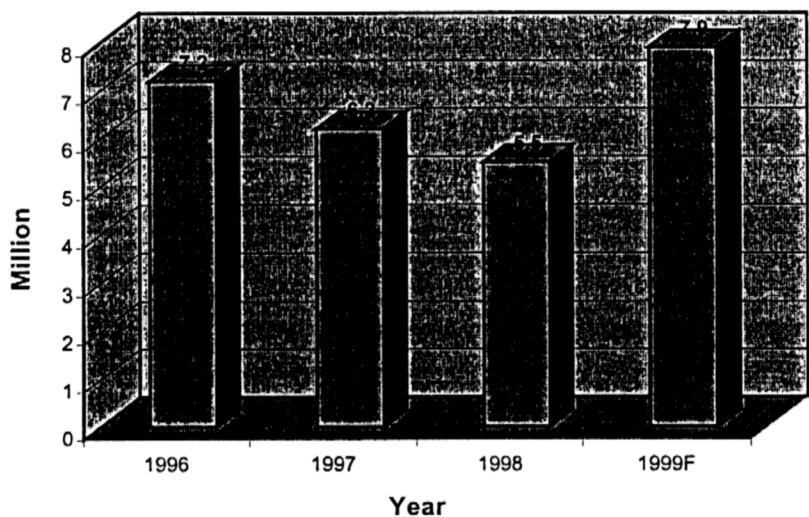
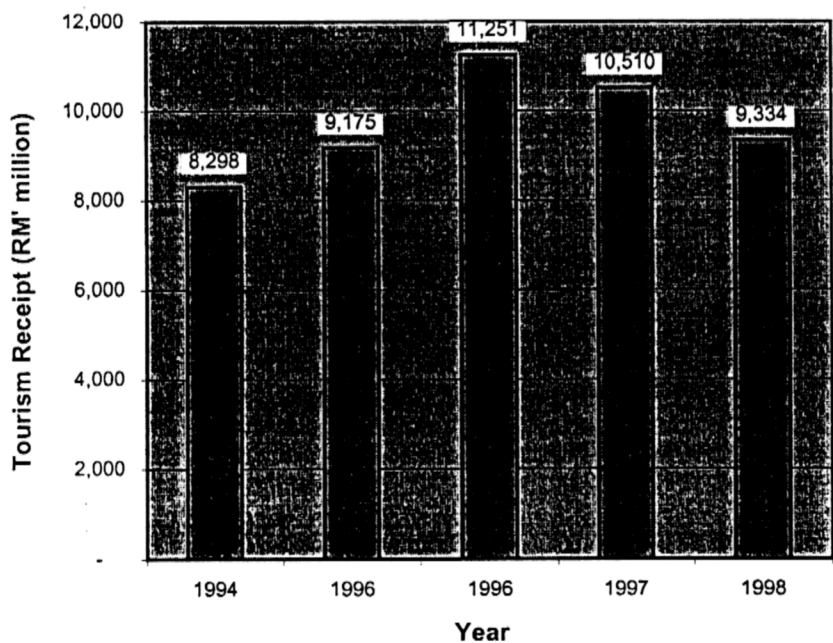


**MALAYSIA  
TOURISM STATISTICAL  
HIGHLIGHTS**

**Tourist Arrival**



**Tourism Receipt Malaysia**



Source - Tourism Malaysia Website: [www.tourism.gov.my](http://www.tourism.gov.my)

## Appendix 1.2

	Visitor Arrivals					
	TOURIST			EXCURSIONIST		
	1999	1998	(%)	1999	1998	(%)
Peninsular Malaysia	7,483,823	5,203,355	+43.8	5,483,252	4,856,070	12.9
Sarawak	264,285	195,051	+35.5	469,926	466,338	0.8
Sabah	142,987	106,494	+34.3	5,304	N.A	-
Labuan	40,054	45,848	-12.6	21,029	12,989	61.9
<b>MALAYSIA</b>	<b>7,931,149</b>	<b>5,550,748</b>	<b>+42.9</b>	<b>5,979,511</b>	<b>5,335,397</b>	<b>12.1</b>

x

**Tourist:**

A temporary visitor staying for at least one night but not more than one year in a country visited and whose main purpose of visit could be classified as leisure, business, VFR or attending conference and meetings, other than the exercise of an activity remunerated from within the country visited.

