



Economic Briefing To the Penang State Government

PENANG GRP FOR QUARTER 1 2004

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The Penang economy this quarter has been driven by the upbeat manufacturing sector and positive consumer sentiments in the tertiary sector. These two sectors together contribute to approximately 95% of Penang's GDP. Compounding these effects are the weak base that these figures are compared against, namely Q1 2003 which was plagued by external circumstances such as the SARS and the general market slowdown driven by the possibility of a US led attack on Iraq. These factors had a profound impact on the manufacturing and tertiary sector. The increasing demand for Electrical and Electronic (E&E) goods due to improving global market conditions in 2004 have driven up manufacturing figures immensely.

Penang Q1 2003 versus Penang Q1 2004: Facts and Figures

The tables below highlight the rate of growth of the five main sectors in Penang for Q1 2004 relative to the performance of Q1 2003.

Table 1: Penang's Gross Regional Product by Economic Sectors for Q1 2003

Sectors	Sectoral Share (%)	Volume (RM Million in 1987 Prices)
Agriculture, Hunting, Forestry & Fishing	1.6%	71
Mining & Quarrying	1.0%	48
Manufacturing	41.2%	1851
Construction	2.1%	94
Services	54.0%	2417
Sum	100%	4481

Source: SERI

Table 2: Penang's Gross Regional Product by Economic Sectors for Q1 2004

Sectors	Sectoral Share (%)	Volume (RM Million in 1987 Prices)
Agriculture, Hunting, Forestry & Fishing	1.53%	73.5
Mining & Quarrying	0.95%	45.8
Manufacturing	42.42%	2036.1
Construction	1.97%	94.5
Services	53.13%	2549.9
Sum	100%	4799.8

Source: SERI

Table 3: Penang's Relative Growth Rate by Economic Sectors for period Q1 2003 – Q1 2004

Sector	Relative Growth Rate
Agriculture, Hunting, Forestry & Fishing	3.5%
Mining & Quarrying	-4.6%
Manufacturing	10.0%
Construction	0.5%
Services	5.5%

Source: SERI

Manufacturing

2003 national manufacturing figures and performance trends were used as key benchmark indicators to analyse Penang's Q1 2004 performance. The manufacturing sector has a predictable trend (under normal circumstances) whereby production figures build up from Q1 to Q4.

The manufacturing sector in Penang continues to play a big role in Malaysia whereby 14.4% of Malaysia's 298 approved projects and 12.7% of the total investments are based here. The latest figures from the Malaysian Industrial Development Authority (MIDA) show that the number of projects approved and the total amount of investments into Penang have increased significantly in Q1 2004 compared to Q1 2003. As can be seen from Table 4, the amount of investments approved has recorded a significant 40.3% growth from RM334,384,301 in Q1 2003 to RM469,092,969 in Q1 2004. In line with that, the number of potential job positions created through the new investments and expansions increased by 4.9%. Total new investments and reinvestments into the E&E sector increased (for Jan-Feb 2003 and Jan-Feb 2004) by 35% while BNM recorded an increase in loans given out to the Penang manufacturing sector by 2.7% on a Y-o-Y basis.

A survey of local manufacturing firms have indicated a quantum leap in Y-o-Y earnings where some firms have reported up to 3 fold earnings to date. This renewed growth in the sector is attributed to the upsurge in demand for E&E goods coming out of China and the United States.

Table 4 - Penang: Number of Approved Projects and Investments (Local & Foreign)

	Q1 2003	Q1 2004	Y-o-Y Growth
Number of Projects Approved	36	43	19.4%
Potential Employment	2,214	2,322	4.9%
Amount of Investment Approved	334,384,301	469,092,969	40.3%
<i>Local</i>	99,043,306	298,963,336	201.9%
<i>Foreign</i>	235,340,995	170,129,633	-27.7%

Source: MIDA

The most noteworthy change is the share of local versus foreign investments. In Q1 2003, the share of domestic investments vis-à-vis foreign investments was 29.6% and 70.4% respectively of total investments. A year later, domestic investments soared to 63.7% while foreign investments fell to 36.3%. This explosion of domestic investment signifies a higher dependency on the small medium industries (SMIs) to play a bigger part in the Penang manufacturing sector. The increased contribution of SMIs in the manufacturing sector will lessen the pressure for Penang to rely on the MNCs as the sole growth generator of this sector.

Table 5 highlights the E&E sector which in the period of January to February 2004 saw 15 new/expansion projects worth RM303,422,768 in investments. The machinery manufacturing sector also recorded investments of nearly RM30 million within the first 2 months of 2004.

