KEMENTERIAN EKONOMI
JABATAN PERANGKAAN MALAYSIA

AKAUN SATELIT
PELANCONGAN
TOURISM SATELLITE ACCOUNT

2022

JABATAN PERANGKAAN MALAYSIA
DEPARTMENT OF STATISTICS MALAYSIA

KEMENTERIAN EKONOMI
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Pemakluman

Jabatan Perangkaan Malaysia (DOSM) sedang menjalankan Banci Ekonomi pada tahun 2023. DOSM amat menghargai kerjasama daripada responden dalam memberikan maklumat kepada DOSM serta menjayakan banci ini. Sila layari www.dosm.gov.my untuk maklumat lanjut.

DOSM telah melancarkan OpenDOSM NextGen sebagai medium yang menyediakan katalog data dan visualisasi bagi memudahkan pengguna menganalisis pelbagai data. OpenDOSM NextGen ialah platform perkongsian data sumber terbuka dan boleh diakses melalui portal https://open.dosm.gov.my.

Kerajaan Malaysia telah mengisytiharkan Hari Statistik Negara (MyStats Day) pada 20 Oktober setiap tahun. Tema sambutan MyStats Day adalah "Statistik Nadi Kehidupan".

Announcement

The Department of Statistics Malaysia (DOSM) is conducting the Economic Census in 2023. DOSM greatly appreciates the cooperation of respondents in providing information and ensuring the success of this census. Please visit www.dosm.gov.my for more information.

DOSM has launched OpenDOSM NextGen as a medium that provides a catalogue of data and visualisation to facilitate users in analysing various data. OpenDOSM NextGen is an open source data sharing platform and accessible through https://open.dosm.gov.my portal.

The Government of Malaysia has declared National Statistics Day (MyStats Day) on October 20 each year. MyStats Day theme is "Statistics is the Essence of Life".

JABATAN PERANGKAAN MALAYSIA
DEPARTMENT OF STATISTICS MALAYSIA

KATA PENGANTAR

Akaun Satelit Pelancongan adalah satu kerangka statistik untuk mengukur perkembangan industri pelancongan dan sumbangannya kepada Keluaran Dalam Negeri Kasar. Penyusunan statistik ini dilaksanakan berdasarkan rangka kerja *Tourism Satellite Account: Recommended Methodological Framework 2008* dan *System of National Accounts 2008*. Statistik ini disusun secara tahunan dengan mengintegrasikan produk dan industri berkaitan pelancongan.

Penerbitan ini dibahagikan kepada tiga bahagian utama. Bahagian pertama memaparkan penemuan utama, ringkasan penemuan dan rencana, manakala jadual statistik di bahagian kedua. Aspek teknikal berkaitan konsep, definisi, metodologi, sumber data serta kod & klasifikasi yang digunakan dalam penerbitan ini diterangkan di bahagian ketiga bagi memudahkan pengguna memahami statistik yang diterbitkan.

Statistik ini boleh membantu agensi kerajaan, ahli ekonomi, ahli akademik serta individu bagi tujuan membuat perancangan dan penggubalan dasar, analisis ekonomi dan unjuran serta dapat membantu merancang pembangunan perniagaan.

Jabatan Perangkaan Malaysia (DOSM) merakamkan penghargaan atas kerjasama semua pihak dalam membekalkan data yang diperlukan dan menyumbang kepada kejayaan penerbitan ini. Sebarang maklum balas dan cadangan untuk penambahbaikan penerbitan ini pada masa akan datang amatlah dihargai.

DATO' SRI DR. MOHD UZIR MAHIDIN
Ketua Perangkawan Malaysia

September 2023

PREFACE

Tourism Satellite Account is a statistical framework to gauge the performance of the tourism industry and its contribution to the Gross Domestic Product. The compilation of these statistics is in accordance with the framework of Tourism Satellite Account: Recommended Methodological Framework 2008 and System of National Accounts 2008. These statistics is compiled annually and integrates products and industries related to tourism.

This publication is divided into three main parts. The first part displays the main findings, summary of findings and article, meanwhile the statistical tables in the second part. Technical aspects related to concepts, definitions, methodology, data sources and code & classification used in this publication are described in the third part to assist users to understand the published statistics.

These statistics could assist government agencies, economists, academicians and individuals for planning and formulation of policies, economic analysis and projections as well as for business development planning.

The Department of Statistics Malaysia (DOSM) acknowledges the cooperation of all parties that have provided the required data and contributed to the success of this publication. Any feedback and suggestions towards improving the future publication are highly appreciated.

DATO' SRI DR. MOHD UZIR MAHIDIN
Chief Statistician Malaysia

September 2023

SINGKATAN / ABBREVIATION

ASP	:	Akaun Satelit Pelancongan
B	:	Bilion / *Billion*
KDNK	:	Keluaran Dalam Negeri Kasar
KDNKPL	:	Keluaran Dalam Negeri Kasar Pelancongan Langsung
NDK	:	Nilai Ditambah Kasar
NDKIP	:	Nilai Ditambah Kasar Industri Pelancongan
NDKPL	:	Nilai Ditambah Kasar Pelancongan Langsung
MICE	:	Mesyuarat, insentif, konvensyen, pameran / *Meeting, incentive, convention, exhibition*
RM	:	Ringgit Malaysia
CPC	:	*Central Products Classifications*
DOSM	:	*Department of Statistics, Malaysia*
DTS	:	*Domestic Tourism Survey*
GDP	:	*Gross Domestic Product*
GVA	:	*Gross Value Added*
GVATI	:	*Gross Value Added of Tourism Industries*
IRTS	:	*International Recommendations for Tourism Statistics*
ISIC	:	*International Standard Industrial Classification of All Economic Activities*
MCPA	:	*Malaysia Classification of Products by Activity*
MSIC	:	*Malaysia Standard Industrial Classification*
No.	:	*Number*
SNA	:	*System of National Accounts*
SUT	:	*Supply and Use Table*
TDGDP	:	*Tourism Direct Gross Domestic Product*
TDGVA	:	*Tourism Direct Gross Value Added*
TSA	:	*Tourism Satellite Account*
TSA: RMF	:	*Tourism Satellite Account: Recommended Methodological Framework*
UNWTO	:	*United Nations World Tourism Organization*

NOTA / NOTES

Penjumlahan angka komponen mungkin tidak bersamaan dengan angka jumlah kecil atau jumlah besar disebabkan pembundaran.

The sum of the component figures may not tally with the sub-total or total figures due to rounding.

KANDUNGAN / *CONTENTS*

KANDUNGAN / *CONTENTS*

INDIKATOR PELANCONGAN *INBOUND* / *INBOUND TOURISM INDICATORS*

Tahun / *Year*	2018	2019	2020	2021	2022
A. Ketibaan pelancong / *Tourist arrivals*					
A1. Bilangan ketibaan pelancong ke Malaysia dari negara terpilih *Number of tourist arrivals to Malaysia from selected countries*	25,832,354	26,100,784	4,332,722	134,728	10,070,964
i. Benua Asia / *Asia Continent*					
Singapore	10,615,986	10,163,882	1,545,255	16,308	5,222,991
Indonesia	3,277,689	3,623,277	711,723	11,025	1,481,739
Thailand	1,914,692	1,884,306	394,413	59,607	715,528
Brunei Darussalam	1,382,031	1,216,123	136,020	773	301,757
China	2,944,133	3,114,257	405,149	7,701	212,603
India	600,311	735,309	155,883	3,916	324,548
Japan	394,540	424,694	74,383	3,114	83,309
Philippines	396,062	421,908	66,051	2,317	159,442
Saudi Arabia	112,263	121,444	23,390	687	35,980
ii. Benua Amerika Utara / *North America Continent*					
United States	253,384	269,928	48,810	2,030	108,141
Canada	84,705	87,568	16,631	471	30,656
iii. Benua Australia / *Australia Continent*					
Australia	351,500	368,271	72,680	1,321	152,265
New Zealand	50,698	50,140	8,794	196	18,238
iv. Benua Eropah / *Europe Continent*					
United Kingdom	361,335	346,485	63,868	2,676	134,667
Germany	128,895	130,221	27,458	824	57,780
Netherlands	81,651	82,110	14,486	466	31,070
v. Negara-negara lain / *Other countries*	2,882,479	3,060,861	567,728	21,296	1,000,250
A2. Taburan peratus mod pengangkutan (%) / *Percentage distribution mode of transport (%)*					
Udara / *Air*	34.7	36.8	38.3	51.5	28.8
Darat / *Land*	59.5	56.8	53.1	47.4	62.5
Laut / *Sea*	4.5	4.9	7.3	1.1	6.8
Rel / *Rail*	1.3	1.5	1.3	0	1.8
B. Penginapan / *Accommodation*					
Bilangan hotel / *No. of hotels*	4,750	5,382	5,339	5,170	5,052
Bilangan bilik / *No. of rooms*	112,495,555	124,299,655	121,478,205	118,074,215	117,785,500
Bilangan tetamu / *No. of guests*	82,448,869	79,929,203	35,405,021	20,060,819	73,947,777
Domestik / *Domestic*	52,448,312	51,093,010	30,703,994	19,872,079	60,048,624
Antarabangsa / *International*	30,000,557	28,836,193	4,701,027	188,740	13,899,153
Purata bilangan hari menginap *Average length of stay*	6.5	7.4	4.1*	n.a	3.8
Purata kadar penginapan (%) *Average occupancy rate (%)*	60.8	58.8	30.9	28.2	46.7

* Merujuk kepada suku tahun pertama 2020 / *Refers to first quarter of 2020*

n.a: tidak tersedia / *not available*

Nota: Indikator diselaraskan dengan Jadual 10 seperti dalam TSA: RMF 2008
Note: Indicators conforms with Table 10 in the TSA: RMF 2008

Sumber : Tourism Malaysia
Source : Tourism Malaysia

INDIKATOR PELANCONGAN DOMESTIK / *DOMESTIC TOURISM INDICATORS*

Tahun / *Year*	2018	2019	2020	2021	2022
A. Pelawat domestik / *Domestic visitors*					
A1. Bilangan pelawat domestik mengikut negeri dikunjungi ('000) *Number of domestic visitors by state visited ('000)*	**221,272**	**239,121**	**131,660**	**65,976**	**171,603**
Johor	13,487	14,274	7,243	3,658	12,376
Kedah	14,480	14,831	10,831	4,023	11,186
Kelantan	9,846	10,986	6,058	1,921	6,627
Melaka	13,123	13,979	7,275	3,878	11,757
Negeri Sembilan	12,802	13,303	7,918	5,485	11,490
Pahang	18,111	18,498	9,905	3,405	13,189
Pulau Pinang	14,450	15,411	8,929	5,061	10,003
Perak	17,553	21,070	13,173	4,489	14,567
Perlis	2,156	2,088	1,193	407	1,669
Selangor	30,179	33,589	19,715	10,212	21,990
Terengganu	13,742	14,158	7,420	3,719	10,233
Sabah	20,360	22,035	10,337	3,815	12,589
Sarawak	19,380	19,793	9,393	6,511	15,465
W.P. Kuala Lumpur	19,165	22,633	12,435	9,116	16,913
W.P. Labuan	545	524	107	54	244
W.P. Putrajaya	1,892	1,949	451	223	1,306
Bilangan pelawat ('000) / *No. of visitors ('000)*	**221,272**	**239,121**	**131,660**	**65,976**	**171,603**
Pelancong / *Tourists*	78,239	84,716	46,259	14,883	65,056
Pelawat harian / *Excursionists*	143,033	154,405	85,401	51,093	106,547
Bilangan perjalanan pelancongan ('000) *Number of tourism trips ('000)*	**302,415**	**332,378**	**146,990**	**72,399**	**207,785**
Perjalanan harian / *Same day trips*	200,868	218,705	98,704	56,857	135,869
Perjalanan bermalam / *Overnight trips*	101,547	113,673	48,286	15,542	71,916
Purata bilangan hari menginap / *Average length of stay*	**2.4**	**2.5**	**1.9**	**2.2**	**2.5**
A2. Taburan peratus mod pengangkutan (%) / *Percentage distribution mode of transport (%)*					
Udara / *Air*	**1.2**	**0.9**	**1.0**	**1.1**	**1.7**
Air / *Water*	**0.6**	**0.6**	**0.4**	**0.3**	**0.3**
Darat / *Land*	**98.2**	**98.5**	**98.6**	**98.6**	**98.0**
Kenderaan persendirian / *Private vehicles*	95.0	94.5	95.2	97.2	96.7
Bas / *Bus*	2.7	2.1	2.0	1.3	1.8
Teksi / *Taxi*	2.0	3.2	2.4	1.1	0.8
Rel / *Rail*	0.3	0.2	0.4	0.4	0.7
B. Jenis penginapan (%) / *Type of accommodation (%)*					
Rumah saudara & rakan / *Relatives' & friends' house*	68.2	70.9	65.1	58.6	67.9
Hotel / *Hotel*	20.4	18.5	24.1	29.5	21.2
Chalet / *Chalet*	2.3	1.5	0.8	3.1	1.9
Apartmen / *Apartment*	4.4	3.6	2.3	2.6	3.3
Inap desa / Rumah percutian / *Homestay / Vacation homes*	3.0	3.8	3.8	4.5	3.4
Rumah rehat / *Rest house*	1.7	1.7	3.9	1.7	2.3

Nota: Indikator diselaraskan dengan Jadual 10 seperti dalam TSA: RMF 2008
Note: Indicators conforms with Table 10 in the TSA: RMF 2008

Sumber : Survei Pelancongan Domestik, Jabatan Perangkaan Malaysia (DOSM)
Source : Domestic Tourism Survey, Department of Statistics, Malaysia (DOSM)

PELANCONGAN INBOUND / INBOUND TOURISM

Ketibaan Pelancong
Tourist Arrivals

2022: 7375%
2021: -96.9%

Perubahan peratusan tahunan (%)
Annual percentage change (%)
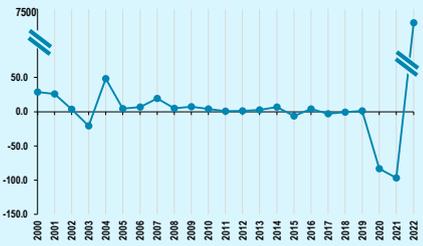
Bilangan Hotel
Number of Hotel

