in Penang. Tourism is closely linked to development of various tourism products and attractions that encompasses the growing number of new destinations such as the Georgetown Heritage Enclave, 3D Museum, The Butterfly Farm and etc. The dynamism of this attractions had turned tourism into a key driver for socio-economic progress by creating competition among the tourism industry players in Penang. Penang Hill being one of the tourism icons in Penang is into this competition naturally and vying hard to capture a bigger market share in term of tourist arrivals especially the International Tourist Arrivals.

According to the statistic and data collected, Penang Hill has not been successful in capturing the foreign tourist arrivals even though the statics shows that there had been a steady increase of foreign tourist arrivals to Penang.

This case study had been taken up as the maiden effort to uncover the riddle of mystery of why many of foreign tourist that had chosen Penang as their choice of vacation destination, had not visited Penang Hill which is considered as the tourism icon of Penang,

Executive Summary

Since the inception of Penang Hill Corporation in 2009 as the latest statutory body of the Penang State Government, it was vested with the huge responsibility of turning around Penang Hill, the tourism icon of Penang into a world class hill tourism resort.

After struggling for about a year and half, finally in 2011 Penang Hill Corporation emerged as a full-fledged organisation competing in the growing service industry in the tourism sector in Penang. Being one of the most vibrant cities in Malaysia, Penang had etched itself as the most sought after tourist destination in the international platform with the recent conferring of Georgetown as a UNESCO World Cultural Heritage Site in 2008.

Since then Penang had been experiencing an increase in the foreign tourist arrivals, flocking to immense in the various offerings such as Historical and Cultural Sites, sumptuous furnishings of exquisitely prepared local cuisine, breath-taking tropical hill nature and many more interesting places to visit.

Looking at the statics of foreign tourist arrivals to Penang in 2004, there were about 720 thousand of foreign tourist had arrived to Penang but only about 45 per cent of this tourist had visited Penang Hill. This is extremely surprising and puzzling on why such a huge number of foreign visitors who are here in Penang had not visited Penang Hill which is considered as the tourism icon of Penang.

The Penang Hill Corporation's target to hit at least 500 thousand foreign visitors per year had never been materialised and seems impossible all this years. The arrivals of foreign tourist to Penang Hill is very significant for its future sustainability since Penang Hill Corporation is a stand-alone agency, as such the responsibility to develop and nurture the three pillars of sustainability namely,

Economic, Social and Environment is very much a concern to Penang Hill Corporation.

The above issue had given an opportunity for this paper to probe and uncover the mysteries on why Penang Hill Corporation was not able to attract more foreign tourist despite the encouraging number of foreign tourist arrivals to Penang Island.

The get the truth for the horse mouth, two sets of questionnaires' was prepared for this case study and interview session with them was conducted. The first set of questionnaires' is formulated for the tourist who had visited Penang Hill and the other is for the tourist who had visited Penang but not visited Penang Hill. The earlier sets of question is formulated to find out about the current experience and expectation of those who had visited Penang Hill so that the future direction of Penang Hill on development and preservations initiatives would be able to take into the consideration of this feed backs so that it could attract more foreign visitors to Penang Hill. The latter set of questions is formulated to find out the reasons on why those who had visited Penang had not visited to Penang Hill. This is to find out why many of them did not visits Penang Hill and how could we attract them to Penang Hill in the future.

After collecting the data and information from the targeted tourist, two type of analysis is conducted, the first one is the Fish bone Analysis also known as cause and affect analysis and the other one is 4Ps which is known as marketing mix tools. The fish bone analysis is used to explore all of the things that could cause the poor arrivals of foreign tourist, before start to think about a solution. This diagram based technique, which combines Brainstorming with a type of Mind Map, pushes to consider all possible causes of a problem, rather than just the ones that are most obvious. The 4 Ps tool would be able to tell whether we are putting the right product

in the right place, at the right price and at the right time in order to make attractive for foreign tourist to visit Penang Hill.

From the above analysis, many issues were unwrapped such as, marketing issues, human capital issues, budgeting issues, collaboration and networking issues. All this issues were point to the Marketing Division of Penang Hill Corporation since the target and KPI set forth falls under their purview.

As recommendations for the above issues it was suggested the marketing division of Penang Hill Corporation should develop a comprehensive Strategic Marketing Plan which embodies a holistic approach to each and every issues mentioned above. A Strategic Marketing Plan sets the framework and direction for all marketing activities for a destination including market research, budgeting, networking, collaboration with international industry players, contemporary ticketing system, brand development and management, advertising and promotion, sales, distribution and cooperative marketing opportunities.

With the above recommendations and proper implementation strategy, I strongly believe that Penang Hill Corporation could successfully attract more International tourist to Penang Hill and reach beyond the expected targets on foreign tourist arrivals.

1.0 Introduction

Being well known as one of the oldest colonial hill station established during the British settlement in Malaya way back in 18th century, Penang Hill enjoys the rich Historical and Heritage charm besides amazing and fascinating flora and faunas. Penang Hill offers cool and an ideal climate all year round and a spectacular Panoramic view of George Town City. This offering has made Penang Hill major tourist hotspots in Penang for both local and foreign tourist.

According to Penang Chief Minister, who is also the Chairman for Penang Hill Corporation (an organisation entrusted with the transformation of Penang Hill into a hill resort of a choice in this region), Penang continues to record encouraging arrival numbers of tourist at its international airport in 2014. For the first two months of the year, there were over 268,000 domestic arrivals and more than 196,000 international arrivals. Chief Minister Lim Guan Eng said compared with last year, the numbers were up 33.4 per cent for domestic arrivals and 8.23 per cent for international arrivals (The Malaysian Insider, 2014). Even though the influx of foreign tourist to Penang indicates an upward trend but the number of visitors to Penang Hill is way below 50 per cent according to the research data (Foreign Tourist Arrival to Penang via Airport 2013 & 2014, PTBDC) collected from the Penang State Tourism Development & Culture. According to Penang Hill Corporation Key Performance Indicator (KPI) scorecard (Table 1.1) for the year 2014, the total number of visitors expected to visit Penang Hill in 2014 was 1.3 million and the actual number of tourist visited was 1.362 million (an increase of 62 thousands visitors) whereas the projected ticketing income for 2014 was RM18 million but actual ticketing amount collected was RM15.641 million (less RM2.359 million compared to projection). If one observes carefully, the total number of visitors

targeted for 2014 had exceeded the target but the total ticketing income targeted for 2014 had not reached the target. This means the total number of visitors to Penang Hill was able to exceed its target but not the ticketing income. In fact, when the number of visitors increases, the total ticketing income should also increase, but why this disparity occurred?