Table 5 - Penang: Approved Projects and Investments by Industry, Jan – Feb 2004

Industry	Number of Projects	Total Capital Investment (RM)
Electrical & Electronics	15	303,422,768
Basic Metal Products	1	1,400,000
Food Manufacturing	1	5,169,537
Machinery Manufacturing	4	29,782,200
Paper, Printing & Publishing	2	21,399,003
Scientific & Measurement Equipment	2	12,400,000
Wood & Wood Products	1	7,100,000
TOTAL	26	380,673,508

Source: MIDA, Penang

We therefore conclude that the Penang manufacturing sector is the growth engine for Q1 GDP performance, growing at 10% (Y-o-Y). This is against the backdrop of the Q1 2003 manufacturing environment which was marred by the possibility of war in the Middle East which led to dampened demands.

Tertiary

This sector comprises of Utilities; Transport, Storage and Communications, Wholesale and retail trade, Hotels and Restaurants (WRHR); Finance, Insurance, Real Estates and Business Services (FIREBS); Government Services and others. WRHR together with FIREBS contribute to approximately 50% of the tertiary sector. Growth in BNM loans to this sector recorded a 7.6% increase Y-o-Y.

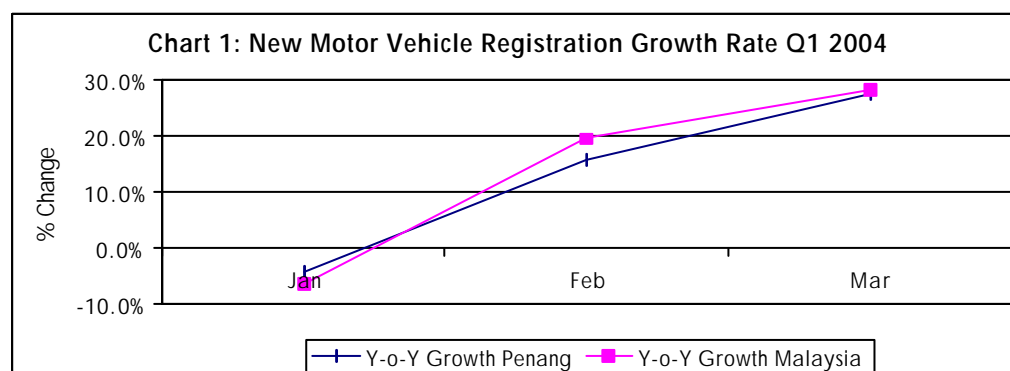
On the tourism front, there has been a slight decline on the number of tourists arrivals in Q1 2004 compared to Q1 2003. The ratio of local to foreign tourist remains unchanged with the bulk of tourists being local people. Foreign tourist numbers have shrunk due to unwarranted security concerns associated with travel to Malaysia in the light of recent global events such as the Bali bombing and the unrest in Southern Thailand.

New motor vehicle registrations have been used as the main indicator of consumption demand. New motor vehicle registration for Malaysia and Penang grew in tandem whereby both the state and the nation suffered a decline in January but rebounded strongly in February and March. The positive increase in the purchases made on new cars signifies an optimistic outlook in consumer confidence towards spending.

Table 6 – Penang: New Motor Vehicle Registration

	Penang		Malaysia		Y-o-Y Growth	
	2003	2004	2003	2004	Penang	Malaysia
January	8,099	7,765	76,424	71,637	-4.1%	-6.3%
February	5,432	6,287	53,278	63,656	15.7%	19.5%
March	6,724	8,566	63,828	81,872	27.4%	28.3%
Total	20,255	22,618	193,530	217,165	11.7%	12.2%

Source: Road Transport Department, Malaysia



Source: Road Transport Department, Malaysia

Construction

The construction sector, as it is currently monitored in the country, makes use of a number of indicators including sales and advertising permits, housing approvals, loans approved (residential, non-residential and construction), cement and concrete products, iron and basic steel production as well as the production of construction related materials.

On the property front, demand for residential properties has improved while commercial demand has fallen Y-o-Y. Developers are finding themselves in a buyers' market. Response to recently launched projects vary, depending on price and location. Many launched projects have yet to be built whilst some new properties have less than 70% take-up rate. On the contrary, some newly-launched townships located on the mainland have reported an increase in sales due to factors such as location and price.

On the other hand, contractors face shortages of raw building materials such as steel and sand which lead to massive increases in prices of construction materials. BNM loan figures disbursed to this sector recorded an increase of 9.8% Y-o-Y. In view of these factors, we report a marginal rate of increase in Penang property development and construction. With the additional RM10 billion into the 8th Malaysia Plan, we expect growth in this sector to be more skewed towards Q3 and Q4 of 2004 as national infrastructural projects are carried out to enhance economic development.