2022: -2.3%
2021: -3.2%

Perubahan peratusan tahunan (%)
Annual percentage change (%)

Bilangan Bilik
Number of Room

2022: -0.2%
2021: -2.8%

Perubahan peratusan tahunan (%)
Annual percentage change (%)

Bilangan Tetamu Domestik
Number of Domestic Guests

2022: 202.2%
2021: -35.3%

Perubahan peratusan tahunan (%)
Annual percentage change (%)

Bilangan Tetamu Antarabangsa
Number of International Guests

2022: 7264.2%
2021: -96.0%

Perubahan peratusan tahunan (%)
Annual percentage change (%)
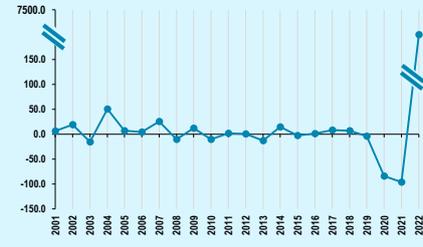
Purata Kadar Penginapan
Average Occupancy Rate

2022: 46.7%
2021: 28.2%

(%)
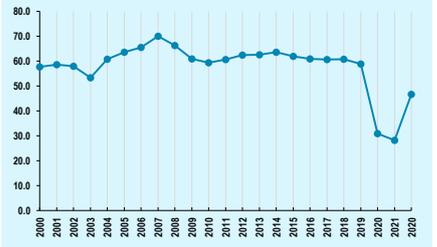
PELANCONGAN DOMESTIK / DOMESTIC TOURISM

Bilangan Pelawat
Number of Visitors

2022: 160.1%
2021: -49.9%

Perubahan peratusan tahunan (%)
Annual percentage change (%)

Jumlah Pelancong
Total Tourist

2022: 337.1%
2021: -67.8%

Perubahan peratusan tahunan (%)
Annual percentage change (%)

Bilangan Pelawat Harian
Number of Excursionist

2022: 108.5%
2021: -40.2%

Perubahan peratusan tahunan (%)
Annual percentage change (%)

Bilangan Perjalanan Harian
Same Day Trips

2022: 139.0%
2021: -42.4%

Perubahan peratusan tahunan (%)
Annual percentage change (%)

Bilangan Perjalanan Bermalam
Overnight Trips

2022: 362.7%
2021: -67.8%

Perubahan peratusan tahunan (%)
Annual percentage change (%)

Purata Bilangan Hari Menginap
Average Length of Stay

2022: 2.5 malam/*nights*
2021: 2.2 malam/*nights*

Bilangan malam
Number of nights
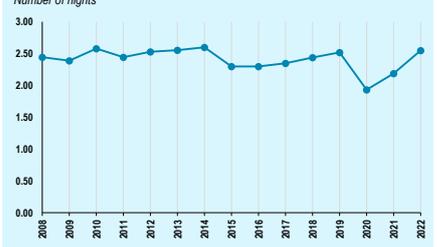
Sumber : **Jabatan Perangkaan Malaysia (DOSM) dan Lembaga Penggalakan Pelancongan Malaysia (Tourism Malaysia)**
Source   : Department of Statistics, Malaysia (DOSM) and Malaysian Tourism Promotion Board (Tourism Malaysia)

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KEMENTERIAN EKONOMI
JABATAN PERANGKAAN MALAYSIA

@StatsMalaysia

BANCI 2024 PERTANIAN
KUNCI KEMAJUAN PERTANIAN

B/23 BANCI EKONOMI 2023
DATA PEMANGKIN EKONOMI NEGARA

MALAYSIA MADANI

SUSTAINABLE DEVELOPMENT GOALS

AKAUN SATELIT PELANCONGAN 2022

Industri pelancongan menyumbang 14.0 peratus kepada KDNK[1] pada 2022 (2021: 12.8%)

RM251.5b
2021: RM198.5b
Nilai

14.0%
2021: 12.8%
Sumbangan kepada KDNK

26.7%
2021: -0.9%
Pertumbuhan

Komponen utama NDKIP[2]

54.1%
2021: 56.0%
Perdagangan runcit

17.1%
2021: 17.1%
Makanan & minuman

12.6%
2021: 15.1%
Perkhidmatan khusus pelancongan negara
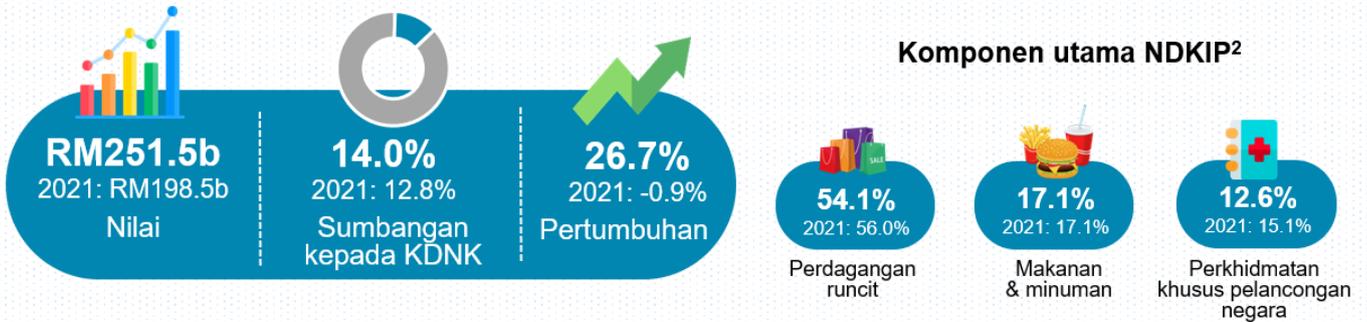
Penggunaan Pelancongan *Internal*

Pelancongan domestik mendominasi 63.9 peratus kepada penggunaan pelancongan *internal* (2021: 97.4%)

RM92.7b
2021: RM17.9b

Perbelanjaan Pelancongan *Inbound*

Sumbangan
36.1%
2021: 2.6%

RM33.4b
2021: RM0.5b

Perbelanjaan Pelancongan Domestik

RM59.2b
2021: RM17.5b

Sumbangan
63.9%
2021: 97.4%

Komponen utama kepada perbelanjaan pelancongan *inbound*:

33.8%
2021: 9.4%
Membeli-belah

21.4%
2021: 37.8%
Pengangkutan penumpang

16.8%
2021: 16.7%
Makanan & minuman

Komponen utama kepada perbelanjaan pelancongan domestik:

42.1%
2021: 53.1%
Membeli-belah

16.4%
2021: 15.9%
Makanan & minuman

14.9%
2021: 11.7%
Bahan api kenderaan

Guna Tenaga dalam Industri Pelancongan

23.4 peratus guna tenaga terlibat dalam industri pelancongan di Malaysia
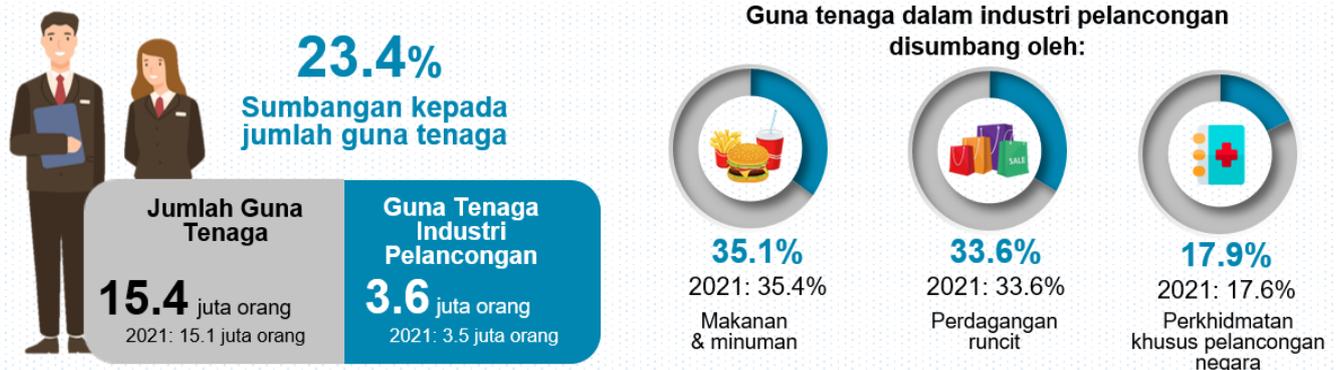
23.4%
Sumbangan kepada jumlah guna tenaga

Jumlah Guna Tenaga
15.4 juta orang
2021: 15.1 juta orang

Guna Tenaga Industri Pelancongan
3.6 juta orang
2021: 3.5 juta orang

Guna tenaga dalam industri pelancongan disumbang oleh:

35.1%
2021: 35.4%
Makanan & minuman

33.6%
2021: 33.6%
Perdagangan runcit

17.9%
2021: 17.6%
Perkhidmatan khusus pelancongan negara

TOURISM SATELLITE ACCOUNT 2022

Tourism industry contributed 14.0 per cent to GDP[1] in 2022 (2021: 12.8%)

RM251.5b
2021: RM198.5b
Value

14.0%
2021: 12.8%
Share to GDP

26.7%
2021: -0.9%
Growth

Main components of GVATI[2]

54.1%
2021: 56.0%
Retail trade

17.1%
2021: 17.1%
Food & beverage

12.6%
2021: 15.1%
Country-specific tourism services
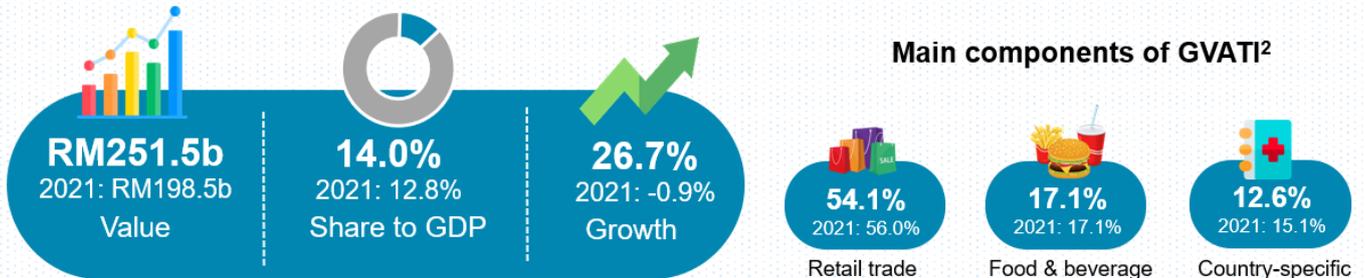
Internal Tourism Consumption

Domestic tourism dominated 63.9 per cent of internal tourism consumption (2021: 97.4%)

RM92.7b
2021: RM17.9b

Inbound Tourism Expenditure

Share
36.1%
2021: 2.6%

RM33.4b
2021: RM0.5b

Domestic Tourism Expenditure

RM59.2b
2021: RM17.5b

Share
63.9%
2021: 97.4%

Main components of inbound tourism expenditure:

33.8%
2021: 9.4%
Shopping

21.4%
2021: 37.8%
Passenger transport

16.8%
2021: 16.7%
Food & beverage

Main components of domestic tourism expenditure:

42.1%
2021: 53.1%
Shopping

16.4%
2021: 15.9%
Food & beverage

14.9%
2021: 11.7%
Automotive fuel

Employment in Tourism Industries

23.4 per cent of employment engaged in the tourism industry in Malaysia

23.4%
contribution to total employment

Total Employment	Tourism Employment
15.4 million persons 2021: 15.1 million persons	**3.6** million persons 2021: 3.5 million persons

Employment in the tourism industry attributed by:

35.1%
2021: 35.4%
Food & beverage

33.6%
2021: 33.6%
Retail trade

17.9%
2021: 17.6%
Country-specific tourism services

[1] Gross Domestic Product
[2] Gross Value Added of Tourism Industries

1.0 PENGENALAN

Statistik Akaun Satelit Pelancongan (ASP) Malaysia bagi tahun 2022 menyediakan maklumat mengenai Nilai Ditambah Kasar Industri Pelancongan (NDKIP), Keluaran Dalam Negeri Kasar Pelancongan Langsung (KDNKPL), perbelanjaan pelancongan bagi *inbound*, domestik, *outbound*, penggunaan pelancongan *internal* dan guna tenaga dalam industri pelancongan. Statistik disediakan mengikut industri dan produk yang berkaitan pelancongan pada harga semasa. ASP adalah perluasan daripada *System of National Accounts* (SNA) 2008 dan penyusunan ini memaparkan maklumat mengenai penawaran dan permintaan dalam sektor pelancongan.

2.0 SENARIO PELANCONGAN GLOBAL

UNWTO *World Tourism Barometer* melaporkan bilangan ketibaan pelancong yang direkodkan di seluruh dunia pada 2022 adalah seramai 963 juta orang berbanding 456 juta orang pada tahun sebelumnya. Ini menunjukkan sektor pelancongan masih berdaya tahan dengan pemulihan 65.7 peratus daripada paras pra-pandemik (**Paparan 1**).