The main reason is, the visitors to Penang Hill were categorized into two main categories, which are local visitors and foreign visitors. According to Penang Hill Customers profiling ratio, 70 per cent of visitors to Penang Hill were locals and only 30 per cent were foreigners. The ticket price for local visitors in 2014 was RM8, while the ticket price for foreign visitors was RM30. This has caused the increased number of tourist especially the local tourist but unable to meet the targeted ticketing income. In fact, PHC has set the target for both local and foreign visitor's ridership and ticketing revenues.

According to foreign tourist arrivals statistic (see table 1.2), the foreign tourist arrival to Penang in 2014 was 717,714 visitors and out of this number only 331,927 visitors came to Penang Hill. This show that, about 54 per cent of foreign tourist did not visited Penang Hill

In this case study, I've have to explore and analyse on real factors and data on why 54 per cent of foreign tourist had not visited Penang Hill. The above issue may impact Penang Hill's future sustainable growth.

Table 1.1: The KPI Scorecard of PHC - 2014

KPI SCORECARD							
	METRIC	2013		2014		2015	
		PLAN ('000)	ACTUAL ('000)	PLAN ('000)	ACTUAL ('000)	PLAN ('000)	ACTUAL ('000)
VISITOR		1,500	1,234	1,300	1,362	1,450	
TICKETING INCOME	RM	*21,000	12,876	*18,000	15,641	17,094	
NON TICKETING INCOME	RM	*5,000	483	*900	1,426	2,000	
OPEX	RM	11,000	11,177	11,000	10,261	11,500	
CAPEX	RM	7,000	6,975	5,000	7,285	6,000	
ACCU. RESERVED	RM	8,800	12,592	14,500	15,106	20,700	
WAITING TIME	MINUTES	N/A	N/A	20	15	10	
CUSTOMER SATISFACTION	STAR RATING	N/A	N/A	4.5	4.0	4.5	
HEAD COUNT \$		103	94	94	90	102	
TURN OVER	%	N/A	10.6	N/A	5.6		
PROJECT (UPEN + PHC)		4	4	9	7	13	
UPEN	RM	7,600	6,975	7,319	7,285	9,227	
SECURITY INCIDENT \$		-	0	-	0	-	
DOWN TIME	HOURS	0	10	0	4.2	0	
MAINTENANCE	%	100	100	100	66.28	100	

NOTE
* Revised by KPI in Mid 2014 and Approved in BOD

BOD 1/2015 5

1.1 Background of the Case Issue

The issue in this case study is that the foreign tourist arrival to Penang had increased steadily from 671264 visitors in 2013 to 717714 visitors in 2014 (Table 1.2, Foreign Tourist Arrivals to Penang, PSTDC) but only a fraction of this total numbers are coming to Penang Hill, that is about 47.88 per cent in 2013 and 46.24 per cent in 2014. Now the question is why isn't the remaining balance of foreign tourist that makes up of about more than 50 per cent, and who made effort to came to Penang for holiday but had not visited Penang Hill? The next question is how to increase the number of Foreign Tourist to fulfil the existing research gap? This is because the current research data for 2014 by Penang Tourism Development Council indicates only about 331,927 of total foreign tourist visited Penang Hill. The target is to

receive about 500 thousand foreign visitors per year and finally, to make Penang Hill a Tourism icon in Penang so that it could attracts not only local visitors but mainly foreign visitors.

To answer the above research questions or rather to find solutions for the above issue, this case study has to find out why more than 50 per cent of foreign tourist who had come to Penang for a vacation but had not visited Penang Hill; and also how to increase the number of foreign visitors to meet the target of 500 thousand visitors per year set by PHC. Table 1.1 below contains the statistic of foreign tourist arrivals to Penang from January to December for the year 2013 and 2014. The statistic of the foreign tourist arrivals were obtained from the Penang Tourism Development and Culture and as for the foreign tourist arrivals to Penang Hill, the statistic were obtained from the Marketing Division of Penang Hill Corporation.

Table 1.2: Statistic of Foreign Arrival to Penang & Penang Hill- 2013 & 2014, PSTDC.

Statistics of Tourist Arrival						
MONTH	International Tourist Arrival to Penang		International Tourist Arrival to Penang Hill		% Percentage of Visitors (Diff.)	
	2013	2014	2013	2014	2013	2014
January	45083	54581	22311	25435	50.51	64.65
February	50511	59561	21848	28208	56.75	62.07
March	53785	57993	24764	25576	53.96	60.27
April	53009	68628	21552	28179	59.34	76.31
May	51535	55476	23198	26830	54.99	55.59
June	68652	57989	37136	28344	45.91	43.18
July	56826	60099	26651	26048	53.10	59.92
August	63169	63778	41730	44648	33.94	30.28
September	56495	55723	22806	22834	59.63	58.22
October	53474	57155	26241	24567	50.93	60.94
November	49381	60998	21785	20882	55.88	81.24
December	69344	65733	31359	30376	54.78	50.99
Total	671264	717714	321381	331927	47.88	46.24

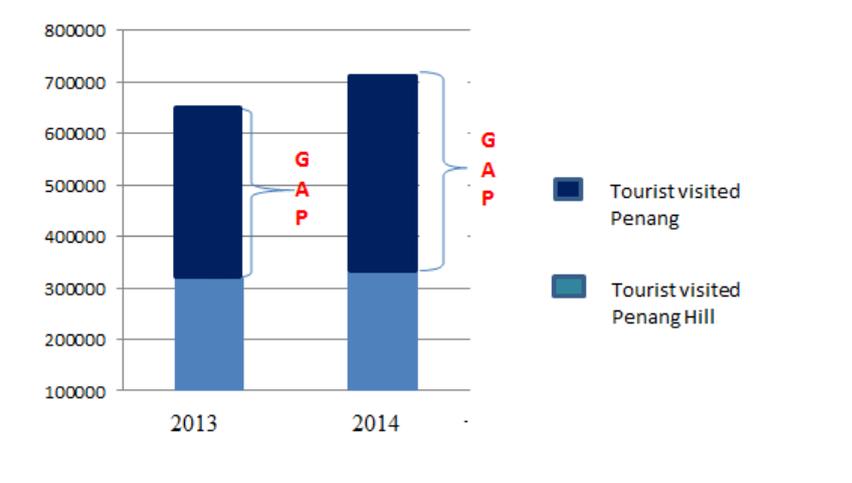


Figure 1.1 Tourist Arrivals to Penang and Penang Hill

Table 1.2 shows the data on foreign tourist arrivals to Penang and Penang Hill for the year 2013 and 2014. According to the table, in 2013, around 671,264 foreign tourists had visited Penang and out of this number only about 321,381 foreign tourists had visited Penang Hill, which is about 47 per cent tourist. Meanwhile in 2014, around 717,714 foreign tourists visited Penang and out of the number only about 331,927 foreign tourists visited Penang Hill, which is about 46.24 per cent tourist.