Agriculture, Hunting, Forestry & Fishing

Of this category, agriculture and fisheries are the major contributors toward Penang GRP. Due to the highly unpredictable nature of this sector where production figures are commonly affected by seasonal influences and unforeseen circumstances, we were unable to use a key benchmark year to predict quarterly production trends. However, Q1 performance was promising as there were no negative factors affecting production of paddy and orchard harvest.

According to industry sources, the first paddy harvest is expected around June to July for the year 2004. This is due to the delayed planting season caused by floods late last year. Paddy production has improved and is expected to improve further into the year as many farmers have taken up National schemes such as the Bank Pertanian Scheme launched last year to achieve "10-tonne" production figures, an incentive-linked program to raise paddy output per hectare. These schemes aim to assist farmers in upgrading farming techniques to achieve maximum yield to raise overall productivity of the sector

The fisheries sector is also expected to surge ahead strongly even though it has been long regarded as a sunset industry. Industry sources quote that the cockle breeding production in Penang is ranked 3rd in the nation while aquaculture production is the 4th highest among all the states in Malaysia. There is much potential in this sector as it is a lucrative export that is much sought after by many foreign countries.

Penang is expected to derive greater economic benefits as the nation places more emphasis on this sector. In line with national policy there are currently large agricultural projects underway especially in the SPU district. BNM recorded a promising increase of 21.8% in loans disbursed to our agricultural, hunting, forestry and fishing sectors.

Mining & Quarrying

Penang derives little economic contribution from this sector in relation to the other sectors, as its sectoral contribution to Penang GDP is less than 1%. There are currently no mines in operation although there are some stone quarries on the mainland. Slight correlation exists between this sector with the construction sector and hence we expect growth in this sector towards Q3 and Q4 of 2004.

Loan Figures

Loan figures were used as an important indicator of growth in the given sectors. Penang recorded huge loan increases for Q1 2004 versus Q1 2003 for the purchase of securities, transport vehicles, residential property and credit cards. These indicate an increase in consumer spending patterns. The other core sectors to register a marked increase were manufacturing, agriculture and FIREBS.

Despite large decreases in loan growth to the construction and durable goods sector, Table 7 highlights that the overall Y-o-Y growth for loans is much higher for Penang compared to Malaysia. Coupled with the rationale in the above-mentioned points, this indicates that Penang GRP should be close to or equal the nation's GDP for Q1 2004.

Table 7 - Growth Rates in Sectoral Loans

Sectoral Loans	Y-o-Y Growth	
	Penang	Malaysia
Loans-purchase of securities	28.6%	-5.7%
Loans-purchase of transport vehicles	10.3%	11.9%
Loans-purchase of residential property	15.6%	15.8%
Loans-purchase of non-residential property	1.3%	4.5%
Loans-personal use	6.1%	7.4%
Loans-credit card	13.5%	14.6%
Loans-purchase of consumer durable goods	-23.9%	-9.4%
Loans-agriculture, hunting, forestry & fishing	21.8%	-6.6%
Loans-mining & quarrying	-33.1%	10.3%
Loans-manufacturing	2.7%	-0.4%
Loans-electricity, gas & water supply	-57.1%	-20.2%
Loans-construction	-14.7%	-7.8%
Loans-wholesale, retail, restaurant & hotels	7.0%	5.4%
Loans-transport, storage & communication	-3.6%	16.6%
Loans-finance, insurance, real estate & business services	19.6%	0.3%
Loans-community, social & personal services	-5.8%	-15.2%
Loans-sectors n.e.c.	1.4%	-7.1%
Total	8.2%	5.1%

Source: Bank Negara Malaysia

Conclusion

We thereby conclude that **Penang's Q1 GRP** for the year 2004 stands close to that of Malaysia's Q1 GDP at **7.11%** compared to national Q1 GDP figures at 7.6%. Sectoral contribution to Penang GRP remains unchanged with the major contributing sectors being manufacturing and services. *§ Poh Heem Heem, Tan Yin Hooi & Dr. Chan Huan Chiang.*

ARE WE READY FOR ELDERLY TOURISTS?

High Potential Market

Tourism is an important foreign exchange earner for Malaysia and the elderly tourist sector is a growing one. The purpose of this article is to highlight the increasing number of elderly tourists, the need for barrier-free and accessible tourist spots to cater for this segment of tourists, the existing state of such facilities in major Malaysian cities and finally the resources available to make Penang a barrier-free tourist destination.