Paparan 1: Bilangan ketibaan pelancong di peringkat global

Dunia	
Ketibaan	Pertumbuhan
2022 : 963 juta	**2022/21 : 111.2%**
2021 : 456 juta	2022/19 : -34.3%
2019 : 1,465 juta	2021/19 : -68.9%

Eropah	
Ketibaan	Pertumbuhan
2022 : 595 juta	**2022/21 : 95.0%**
2021 : 305 juta	2022/19 : -20.1%
2019 : 744 juta	2021/19 : -59.0%

Asia-Pasifik	
Ketibaan	Pertumbuhan
2022 : 101 juta	**2022/21 : 304.6%**
2021 : 25 juta	2022/19 : -72.1%
2019 : 360 juta	2021/19 : -93.1%

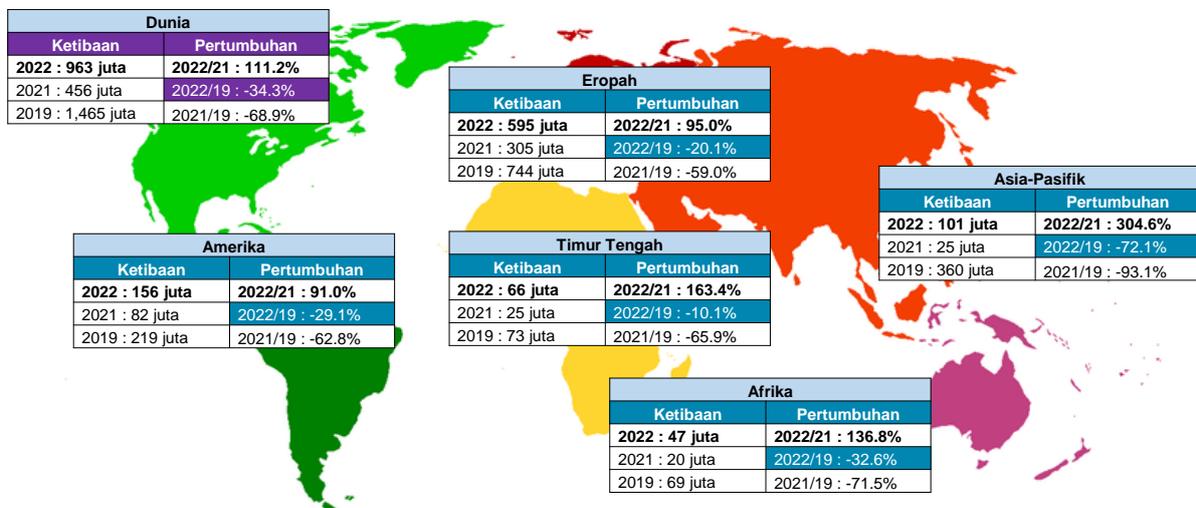| Amerika	
Ketibaan	Pertumbuhan
2022 : 156 juta	**2022/21 : 91.0%**
2021 : 82 juta	2022/19 : -29.1%
2019 : 219 juta	2021/19 : -62.8%

Timur Tengah	
Ketibaan	Pertumbuhan
2022 : 66 juta	**2022/21 : 163.4%**
2021 : 25 juta	2022/19 : -10.1%
2019 : 73 juta	2021/19 : -65.9%

Afrika	
Ketibaan	Pertumbuhan
2022 : 47 juta	**2022/21 : 136.8%**
2021 : 20 juta	2022/19 : -32.6%
2019 : 69 juta	2021/19 : -71.5%

Pertumbuhan: Perubahan peratusan tahunan (%)
Sumber: *UNWTO World Tourism Barometer, Volume 19, July 2022*

Timur Tengah menunjukkan pemulihan terpantas pada 2022 dengan ketibaan mencapai 89.9 peratus daripada paras 2019 diterajui oleh ketibaan jemaah haji dan umrah. Eropah, Amerika dan Afrika juga mencatatkan pertumbuhan kukuh pada 2022 berbanding 2021, masing-masing mencapai 79.9 peratus, 70.9 peratus dan 67.4 peratus daripada paras 2019. Asia-Pasifik juga mencatatkan peningkatan yang kukuh tetapi berada pada 27.9 peratus berbanding 2019 kerana beberapa sempadan negara masih ditutup untuk tujuan perjalanan pelancongan.

3.0 SENARIO PELANCONGAN DI MALAYSIA

Ketibaan pelancong *inbound* pada 2022 telah mencecah 10.1 juta orang menunjukkan pertumbuhan kukuh berbanding tahun sebelumnya. Walau bagaimanapun, pemulihan adalah rendah berbanding dengan paras pra-pandemik yang merekodkan 38.6 peratus (**Carta 1**).

Carta 1: Bilangan ketibaan pelancong di Malaysia, 2000-2022

Tahun Melawat Malaysia Ketibaan (juta) Pertumbuhan (%)
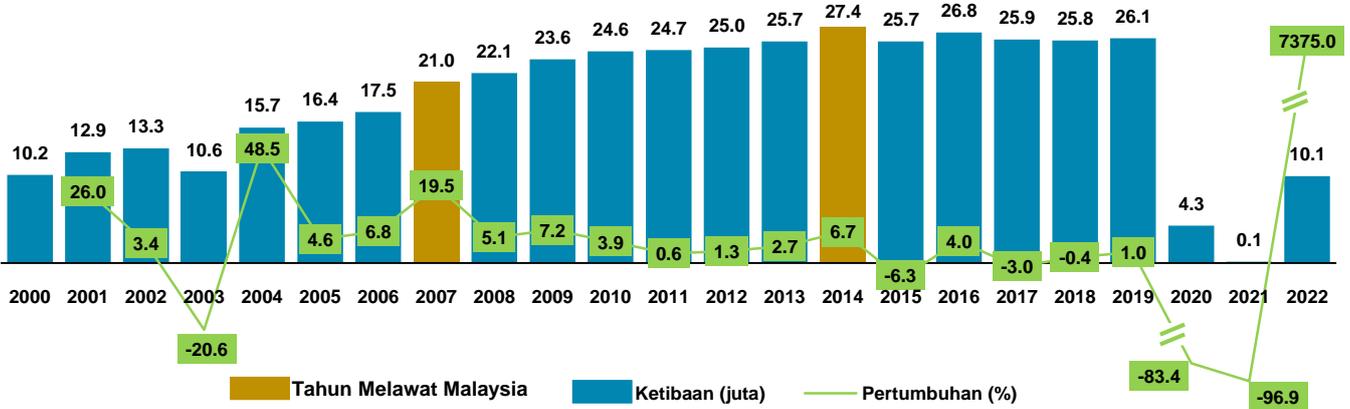
Sumber: Tourism Malaysia (TM)

Ketibaan pelancong dari Singapura pada 2022 telah menyumbang 51.9 peratus (2019: 38.9%) kepada jumlah ketibaan. Ini diikuti dengan ketibaan pelancong dari Indonesia dan Thailand yang masing-masing menyumbang 14.7 peratus dan 7.1 peratus. Perubahan struktur ketibaan pelancong berbanding 2019 adalah berikutan penurunan jumlah ketibaan pelancong China selaras dengan dasar sifar COVID-19 yang dilaksanakan oleh kerajaan negara China.

4.0 PRESTASI PELANCONGAN 2022

4.1 Nilai Ditambah Kasar Industri Pelancongan (NDKIP)

NDKIP berjumlah RM251.5 bilion dengan menyumbang sebanyak 14.0 peratus kepada Keluaran Dalam Negeri Kasar (KDNK) berbanding 12.8 peratus pada 2021 seperti ditunjukkan dalam **Carta 2**. Berdasarkan prestasi sub-sektor pelancongan pasca pra-pandemik, semua industri telah merekodkan kadar pertumbuhan positif dan prestasi keseluruhan telah memulih 4.8 peratus melepasi paras pra-pandemik.

Carta 2: NDKIP - Nilai, perubahan peratusan tahunan dan peratus sumbangan kepada KDNK, 2015-2022

NDKIP (RM Bilion) Perubahan peratusan tahunan (%) Peratus sumbangan kepada KDNK
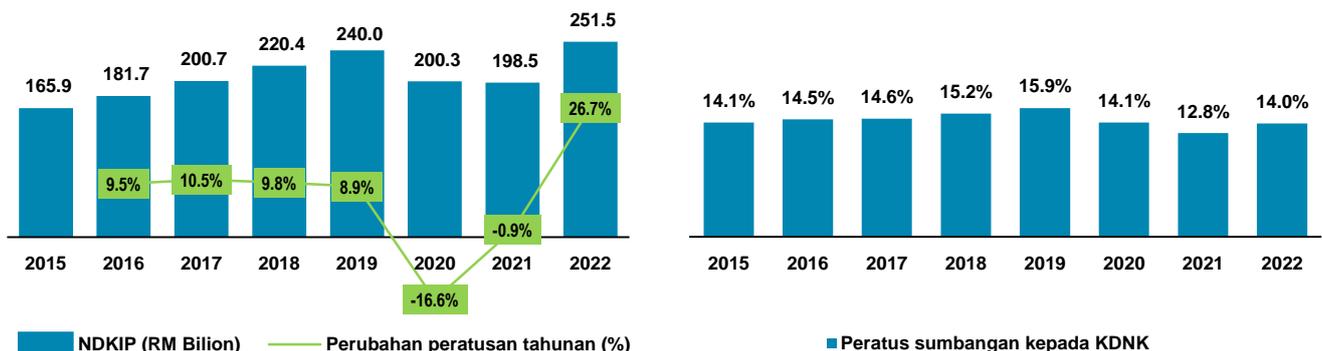
Perdagangan runcit kekal sebagai penyumbang utama dalam industri pelancongan dengan sumbangan sebanyak 54.1 peratus. Ini diikuti oleh Perkhidmatan penyediaan makanan & minuman (17.1%) dan Perkhidmatan khusus pelancongan negara (12.6%) seperti di **Paparan 2.**

Paparan 2: NDKIP – Peratus sumbangan mengikut industri pelancongan, 2022

Perdagangan runcit
54.1%
(2021: 56.0%)

Perkhidmatan khusus pelancongan negara
12.6%
(2021: 15.1%)

Pengangkutan penumpang
3.2%
(2021: 2.0%)

Bahan api kenderaan
2.5%
(2021: 2.2%)

Makanan & minuman
17.1%
(2021: 17.1%)

Penginapan
5.9%
(2021: 4.9%)

Kebudayaan, sukan & rekreasi
3.0%
(2021: 2.1%)

Agensi pengembaraan
1.5%
(2021: 0.5%)
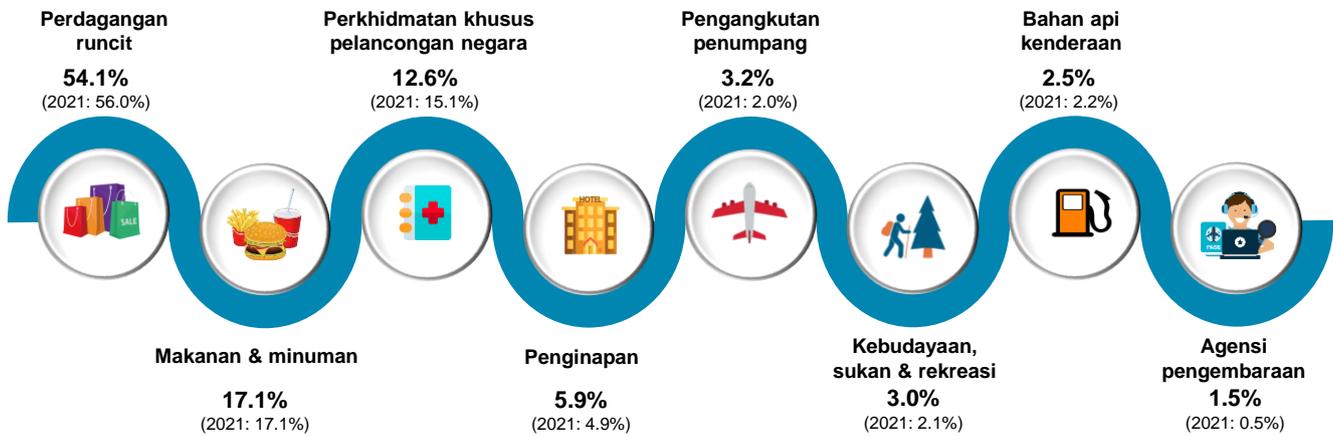
4.2 Keluaran Dalam Negeri Kasar Pelancongan Langsung (KDNKPL)

KDNKPL telah merekodkan RM47.9 bilion berbanding RM11.6 bilion pada 2021, meningkat sebanyak 313.8 peratus (2021: -59.1%). Secara keseluruhan, KDNKPL menyumbang 2.7 peratus kepada KDNK berbanding 0.8 peratus pada tahun sebelumnya.

Carta 3:   KDNKPL - Nilai, perubahan peratusan tahunan dan peratus sumbangan kepada KDNK, 2015-2022

KDNKPL (RM Bilion):
2015	2016	2017	2018	2019	2020	2021	2022
75.0	82.1	87.9	94.6	102.3	28.4	11.6	47.9

Perubahan peratusan tahunan (%):
2016	2017	2018	2019	2020	2021	2022
9.5%	7.1%	7.6%	8.1%	-72.3%	-59.1%	313.8%

Sumbangan kepada KDNK:
2015	2016	2017	2018	2019	2020	2021	2022
6.4%	6.6%	6.4%	6.5%	6.8%	2.0%	0.8%	2.7%

■ KDNKPL (RM Bilion) ── **Perubahan peratusan tahunan (%)**

■ Sumbangan kepada KDNK
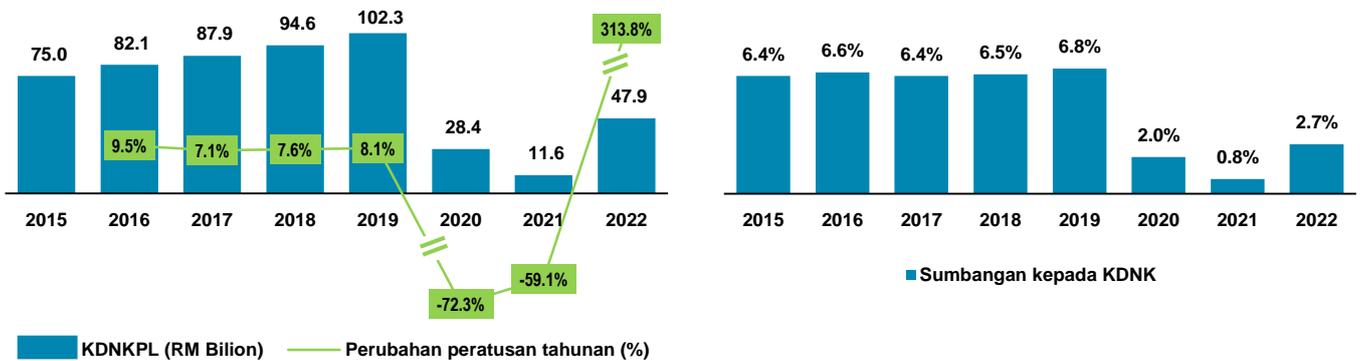
Tiga industri utama dalam KDNKPL adalah Perdagangan runcit, Perkhidmatan penyediaan makanan & minuman dan Penginapan dengan sumbangan sebanyak 74.7 peratus pada 2022 (**Paparan 3**).