**Excursionist:**

A temporary visitor staying less than 24 hours without an overnight stay in a country other than his usual place of residence and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited.

**Visitor:**

Any person visiting a country than his own usual place of residence for a period not exceeding one year and for any reason other than following an occupation remunerated from within the country visited.

**Average Per Capita Expenditure:**

Refers to expenditure per person. This is computed by dividing total tourist expenditure by number of tourists.

For more information, please contact:

Tourism Malaysia

Research Division

Tel: (603) 293 5188

Fax: (603) 293 5884

Email: [tourism@tourism.gov.my](mailto:tourism@tourism.gov.my)

## Appendix 1.3

MONTH	Monthly Tourist Arrivals		CHANGE (%)
	1999	1998	
JANUARY	508,726	332,931	52.8
FEBRUARY	472,440	149,524	216.0
MARCH	613,852	559,422	9.7
APRIL	532,764	574,261	-7.2
MAY	588,151	469,479	25.3
JUN	710,163	577,010	23.1
JULY	641,761	299,483	114.3
AUGUST	627,300	596,239	5.2
SEPTEMBER	699,756	477,080	46.7
OCTOBER	865,800	459,713	88.3
NOVEMBER	873,537	461,985	89.1
DECEMBER	796,899	593,621	34.2

x

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## Appendix 1.4

	Components of Expenditure (Million)					
	Tourist Receipts			Excursionist Receipts		
	1999	1998	(%)	1999	1998	(%)
Accommodation	3,893.5	2,968.8	31.1	-	-	-
Shopping	2,723.0	1,947.8	39.8	671.6	549.5	42.2
Food & Beverage	2,353.4	1,484.4	58.5	175.2	87.4	100.4
Local Transportation	1,170.5	557.7	109.9	50.9	44.5	14.4
Organised Sightseeing	677.7	283.1	139.4	9.0	3.8	140.0
Domestic Airfares	739.3	489.1	51.2	-	-	-
Entertainment	406.6	489.1	-16.9	18.1	18.1	0.0
Miscellaneous	357.3	360.4	-0.8	205.8	50.5	307.4

x

**Tourist:**

A temporary visitor staying for at least one night but not more than one year in a country visited and whose main purpose of visit could be classified as leisure, business, VFR or attending conference and meetings, other than the exercise of an activity remunerated from within the country visited.

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## HOTEL INDUSTRY

AVERAGE OCCUPANCY RATE				GUEST			
	1999 (%)	1998 (%)	% Points		1999	1998	%
JAN	40.2	42.5	-2.3	Domestic	11,494,231	9,924,178	15.8
FEB	48.6	50.2	-1.6	International	10,339,913	9,891,682	4.5
MAR	50.4	51.4	-1.0	GUEST NIGHT			
JAN- MAR	46.4	48.0	-1.6		1999	1998	%
APR	45.7	49.3	-3.6	Domestic	16,166,052	14,181,548	14.0
MAY	49.6	52.4	-2.8	International	17,410,073	16,124,175	8.0
JUN	52.7	53.5	-0.8			1999	1998
APR- JUN	49.3	51.7	-2.4	No. Of Establishments		1,404	1,419
JUL	52.9	50.1	-2.8	No. Of Rooms		109,413	107,791
AUG	55.7	53.2	2.5				
SEP	53.2	49.6	3.6				
JUL- SEP	53.9	51.0	2.9				
OCT	55.1	45.8	9.3				
NOV	57.8	49.1	8.7				
DEC	59.2	51.8	7.4				
OCT- DEC	57.4	48.9	8.5				
JAN- DEC	51.7	49.9	1.8				

**Tourist:**

A temporary visitor staying for at least one night but not more than one year in a country visited and whose main purpose of visit could be classified as leisure, business, VFR or attending conference and meetings, other than the exercise of an activity remunerated from within the country visited.