In recent years, **older persons** are beginning to form a high percentage of tourists as population ages all over the world. Estimates based on personal interviews with local tourist guides in Penang show that this group constitutes 40-50% of arrivals, depending on the different countries of origin and time of the year. They are also reported to stay longer, from 4-5 days and up to 2 weeks in many instances. Saga Holidays, a tour agency, actually arranges tours specifically for elderly tourists. The number of arrivals of elderly tourists usually increases during winter months. Many of these elderly tourists suffer from various forms of impairments and disabilities in one way or another and usually travel to hotter climates as cold weather often aggravates their ailments. Older persons and people with disabilities are becoming a growing group of consumers of travel, sports, and other leisure-oriented products and services. In addition to this, families with young children are also becoming part of an increasing tourist market that will also require **barrier free access** facilities for easier mobility. Thus, **large numbers of people require tourism facilities and products to be barrier free**. Most of the hotels, transportation facilities and tourist sites are not physically accessible to persons with disabilities and older persons. Staff members of tourism service providers are also not trained to provide elderly friendly services or assist disabled-persons.

FACTS AT A GLANCE

- 14% of ESCAP's Region total population are 60 yrs or older, the Region is home to 56% of world's older persons.
- Barrier free environments will benefit older persons, disabled persons and families with young children.
- Elderly People with disabilities travel with carers, family and friends. UNESCAP estimates 600 million disabled people worldwide with 400 million in the Asia-Pacific region

The share of older people in the population of developed countries is already rising dramatically and a similar phenomenon has been observed in developing countries. In 1950, according to United Nations estimates, there were approximately 200 million persons 60 years of age and over throughout the world. By 1975, their number had increased to 350 million. United Nations projections to the year 2000 indicate that the number has increased to 590 million, and by the year 2025 to over 1,100 million, that is, an increase of 224 per cent since 1975.¹

United Nations' projections indicated that by the year 2025, about 14.4% of the total population (4.5 billion) in the ESCAP region will be over 60 years old, the region will be home to 56% of the world's older persons. [1999 estimates of ESCAP's population is 3.7 billion] A significant percentage of these older persons have some type of disability. In Western Australia alone, over 50% of people **over 60 years** of age **have a disability**.² Majority of tourists from Scandinavian countries and even China are persons above 60 years of age. As the global society gets more affluent and healthcare improves, resulting in longer life spans, older persons are able to afford to travel more widely.

For disabled persons, there is a wide variation in the estimates of the disability rates reported by developed and developing countries. This variation is mainly due to the definitions of disability used. Disability types range from hearing, vision, and mobility impairment to intellectual impairment and psychiatric disorders.

UN-ESCAP, however, estimates that there is a total of 600 million people with disabilities worldwide, with **400 million** living in the **ESCAP region**. As such some of these disability figures also **cover older persons with disabilities**.

In order to address, the problems of disabled persons and *older persons* with disabilities as tourists, the Asia-Pacific Conference on Tourism for People with Disabilities held on 24-27 December 2000 in Bali, Indonesia, stated that persons with disabilities (both old and young) have equal right of access to all tourism infrastructure, products and ser-

¹ International Plan of Action on Ageing, adopted by the World Assembly on Ageing and endorsed by the General Assembly in its resolution 37/51 of 3 December 1982,

² Disability Service Commission (1998) accessing new markets: customers with disabilities. West Perth. Western Australia.

vices, including employment opportunities and benefits that the tourism industry can provide. The tourism industry should provide the same choices for all consumers to ensure the full participation of persons with disabilities, and protection of the individual's right to travel with dignity.

It is also widely recognized that *older persons and people with disabilities travel together with carers, family and friends* constituting a large potential consumer market for tourism and the hospitality industry. In order to take advantage of this niche market, Malaysia must address the issue of tourism accessibility for older persons and people with disabilities. Through the promotion of non-handicapping environments, we are actually promoting "**Tourism for All**" with the concept of a universal design for all built environments, which incorporate barrier-free features.

Pluses in Penang

Good access will not only benefit people with disabilities but also other members of the society, especially older persons. These also include older persons with impairments and handicaps such as severe osteoporosis, stroke patients, people with spinal cord injuries, patients with severe rheumatoid arthritis. A barrier-free access does not only include provision of physical structures such as ramps, hand rails etc but also accommodative, friendly and understanding services beginning from entry point (immigration, customs etc) till the end of stay for the tourist. For older persons, there need to be more seats provided for rest in public places and shopping complexes, gentle slopes and ramps instead of steep steps and high pavements, more sitting toilets, ready and accessible medical facilities etc. Better and well-placed signages are also a boon to the tourist industry and should be promoted to ensure that not only deaf people but also all other tourists benefit from them. Security is also a main concern for elderly tourists, especially protection from snatch thefts.

