



INTERNATIONAL TOURIST MOVEMENTS AND PATTERNS in Sabah 1988–2013

**TARMIJI MASRON
BADARUDDIN MOHAMED
MASAMI FUJIMAKI
AZIZAN MARZUKI
NORHASIMAH ISMAIL**

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AND PATTERNS
in Sabah 1988-2013

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LIST OF ABBREVIATIONS

| | | |
|--------------|---|---|
| FIT | - | Flexible Independent Travel (FIT) |
| GIS | - | Geographical Information System |
| M | - | Meter |
| UK | - | United Kingdom |
| UNWTO | - | United Nations World Tourism Organization |
| WTO | - | World Tourism Organization |

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PREFACE

With the increase in tourism in the 1990s, the tourism industry began to be viewed as a highly specialized commodity. Sabah tourism attractions range from the breath-taking natural wonders such as mountains, jungles, islands and flora and fauna, to the colourful cultures of its multi-ethnic inhabitants. In 2010, the state of Sabah was one of the most popular tourist destinations together with the states of Selangor, Sarawak, Johor and Pahang. Located on the northern point of the island of Borneo, Sabah has become one of the leading tourist destinations in Malaysia. This monograph reports is intended to analyze and report on data of tourist arrivals to Sabah, Malaysia from 1998 to 2013 using the Geographic Information System (GIS) application. Tourist flow and country of origin of international tourists to Sabah will be analyzed and mapped using Spider Diagram Tool and colour visualization method.

Ten countries that had the highest tourist arrivals in Sabah state originated from Indonesia with 3,011,335; followed by Brunei (1,520,273), Hong Kong & China (1,316,670), Philippines (861,210), Japan (772,644), South Korea (697,548), Taiwan (600,954), UK & Ireland (322,809), Singapore (298,269), and Australia (255,394), while the ten countries that showed the lowest tourist arrivals were from Belgium & Luxembourg, Finland, Switzerland, Russia, Norway, Italy, Denmark, Sweden, Netherland and New Zealand with arrival figures of 14,234, 14,858, 17,672, 19,818, 20,876, 27,762, 28,437, 33,790, 42,324 and 48,136 respectively. From the total tourist arrivals, 85% were from the Asian continent, 3% from America, 3% from Oceania, 7% from Europe and lastly 2% from other continents. In order to identify and comprehend the demography of the tourists who visited

Sabah, the Research Division of the Sabah Tourism Board compiled an international demographic tourist data in the year 2011 covering age, gender, purpose of visit, travel arrangement, repeat visitation, occupation and travel accommodation.

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1

INTRODUCTION

In the context of today's world, tourism is one of the activities of growing economic and social importance. Tourism has grown to become a collection of activities, services and industries that delivers a travel experience, including transportation, accommodations, eating and drinking establishments, retail shops, entertainment businesses, activity facilities and other hospitality services provided for individuals or groups travelling away from home. There have been many attempts to define the word tourism, such as;

"The temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations, and the facilities created to cater to their needs." (Mathieson & Wall, 1982)

"The sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host governments and host communities in the process of attracting and hosting these tourists and other visitors." (Macintosh & Goeldner, 1986)

"set of activities engaged in by persons temporarily away from their usual environment, for a period of not more

than one year, and for a broad range of leisure, business, religious, health, and personal reasons, excluding the pursuit of remuneration from within the place visited or long-term change of residence.” (Smith, 2004)

All these definitions offer a clear insight into the scope and context of tourism and demonstrate that it is an activity embracing all aspects of the movement of people away from their normal surroundings and the activities they undertake and facilities they use in their destination areas.

In Malaysia, with an increasing population of 18,707,774 million in 1991 to 25,715,460 million in 2013 (Tourism Malaysia, 2014), tourism is fast becoming the second most significant sector for the Malaysian economy. Malaysia has been successful in attracting many tourists to visit and experience the different types of tourism on offer, especially island tourism, which has later lead to the development of mass tourism. Development of the tourism industry can be characterized as part of an effort to build, expand and diversify the economic base of the country in the service sector to enable it to become more dynamic, progressive and economically viable.

Malaysia has been recognized as a major tourist destination on the international stage with a ranking of 11th in tourist arrivals worldwide and No. 3 in tourist arrivals in the Asia and Pacific region in 2013 (UNWTO, 2014), and also identified as one of 30 tourist destinations of the world by international tourism organizations (Fathilah & Lindsay, 2008). Tourism can help developing countries generate important investments and can contribute to their economic growth and social progress. Apart from its economic spillover, tourism also facilitates and encourages the performance of activities that assist in the demand of tourists like lodging, feeding, transport, amusement, the knowledge of traditions, attractions of the culture, etc. (Briones-Juarez, 2009).