The above figure 1.1 shows the existing gap between the arrivals of foreign tourist to Penang and Penang Hill. This gap was used as the base for the case study to find out why more the 50 per cent of foreign tourist had visited Penang but had not visited Penang Hill. The foreign tourist arrivals to Penang and Penang Hill had been distinguished with two different colours in the above figure 1.1; the light blue colour on the column indicates the foreign tourist arrivals to Penang Hill, while the dark blue colour indicates the foreign tourist arrivals to Penang. The two contrast colours were used on the column in the above figure 1.1 to show clearly that there exist a huge gap between the foreign tourist arrivals to Penang and Penang Hill.

2.0 Industry Background

Tourism industry in Malaysia has been recognised as a key driver in the services sector. The tourism sector is assuming a greater role in stimulating the economy during the Eighth Malaysia Plan period 2001 - 2005. The overall policy thrust of the tourism sector is to achieve sustainable tourism growth to realise the full potential of employment and impact of income-generation at the national, state and local levels. A holistic and integrated approach that leverages on innovation and vitality of the private sector, the hospitality, courtesy and civic-consciousness of the public as well as the support of the Government is essential to elevate the tourism industry to a higher level of achievement. Similar to any other developing countries, we can proudly declare the Malaysia is extremely rich with cultural and natural diversity which was considered at the national assets. These valuable assets were the main catalyst in drawing attractions and shifting our tourism industry to the international platforms.

This earn the recognition or the World Travel & Tourism Council (WTTC), who declared Malaysia as a destination full of unrealized potential with the main strength as the availability of a vast range of diverse attractions to suit all tastes; relatively affordable prices and; largely unspoilt destination (National Tourism Policy, 2004).

The tourism industry in Malaysia started to bloom since the early 1970s and progressed all the way to become the second highest foreign exchange earner for our country after the manufacturing segments (National Tourism Policy, 2004-2010).

The direct contribution of Travel & Tourism to GDP in 2013 was MYR70.4bn (7.2 per cent of GDP). This is forecast to rise by 7.0 per cent to MYR75.3billion in 2014. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding

commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

The direct contribution of Travel & Tourism to GDP is expected to grow by 4.4 per cent p.a. to MYR115.4bn (7.6% of GDP) by 2024 (Travel & Tourism Economies Impact, 2014).

In the early growth of the industry, tourism was more focussed at beach resorts as a destination for relaxation. It was in the 1990s that it extended to include other attractions like shopping, events, theme park and nature-based. The main markets for Malaysia tourism are the neighbouring ASEAN countries especially Singapore, Thailand, Brunei and Indonesia. While others include Japan, Hong Kong, South Korea, China, Taiwan, India, United Kingdom, Australia, Canada and the United States of America.

2.1 Tourism Programmes

The major programmes implemented include the preservation and conservation of historical sites, provision and upgrading of tourism-related infrastructure as well as improvement in the quality of tourism products and services.

2.2 Product Development

Product development in niche areas will continue to be emphasised based on the needs of target markets and the relative strengths and comparative advantage of the various states.

2.3 Domestic Tourism

The development of domestic tourism will remain a key priority and be actively promoted.

2.4 Marketing and Promotion

Effective, customer-focused promotional efforts are carried out to expand and diversify the tourism market base. Marketing and promotional efforts are updated to consistently develop Malaysia's brand in key overseas market by reinforcing the image of the country as a top e holiday destination.

2.5 Human Resource Development

Human resource development will continue to be given priority to enhance the level of competencies and professionalism to further improve the quality of service and facilitate the growth of an efficient and competitive tourism industry.

2.6 Accessibility

Support infrastructure like air, land and sea transportation will continue to be upgraded to ensure efficiency, high standard accessibility and sustainable growth of the tourism industry.

2.7 Ensuring Quality of Service, Comfort, Safety and Security of Tourists

Quality of service, comfort, safety and security of tourists are crucial for the success of the tourism industry. Efforts will continue to be carried out to build Malaysia's image as a safe tourist destination with high quality of service.

2.8 Strategic Alliances and International Cooperation

Regional cooperation will be actively pursued to reap synergistic benefits.

2.9 Tourist Arrivals to Malaysia

Tourism has become one of the largest and fastest growing industries in Malaysia. The tourism industry is globally a rapid growing industry and catalyst to the economic growth as well as generates employment opportunities, apart from contributes to the development, especially in a developing country like Malaysia. The rapid growth is seen as a huge potential for further advancement of the industry,

and thus strengthening of the nation's economy through it. Then main contributing factors for the incredible influx of tourist to Malaysia could be accredited to the geographic location of Malaysia, surrounded by sea, has made its rich with surrounding islands attractions in the form of well-preserved nature, white sandy beach, diverse sea creatures and beautiful corals. Malaysia is also luxuriant in historical monuments such as old buildings from the era of Portuguese and British colonization, especially in the cities like Kuala Lumpur, Melaka, Pulau Pinang and Taiping. In addition, there are also the remains of ancient settlements like the mausoleum and settlement of Lembah Bujang Kedah and pre-historic cemetery of Gua Niah Sarawak.

Visit Malaysia Year Campaign which was started in 1990 became the starting point for the expansion of the country's tourism industry. Due to the success, the Visit Malaysia Year Campaign was repeated and continued till to date. Visit Malaysia Year 2007 was launched in conjunction with the celebration of 50 years of Malaysian independence, whereby 240 events and festivals were organized throughout the year. These include the floral festival, cultural performances, Kuala Lumpur International Arts Festival, National Water Festival, Colours of Malaysia, Penang International Lantern Festival, Gawai Dayak and Borneo cultural festival, Colour and Flavours of Malaysia parade and World Firework Competition.