Penang is a very attractive location for accessible tourism because of its strategic location as well as its already available tourism products such as shopping, food, historic places of interest and most of all the presence of the numerous organizations for senior citizens and disabled persons all in one small place. The close proximity of the tourist sites and readily available food outlets make it convenient for older persons and people with disabilities to experience Malaysian culture and cuisine without having to travel extensively. And all this can be done at a relatively cheap cost. Older persons and people with disabilities also have an option to meet up, exchange fellowship, and exchange ideas with their counterparts with similar disabilities through contacts with the various *senior citizen's* groups and disabled people's organization in Penang. Tour packages that encourage older persons to prolong their stay include golf packages, activities and projects with their counterparts who have opted for the "Malaysia, My Second Home" Programme.

Penang also has an array of international standard sports facilities that can cater for games and sports activities of disabled persons. Its numerous hotels can cater for MICE (Meetings, Incentives, Conventions & Exhibitions). There is also a possibility to link accessible tourism with medical tourism and expand it with new product development in this area such as widening the scope to **healthcare medical check-ups, optical and dental services** for the elderly.

PENANG AT A GLANCE

- Ready & affordable tourism products
- Convenient tourism sites & eating places nearby
- Numerous NGOs
- Various facilities for MICE available
- Popular destination for "Malaysia My Second Home" Programme
- NGOs and associations of target group present
- Existing facilities for medical tourism such as excellent healthcare services by numerous hospitals, affordable optical and dental services
- Municipal Council active in providing barrier free activities
- Private sector possess strong and aggressive marketing strategies for new tourism products

How Penang Fares On Accessibility

Access is a very crucial factor in the lives of elderly persons and people with disabilities. Without access, the elderly as well as people with disabilities may be confined to their homes due to limited mobility and will be unable to live a full and meaningful life. Access will enable the elderly and people with disabilities to travel from place to place independently. Thus, it is very important that municipal planners, architects, engineers and building developers and contractors understand the barriers to access and provide for non-handicapping environments. In addition, barrier-free environments also benefit the temporarily and permanently disabled due to accidents and mishaps, elderly people,

children, pregnant mothers, tourists with heavy luggage or those pushing prams. The design for barrier free environments should be incorporated into new building plans from the start as renovations later on will cost more.

In a recent nationwide survey conducted by SERI with P.E. Research Sdn Bhd. on accessibility in major cities (including Georgetown), local authorities were interviewed regarding the provision of barrier-free features. These findings will indicate to us how Penang fares nationwide in terms of barrier-free facilities.

The local authorities interviewed were:

- Penang Island Municipal Council (*Majlis Perbandaran Pulau Pinang - MPPP*)
- Kota Kinabalu City Hall (KK City Hall)
- Selayang Municipal Council (*Majlis Perbandaran Selayang - MPS*)
- Petaling Jaya Municipal Council (*Majlis Perbandaran Petaling Jaya - MPPJ*)
- Padawan Municipal Council (PMC), Sarawak
- Bau District Council (Bau DC), Sarawak

Interviews were also carried out with selected persons with disabilities (both individuals and organisations) to solicit their views and opinions regarding the barrier-free initiatives of the local authorities.

In addition to the interviews, the study team also visited several sites in the states to gauge the progress with respect to the creation of a barrier-free initiative.

Accessibility Survey Findings

The findings of the survey of selected local authorities are summarised below.

Table 1.1: Summary of Findings of Accessibility Survey of Local Authorities

	MPPP	KK City Hall	MPS	MPPJ	PMC	Bau DC	Total
Barrier Free Policy	Yes	Yes	Yes	Yes	Yes	Yes	100%
Enforcement of UBBL	Yes	No	Yes	Yes	Yes	No	67%
Funding	No	No	No	Yes	No	No	16%
Access Officer	Yes	No	No	No	No	No	16%
Training	Yes	No	No	Yes	No	No	33%
Information Dissemination	Yes	No	No	Yes	No	No	33%
Incentives	No	No	No	No	No	No	None
% Compliance	51 – 60%	>11 - 30%	> 70%	> 70%	5 - 10%	<5%	

Source: PE Research Accessibility Survey of Local Authorities, 2004

Although all the local authorities surveyed indicated that they have adopted the barrier-free policy, only MPPJ has specifically set aside funds for the provision of barrier-free features. However, the local authorities do not provide any incentives to building owners for renovating their buildings to comply with the by-laws. *Despite this*, both MPPJ and MPS estimated their compliance to the UBBL at more than 70%, while MPPP estimated that compliance is 51 – 60%. On the other hand, KK City Hall puts compliance at less than 30% while the Bau Municipal Council in Sarawak puts compliance at less than 30%. However, the opinion of users of such facilities greatly differs from that of the local authorities. The users' views are discussed in the following section.

User Views on Accessibility

In order to solicit the opinion of users with respect to accessibility, the Study Team had also asked whether the interviewees are aware of the existence of the By-laws 34A of the Uniform Building Bylaws (UBBL) regarding the provision of disabled friendly facilities in all public and private buildings within a stipulated time e.g. ramps & railings, disabled toilets, Braille blocks and pavements, and signage.