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Source - Tourism Malaysia Website: [www.tourism.gov.my](http://www.tourism.gov.my)

## Supply Of Hotels and Rooms in Malaysia : 1981-1999

Year	Supply of Hotel	Change	Supply of Rooms	Change	Percentage Change
1981	816	-	28,432	-	-
1982	820	4	28,913	481	1.7%
1983	824	4	30,574	1,661	5.7%
1984	825	1	32,835	2,261	7.4%
1985	851	26	35,720	2,885	8.8%
1986	862	11	38,178	2,458	6.9%
1987	905	43	39,455	1,277	3.3%
1988	914	9	40,760	1,305	3.3%
1989	958	44	43,149	2,389	5.9%
1990	989	31	45,032	1,883	4.4%
1991	1,049	60	49,874	4,842	10.8%
1992	1,085	36	55,866	5,992	12.0%
1993	1,090	5	61,005	5,139	9.2%
1994	1,128	38	65,907	4,902	8.0%
1995	1,220	92	76,373	10,466	15.9%
1996	1,289	69	85,514	9,141	12.0%
1997	1,365	76	98,440	12,926	15.1%
1998	1,419	54	107,791	9,351	9.5%

\* Source: <http://tourism.gov.my>

March 2000	1,578	159	117,236	9,445	8.8%
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\*\* Source: National Property Information Centre (Napic)

# Klang Valley Hotels Performance - Past and Present Statistics of selected deluxe hotels, 1996-1999

Hotels	Star Class	No. Rooms	1996		1997		1998		1999	
			Occ. %	ATR RM	Occ. %	ATR RM	Occ. %	ATR RM	Occ. %	ATR RM
Concorde	4	610	76%	161	69%	155	58%	137	59%	116
KL Hilton	5	581	79%	227	69%	213	56%	175	56%	142
Park Royal	4	330	91%	189	83%	183	69%	156	72%	125
Pan Pacific	4	539	75%	202	71%	206	59%	176	66%	129
Regent	5	469	75%	298	68%	288	60%	233	58%	200
Equatorial	4	300	76%	174	69%	168	61%	149	53%	129
Shangri-La	5	721	74%	272	64%	279	56%	255	57%	206
Istana	5	516	69%	239	64%	223	55%	173	50%	138
Nikko	5	470	45%	217	61%	203	56%	185	52%	166
Renaissance	5	400	67%	246	67%	267	54%	234	48%	200
New World	4	521	60%	155	66%	164	63%	137	57%	124
Marriott	5	518	n/a	n/a	29%	257	51%	214	60%	165
Crown Princess	4	533	60%	137	52%	144	35%	126		
Legend	4	590	n/a	n/a	71%	179	50%	163	55%	120
Hyatt Saujana	5	386	82%	236	77%	255	55%	252	46%	233
Federal	4	450	87%	142	73%	137	50%	120	53%	104
Ming Court Vista	4	379	59%	133	58%	119	42%	110	47%	97
Mandarin Oriental	5	642	n/a	n/a	n/a	n/a	n/a	n/a	70%	250
-	-	8,955	72%	202	65%	202	55%	176	56%	156

## **Survey: Challenges in Klang Valley hotel industry** **- The business strategy toward changes**

The survey is aimed to:

- analyse how the hotel operators respond towards this competitive environment, and
- identify the best practice and business strategy adapted during this challenging time

Prepared by Choong Nyuk Fee, CGA 98030

Supervisor: Abdul Latif bin Hj. Salleh, PhD

University of Malaya

MBA Program - 1999/2000

Faculty of Business and Accountancy

Survey on -

**THE CHALLENGES FACING BY HOTEL INDUSTRY IN KLANG VALLEY**

**Part I: Background Information**

1. Name of Hotel: \_\_\_\_\_
2. Contact Person: \_\_\_\_\_  
Position: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Address: \_\_\_\_\_ Fax: \_\_\_\_\_  
\_\_\_\_\_ E-mail: \_\_\_\_\_
3. Years of Commencement of Operations: \_\_\_\_\_
4. Please indicate the industry classification of your hotel and its type:  

<u>Category</u>	<u>Type</u>
<input type="checkbox"/> Five Star	<input type="checkbox"/> City <input type="checkbox"/> Resort
<input type="checkbox"/> Four Star	
<input type="checkbox"/> Three Star	
5. What is the ownership structure of your hotel?  