Due to the above initiative, Tourist Arrivals into Malaysia had increased to 2,447,845 in December of 2014 from 2,130,022 in November of 2014. Tourist Arrivals in Malaysia averaged 1,554,071.32 from 1999 until 2014, reaching an all-time high of 2,806,565 in December of 2013 and a record low of 459,374 in April of 2003, Tourist Arrivals to Malaysia as reported by Ministry of Tourism & Culture Malaysia, 2015.

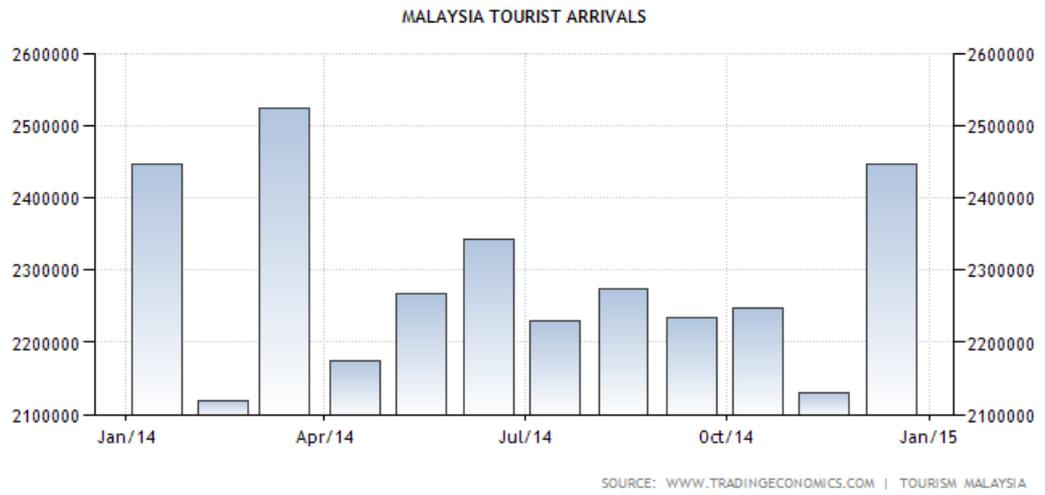


Figure 2.1 Tourist Arrivals to Malaysia 1999-2015 (source: MOTAC, 2015)

Table 2.1: Malaysia Tourist Arrivals by Country-2014(Source: MOTAC, 2014)



MALAYSIA TOURIST ARRIVALS BY COUNTRY OF NATIONALITY DECEMBER 2014

NO	COUNTRY OF NATIONALITY	DECEMBER			JANUARY - DECEMBER		
		2013	2014	Growth %	2013	2014	Growth %
1	SINGAPORE	1,543,174	1,290,093	(16.4)	13,178,774	13,932,967	5.7
2	INDONESIA	273,660	277,473	1.4	2,548,021	2,827,533	11.0
3	BRUNEI DARUSSALAM	179,392	129,438	(27.8)	1,238,871	1,213,110	(2.1)
4	CHINA	125,444	108,210	(13.7)	1,791,423	1,613,355	(9.9)
5	THAILAND	93,317	91,049	(2.4)	1,156,452	1,299,298	12.4
6	INDIA	63,735	66,142	3.8	650,989	770,108	18.3
7	PHILIPPINES	59,046	53,977	(8.6)	557,147	618,538	11.0
8	AUSTRALIA	64,280	52,259	(18.7)	526,342	571,328	8.5
9	JAPAN	53,256	45,640	(14.3)	513,076	553,106	7.8
10	UNITED KINGDOM	39,636	33,858	(14.6)	413,472	445,789	7.8
11	SOUTH KOREA	25,502	31,114	22.0	274,622	385,769	40.5
12	BANGLADESH	17,741	25,015	41.0	134,663	204,418	51.8
13	NEPAL	17,136	21,577	25.9	132,148	159,144	20.4
14	UNITED STATES	24,697	20,743	(16.0)	246,936	262,106	6.1
15	VIETNAM	21,731	20,113	(7.4)	235,700	285,716	21.2
16	TAIWAN	19,945	17,344	(13.0)	286,266	274,665	(4.1)
17	MYANMAR	9,206	11,699	27.1	90,740	95,352	5.1
18	GERMANY	12,545	11,479	(8.5)	136,749	158,453	15.9
19	FRANCE	12,466	11,074	(11.2)	145,108	169,973	17.1
20	PAKISTAN	8,385	10,041	19.7	81,397	97,144	19.3
21	CANADA	9,768	7,932	(18.8)	88,904	92,761	4.3
22	NETHERLANDS	7,655	7,137	(6.8)	83,955	97,988	16.7
23	RUSSIA	7,221	6,197	(14.2)	53,203	61,845	16.2
24	IRAN	7,195	5,727	(20.4)	78,316	72,264	(7.7)
25	CAMBODIA	6,182	5,696	(7.9)	64,534	73,700	14.2
26	NEW ZEALAND	6,878	5,386	(21.7)	63,175	67,448	6.8
27	SRI LANKA	6,515	5,159	(20.8)	64,051	61,670	(3.7)
28	SWEDEN	6,375	4,838	(24.1)	43,460	38,127	(12.3)
29	ITALY	4,643	4,732	1.9	45,253	55,210	22.0
30	SAUDI ARABIA	4,672	3,961	(15.2)	94,986	113,921	19.9
31	SOUTH AFRICA	4,252	3,495	(17.8)	22,473	22,667	0.9
32	SPAIN	2,397	2,470	3.0	26,162	35,389	35.3
33	SWITZERLAND	2,648	2,351	(11.2)	28,191	30,556	8.4
34	UAE	3,332	2,286	(31.4)	19,830	19,772	(0.3)
35	IRAQ	3,447	2,091	(39.3)	27,869	27,124	(2.7)
36	IRELAND	2,676	2,035	(24.0)	24,459	27,322	11.7
37	DENMARK	2,390	1,946	(18.6)	25,312	27,703	9.4
38	EGYPT	2,377	1,873	(21.2)	21,053	26,222	24.6
39	OMAN	2,065	1,808	(12.4)	26,601	34,534	29.8
40	NORWAY	2,127	1,729	(18.7)	22,325	22,339	0.1
41	POLAND	1,506	1,510	0.3	16,397	19,896	21.3
42	BELGIUM	1,620	1,411	(12.9)	18,502	21,309	15.2
43	KAZAKHSTAN	2,243	1,357	(39.5)	19,840	18,072	(8.9)
44	LAOS	3,171	1,239	(60.9)	35,676	26,627	(25.4)
45	TURKEY	1,222	1,114	(8.8)	12,775	16,493	29.1
46	OTHERS	37,694	34,027	(9.7)	349,262	388,484	11.2
	GRAND TOTAL	2,806,565	2,447,845	(12.8)	25,715,460	27,437,315	6.7