In addition, tourism attracts national and foreign investment and impels regional infrastructure by means of the urbanization and construction of new and improved communication means (terrestrial, sea, air). Malaysia has a long tradition of tourism, attracting travelers fascinated by the art, architecture, handicrafts, traditional attire, music and dance, which reflects a colorful heritage and cultures both diverse and amalgamated. The Malaysian populace consists of Malays, Chinese, Indian, and other indigenous groups including the Orang Asli, Dayaks, Kadazan Dusun, Melanau, Murut and more.

2

TOURISM IN SABAH

OVERVIEW

Sabah, located on the northern point of the island of Borneo, is one of the thirteen states that constitute Malaysia (Figure 2.1). Sabah is the second largest state and shares the island of Borneo with Sarawak, Brunei, and Indonesian Kalimantan. The capital of the state of Sabah is Kota Kinabalu, formerly known as Jesselton during British rule. Located under the typhoon prone region of Philippines, it is also known as Sabah, *Negeri di Bawah Bayu* which means Sabah, land below the wind. Sabah's geographical structure is a mix of mountainous regions, beaches and tropical rainforests.

The western side is mostly mountainous with three of Malaysia's highest mountains being part of it. The Crocker range is the most famous, with mountains up to 4,000m height. Mount Kinabalu, at 4,095 meters is the highest mountain in Malaysia and the fourth highest in Asia. The tropical rainforests of Sabah include the Kinabalu National Park which was declared as a World Heritage Site in 2000 due to its ecological diversity. Sabah is divided into five administrative divisions; namely: West Coast Division, Interior Division, Kudat Division, Sandakan Division, Tawau Division and Labuan Division. In 1984, Labuan was declared as a federal territory.

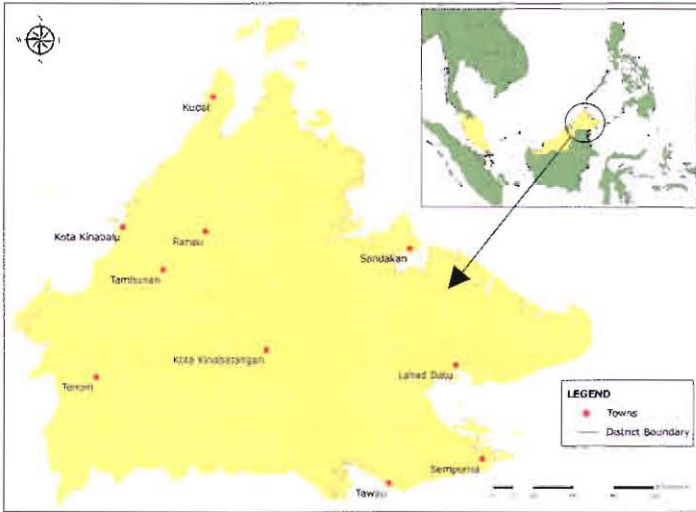


Figure 2.1 Main cities in Sabah state

Sabah is well-connected locally and internationally with Kota Kinabalu International Airport (KKIA) is the main gateway. KKIA situated about 20 minutes away from the city, where Malaysia Airlines (MAS) and AirAsia provide daily direct flights to Sabah from Kuala Lumpur. Internationally, Sabah is accessible from Brunei Darussalam, China, Hong Kong, Taipei, Japan, Thailand, Philippines, Singapore and South Korea (Figure 2.2). The flights that operate here include Silk Air, Cathay Pacific, Royal Brunei Airlines, Cebu Pacific Air, Korean Air, Dragonair, Asiana, MASwings and Jetstar Airways. Visitors from Australia can also arrive in Sabah via Kuala Lumpur.

Other than that, there are also direct domestic flights to Kota Kinabalu by MAS from Johor Bahru, Kuching, Sibiu, and Miri, with in-state service to Sandakan and other towns, while AirAsia only has direct domestic flights from Johor Bahru. There is second airport in Sabah called the Low Cost Carrier Terminal or Terminal Two, which situated about 7 km from KKIA. Most international air links from Europe and America can be connected through major cities in the South East Asia region such as Hong Kong, Kuala Lumpur, Singapore, Tokyo, Seoul, Taipei, Manila and Bandar Seri Begawan.

Visitors from Labuan, Indonesia and Philippines can arrive in Sabah by sea. Ferry terminals and immigration check points are

situated at Kota Kinabalu, Sandakan and Tawau. The Sutera Harbour Marina in Kota Kinabalu welcomes foreign guests who wish to berth their yachts in comfort and convenience. Vessels are required to do port clearance before their crew is allowed ashore. Overland travel between Kota Kinabalu, Kuching and Brunei Darussalam is possible via the Trans Borneo Highway. However, visitors are advised to be prepared for long journeys. Those who are intending to self-drive should plan their routes and rest stops.