Paparan 3: Penyumbang utama kepada KDNKPL, 2022

47.4%
2021: 50.5%
Perdagangan runcit

14.0%
2021: 10.7%
Makanan & minuman

13.3%
2021: 14.9%
Penginapan

4.3 Penggunaan Pelancongan *Internal*

Penggunaan pelancongan *internal* adalah merangkumi perbelanjaan pelancongan *inbound* dan perbelanjaan pelancongan domestik. Penggunaan pelancongan *internal* kembali pulih sebanyak 417.0 peratus mencecah RM92.7 bilion pada 2022 berbanding penurunan sebanyak 65.8 peratus pada tahun sebelumnya (**Paparan 4)**.

Paparan 4: Penggunaan pelancongan *internal* – Nilai, perubahan peratusan tahunan dan sumbangan utama kepada penggunaan pelancongan *internal*

Sumbangan utama, 2022

Membeli-belah	Makanan & minuman	Pengangkutan penumpang
39.1% 2021: 51.9%	**16.5%** 2021: 16.0%	**12.9%** 2021: 6.0%

Membeli-belah (39.1%) mendominasi penggunaan pelancongan *internal* dan diikuti oleh Perkhidmatan penyediaan makanan & minuman (16.5%) dan Pengangkutan penumpang (12.9%) seperti **Paparan 4**. Pelancongan domestik kekal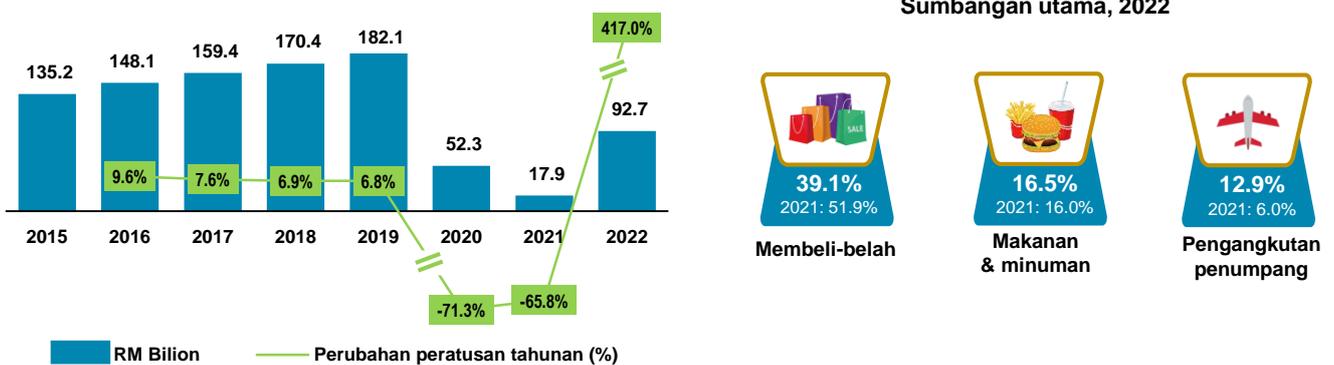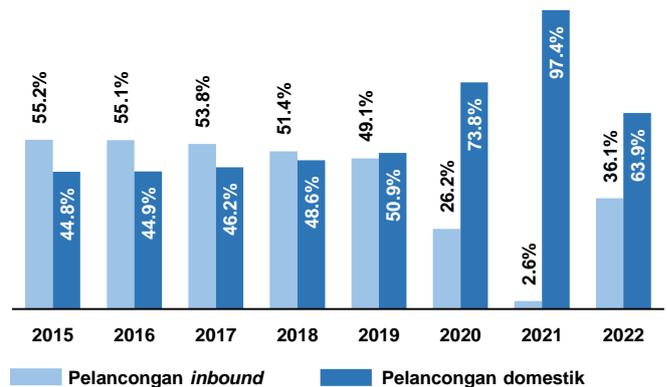 sebagai penyumbang utama (63.9%) kepada jumlah penggunaan pelancongan *internal* manakala pelancongan *inbound* menyumbang 36.1 peratus (**Carta 4**).

Carta 4: Sumbangan pelancongan *inbound* dan pelancongan domestik kepada penggunaan pelancongan *internal,* 2015-2022

4.3.1 Perbelanjaan Pelancongan *Inbound*

Perbelanjaan pelancongan *inbound* pada tahun 2022 berjumlah RM33.4 bilion telah menunjukkan peningkatan yang signifikan (7000.2%) berbanding tahun sebelumnya (**Paparan 5**). Pembukaan semula sempadan kepada semua pelancong pada 1 April 2022 telah memulakan proses pemulihan pelancongan Malaysia selepas hampir dua tahun menanggung pandemik COVID-19. Walau bagaimanapun, pemulihan ini hanya mencapai 37.4 peratus daripada paras pra-pandemik atau penyusutan sebanyak 62.6 peratus berbanding tahun 2019. Membeli-belah sebagai komponen utama bagi perbelanjaan pelancongan *inbound* telah menyumbang 33.8 peratus. Ini diikuti oleh Pengangkutan penumpang (21.4%) dan Perkhidmatan penyediaan makanan & minuman (16.8%) seperti di **Paparan 5**.

Paparan 5: Perbelanjaan pelancongan *inbound* - Nilai, perubahan peratusan tahunan dan sumbangan utama kepada perbelanjaan pelancongan *inbound*

Sumbangan utama, 2022

Membeli-belah	Pengangkutan penumpang	Makanan & minuman
33.8% 2021: 9.4%	**21.4%** 2021: 37.8%	**16.8%** 2021: 16.7%
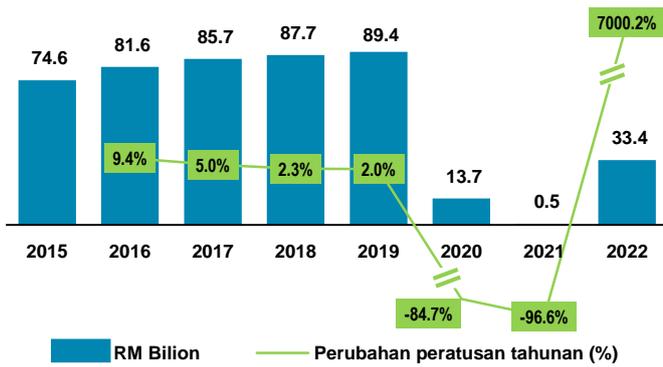
4.3.2 Perbelanjaan Pelancongan Domestik

Perbelanjaan pelancongan domestik mencatatkan RM59.2 bilion pada tahun 2022 berbanding RM17.5 bilion pada tahun sebelumnya iaitu peningkatan signifikan sebanyak 239.3 peratus (2021: -54.8%) seperti yang ditunjukkan dalam **Paparan 6**. Lonjakan sebanyak 160.1 peratus dalam bilangan pelawat domestik telah menyumbang kepada pemulihan pelancongan domestik. Walau bagaimanapun, pertumbuhan perbelanjaan pelancongan domestik masih 36.1 peratus di bawah paras pra-pandemik. Prestasi pelancongan domestik pada tahun 2022 didorong oleh perbelanjaan dalam aktiviti Membeli-belah (42.1%), Perkhidmatan penyediaan makanan & minuman (16.4%) dan Jualan runcit bahan api kenderaan (14.9%).

Paparan 6: Perbelanjaan pelancongan domestik – Nilai, perubahan peratusan tahunan dan sumbangan utama kepada perbelanjaan pelancongan domestik

Sumbangan utama, 2022

Membeli-belah	Makanan & minuman	Bahan api kenderaan
42.1% 2021: 53.1%	**16.4%** 2021: 15.9%	**14.9%** 2021: 11.7%
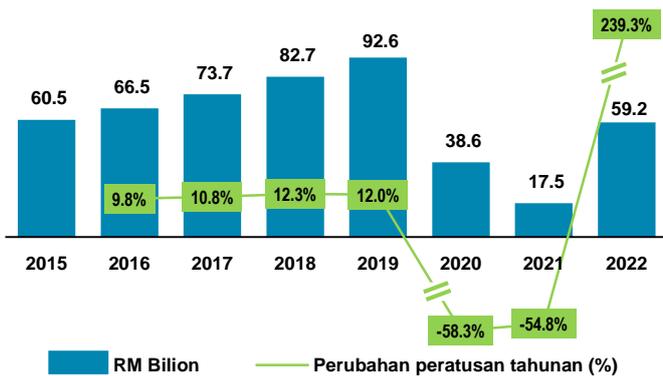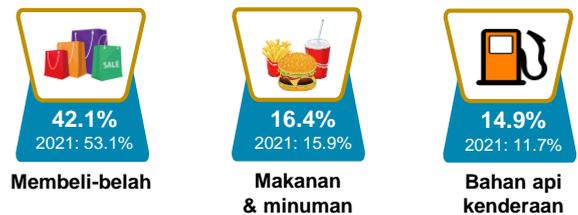
4.4 Perbelanjaan Pelancongan *Outbound*

Perbelanjaan pelancongan *outbound* mencatatkan RM22.5 bilion pada tahun 2022 dengan peningkatan 114.6 peratus berbanding RM10.5 bilion (-39.1%) pada tahun sebelumnya selaras dengan pembukaan pintu sempadan antarabangsa oleh kebanyakan negara (**Paparan 7**). Komponen utama dalam perbelanjaan pelancongan *outbound* adalah Pengangkutan penumpang (31.0%), Membeli-belah (22.9%) dan Penginapan (21.3%) seperti ditunjukkan di **Paparan 7**.

Paparan 7: Perbelanjaan pelancongan *outbound* – Nilai, perubahan peratusan tahunan dan sumbangan utama kepada perbelanjaan pelancongan *outbound*


| 2015	2016	2017	2018	2019	2020	2021	2022
31.1	34.0	38.9	41.1	44.8	17.2	10.5	22.5
	9.4%	14.2%	5.8%	8.9%	-61.6%	-39.1%	114.6%

■ RM Bilion ─── Perubahan peratusan tahunan (%)

Sumbangan utama, 2022

Pengangkutan penumpang	Membeli-belah	Penginapan
31.0% 2021: 26.9%	**22.9%** 2021: 18.0%	**21.3%** 2021: 29.9%
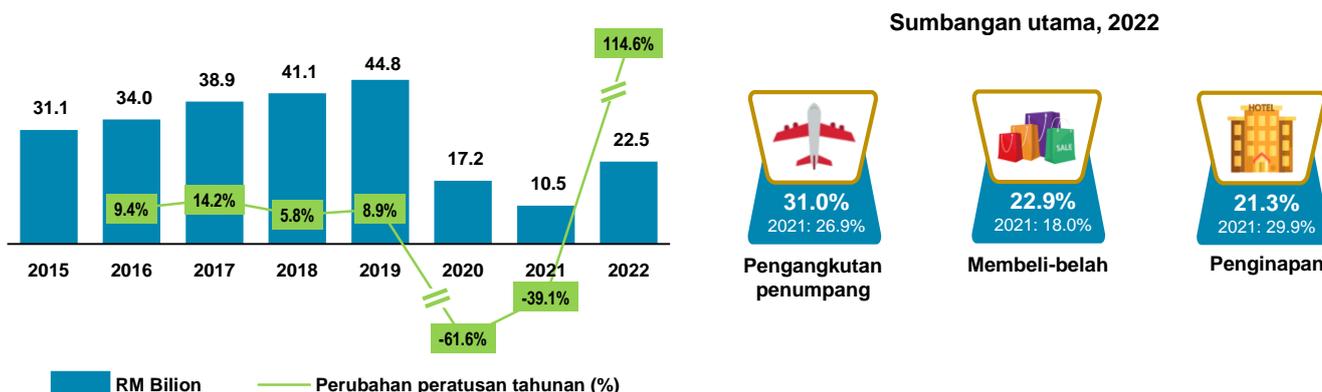
4.5 Kadar Pelancongan

Kadar pelancongan mengukur tahap penggunaan pelancongan *internal* terhadap penawaran domestik dalam industri pelancongan. Kadar pelancongan pada tahun 2022 mencatatkan 22.0 peratus berbanding 6.1 peratus pada tahun sebelumnya.

Paparan 8: Kadar pelancongan mengikut produk pelancongan, 2022

Kadar Pelancongan 22.0% 2021:6.1%

- Penginapan: **43.7%** 2021: 21.0%
- Perkhidmatan khusus bercirikan pelancongan: **7.5%** 2021: 2.1%
- Agensi pengembaraan: **34.2%** 2021: 10.0%
- Makanan & minuman: **20.1%** 2021: 11.5%
- Pengangkutan penumpang: **33.5%** 2021: 4.3%
- Membeli-belah: **20.6%** 2021: 5.8%
- Bahan api kenderaan: **24.8%** 2021: 8.4%
- Kebudayaan, sukan & rekreasi: **23.8%** 2021: 4.8%

Perkhidmatan penginapan mencatatkan kadar pelancongan tertinggi iaitu 43.7 peratus diikuti Agensi pengembaraan (34.2%) dan Pengangkutan penumpang (33.5%). Sebaliknya, Perkhidmatan khusus bercirikan pelancongan adalah produk yang paling rendah digunakan iaitu 7.5 peratus seperti yang ditunjukkan dalam **Paparan 8**.