Source : Tourism Malaysia with the cooperation of Immigration Department

2.10 Tourist Arrivals to Penang

The tourism industry today is a major source of income generation in many states and countries and it also plays a massive, if not vital role in being one of the major catalysts of economic growth. Penang is not any different. Dubbed the Pearl of the Orient, the State has for many years attracted massive amount of visitors from near and far, dating back to the colonial days

Penang tourism cast the most attractions in Malaysia tourism industry. Tourist who comes to Penang will be mesmerized with its beautiful coasts and delightful cuisines. Ferringhi Beach, Penang Hill, Georgetown Heritage Enclaves and other attractions such as magnificent and beautiful Penang Bridge and ferry's which are classic in nature, steals the heart of not only the local but many foreign tourist who now flocks in bigger numbers to the Pearl of the Orient.

The tourism industry which is in a services sector, in turn, is predicted to gradually overtake the manufacturing sector. This prediction is rather convincing as it will go in line with the Penang state government's initiative to converge manufacturing and services industries through shared services outsourcing related businesses. This is essentially a measure being taken to move Penang's breadwinners out of the middle income trap. The tourism sector is expected to flourish in 2015 due to Visit Penang Year. According to Penang Global Tourism, the tourism sector contributed to more than a third of Penang's total GDP. The figures from Tourism Malaysia show that Penang received 4.7 million hotel guests in 2013, while data from Ministry of Health Malaysia revealed that Penang treated a total of approximately 230,000 foreign patients for the first three quarters of 2014(Penang Economic Indicators, The Penang Institute, 2015)

Penang is expecting some 5.5 million foreigners to visit its shores by year-end. Chief Minister Lim Guan Eng said visitor arrivals to the state had trended up on a monthly basis.

He said there was an average of 201,000 visitors a month in 2013 compared to 198,000 in 2012 and 131,000 in 2007. "The Penang branch of the Malaysian Tourism Promotion Board estimates we will receive 5.5 million foreign visitors this year," he said in his speech when opening the Food and Hospitality Trade Fair today. Lim said the tourism industry was a lynchpin of the state's economy with local food being a top draw for visitors. He said Penang was well-known as a food paradise as well as for its multicultural charm and heritage buildings. "When it comes to food, no other state can quite compare to the variety of cuisine in Penang such as Nasi Kandar, Char Koew Teow, Penang Laksa and many others," he said.

Tourism has seen a major boost in Penang in recent years, and since George Town's inclusion in the UNESCO World Heritage List, local and international tourists have been flocking to experience its unique architecture, culture and, naturally, food. New boutique hotels and cafes seem to be sprouting up every day, while the George Town Festival grows larger each year, drawing worldwide praise with it. (Penang expects 2014 foreign tourist arrivals to hit 5.5 million, The Sun Daily, 2015)

Penang State Government through Penang Global Tourism (PGT) is now aggressively promoting Penang on the International Platform by participating International Tourism Events such as World Tourism Exhibitions, Tourism Malaysia Road shows and International Tourism Expo. Penang Global Tourism is the new state tourism bureau set up to work with key tourism players inside and outside of Penang, to promote the state through better forged ties, reliable data & feedback and synergistic activities.

3.0 Penang Hill Corporation Background

Penang Hill Corporation (PHC) was established after the Penang State Legislative Assembly passed the Penang Hill Corporation Enactment 2009. PHC is the latest Penang State Government's statutory body in charge not only for the management, operation, control, maintenance of the Penang Hill Railway service but given a much larger portfolios and responsibilities to look into the overall management and development of Penang Hill. In the early 2010 Penang Hill Corporation begin to build itself up from zero ground with the assistance from the Penang State Secretariat Office. This is because, prior to the handing over of the Penang Hill Funicular to Penang Hill Corporation, Penang Hill was under the purview of a small unit called "Unit Keretapi Bukit Bendera" under the Penang Secretariat Office. The main function of this small unit was basically to manage, operate, control and maintain the Penang Hill Funicular. There was not much focus or important give to the overall development of Penang Hill. The foreign tourist arrivals to Penang Hill at that moment of time were very much less compared to now. There were no promotions or marketing plan developed to attract tourist to Penang Hill.

Penang Hill Corporation started off with a few important divisions that were formed to help with the transactional period during the handing over of Penang Hill Railway Project by Ministry of Tourism & Culture Malaysia to Penang Hill Corporation. The Penang Hill Railway service was subsequently handed over officially to Penang Hill Corporation in March 2011. On 24th of April 2010 the railway service was re-opened to the general public with higher carrying capacity (100 passengers per trip) and speed (10 meters per second).

3.1 Vision Statement of Penang Hill Corporation

The vision of PHC is **“TO BE A HILL RESORT OF CHOICE IN MALAYSIA”**.

This is the dream and aspiration of PHC and it lays out the most important primary goals. It provides guidance and inspiration as to what an organization is focused on achieving in the near future.

This vision of PHC enables its employees to develop business strategies to achieve the stated goals and with a single unifying vision statement, employees are all on the same page and can be more productive.

3.2 Mission Statement of Penang Hill Corporation

A mission statement of PHC is a helpful tool for not just the company overall, but it is also facilitate the focus and productivity of every individual employees. The mission statements of PHC are as follows:

- i. To provide excellent customer service
- ii. To promote green tourism through educational and exhilarating activities
- iii. To advocate green consciousness through sustainable development and preservation of nature and heritage
- iv. To achieve financial sustainability with emphasis on corporate social responsibility

3.3 Business Structure and Organisation Chart

There are seven divisions in PHC namely, Management Services Division, Promotion and Marketing Division, Finance and Strategic Planning Division, Technical Planning and Development Division, Internal Operation Division and Funicular Engineering Division. Since its inception, PHC had successfully integrated the development of the entire tourism product in Penang Hill and embarked on a

journey to transform the hill by preserving the nature and in making the hill more attractive for visitors. PHC do also coordinated well with the all the stakeholders of Penang Hill when it comes to any new development projects so as to less the impact of objection or rejection by them. As we are well aware, Penang is famous for its ferocious and aggressive NGO's who are extremely sensitive when coming to the development of the hill. This poses a great challenge to PHC in developing the hill so that there would be more tourism products for visitors besides the nature and breath-taking views. The organisation chart of PHC is attached in the appendix.