Figure 2.2 Flight air links to Sabah

(Source: Amazing Borneo, 2014)

The people of Sabah are divided into 32 officially recognised ethnic groups. Table 2.1 shows the major different ethnic groups in

Sabah, with the largest immigrant ethnic group being the Chinese. Most Chinese in Sabah are concentrated primarily in Kota Kinabalu, Sandakan and Tawau, with Kota Kinabalu having the highest concentration, followed by Sandakan (second highest) and Tawau (third highest). The largest indigenous ethnic group is the Kadazan-Dusun, followed by Bajau, and Murut. There is a very small number and proportion of Indians and other South Asians in Sabah compared to other parts of Malaysia.

Collectively, all persons coming from Sabah are known as Sabahans and identify themselves as such. Malay is the national language spoken across ethnicities, although the spoken Sabahan dialect of Malay differs much in inflection and intonation from the Peninsular Malaysian version, having more similarity in pronunciation to Indonesian Malay. English, Mandarin as well as Hakka and Cantonese are widely understood. In addition, Kadazan-Dusun, Bajau, Murut and other smaller groups also have their distinct ethnic languages. Sabah also has its own unique Sabahan-slans for many words in Malay. The federal government of Malaysia officially recognizes 28 ethnic groups as being indigenous or bumiputra in Sabah:

Table 2.1 Different ethnic groups in Sabah state

| Etnics Groups | | |
|----------------------|-----------------|--------------------------------------|
| Kadazan-Dusun | Tambanuo | Tidong |
| Malay | Dumpas | Maragang |
| Kwijau | Mangka'ak | Orang Cocos |
| Murut | Suluk | Paitan |
| Bajau | Orang Sungai | Ida'an |
| Illanun | Brunei | Minokok |
| Lotud | Kedayan | Rumanau |
| Rungus | Bisaya Beaufort | Chinese of mixed bumiputra parentage |

TOURISM ATTRACTIONS IN SABAH

With the increase in tourism in the 1990s, the tourism industry began to be viewed as a highly specialized commodity. Sabah tourism attractions range from the breath-taking natural wonders such as mountains, jungles, islands and flora and fauna, to the colourful cultures of its multi-ethnic inhabitants. There are various types of tourism in Sabah such as ecotourism, agro-tourism, island or coastal tourism and rural tourism (Table 2.2). Sabah is at the heart of Borneo and has plenty to offer to visitors and the many popular attractions in Sabah include the Kinabalu National Park, Sepilok Orang Utan Sanctuary, Danum Valley Conservation Area and Tambunan Rafflesia Centre. As for islands, Mabul Island, Pulau Tiga Marine Park, Sipadan Island and Lankayan Island are extremely popular with tourists.

Table 2.2 Tourism varieties in Sabah state

| Tourism Variety | Details |
|----------------------------------|--|
| Ecotourism | <ul style="list-style-type: none"> • covers all travels to natural areas that conserves the environment, contributing at the same time to the welfare of the local society. |
| Agro-tourism | <ul style="list-style-type: none"> • refers to specific sets of leisure activities organized by farmers to cater for visitors • environmentally aware and demand natural products, including healthier food • seek genuine local culture, as well as novel activities and sports • quality accommodation that ensures peace and rest |
| Island or Coastal tourism | <ul style="list-style-type: none"> • based on a unique resource combination at the border of land and sea environments: sun, water, beaches, outstanding scenic views, rich biological diversity (birds, whales, corals etc), seafood and good transportation infrastructure • takes place along the shore and in the water immediately adjacent to the shoreline. • demand a wide variety of associated leisure activities and experiences including sports, cuisine, culture and natural attractions. |

Table 2.2 (cont.)

| Tourism Variety | Details |
|----------------------|--|
| Rural tourism | <ul style="list-style-type: none"> • focuses on actively participating in a rural lifestyle • It can be a variant of ecotourism. • many rural villages can facilitate tourism because many villagers are hospitable and eager to welcome (and sometime even host) visitors. |

1. Kinabalu National Park

Kinabalu National Park was established in 1964 as one of the first national parks of Malaysia and designated by UNESCO in December 2000 as Malaysia's first World Heritage Site for its outstanding universal values. This park is one of the most important biological sites in the world with more than 4,500 species of flora and fauna, including 326 birds and around 100 mammal species. Kinabalu National Park is also home to the world's largest flower, the *Rafflesia*, which blooms exceptionally rarely and shortly for a matter of days. Located on the west coast of Sabah, within the district of Ranau, this park covers an area of 754 square kilometers surrounding Mount Kinabalu. The type accommodations that can be found in the park are in the form of chalets, mostly around the headquarters. The reservations for accommodation and mountain climbing guides are processed through Sutera Sanctuary Lodges (also known as Sutera Harbour).