4.6 Guna Tenaga Dalam Industri Pelancongan

Guna tenaga industri pelancongan melibatkan 3.61 juta orang pada 2022 dan menyumbang sebanyak 23.4 peratus kepada keseluruhan guna tenaga di Malaysia. Guna tenaga industri ini meningkat 2.5 peratus berbanding tahun sebelumnya (2021: 1.8%).
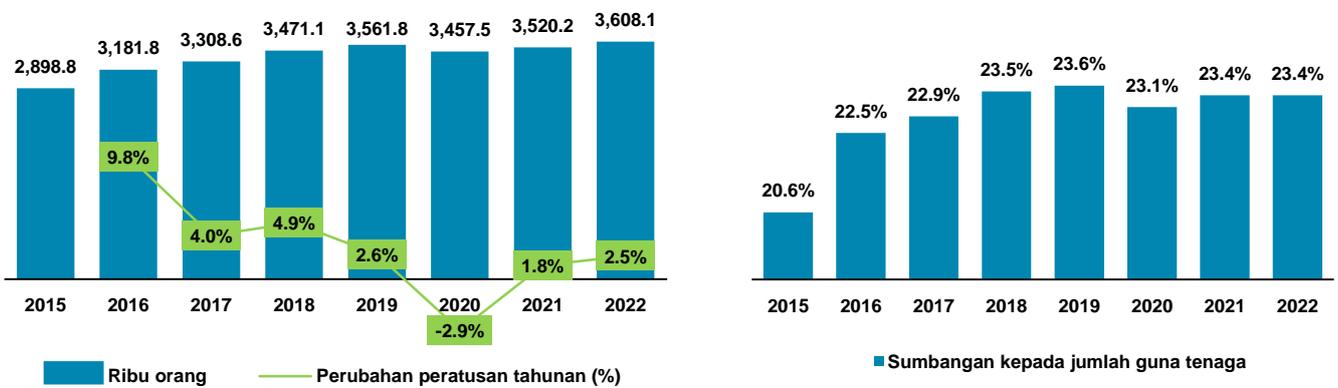
Carta 5: Guna tenaga dalam industri pelancongan - Nilai, perubahan peratusan tahunan dan peratus sumbangan kepada jumlah guna tenaga, 2015-2022

Tahun	Ribu orang	Perubahan peratusan tahunan (%)
2015	2,898.8	
2016	3,181.8	9.8%
2017	3,308.6	4.0%
2018	3,471.1	4.9%
2019	3,561.8	2.6%
2020	3,457.5	-2.9%
2021	3,520.2	1.8%
2022	3,608.1	2.5%

Sumbangan kepada jumlah guna tenaga

Tahun	%
2015	20.6%
2016	22.5%
2017	22.9%
2018	23.5%
2019	23.6%
2020	23.1%
2021	23.4%
2022	23.4%

Penyumbang utama guna tenaga dalam industri pelancongan adalah industri Perkhidmatan penyediaan makanan & minuman (35.1%), Perdagangan runcit (33.6%) dan Perkhidmatan khusus pelancongan negara (17.9%). Ketiga-tiga industri ini telah menyumbang sebanyak 86.6 peratus kepada jumlah guna tenaga industri pelancongan.

Paparan 9: Sumbangan utama guna tenaga dalam industri pelancongan, 2022

35.1%	33.6%	17.9%
2021: 35.4%	2021: 33.6%	2021: 17.6%
Makanan & minuman	Perdagangan runcit	Perkhidmatan khusus pelancongan negara
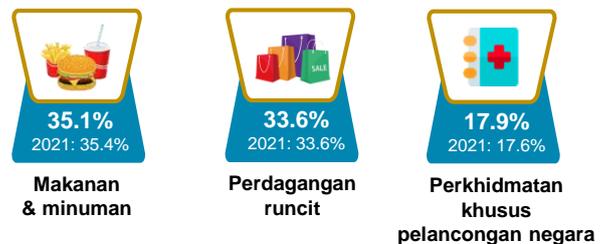
1.0 INTRODUCTION

Statistics of Tourism Satellite Account (TSA) of Malaysia for the year 2022 provides information on the Gross Value Added of Tourism Industries (GVATI), Tourism Direct Gross Domestic Product (TDGDP), tourism expenditure for inbound, domestic, outbound, internal tourism consumption and employment in the tourism industry. Statistics is provided by industry and tourism-related products at current prices. TSA is an extension of the System of National Accounts (SNA) 2008 and this compilation presents information on supply and demand in the tourism sector.
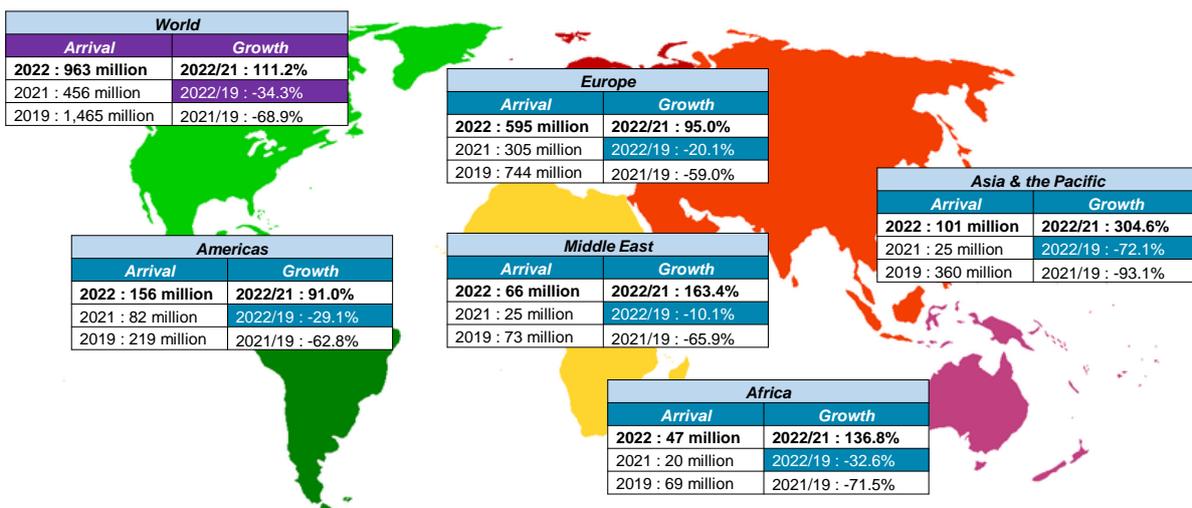
2.0 GLOBAL TOURISM SCENARIO

*The UNWTO World Tourism Barometer reports that the number of tourist arrivals recorded worldwide in 2022 were 963 million people as compared to 456 million people in the previous year. This shows that the tourism sector is still resilient with a 65.7 per cent recovery from pre-pandemic levels (**Exhibit 1**).*

Exhibit 1: Number of global tourist arrivals

World	
Arrival	*Growth*
2022 : 963 million	**2022/21 : 111.2%**
2021 : 456 million	2022/19 : -34.3%
2019 : 1,465 million	2021/19 : -68.9%

Europe	
Arrival	*Growth*
2022 : 595 million	**2022/21 : 95.0%**
2021 : 305 million	2022/19 : -20.1%
2019 : 744 million	2021/19 : -59.0%

Asia & the Pacific	
Arrival	*Growth*
2022 : 101 million	**2022/21 : 304.6%**
2021 : 25 million	2022/19 : -72.1%
2019 : 360 million	2021/19 : -93.1%

Americas	
Arrival	*Growth*
2022 : 156 million	**2022/21 : 91.0%**
2021 : 82 million	2022/19 : -29.1%
2019 : 219 million	2021/19 : -62.8%

Middle East	
Arrival	*Growth*
2022 : 66 million	**2022/21 : 163.4%**
2021 : 25 million	2022/19 : -10.1%
2019 : 73 million	2021/19 : -65.9%

Africa	
Arrival	*Growth*
2022 : 47 million	**2022/21 : 136.8%**
2021 : 20 million	2022/19 : -32.6%
2019 : 69 million	2021/19 : -71.5%

Growth: Annual percentage change (%)
Source: UNWTO World Tourism Barometer, Volume 19, July 2022

Middle East showed the fastest recovery in 2022 with arrivals reaching 89.9 per cent of 2019 levels boosted by the hajj and umrah pilgrim's arrival. Europe, Americas and Africa also recorded strong growth in 2022 as compared to 2021, reaching 79.9 per cent, 70.9 per cent and 67.4 per cent of 2019 levels respectively. Asia & the Pacific also recorded a strong increase but stood at 27.9 per cent as compared to 2019 due to some countries borders remained closed to tourism travel purposes.

3.0 TOURISM SCENARIO IN MALAYSIA

*Inbound tourist arrivals in 2022 have reached 10.1 million people indicate a strong growth as compared to the previous year. However, the recovery was lower than the pre-pandemic levels which recorded 38.6 per cent (**Chart 1**).*

Chart 1: Number of tourist arrivals to Malaysia, 2000-2022

| Malaysia Visit Year | Arrivals (million) | Growth (%) |
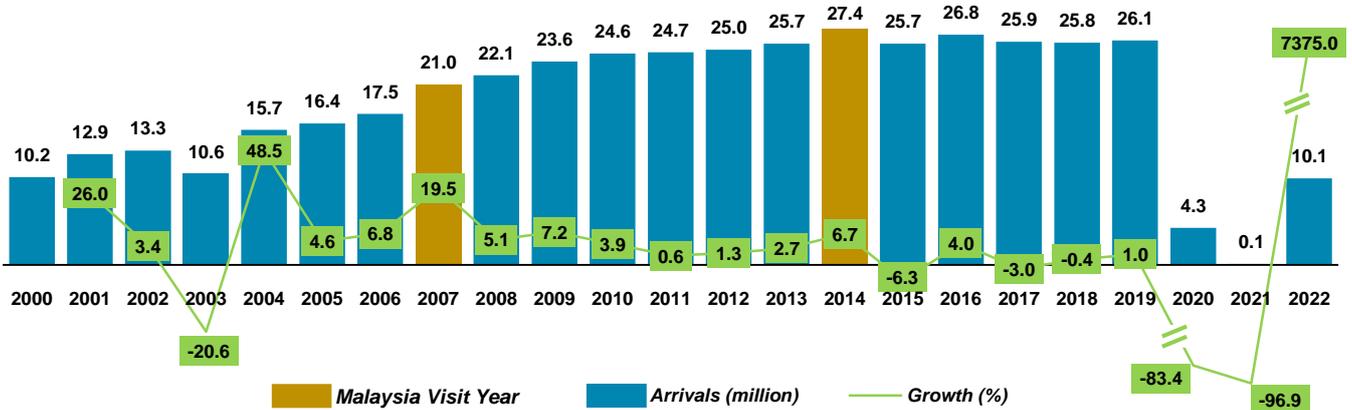
Source: Tourism Malaysia (TM)

Tourist arrivals from Singapore in 2022 contributed 51.9 per cent (2019: 38.9%) to the total arrival. This was followed by the arrival of tourists from Indonesia and Thailand which contributed 14.7 per cent and 7.1 per cent respectively. The change in the structure of the tourist arrival as against 2019 was due to the decrease in the number of Chinese tourist arrivals, which was in line with the zero COVID-19 policy that was implemented by the Chinese government.

4.0 TOURISM PERFORMANCE 2022

4.1 Gross Value Added of Tourism Industries (GVATI)

*GVATI amounted to RM251.5 billion contributing 14.0 per cent to Gross Domestic Product (GDP) as compared to 12.8 per cent in 2021, as shown in **Chart 2**. Based on the post-pandemic performance of the tourism sub-sectors, all industries have recorded positive growth rates and the overall performance was recovered to 4.8 per cent above pre-pandemic levels.*

Chart 2: GVATI – Value, annual percentage change and percentage share to GDP, 2015-2022

| GVATI (RM Billion) | Annual percentage change (%) | Percentage share to GDP |
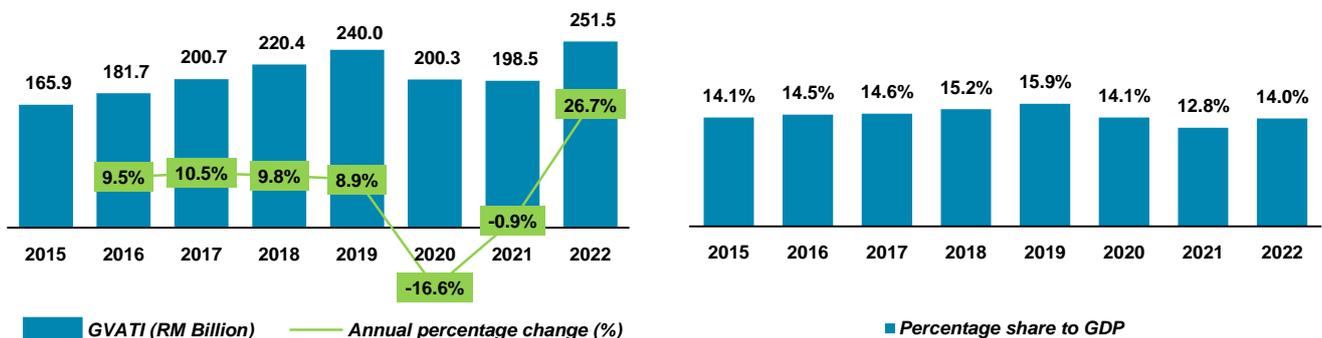
Retail trade continued to be the main contributor to the tourism industry, with a share of 54.1 per cent. This was followed by Food & beverage serving services (17.1%) and Country-specific tourism services (12.6%) as in **Exhibit 2**.