Even though every citizen of PHC is responsible for the business performance and the arrival of tourist to Penang Hill, one particular department in PHC that was specially assigned to attract tourist by promoting Penang Hill and for organising tourism events up at the Penang Hill, is non-other than Promotion and Marketing Division (P&M). Currently P&M division is headed by Miss Janani, who is the Assistant Manager and supported by two assistant administrative officers. Below is the organisation chart of P&M Division:

P&M DIVISION ORGANIZATION CHART

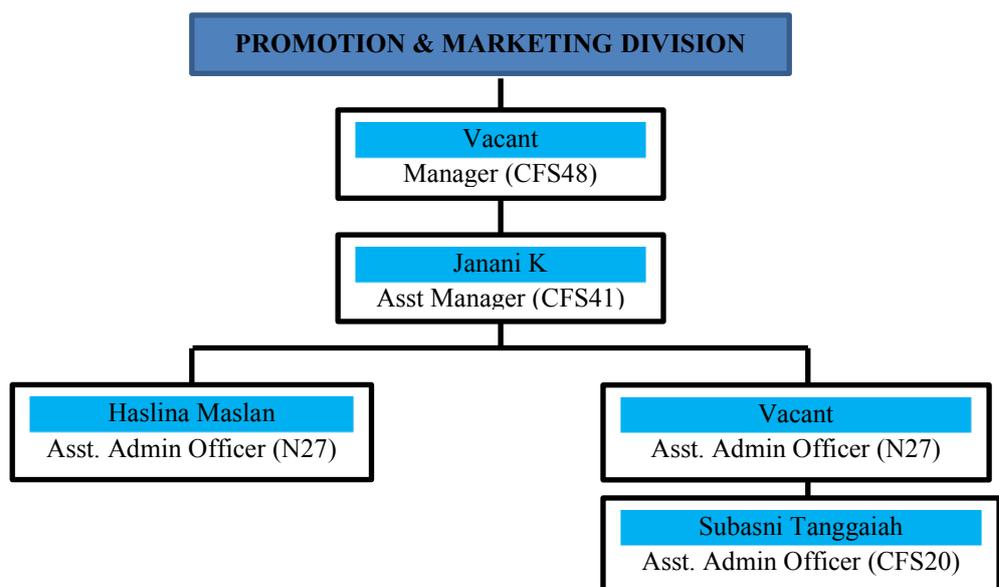


Figure 3.1: The Organisation chart of P&M Division of PHC

The Promotion and Marketing Division of PHC is now focusing more towards organising tourism related event on Penang Hill and less concentration on the promotions due to constraint of headcounts. In 2014 the P&M division only manage to participate on thirteen promotional activities as shown in Table 3.1.

Table 3.1: Promotional activities participated by P&M division in 2014

No	Tarikh	Perkara	Penyertaan	Makluman
1	17-21 Mac	Tourism Sales Mission to India and Sri Lanka	Janani & Dr. Lawrence	Mengikuti Tourism Malaysia melakukan Promosi di Bombay dan New Delhi.
2	12-Apr	Charity Dinner and Dance @ Bayview Beach Resort Penang.	Janani, Haslina & Sarina	Mempromosika Bukit Bendera di Bayview Hotel sempena makan malam amal.
3	20-Apr	Occupy Beach Street	Haslina, Sarina, Anis	Sempena Hari tanpa kereta di Beach Street, terdapat pelbagai aktiviti disediakan. PBBPP juga mengambil bahagian dengan membuka booth untuk mempromosikan Bukit bendera.
4	27-Apr	Occupy Beach Street	Haslina	Sempena Hari tanpa kereta di Beach Street, terdapat pelbagai aktiviti disediakan. PBBPP juga mengambil bahagian dengan membuka booth untuk mempromosikan Bukit bendera.
5	4 Mei	Occupy Beach Street	Sarina	Sempena Hari tanpa kereta di Beach Street, terdapat pelbagai aktiviti disediakan. PBBPP juga mengambil bahagian dengan membuka booth untuk mempromosikan Bukit bendera.
6	11 Mei	Occupy Beach Street	Haslina & Sarina	Sempena Hari tanpa kereta di Beach Street, terdapat pelbagai aktiviti disediakan. PBBPP juga mengambil bahagian dengan membuka booth untuk mempromosikan Bukit bendera.
7	31 Mei-8 Jun	Pesta Bunga @ Botanical Garden	Sarina & Haslina	Sempena Pesta Bunga Negeri Pulau Pinang, PBBPP turut mengambil bahagian bagi mempromosikan Bukit Bendera kepada pengunjung yang datang.
8	6-8 Jun	Auto city carnival	Janani	Sempena pameran kereta di Auto City, Juru.
9	10 Julai 2014	META Expo 2014 Alliance events & Exhibition Services Sdn. Bhd		Meletakkan risalah untuk diedarkan kepada pengunjung
10	15-17 August	MATTA FAIR, Johor Bahru	Haslina & Sarina	Mempromosikan Bukit Bendera untuk diperkenalkan di Negeri Johor.
11	22-24 August	MATTA FAIR, Malacca	Janani	Mempromosikan Bukit Bendera untuk diperkenalkan di Negeri Melaka.
12	5-7 September	MATTA FAIR, Kuala Lumpur	Janani & Haslina	Mempromosikan Bukit Bendera untuk diperkenalkan di Kuala Lumpur.
11	13-14 September	Penang International Green Carnival	Janani	Promosi Bukit Bendera sempena Hari Hijau Sedunia
12	08 November 2014	Asian Tourism & Fashion Fair @ Automall, Pinang	Haslina & Sarina	Pertunjukan fesyen dan pameran berkenaan pelancongan
13	12 November 2014	Langkawi	Janani	Pameran Pelancongan yang menjemput agensi pelancongan dari luar.

The main Key Performance Index (KPI) for the P&M department was to increase the number of visitors to Penang Hill. There are also other important functions such as:

- i. Collect, compile and analyse the statistics on a monthly and annual tourists arrivals to be presented at the Penang Hill Corporation's Board of Directors Meeting.
- ii. Prepare and help to run the programs inauguration, seminars, receptions and official trips of domestic and foreign visitors to Penang Hill.
- iii. Oversees and manage the distribution of the promotional material and pamphlets to Airports, hotels and other tourism attractions places Penang.
- iv. Responsible for planning and conducting promotional activities at State, National and international platforms..
- v. Assist in coordinating and monitoring the implementation of Events with Penang Tourism Ministry, Penang Tourism Board and Penang Global Tourism.
- vi. Designing and implementing a program of advertising and printing brochures, audio- visual publishing Penang tourism destination and a souvenir book for the purpose of publicity and promotion.
- vii. Investigate and resolve complaints related to tourism products and attractions.
- viii. Giving feedback to written complains or questions related to tourism matters within three working days.