The findings from the user survey showed that most the respondents were aware of the existence of By-laws 34A of the UBBL (Table 1.2). The low incidence of awareness in Sabah is likely because the UBBL has not been enacted in Sabah.

Table 1.2: Awareness of Existence of By-laws 34A of UBBL

State	Aware %	Not Aware %	N
Johor	60%	40%	10
Kedah	50%	50%	2
Melaka	100%	0%	3
Penang	72%	28%	25
Perak	83%	17%	6
Sabah	36%	64%	11
Sarawak	69%	31%	13
Selangor	85%	15%	13
Terengganu	50%	50%	8
KL	75%	25%	4
Total	67%	33%	95

Source: PE Research Survey, 2004

Organisations of people with disabilities were interviewed and requested to rate, on a scale of 1 to 5 (1 = none at all, 2 = Inadequate, 3 = Not sure, 4 = Adequate, 5 = very adequate), as to whether key public places have adequate disabled friendly facilities. The results are summarised in the following tables and charts.

The overall average rating of disabled access by state (Table 1.3) shows that Kuala Lumpur received the highest overall average rating (2.7) while Trengganu has the lowest overall average rating (1.5). It is interesting to note that despite the initiatives of the Penang Island Municipal Council, Penang only received an overall average rating of 1.9. This could be attributed to the fact that the Penang stakeholders surveyed were more aware of the barrier-free standards and have higher expectations.

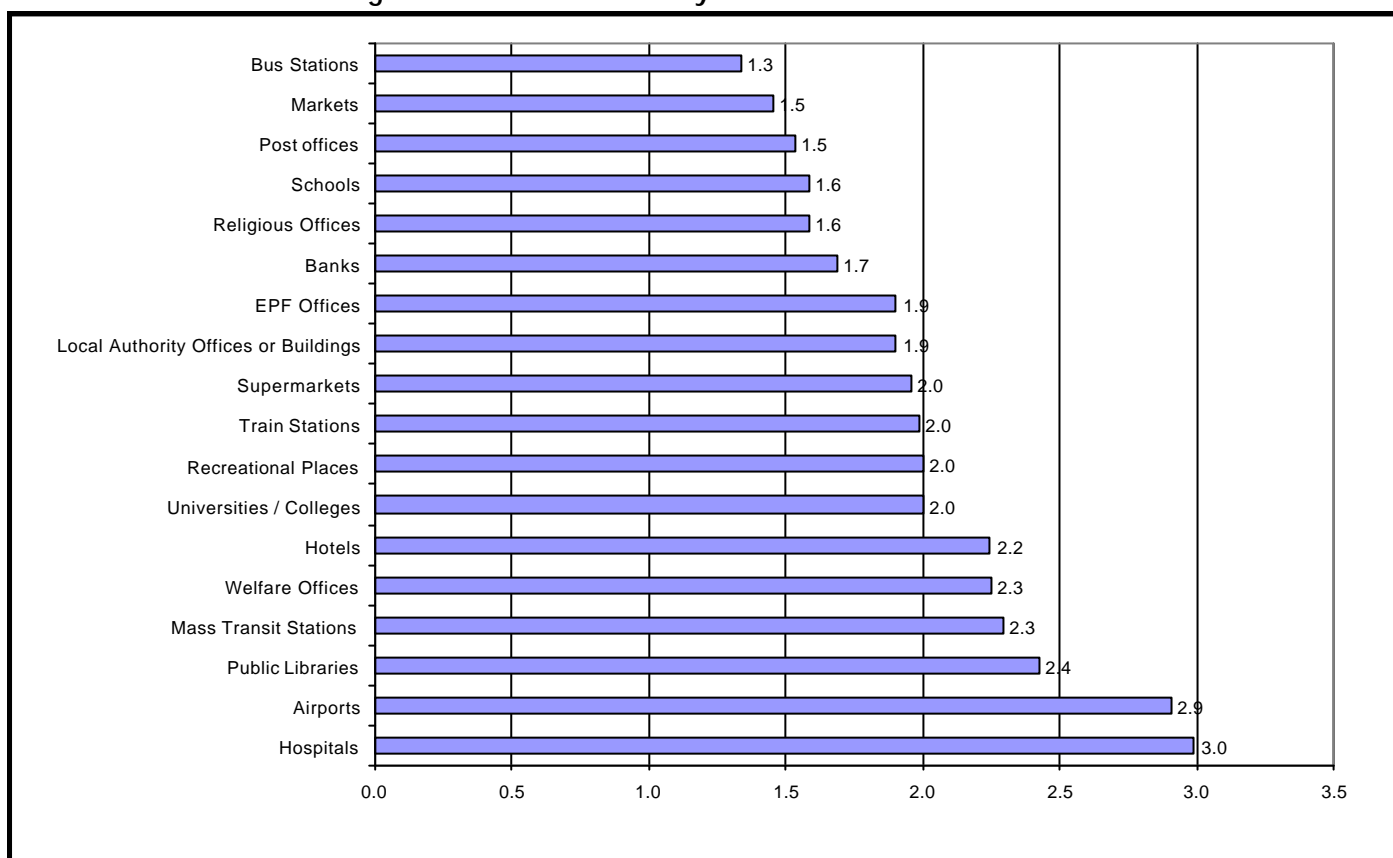
Table 1.3: Overall Rating of Disabled Access by State