Exhibit 2: GVATI – Percentage share by tourism industry, 2022

Retail trade
54.1%
(2021: 56.0%)

Country-specific tourism services
12.6%
(2021: 15.1%)

Passenger transport
3.2%
(2021: 2.0%)

Automotive fuel
2.5%
(2021: 2.2%)

Food & beverage
17.1%
(2021: 17.1%)

Accommodation
5.9%
(2021: 4.9%)

Cultural, sports & recreational
3.0%
(2021: 2.1%)

Travel agencies
1.5%
(2021: 0.5%)
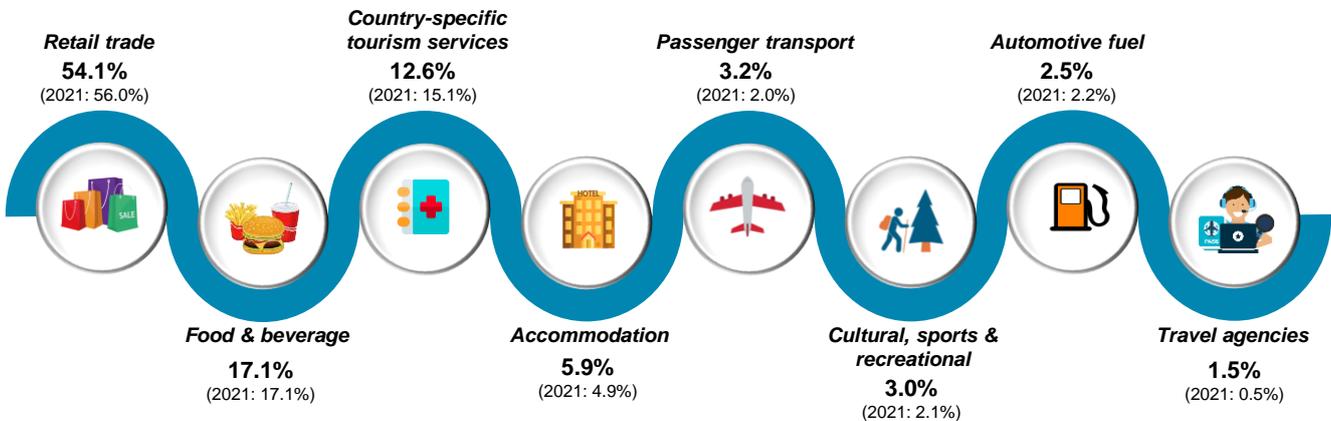
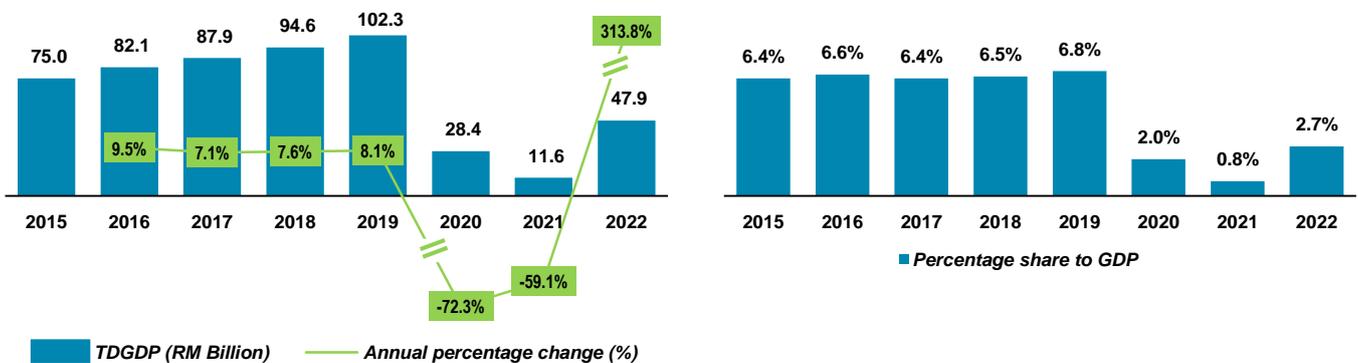## 4.2 Tourism Direct Gross Domestic Product (TDGDP)

TDGDP recorded RM47.9 billion as compared to RM11.6 billion in 2021, an increase of 313.8 per cent (2021: -59.1%). Overall, TDGDP contributed 2.7 per cent to GDP as against 0.8 per cent in the previous year.

Chart 3: TDGDP – Value, annual percentage change and percentage share to GDP, 2015-2022

Year	TDGDP (RM Billion)	Annual percentage change (%)	Percentage share to GDP
2015	75.0		6.4%
2016	82.1	9.5%	6.6%
2017	87.9	7.1%	6.4%
2018	94.6	7.6%	6.5%
2019	102.3	8.1%	6.8%
2020	28.4	-72.3%	2.0%
2021	11.6	-59.1%	0.8%
2022	47.9	313.8%	2.7%

■ TDGDP (RM Billion)   — Annual percentage change (%)

■ *Percentage share to GDP*

The three main contributors in TDGDP were Retail trade, Food & beverage serving services and Accommodation, accounted for 74.7 per cent share in 2022 (**Exhibit 3**).

Exhibit 3: Main contributor of industries in TDGDP, 2022

47.4%
2021: 50.5%
Retail trade

14.0%
2021: 10.7%
Food & beverage

13.3%
2021: 14.9%
Accommodation
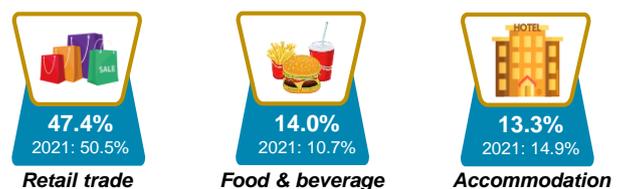
4.3 Internal Tourism Consumption

*The internal tourism consumption comprises inbound tourism expenditure and domestic tourism expenditure. The internal t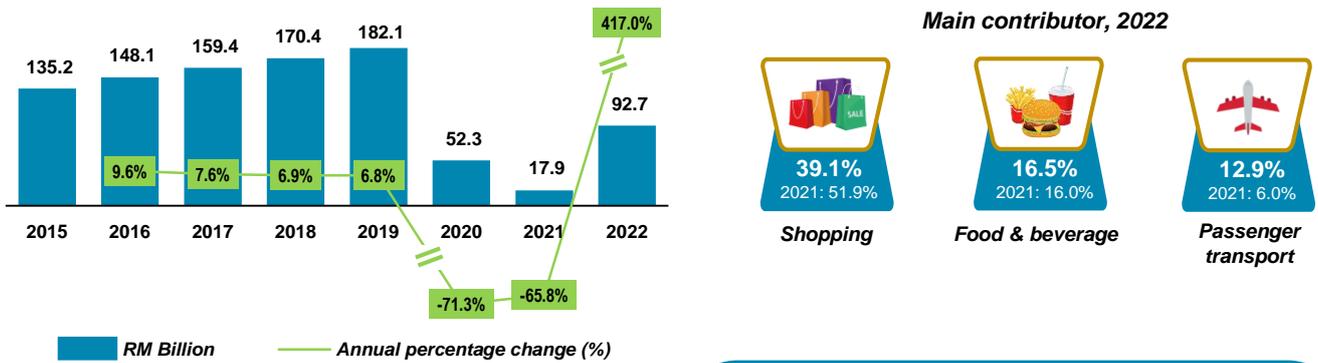ourism consumption rebounded by 417.0 per cent, reaching RM92.7 billion in 2022 as compared to a decrease of 65.8 per cent in the previous year (**Exhibit 4**).*

Exhibit 4: Internal tourism consumption – Value, annual percentage change and main contributor to internal tourism consumption

Main contributor, 2022

39.1% 2021: 51.9% *Shopping*	**16.5%** 2021: 16.0% *Food & beverage*	**12.9%** 2021: 6.0% *Passenger transport*

*Shopping (39.1%) dominated the internal tourism consumption and followed by Food & beverage serving services (16.5%) and Passenger transport (12.9%) as in **Exhibit 4**. Domestic tourism remains as the main contributor (63.9%) to the total internal tourism consumption while inbound tourism contributed 36.1 per cent (**Chart 4**).*

Chart 4: Percentage share of inbound tourism expenditure and domestic tourism expenditure to internal tourism consumption, 2015-2022
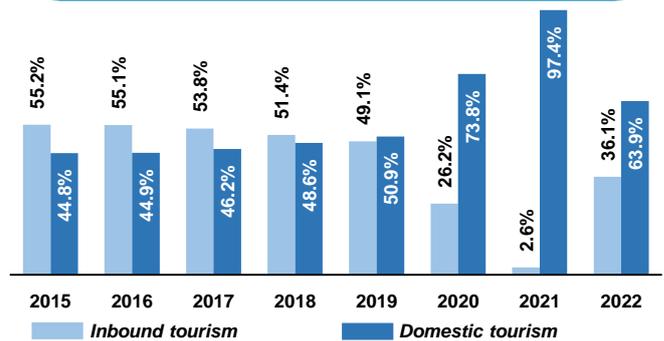
4.3.1 Inbound Tourism Expenditure

*The inbound tourism expenditure in 2022 totalling RM33.4 billion, demonstrated a significant increase (7000.2%) as compared to the previous year (**Exhibit 5**). The reopening of borders to all travelers on 1ˢᵗ April 2022 has initiated Malaysia's tourism recovery after enduring nearly two years of the COVID-19 pandemic. However, the recovery only reached 37.4 per cent of the pre-pandemic levels or a decrease of 62.6 per cent as compared to 2019. Shopping as the main component for inbound tourism expenditure contributed 33.8 per cent. This was followed by Passenger transport (21.4%) and Food & beverage serving services (16.8%) as per **Exhibit 5**.*

Exhibit 5: Inbound tourism expenditure – Value, annual percentage change and main contributor to inbound tourism expenditure

74.6   81.6   85.7   87.7   89.4   13.7   0.5   33.4
        9.4%   5.0%   2.3%   2.0%   7000.2%
2015   2016   2017   2018   2019   2020   2021   2022

-84.7%   -96.6%

RM Billion   **Annual percentage change (%)**

Main contributor, 2022

| 33.8%
2021: 9.4%
Shopping | 21.4%
2021: 37.8%
Passenger transport | 16.8%
2021: 16.7%
Food & beverage |
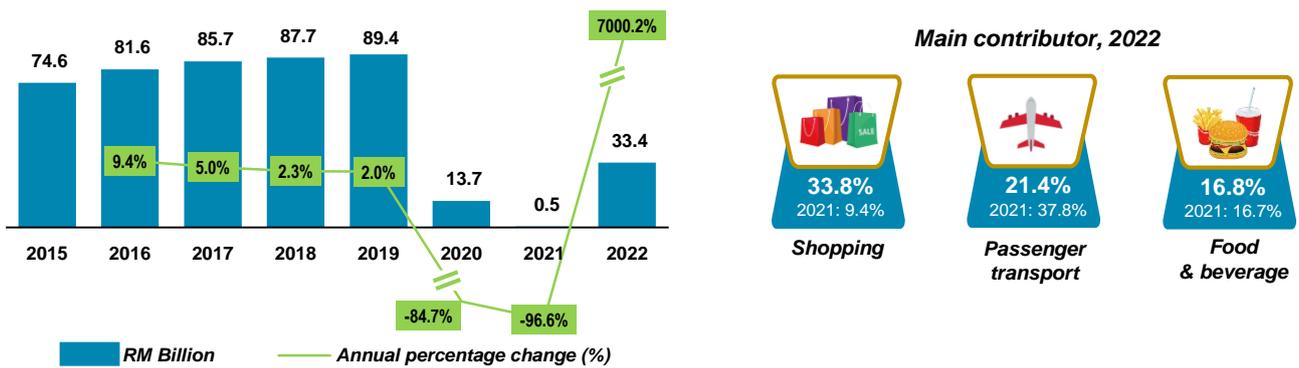
4.3.2 Domestic Tourism Expenditure

*Domestic tourism expenditure reached RM59.2 billion in 2022 as compared to RM17.5 billion in the previous year, marking a significant 239.3 per cent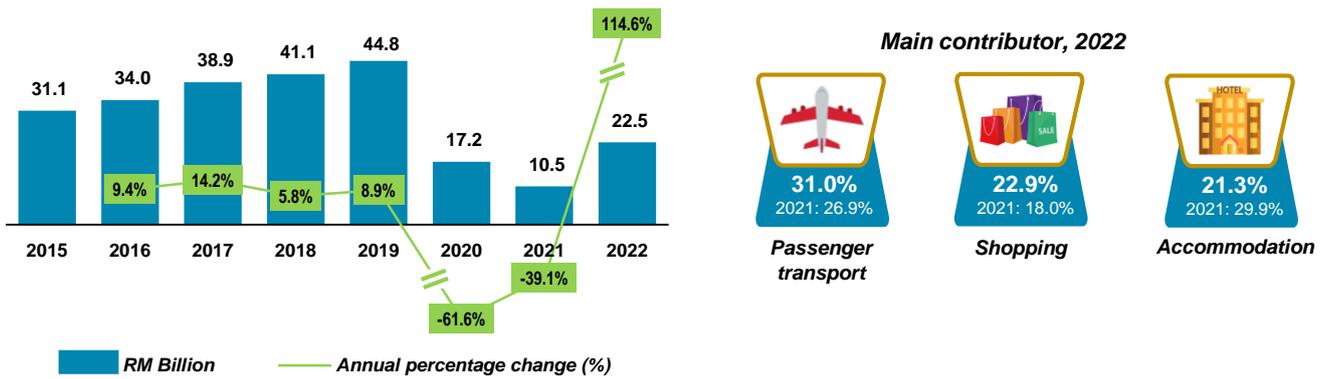 increase (2021: -54.8%) as depicted in **Exhibit 6**. The remarkable 160.1 per cent surge in the number of domestic visitors has contributed to the recovery of domestic tourism. However, the growth of domestic tourism expenditure is still 36.1 per cent below the pre-pandemic level. The performance of domestic tourism in 2022 was primarily propelled by expenditure on Shopping activities (42.1%), Food & beverage serving services (16.4%) and Retail sales of automotive fuel (14.9%).*

Exhibit 6: Domestic tourism expenditure - Value, annual percentage change and main contributor to domestic tourism expenditure

60.5   66.5   73.7   82.7   92.6   38.6   17.5   59.2
        9.8%   10.8%   12.3%   12.0%   239.3%
2015   2016   2017   2018   2019   2020   2021   2022

-58.3%   -54.8%

RM Billion   **Annual percentage change (%)**

Main contributor, 2022

| 42.1%
2021: 53.1%
Shopping | 16.4%
2021: 15.9%
Food & beverage | 14.9%
2021: 11.7%
Automotive fuel |
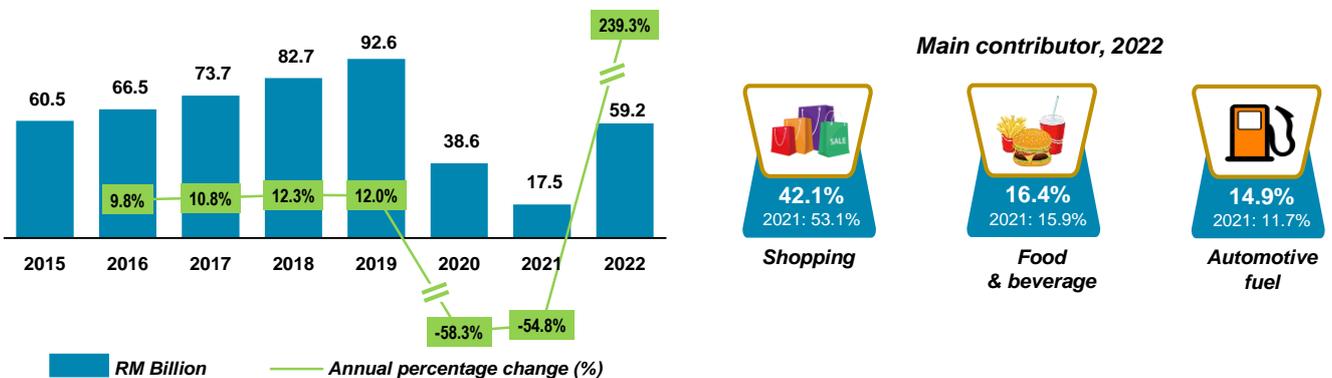
4.4 Outbound Tourism Expenditure