- ix. To provide customer service for the visitors to Penang Hill, to make their visit a memorable one.

The objectives of P&N Division among others are to attract tourist to Penang Hill via 4P's (Product, Price, Place and Promotion) blend with effective marketing strategies. Develop Products that attracts tourist to increase revenue for the organization and to create an environment fostering best practices in customer service

3.4 Vision Statement of P&M Division

The aim of the Promotions and Marketing division is to make Penang Hill as a tourism destination of distinction, by contributing in the implementation of development policies and strategies to further spur the economy of the State.

3.5 The mission's statement of P&M Division

- i. To develop the tourism attractions/products in Penang Hill to be a major contributor the state's economic growth
- ii. Introduce and promote Penang Hill on the International Platform
- iii. To provide an enabling environment for the economic growth and sustainable development of the tourism and other productive sectors in Penang Hill
- iv. Working with stakeholders to promote greater economic diversification and sectorial linkages, international competitiveness improved productivity and investment.

Table 3.2: The Key Performance Indicator of P&M Division - 2014

KPI Monitoring (Promotion and Marketing)													
No	Activities	Month											
		Jan	Feb	March	Apr	May	June	Jul	Aug	Sept	Oct	Nov	Dec
1	Malaysia Book of Record												
2	Passport System												
3	Events												
	◦ Valentine's Day Celebration												
	◦ Chinese New Year Celebration												
	◦ Penang Hill Heritage Forest Challenge												
	◦ School Holiday Programme												
	◦ Explorace @ Penang Hill												
	◦ Happy Birthday Blue Coach!												
4	Pushcart												
5	Mobile Application												
6	Photography Book												
7	Penang Hill Promo Video												
8	Initiate Registration of Trade Mark												
9	Brochure Distribution												
10	Collaboration with Tour Agencies, PGT & Tourism Authorities												
11	Promotion Exhibition												
12	Join Events												
13	Social Media - Facebook, Twitter, Instagram												

Table 3.3 Tourism related project handled by P&M- 2014

No.	Description	Category	Deadline	Start	% Comp.	Status	Cost (RM)	Steering
1	Flag Garden - poles	Product Development	15/05/2013	10/03/2013	100%	Installation completed 16 May 2013	RM 19,800.00	Completed
2	Sedan Chair	Product Development	15/05/2013	10/03/2013	100%	Completed. Delivery on 21 May 2013	RM 5,000.00	Completed
3	Treasure Store	Business Development	22/05/2013	11/04/2013	100%	Construction work to complete by 17 May 2013. Soft Launching on 22nd May 2013	RM 19,300.00	Completed
4	Merchandize list	Business Development	01/04/2013	01/03/2013	100%	Ready for delivery starting 1 April 2013 - Awaiting Treasure Store to be ready.		Completed
5	New Brochure	Promotions	15/06/2013	22/02/2013	100%	3D Map is ready. Printing companies identified. Info in translation process by USM Language Centre 2/10- Receive brochure in English, Chinese & Arabic		Completed
6	Journey through Nature and Heritage Brochure	Product Development	25/03/2013		100%	Ready for publication and offer		Launched
7	Coach Name	Promotions	15/04/2013		100%	No response from staf - to go with Dato Ang's suggestion Coach 2: Mutiara / Coach 1: Pinang		Completed
8	Malaysian Nature Society Booklet	Business Development	15/05/2013		80%	LO delivered. To be delivered by early June 2013.	RM 6,000.00	confirmed
9	ATAP Video - 15 minutes slot	Marketing	04/10/2013		80%	Confirmation form forwarded to ATAP inc. RM500 fee. Payment done. Shooting done on 14 July 2013	RM 500.00	
10	8 SCULPTURE project	Product Development	30/06/2013		90%	Local Art Institute list obtained. Letter of invitation to send out by 1 April 2013. Received only 1 respond from Equator Academy of Arts		No participation for outdoor sculptures
11	Promotion Signboard	Marketing	31/05/2013		100%	Artwork approved. Signage to be installed at 4 locations on 15 May 2013		Completed
12	6D Cinema	Business Development			10%	Proposal by Kirana Maju - submitting on 1 April 2013		in progress
13	Bataran Bukit Bendera Rental	Business Development			100%	Rental rates established. Open for rental		confirmed
14	Penang Hill 3D Logo at Dataran Bukit Bendera	Promotions	30/06/2013		15%	Design forwarded to R&D 15 May 2013		in progress
15	Wooden Horse	Product Development			100%	Direct purchase from store		Completed
16	British Telekom Phone Booth	Product Development			100%	Direct purchase from store		Completed
18	Facebook Photo Contest - Award	Promotions			X	confirm in Core Meeting - decision to permanently KIV		KIV
19	Direction signs	Product Development	30/06/2013		100%	LO out to vendor. Awaiting delivery		Completed
20	Photo book	Product Development	31 Nov 2013	16/6/2013	50%	Photo competition with Photography Society of Penang		in progress
21	Jungle War Zone (paintball)	Business Development	31/08/2013	01/07/2013	100%	Completed feasibility studies at Coolie Lines Quarters. Draft RFP Guideline completed. ePerolehan closing 22 July 2013 1st Opening on 15th September 2013		Completed
22	Public Photo Service	Business Development	01/09/2013	15/07/2013		BOD approval 1 July 2013		
23	Mountain Bike Service	Product Development				BOD approval 1 July 2013		
24	Edgecliff Bungalow	Business Development	15/06/2013			In negotiation and awaiting proposal from Astronomy Society of USM BOD approval 1 July 2013		
25	Ticket Advertisement	Marketing	01/06/2013			Drafting for concept		
26	Distribution of Brochure to hotels & airport	Marketing		1/8/2013		1/8- send to 18 hotels, penang airport 24-26/9- Send to about 15 places in Langkawi		
27	Rest N Go (GINTELL)	Business Development						

4.0 Details of the Case Issue

Foreign tourist arrival to Penang Hill had always been the focal issue to the management of PHC especially when there is a huge gap between the total numbers of foreign visitors to Penang compared to Penang Hill. The booming tourism industry in Penang had attracted many individuals and firm to operate tourism related business such as 3D Museum, Tour by bicycle around Georgetown Heritage Enclaves, The Phone Museums, and The Escapes and many more attractions. With many such tour operators mushrooming in Penang, the task to attract tourist, mainly from other countries had been an arduous one especially for PHC's marketing division. Now they have to compete with many other industry players by innovating creative tourism products and packages. The challenge faced by the Marketing Division of Penang Hill is to achieve the target set by the Board of Directors, which is to increase the number of foreign tourist to Penang Hill to 500,000 visitors per year. The below Colum Chart portrays clearly the existence of gap between the current arrival of foreign tourist against the targeted number by Penang Hill.