State	Rating
Johor	2.0
Kedah	1.7
Melaka	2.8
Penang	1.9
Perak	1.7
Sabah	1.7
Sarawak	1.9
Selangor	2.4
Terengganu	1.5
WP Kuala Lumpur	2.7
Overall Rating	2.0

Source: PE Research Survey, 2004

Chart 1.1 clearly shows that the respondents to the survey all rate that disabled friendly facilities of the key public places are mostly inadequate. In fact, two-thirds of the list of key public places assessed received average ratings of 2 and below, with bus stations receiving the lowest average rating. The highest average rating was for hospitals (3.0) followed by airports (2.9). It is pertinent to highlight that the respondents gave an average rating of 2.3 for welfare offices.

Chart 1.1: Overall Rating of Disabled Access of Key Public Places



Source: PE Research Survey, 2004

Rating of Disabled Access

Table 1.4: Rating of Disabled Access of Key Places by State

Place	Penang	Perak	Selangor	WPKL	Malacca	Johor	Terengganu	Sabah	Sarawak	Kedah
Hospitals	3.2	3.5	3.2	3.5	3.7	3.0	1.9	2.4	2.9	4.0
Schools	1.4	1.0	2.1	2.3	2.7	1.6	1.6	1.5	1.4	1.0
Local Authority Buildings	1.7	1.3	2.2	2.8	2.7	2.1	1.4	1.6	2.3	1.0
Universities	2.0	1.3	2.4	2.5	3.3	1.9	2.1	1.5	1.8	
Banks	1.3	1.5	2.5	2.3	2.7	1.7	1.4	1.5	1.7	1.0
Public Libraries	3.0	2.0	2.5	2.8	3.0	2.1	2.1	1.8	2.3	2.0
Hotels	1.8	1.8	2.7	3.0	3.7	2.9	1.7	2.2	2.2	1.5
Welfare offices	1.8	2.5	2.9	2.8	2.7	2.8	1.6	1.7	2.5	2.5
Post offices	1.3	1.8	2.1	2.5	2.0	1.6	1.1	1.5	1.2	1.0
Markets	1.4	1.3	1.7	2.3	2.3	1.1	1.1	1.2	1.5	1.0
Supermarkets	1.9	1.7	2.4	2.5	4.0	1.8	1.1	1.5	1.9	3.0
Recreational Places	2.0	1.3	2.8	2.8	3.0	1.7	1.5	1.6	1.9	2.0
Train Stations	2.3	1.5	2.5	2.8	3.0	1.4		1.5		1.0
Mass Transit Stations			2.5	2.8						
Bus Station	1.2	1.2	1.8	2.3	1.3	1.2	1.1	1.2	1.2	2.0
Airports	3.4	2.3	3.1	4.0	3.7	3.4	1.5	2.5	2.7	1.0
EPF Offices	1.8	2.0	1.8	2.5	2.0	2.9	1.0	1.7	1.8	2.5
Religious Buildings	1.3	1.2	2.2	2.3	2.3	1.6	1.0	1.5	1.8	1.0

Source: PE Research Survey, 2004

Table 1.4 shows how respondents rated various places with respect to disabled features by states.

Respondents were also asked to rate their level of satisfaction with respect to the legal provisions, the enforcement, the physical provision (both quantity and quality) of such features in the town/city that they presently reside or the nearest village/ town/city. On a scale of 1 to 5, (1 = Very Dissatisfied, 5 = Very Satisfied), the survey shows that while respondents gave an average rating of 2.8 for legal provisions to ensure the provision of disabled facilities, the average rating for other criteria are all below 2 (Dissatisfied) as shown in Table 1.5.