*Outbound tourism expenditure posted RM22.5 billion in 2022 with a growth of 114.6 per cent as compared to RM10.5 billion (-39.1%) in the previous year, in line with the international border openings by most countries (**Exhibit 7**). The main component in outbound tourism expenditure were Passenger transport (31.0%), Shopping (22.9%) and Accommodation (21.3%) as indicated in **Exhibit 7**.*
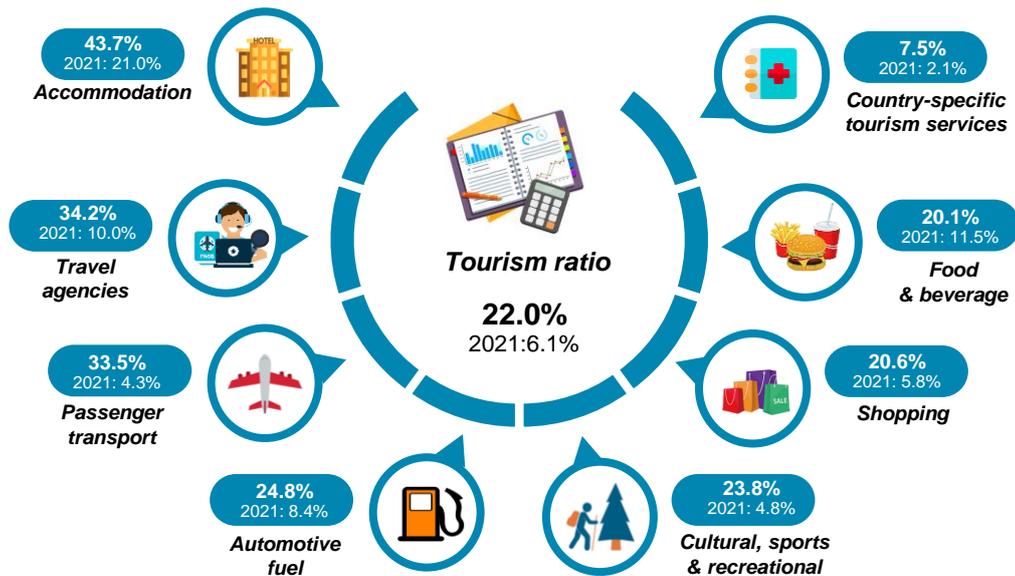
Exhibit 7: Outbound tourism expenditure – Value, annual percentage change and main contributor to outbound tourism expenditure

	2015	2016	2017	2018	2019	2020	2021	2022
RM Billion	31.1	34.0	38.9	41.1	44.8	17.2	10.5	22.5
Annual percentage change (%)		9.4%	14.2%	5.8%	8.9%	-61.6%	-39.1%	114.6%

Main contributor, 2022

31.0%
2021: 26.9%
Passenger transport

22.9%
2021: 18.0%
Shopping

21.3%
2021: 29.9%
Accommodation

4.5 Tourism Ratio

The tourism ratio measures the level of internal tourism consumption to domestic supply in the tourism industry. The tourism ratio in 2022 recorded 22.0 per cent as compared to 6.1 per cent in the previous year.

Exhibit 8: Tourism ratio by tourism products, 2022

43.7% 2021: 21.0% *Accommodation*

7.5% 2021: 2.1% *Country-specific tourism services*

34.2% 2021: 10.0% *Travel agencies*

20.1% 2021: 11.5% *Food & beverage*

33.5% 2021: 4.3% *Passenger transport*

20.6% 2021: 5.8% *Shopping*

24.8% 2021: 8.4% *Automotive fuel*

23.8% 2021: 4.8% *Cultural, sports & recreational*

Tourism ratio
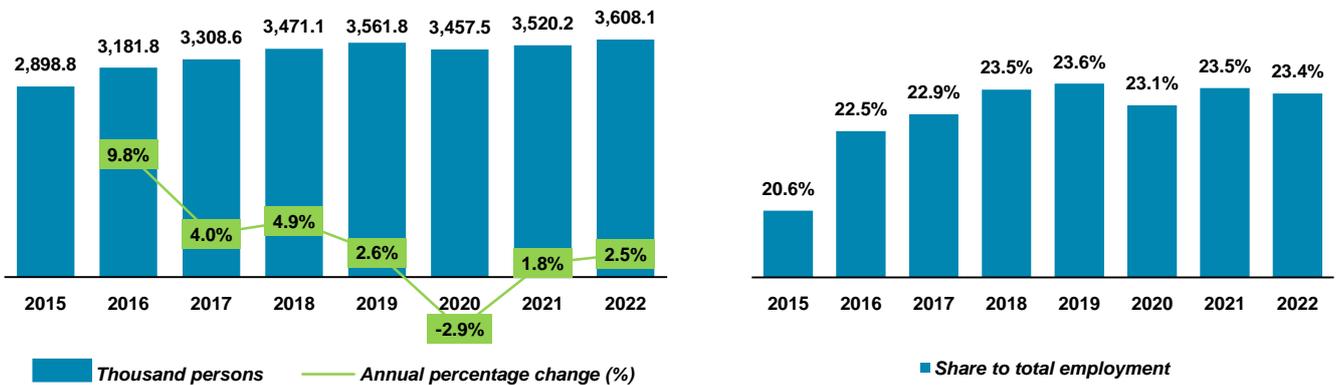**22.0%**
2021:6.1%

Accommodation services recorded the highest tourism ratio, accounted for 43.7 per cent followed by Travel agencies (34.2%) and Passenger transport (33.5%). In contrast, Country-specific tourism services were the least utilised product at 7.5 per cent as shown in **Exhibit 8**.

4.6 Employment in Tourism Industry

The tourism industry employed 3.61 million persons in 2022 and contributed 23.4 per cent to the total employment in Malaysia. The employment in this industry rose to 2.5 per cent as compared to the previous year (2021: 1.8%).

Chart 5: Employment in tourism industries – Value, annual percentage change and percentage share to total employment, 2015-2022

Left chart (Thousand persons / Annual percentage change %):

Year	Thousand persons	Annual percentage change (%)
2015	2,898.8	
2016	3,181.8	9.8%
2017	3,308.6	4.0%
2018	3,471.1	4.9%
2019	3,561.8	2.6%
2020	3,457.5	-2.9%
2021	3,520.2	1.8%
2022	3,608.1	2.5%

Legend: ■ *Thousand persons* —— *Annual percentage change (%)*

Right chart (Share to total employment):

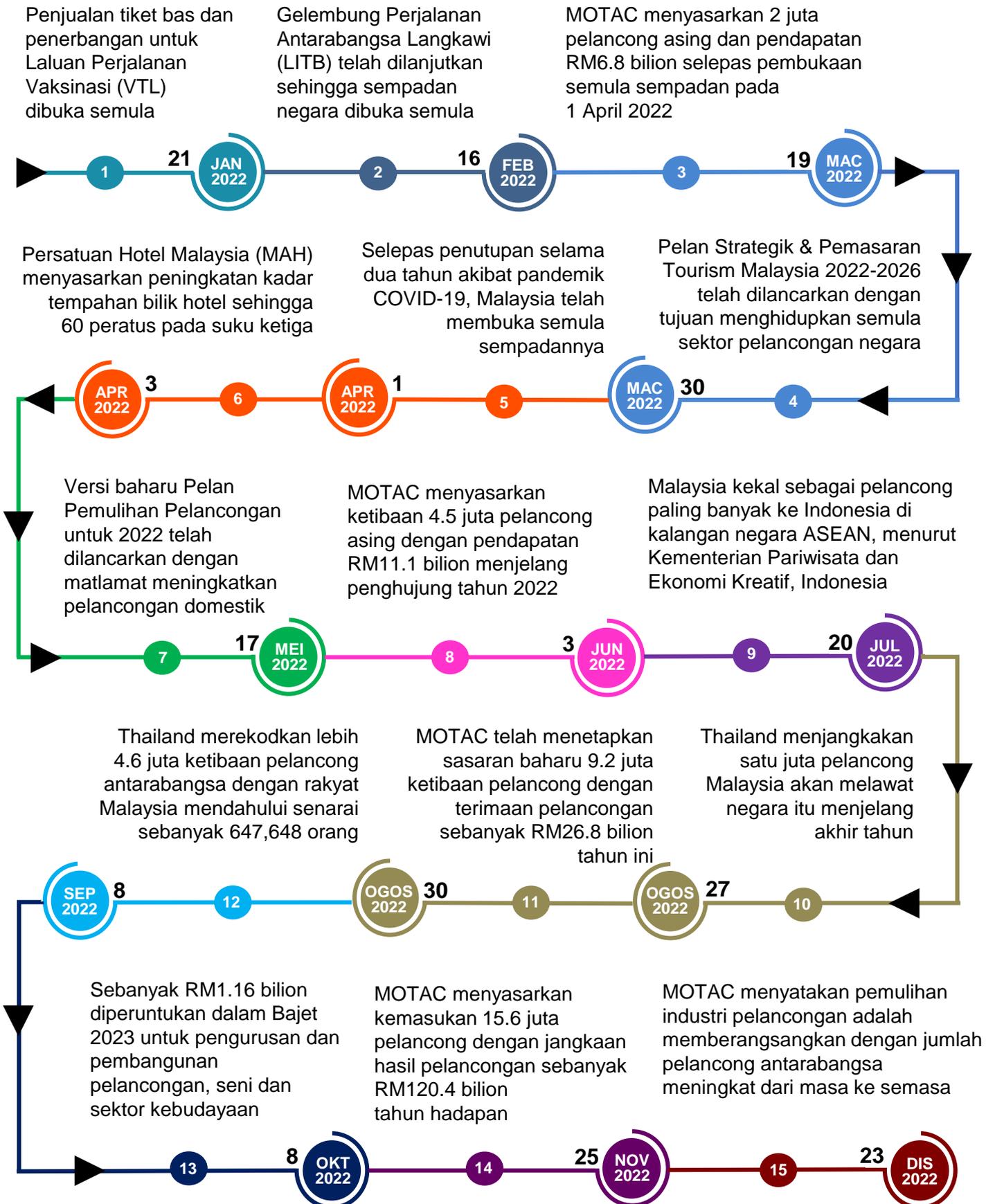| Year	Share to total employment
2015	20.6%
2016	22.5%
2017	22.9%
2018	23.5%
2019	23.6%
2020	23.1%
2021	23.5%
2022	23.4%

Legend: ■ *Share to total employment*

The main contributors to employment in the tourism industry were Food & beverage serving services industry (35.1%), Retail trade (33.6%) and Country-specific tourism services (17.9%). These three industries have collectively contributed 86.6 per cent of the total employment in the tourism industry.

Exhibit 9: Main percentage share for employment in tourism industries, 2022

35.1%	**33.6%**	**17.9%**
2021: 35.4%	2021: 33.6%	2021: 17.6%
Food & beverage	*Retail trade*	*Country-specific tourism services*

16

KRONOLOGI PELANCONGAN DI MALAYSIA 2022

Penjualan tiket bas dan penerbangan untuk Laluan Perjalanan Vaksinasi (VTL) dibuka semula

21 **JAN 2022**

Gelembung Perjalanan Antarabangsa Langkawi (LITB) telah dilanjutkan sehingga sempadan negara dibuka semula

16 **FEB 2022**

MOTAC menyasarkan 2 juta pelancong asing dan pendapatan RM6.8 bilion selepas pembukaan semula sempadan pada 1 April 2022

19 **MAC 2022**

Persatuan Hotel Malaysia (MAH) menyasarkan peningkatan kadar tempahan bilik hotel sehingga 60 peratus pada suku ketiga

APR 2022 **3**

Selepas penutupan selama dua tahun akibat pandemik COVID-19, Malaysia telah membuka semula sempadannya

APR 2022 **1**

Pelan Strategik & Pemasaran Tourism Malaysia 2022-2026 telah dilancarkan dengan tujuan menghidupkan semula sektor pelancongan negara

MAC 2022 **30**

Versi baharu Pelan Pemulihan Pelancongan untuk 2022 telah dilancarkan dengan matlamat meningkatkan pelancongan domestik

17 **MEI 2022**

MOTAC menyasarkan ketibaan 4.5 juta pelancong asing dengan pendapatan RM11.1 bilion menjelang penghujung tahun 2022

3 **JUN 2022**

Malaysia kekal sebagai pelancong paling banyak ke Indonesia di kalangan negara ASEAN, menurut Kementerian Pariwisata dan Ekonomi Kreatif, Indonesia

20 **JUL 2022**

Thailand merekodkan lebih 4.6 juta ketibaan pelancong antarabangsa dengan rakyat Malaysia mendahului senarai sebanyak 647,648 orang

SEP 2022 **8**

MOTAC telah menetapkan sasaran baharu 9.2 juta ketibaan pelancong dengan terimaan pelancongan sebanyak RM26.8 bilion tahun ini

OGOS 2022 **30**

Thailand menjangkakan satu juta pelancong Malaysia akan melawat negara itu menjelang akhir tahun

OGOS 2022 **27**

Sebanyak RM1.16 bilion diperuntukan dalam Bajet 2023 untuk pengurusan dan pembangunan pelancongan, seni dan sektor kebudayaan