2. Sepilok Orang Utan Sanctuary

Sepilok Orang Utan Sanctuary is located about 25 kilometers west of Sandakan in the state of Sabah within the Kabili-Sepilok Forest Reserve which covers an area of 4,294 ha and is one of the biggest and most well known orang utan sanctuaries in Malaysia. The centre was opened in 1964 as the first official orang utan rehabilitation project for rescued orphaned baby orang utans from logging sites, plantations, illegal hunting or kept as pets. Around

75 orang utans roam free within the forest reserve. During their rehabilitation the animals rely heavily on the help of the people that work at the centre and also on the donations from tourists. Tourists are allowed to take pictures of these rare animals during daily feeding time.

3. Danum Valley Conservation Area

Danum Valley Conservation Area (DVCA) is an informal protected area in the Ulu Segama Forest Reserve of primary, undisturbed, predominantly lowland rainforest with an outstanding complement of Borneo flora and fauna. It is part of the almost one million hectares of forest concession assigned to Yayasan Sabah. In 1976, WWF-Malaysia suggested that the area be declared a national park and thereafter it is known as "Danum Valley Conservation Area". The pristine lowland rainforest of Danum Valley is arguably Borneo's premier wildlife location. These forests are known to harbour some of the richest concentration of species anywhere on the island such as orangutans, clouded leopards, pygmy elephants, Sumatra rhinos, Banteng (wild ox), red-leaf monkeys, gibbons, pig-tailed macaques, sambar deers, bearded pigs, western tarsiers, sunbears and 320 species of birds including all eight species of the Bornean Hornbills and six species of Pitta, including the impressive Giant Pitta. Several bird species are endemic to Borneo: Bornean Bristlehead, Bulwer's Pheasant, Bornean Ground-Cuckoo, Bornean Wren-Babbler, Black-throated Wren-Babbler and Dusky Munia, just to name a few. Danum Valley has indeed become a birdwatcher's paradise.

4. Tambunan Rafflesia Information Centre

The Rafflesia is one of the rarest and strangest flowers in the world. It is undeniably the largest you can find in the world as it weighs up to 22 pounds and looks quite alien-like. It is actually a parasite which can be hosted by only one vine in the world. Rafflesia is only found in Sumatra, Java, Peninsular Malaysia, Borneo and the Philippines. The flower smells like rotting meat near the end of its

life cycle to attract flies and other insects. The flower blossoms only for three to five days. The chance of seeing one blooming will require some luck and good timing and such rarity contributes to its fascination with tourists.

5. Sipadan Island

Sipadan is the only oceanic island in Malaysia, rising 600 metres from the seabed. It is located in the Celebes Sea off the east coast of Sabah, which was formed by living corals growing on top of an extinct volcanic cone that took thousands of years to develop. More than 3,000 species of fish and hundreds of coral species have been classified in this ecosystem. Sipadan has been rated by many dive journals as one of the top destinations for diving in the world. Sipadan Island, a marine paradise, is renowned among divers for its rich underwater biodiversity, pristine reefs, and sudden drop offs into the deep blue. Visiting Sipadan Island requires a permit issued by Sabah Parks, a Sabah Government agency. There are a limited number of 120 permits available each day, considered a good move by the Malaysian Government to minimize the stress on the reefs and marine life in Sipadan.

6. Lankayan Island

Lankayan Island is a very small tropical coral resort island in the Sulu Sea and has many species of attractive flora and fauna. The only resort on the island is Lankayan Island Dive Resort, built in 1997. Tourists who visit Lankayan Island are attracted by the myriad of macro marine life, coral and sunken wrecks, and also for its whale shark sightings. Lankayan has been declared part of an immense Marine Protected Area to adopt the eco-tourism concept. Unpopulated and covered by thick tropical island vegetation on its topside, this peaceful, untouched little bit of paradise is ringed by an endless pure white sandy beach. Accommodation offerings constitute simple yet elegant wooden, roomy and perfectly appointed seafront chalets. Situated within the Sea Turtle Corridor, Lankayan Island is also a nesting place and foraging ground for sea turtles; most commonly Green and Hawksbill Turtle.

3

DATA SOURCES AND GIS MAPPING

This research is an attempt to study and map the international tourist arrivals in Sabah state using tourist arrivals data and Geographical Information System (GIS).

DATA COLLECTION

Data collection was obtained from the Sabah Tourism Board, generally known as Sabah Tourism. The tourist arrivals data consist of arrivals data to Sabah by country, year and months from the year 1998 until 2013. Some other data was collected based on literature reviews or previous studies on information of tourism industry in Sabah state from books, scientific journals, monographs, brochures, articles and other reliable sources. The data was processed and arranged in Microsoft Excel 2010 for bar graph and pie-chart development for clearer data representation.

GIS MAPPING

The tourist arrivals data were then used for further spatial mapping using ArcGIS 10.1. There are two types of GIS analysis used to