<input type="checkbox"/> 100% Local	<input type="checkbox"/> 100% Foreign
<input type="checkbox"/> Joint Venture (>51% Local control)	<input type="checkbox"/> Joint Venture (>51% Foreign control)
6. Number of rooms that your hotel operates: \_\_\_\_\_
7. Number of employees in your hotel : \_\_\_\_\_
8. Please indicate the appropriate classification of your hotel chain:  

<input type="checkbox"/> International chain operator
<input type="checkbox"/> Regional chain operator
<input type="checkbox"/> Local chain operator
<input type="checkbox"/> Independent operator

9. Please name your hotel's direct competitors?
- (1) \_\_\_\_\_
- (2) \_\_\_\_\_
- (3) \_\_\_\_\_
- 
10. What do you perceive as your hotel's competitive advantages?  
(Please rank in order of importance)
- |  |                                       |
|--|---------------------------------------|
| <input type="checkbox"/> Service                       | <input type="checkbox"/> Pricing      |
| <input type="checkbox"/> Geographical/Location         | <input type="checkbox"/> Facilities   |
| <input type="checkbox"/> Sales and marketing           | <input type="checkbox"/> Cost Control |
| <input type="checkbox"/> Skilled/experienced personnel | <input type="checkbox"/> Other _____  |
- 
11. In the long run, which directions do you think the hotel should take to remain competitive and attractive?
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- 
12. What is your hotel or chain of hotels established corporate vision?
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- 
13. Is there a corporate culture in your hotel? Yes / No
- If yes, please state: \_\_\_\_\_
- \_\_\_\_\_

**Part II: Impact of Economic Crisis**

1. Since the economic crisis started in mid 1997, which of the following affected your company operation as described:  
(Please tick relevant box indicating its impact)

Sales	Most Unfavourably			Most Favourably	
- Room Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Restaurant and Bars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Other income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Markets/Demand	Decrease			Increase	
- Local market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Overseas Market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Operational Performance	Decline			Improved	
- Competitiveness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Guest Satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Profitability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Human Resource	Decrease			Increase	
- Staff turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Training expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Productivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Finance	Decrease			Increase	
- Cost of Funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Liquidity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Part III: Impact of Current Supply Market**

1. What are your hotel's average occupancies in the past and present?
- Year 1997 - \_\_\_\_\_ %
- Year 1998 - \_\_\_\_\_ %
- Year 1999 - \_\_\_\_\_ %
- Year 2000 - \_\_\_\_\_ % (forecast)
2. Do you agree that presently there is excessive supply of hotel rooms in Klang Valley?
- ☐ Yes. ☐ No
3. Please indicate how significant have this market scenario severely affected to your hotel business?
- Least significant Most significant
- ☐ ☐ ☐ ☐ ☐
4. Which marketing channels do you perceive as more effective?
- (Please rank according to its significance)
- ☐ Advertisement overseas ☐ Tour agents
- ☐ Local advertisement ☐ Guest recommendation
- ☐ Direct marketing ☐ Sales team
- ☐ Other \_\_\_\_\_
5. Guest profile of your hotel (Please rank according to its contribution)
- ☐ Business and individual travellers
- ☐ Tour groups
- ☐ Convention and incentive groups
- ☐ Family groups
- ☐ Others \_\_\_\_\_



6. What are the effective marketing techniques adopted by your hotel?  
(Please rank according to its significance)
- ☐ Aggressive local advertising      ☐ Tour agency marketing
- ☐ Aggressive overseas advertising      ☐ Discount packages
- ☐ Promotion of hotel facilities      ☐ Value added packages
- ☐ Other \_\_\_\_\_
7. Do you think that the Government should have more concentrated efforts to improve the tourism industry?      ☐ Yes.      ☐ No
8. If "Yes" for question 7, please rank the following activities of which you think that they are effective action:
- ☐ Promote Malaysia as preferred destination for quality holiday
- ☐ Promote Malaysia as choice of value-for-money holiday destination
- ☐ Promote Malaysia as preferred choice for meetings, incentive, conventions and exhibitions
- ☐ Tax incentives such as double tax deduction, reinvestment allowances etc.