Table 1.5: Rating of Enforcement and Provision of Disabled Access by State

State	Enforcement	Physical Provision	Quality and Quantity	Legal Provision	Overall
Johor	1.6	1.8	1.8	2.4	1.9
Kedah	1.5	1.5	1.5	3.0	1.9
Melaka	3.0	2.0	2.0	2.0	2.2
Penang	1.6	1.9	1.7	3.7	2.3
Perak	2.0	1.8	1.8	3.5	2.4
Sabah	1.5	1.6	1.8	1.7	1.7
Sarawak	1.9	2.0	1.8	2.4	2.0
Selangor	1.9	1.8	2.1	2.6	2.1
Terengganu	1.0	1.0	1.4	3.4	1.7
WPKL	1.3	2.3	2.3	2.0	1.9
Total	1.7	1.8	1.8	2.8	2.0

Source: PE Research Survey, 2004

Penang is among the top on the list for the overall rating for enforcement and provision of disabled access by state. This is because of the high level of awareness of disabled access that have been extensively advocated by the various organizations of the disabled. The disabled organizations have also worked together the Building Department of the Penang Island Municipal Council to provide such features in various places such as Gurney Drive, KOMTAR, Beach Street, Botanical Gardens etc. In addition to this, many campaigns on the promotion of non-handicapping environments have also raised public awareness on this issue. Penang can further improve its status by identifying more places of interest and tourist sites to make them disabled friendly.

Conclusion

Other neighboring countries such as Singapore, Thailand and Indonesia have been actively making their cities accessible to attract more foreign tourists. In their aggressive pursuit of the tourist dollar, they have made various attempts to provide barrier-free facilities at strategic tourist spots. They have made their pavements both pedestrian and disabled friendly, made gentle ramps and put up railings (eg. Orchard Road, Singapore), covered up open drains, put up better signages, Braille instructions in strategic areas, more resting places and rest stops for the elderly. Singapore too has been publishing a series of disabled friendly directories to indicate which places have barrier-free features.

In Malaysia, a good example of barrier-free access is Putrajaya. Its Government complexes and offices are fitted with ramps and disabled toilets, talking lifts and brailled buttons. Similarly, the recreational and public areas of Putrajaya have been fitted with gentle ramps, lifts and disabled toilets. However, other major states have yet to provide similar facilities. During our survey of major "tourist" cities in Malaysia like Kota Kinabalu, Kuching, Kuala Lumpur and Johor Baru, the provision of such facilities have been minimal and dismal.

The time is now right for Penang to capitalize on this niche market for tourism and make it a model for the rest of the country to follow. The presence of strong and active Senior Citizens' Association and disabled institutions (such as St. Nicholas Home for the Visually Impaired, Society of Disabled Persons Penang, Cheshire Home, Penang Deaf Association, Children's Spastic Centre, etc) all on one small island is an added bonus for Penang. Other NGOs and business organizations in Penang such as Sustainable Transport Environment Penang (STEP), Penang Heritage Trust (PHT), Penang International Hoteliers Association (PIHA) and Penang Tourist Guides' Association (PTGA) are keen to promote new tourism products, a sustainable and accessible transportation system as well as a barrier-free Penang for the convenience of tourists. Penang also has a very active and dynamic tourism sector constantly developing new tourism

products and marketing them aggressively.

This unique bond, cooperation and solidarity among these organizations give Penang an advantage over other places in Malaysia. Selected members from the various disabled people's organizations have also received training from UNESCAP on the Training of Trainers for the Promotion of Non-Handicapping Environments in 1998/1999 and are able to conduct access surveys for the project with the cooperation of a professional architect. Penang must thus capitalize on its strengths and resources to make it tourist spots totally disabled friendly.

The local authorities are also aware of the needs of older persons and disabled persons and have started providing facilities for disabled access at a few tourism sites. There already exists a close rapport and cooperation between the local authorities, shopping complex owners and the different disabled groups through the disabled network known as SILA (Sustainable Independent Living and Access). The above tripartite collaborative effort between the various parties has seen facilities being provided around town and in public buildings. The efforts of the disabled are also strongly supported by the Penang Local Government Consultative Forum (PLGCF) which comprises officers from the 2 local councils, assemblymen, individuals and civil society organizations. The Penang Municipal Council is working with SILA and will continue to do so in providing barrier free access for public places.

The effort to make tourist sites barrier-free, however, should not rest solely on the Government but also on the private sector, which should comply with the UBBL to make their premises barrier-free. Hotel operators, restaurant owners, operators of various tourist sites, parks etc are equally responsible and should do their part to promote accessible tourism. Perhaps, undertakings involving community-private sector-municipal partnership for improvement of urban environment should be initiated for such projects. Penang should start with a few selected popular tourist sites and then expand this example to other sites. The compilation of a directory of places with barrier-free features will further enhance Penang's image as an accessible destination.

If every other modern tourist city can do it, Penang can definitely do better! ***§ Khor Hung Teik***