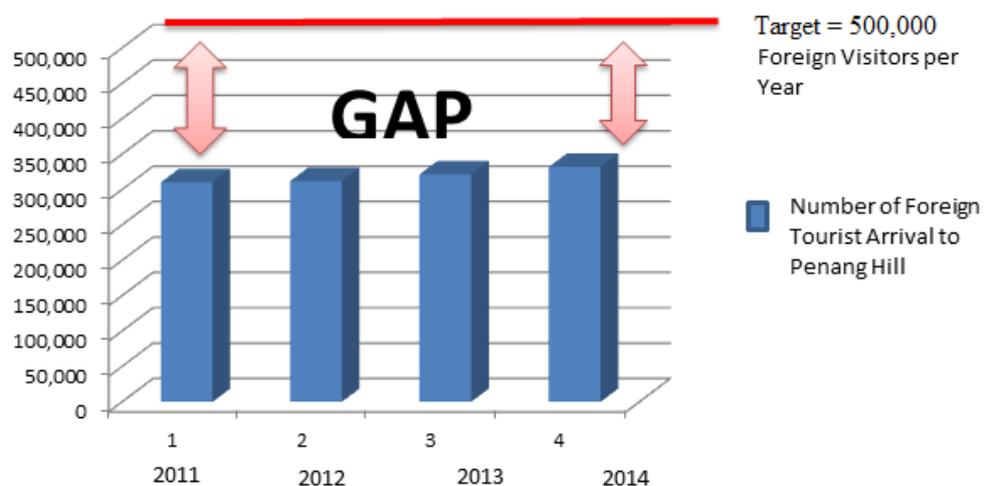


Figure 4.1: Number of Foreign Tourist Arrival to Penang Hill

Table 4.1 Foreign Tourist Arrivals to Penang Hill

Year	Foreign Tourist Arrival to Penang Hill
2011	310,206
2012	311,890
2013	321,381
2014	331,927

Since assuming the position of Assistant Manager in the Promotion and Marketing Division of Penang Hill Corporation, Ms Janani had continuously faces challenges in meeting the Key Performance Indicators that was set and approved by Penang Hill Corporation's Board of Directors. With the current total headcount of three including her, the responsibilities and expectation from her division in promoting Penang Hill and to increase current ridership of foreign tourist to meet the target set which is 500,000 visitors per year had always been an uphill battle for her division. Since the inception of the Penang Hill funicular service around mid of 2010, PHC had barely cross the 350,000 visitors mark, far beyond the targeted number. Figure 4.1 clearly indicated that since the target for the foreign tourist arrivals was set to 500,000 visitors per year, and it was not been able to achieve all this years. Many tourism activities events were organised especially during the school holidays and long holidays to attract more foreign tourist to Penang Hill such as Penang Hill Heritage Forest Challenge which is an annual international event but nevertheless the target set was never able to achieve. Since the inception of the Penang Hill Corporation's funicular service, there were high turnover of staffs which to some great extend affects the organisation's long term business plan due to inconsistency in top management. Since the year of 2010, there were about three General Managers and

Marketing Managers had left and replaced with new officers. Besides that frequent rotation of senior staff do to some extent affects their focus on their job. With new head of department taking over, they would come up with their own future business plans and strategies and old ones would be discontinued. This situation in Penang Hill Corporation had diverted the concentration and morality of the staff since they have to readjust to the new requirements and expectations.

The above changes in top management to some extent affect the budget allocation of the Marketing Division. For example the allocation of budget in the year 2014 for the decorations and celebration of some special events such the New Years and other religious festival were not allocated the following year dear to staff constraints.

Table 4.2: PHC Marketing Davison's Operating Budget for 2014

Senarai Keperluan Operasi (OPEX)														
Bahagian Promosi dan Pemasaran														
Bil.	PERKARA	JAN	FEB	MARCH	APRIL	MAY	JUN	JULY	AUG	SEP	OCT	NOV	DEC	SUM
1	Emolumen (Gaji + Elaun)	61174.13	61174.13	61174.13	61174.13	61174.13	61174.13	61174.13	61174.13	61174.13	61174.13	61174.13	61174.13	734089.56
2	Acara	46000.00	18000.00	26000.00	22000.00	24000.00	57000.00	10000.00	11000.00	50000.00	60000.00	11000.00	56000.00	391000.00
3	Hiasan Majlis		3000.00		10000.00	4000.00			3000.00			3000.00	6000.00	29000.00
4	Produk - Barangan	20000.00	60000.00	20000.00	10000.00	20000.00	10000.00	70000.00	10000.00	20000.00	10000.00	20000.00	20000.00	290000.00
5	Produk - Aktiviti		8000.00	9000.00	8000.00	8000.00	9000.00	8000.00	8000.00	8000.00	8000.00	9000.00	9000.00	92000.00
6	Latihan Pembangunan	15000.00	2000.00	1000.00	2000.00	1000.00	2000.00	10000.00	2000.00	1000.00	2000.00	2000.00	0.00	40000.00
7	Pengangkutan	1000.00		1000.00		1000.00	2000.00	1000.00		1000.00		1000.00	2000.00	10000.00
8	Penempatan (accomodation)	1500.00		1500.00		1500.00	2000.00	1500.00		1500.00		1500.00	2000.00	13000.00
9	Promosi Media Cetak	12000.00			12000.00						12000.00			48000.00
10	Percetakan - Risalah dan Brosur	50000.00						50000.00						100000.00
11	Promosi Luar (Expo)	3000.00	3000.00	3000.00	3000.00	3000.00	3000.00	3000.00	3000.00	4000.00	3000.00	3000.00	4000.00	38000.00
12														0.00
13														0.00
14														0.00
	TOTAL	209674.13	155174.13	122674.13	128174.13	123674.13	146174.13	226674.13	98174.13	146674.13	156174.13	111674.13	160174.13	1785089.56