**Part IV: Managing the Change**

1. What do you perceive as the changing demands of hotel guests?  
(Please tick the relevant boxes)  

☐ Service quality

☐ Range of service

☐ Price sensitivity

☐ Convenience

☐ Telecommunication service

☐ Other \_\_\_\_\_
2. Has there been a change in your hotel business plan during this period?  

☐ Yes

☐ No
3. Which elements of the business plan have been changed?  
(Please tick the relevant boxes)  

☐ Long term goals

☐ Product range

☐ Product differentiation

☐ Target markets

☐ Source of funding

☐ Capital structure

☐ Material sourcing

☐ Re-negotiate with suppliers

☐ Employment policy

☐ Training and development
4. In term of management, please indicate the areas that have been revised the most in view of the economic crisis?  
(Please rank according to its significance)  

☐ Marketing Management

☐ Operation Management

☐ Human Resource Management

☐ Financial Management

☐ Cost Management

☐ Others, please specify

\_\_\_\_\_

\_\_\_\_\_

5. Marketing Management - Please indicate which of the following strategies have been adopted?

	Decrease/ Decline			Increase/ Improved	
--	----------------------	--	--	-----------------------	--

Product

- |                           |                          |                          |                          |                          |                          |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| - Product Range           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| - Product leadership      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| - New product development | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Pricing

- |                            |                          |                          |                          |                          |                          |
|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| - Value for money          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| - Exclusive and high price | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Promotions

- |                    |                          |                          |                          |                          |                          |
|--------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| - Sales Promotions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| - Direct Marketing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| - Advertising      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Distribution

- |                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| - Direct/Sales personnel | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| - Agents/Middlemen       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

6. Human Resource Management - Please indicate which of the critical issues that your hotel are facing?

	Decrease/ Decline			Increase/ Improved	
--	----------------------	--	--	-----------------------	--

- |                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| New Employment           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Training and Development | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Staff Turnover           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Employee Morale          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Salary and Wages         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Working Hours            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Mobilisation of Employee | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

7. What are the measures that have been undertaken during this period?

- |   |  |
|---|--|
| <input type="checkbox"/> Training and retraining of staff | <input type="checkbox"/> Retrenchment                |
| <input type="checkbox"/> Multi-skilling                   | <input type="checkbox"/> Voluntary Separation Scheme |
| <input type="checkbox"/> Productivity-linked wages        | <input type="checkbox"/> Pay Cut                     |
| <input type="checkbox"/> Flexi-hours scheme               | <input type="checkbox"/> Freeze employment           |

8. Cost Management - Please indicate which of the following measures have been undertaken during this period?

Material Cost	Minor				Significant
- Increase local content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Seek alternative materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labour Cost					
- Reducing overtime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Pay cut	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Retrenchment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Defer wages increase	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overhead					
- Reduction of material wastage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Reduce utilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Cut down in advertisements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operation					
- Review/redesign processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Consolidation of activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Cease unprofitable operation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Others, please specify _____					

9. Operation Management - Please indicate which of the following changes have been made?

	Insignificant			Significant	
Reengineering of processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
R&D and Innovation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investing in Information Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Utilisation of Capacity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Part V: Opportunities and Threats**

1. What do you perceive as threats to the hotel industry?

	Insignificant			Significant	
Competition from similar category hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competition from other categories of hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competition from service apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Government policies and legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technology advancement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- (e.g., increasing popular of video conferencing)					
Currency exchange rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Booming in tourism industry in neighbouring countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shortage of skilled personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other - please specify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....					

2. What opportunities do hotels have locally and internationally?

	Minor			Considerable	
New target markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New products and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hotel management services to overseas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Joint ventures with other businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Joint ventures with other competitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diversification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other - please specify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....					

3. What are your perceived changing needs of customers that affect the hotel industry's profitability and structure?

	Insignificant			Significant	
Type of accommodation demanded	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of services demanded	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demand on value added benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price sensitivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities and range of services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other - please specify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....					

4. What do you think about the outlook for the following hotel in the near future?

Category	Not so good			Very Good	
5 Star Hotel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Star Hotel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Star Hotel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budget hotel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please state reasons:

Category	
5 Star Hotel	: _____
4 Star Hotel	: _____
3 Star Hotel	: _____
Budget hotel	: _____