MOTAC menyasarkan kemasukan 15.6 juta pelancong dengan jangkaan hasil pelancongan sebanyak RM120.4 bilion tahun hadapan

MOTAC menyatakan pemulihan industri pelancongan adalah memberangsangkan dengan jumlah pelancong antarabangsa meningkat dari masa ke semasa

8 **OKT 2022**

25 **NOV 2022**

23 **DIS 2022**

TOURISM CHRONOLOGY IN MALAYSIA 2022

Sale of bus and flight tickets for Vaccinated Travel Lane (VTL) reopens

The Langkawi International Travel Bubble (LITB) has been extended until the country's borders reopen

MOTAC aims for 2 million foreign tourists and RM6.8 billion in revenue upon the reopening of borders on 1st April 2022

1   **21st**   **JAN 2022**   **2**   **16th**   **FEB 2022**   **3**   **19th**   **MAR 2022**

The Malaysian Hotel Association (MAH) aims to increase hotel room booking rates up to 60 per cent by the third quarter

After a two-years closure due to the COVID-19 pandemic, Malaysia has reopened its borders

Tourism Malaysia's Strategic & Marketing Plan 2022-2026 was launched with the aim of revitalising the country's tourism sector

APR 2022   **3rd**   **6**   **APR 2022**   **1st**   **5**   **MAR 2022**   **30th**   **4**

A new version of the Tourism Recovery Plan for 2022 has been launched with the aim of boosting domestic tourism

MOTAC targets the arrival of 4.5 million foreign tourists with an income of RM11.1 billion by the end of 2022

Malaysia remains the highest of tourists to Indonesia among ASEAN countries, according to Indonesia's Ministry of Tourism and Creative Economy

7   **17th**   **MAY 2022**   **8**   **3rd**   **JUN 2022**   **9**   **20th**   **JUL 2022**

Thailand recorded more than 4.6 million international tourist arrivals with Malaysians leading the list with 647,648 people

MOTAC has set a new target of 9.2 million tourist arrivals with tourism receipts of RM26.8 billion this year

Thailand anticipates one million Malaysian tourists visiting the country by year-end

SEP 2022   **8th**   **12**   **AUG 2022**   **30th**   **11**   **AUG 2022**   **27th**   **10**

A total of RM1.16 billion allocation in the Budget 2023 for management and development of the tourism, art and culture sectors

MOTAC targets an influx of 15.6 million tourists with an expected tourism revenue of RM120.4 billion next year

MOTAC said the recovery of the tourism industry is encouraging with the number of international tourists increasing from time to time

13   **8th**   **OCT 2022**   **14**   **25th**   **NOV 2022**   **15**   **23rd**   **DEC 2022**

RENCANA

ARTICLE

PASCA PANDEMIK COVID-19: MALAYSIA KE ARAH PEMULIHAN INDUSTRI PELANCONGAN

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PENGENALAN

Pelancongan telah berkembang dengan mantap sepanjang beberapa dekad, membentuk kepelbagaian jenis pelancongan menjadikannya salah satu industri ekonomi yang paling pesat berkembang di dunia. Menurut laporan *World Tourism Organization* (UNWTO)[1] bagi tahun 2019, sebelum tercetusnya pandemik COVID-19, industri ini menerima sejumlah 1.5 bilion pelancong, menyumbang sebanyak USD1.48 trilion kepada pendapatan global berbanding 880 juta pelancong dan USD852 bilion pada 2009. Perkembangan pelancongan moden telah membantu dalam peningkatan lokasi pelancongan baharu menjadikan pelancongan sebagai pemacu utama kepada kemajuan sosioekonomi yang menyumbang 10.4 peratus daripada Keluaran Dalam Negeri Kasar (KDNK) global dan menyediakan 334 juta pekerjaan di seluruh dunia[2]. Ini menunjukkan bahawa pelancongan telah berkembang menjadi industri signifikan dalam perdagangan antarabangsa serta merupakan salah satu sumber pendapatan utama bagi majoriti negara membangun. Kebanyakan tempat pelancongan di seluruh dunia menyaksikan peningkatan luar biasa dalam ketibaan pelancong antarabangsa, disebabkan oleh infrastruktur pengangkutan yang dipertingkatkan, teknologi yang canggih dan situasi ekonomi yang semakin menggalakkan.

Seiring dengan trend di seluruh dunia, industri pelancongan Malaysia menunjukkan prestasi yang baik pada 2019, menjana 15.9 peratus kepada KDNK dengan nilai RM240.2 bilion. Penerbitan Akaun Satelit Pelancongan 2019 juga menyatakan pelancongan menyumbang 27.9 peratus kepada keseluruhan sektor Perkhidmatan serta merekodkan 23.6 peratus sumbangan kepada keseluruhan guna tenaga[3]. Berdasarkan laporan UNWTO[4], ketibaan pelancong dan terimaan pelancongan Malaysia menduduki tempat ke-14 dan ke-23 dalam senarai negara teratas di dunia. Berasaskan pada angka-angka ini, industri pelancongan merupakan sektor penting yang memacu ekonomi Malaysia. Justeru, selaras dengan matlamat Wawasan 2020 untuk menjadi sebuah negara maju dan inklusif, Tourism Malaysia menetapkan sasaran 36.0 juta ketibaan pelancong dan RM168 bilion pendapatan pelancongan menjelang 2020 di bawah Pelan Transformasi Pelancongan Malaysia[5].

Namun, cabaran oleh bencana pandemik COVID-19 yang luar biasa pada 2020 telah mempengaruhi prestasi global terhadap perniagaan, masyarakat dan komuniti. Pelancongan, sebagai industri yang mudah terganggu oleh ketidakstabilan sosioekonomi global, telah terjejas teruk berikutan kebanyakan negara menutup sempadan antarabangsa bagi mengekang penularan wabak tersebut. Ekoran daripada peningkatan kes jangkitan COVID-19, kerajaan Malaysia telah melaksanakan Perintah Kawalan Pergerakan (PKP), yang berkuat kuasa pada 18 Mac 2020. Pelaksanaan PKP, termasuk larangan menyeluruh ke atas semua perjalanan antarabangsa, sekatan kemasukan semua pelancong dan pelawat asing ke negara ini, serta larangan semua pergerakan dan perhimpunan besar-besaran di seluruh negara, termasuk perhimpunan keagamaan, sukan, sosial dan kebudayaan telah mengakibatkan tempoh tidak aktif dalam industri pelancongan. Lanjutan tempoh PKP yang berpanjangan selama beberapa tahun telah mengakibatkan penurunan permintaan jangka panjang dalam aktiviti pelancongan.

Pandemik COVID-19 telah memberi kesan signifikan terhadap ekonomi Malaysia dengan mencatatkan penyusutan yang terendah iaitu 5.5 peratus pada 2020, selepas tahun 1998 (-7.4%)

berikutan krisis ekonomi global. Industri berkaitan pelancongan seperti sub-sektor makanan & minuman dan penginapan turun 26.7 peratus[6]. Ekonomi Malaysia 2021 memperoleh semula momentum dengan pertumbuhan 3.3 peratus. Namun begitu, Makanan & minuman dan penginapan masih lagi merosot 10.4 peratus. Walaupun virus COVID-19 masih wujud, pembukaan semua aktiviti ekonomi secara keseluruhan dan pembukaan semula pintu sempadan pada 1 April 2022 mengembangkan KDNK Malaysia bagi tahun 2022, dengan peningkatan sebanyak 8.7 peratus berbanding tahun sebelumnya (2021: 3.3%). Selain itu, sub-sektor makanan & minuman dan penginapan meningkat sebanyak 33.0 peratus pada 2022 dan trend ekonomi ini menunjukkan pemulihan yang sihat bagi industri pelancongan Malaysia. Walau bagaimanapun, ia mungkin tidak kembali ke paras pra-pandemik dalam masa terdekat. Matlamat artikel ini adalah untuk melihat prestasi industri pelancongan pasca-pandemik di Malaysia dan peringkat global. Prestasi pelancongan pada tahun 2019 dirujuk sebagai paras pra-pandemik.

KETIBAAN PELANCONG ASING KE MALAYSIA

Melihat dalam konteks pelancongan, pengukuran statistik ketibaan pelancong oleh Tourism Malaysia merupakan salah satu instrumen bagi menilai prestasi industri ini. Pertumbuhan statistik tersebut adalah berkadar langsung dengan pendapatan pelancongan sekaligus meningkatkan keseluruhan ekonomi negara. Berdasarkan UNWTO, kemuncak jumlah ketibaan pelancong antarabangsa adalah pada tahun 2019 mencecah 1.5 bilion bertumbuh 4.0 peratus berbanding tahun sebelum di mana pertumbuhan ini juga diramalkan untuk tahun 2020[7]. Cetusan krisis pandemik COVID-19 telah mempengaruhi keupayaan trajektori pertumbuhan ketibaan pelancong global dengan mengalami rekod terburuk pada 2020 iaitu menyusut sebanyak 72.3 peratus[8]. Situasi ini menyamai rekod bilangan ketibaan pelancong pada 30 tahun yang lalu iaitu pada tahun 1990 yang berjumlah 439.4 juta pelancong[9]. Di samping itu, Malaysia juga mengalami perubahan dalam trend ketibaan pelancong asing.

Carta 1: Bilangan ketibaan pelancong ke Malaysia, 2019-2022

Sumber: Tourism Malaysia

Carta 1 menunjukkan ketibaan pelancong ke Malaysia bagi tahun 2019 hingga 2022. Malaysia telah menerima seramai 26.1 juta pelancong pada 2019, dengan pertumbuhan sebanyak 1.0 peratus. Akibat daripada penularan pandemik COVID-19, ketibaan pelancong asing ke Malaysia mencatatkan penurunan ketara pada 2020 dan 2021 dengan masing-masing merekodkan 83.4 peratus dan 96.9 peratus. **Carta 2** pula memaparkan ketibaan pelancong asing secara suku tahunan mula menurun pada suku pertama 2020 di mana bermulanya penularan COVID-19 secara global dengan mencatatkan ketibaan seramai 4.23 juta merosot sebanyak 29.3 peratus pada suku tahun pertama 2020. Keadaan ini berterusan menjunam pada suku seterusnya menyebabkan purata suku tahunan ketibaan pelancong *inbound* pada 2020 hanya mencapai 1.08 juta iaitu penurunan sebanyak 83.5 peratus berbanding tahun sebelumnya.

Pemulihan sektor pelancongan dan pelbagai inisiatif negara yang berterusan telah memberi kesan dalam pemulihan yang pantas terhadap industri pelancongan. Setelah hampir dua tahun dilanda krisis wabak ini, pemulihan sektor pelancongan mula meningkat dengan purata suku tahunan ketibaan pelancong asing mencecah 2.52 juta (2021: 33.7 ribu). Situasi ini didorong oleh usaha kerajaan melaksanakan beberapa inisiatif antaranya memperkenalkan Gelembung Perjalanan Antarabangsa Langkawi (LITB) bermula 15 November 2021. Kerancakan ketibaan pelancong asing seterusnya disokong dengan pembukaan sempadan negara sepenuhnya mulai 1 April 2022 bersesuaian dengan pengumuman peralihan negara ke fasa endemik.

Carta 2: Ketibaan suku tahunan pelancong asing ke Malaysia, 2019-2022
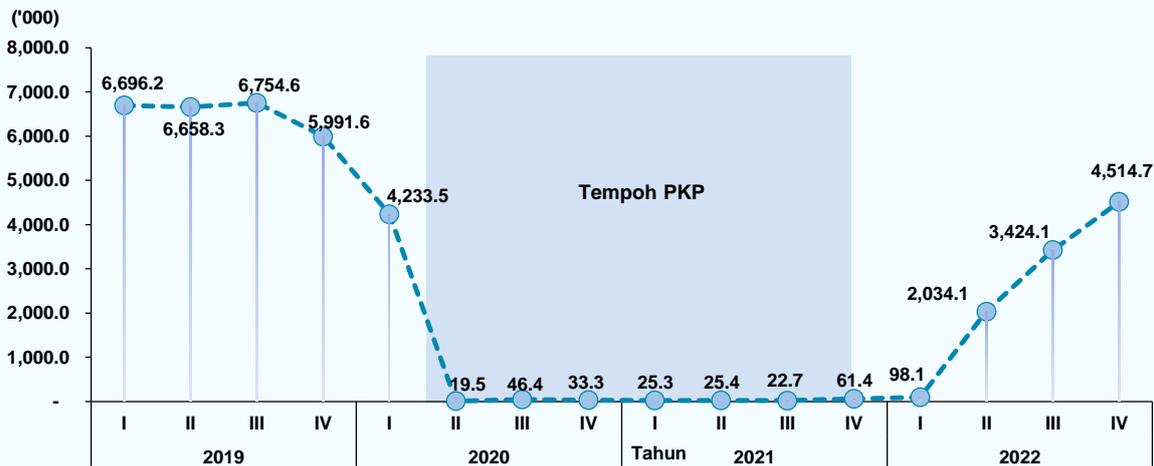
Sumber: Tourism Malaysia

Carta 3 pula menunjukkan ketibaan pelancong asing bulanan bagi tahun 2019 sehingga 2022. Ketibaan pelancong asing menunjukkan peningkatan pada bulan Julai 2020 iaitu 18,660 pelancong berbanding 6,585 pada bulan sebelumnya berikutan daripada pembukaan sempadan negara antara Thailand bagi tujuan perjalanan yang melibatkan sektor ekonomi perlu sahaja. Walau bagaimanapun, pertumbuhan positif dicatatkan pada November 2021 apabila kerajaan membenarkan kemasukan pelancong antarabangsa bagi tujuan pelancongan di Pulau Langkawi. Trend peningkatan ini berterusan pada 2022 di mana ketibaan bulanan pelancong asing bagi tahun 2019 dan 2022 menunjukkan jurang yang lebih kecil (**Carta 3**). Ketibaan pelancong asing ke Malaysia bagi tahun 2022 menuju ke arah pemulihan tetapi masih di bawah paras pra-pandemik. Sebagai contoh, dari segi paras, ketibaan pelancong asing pada Disember 2022 berjumlah 1.84 juta berbanding 1.99 juta pada Disember 2019.

Carta 3: Ketibaan pelancong asing bulanan ke Malaysia, 2019-2022
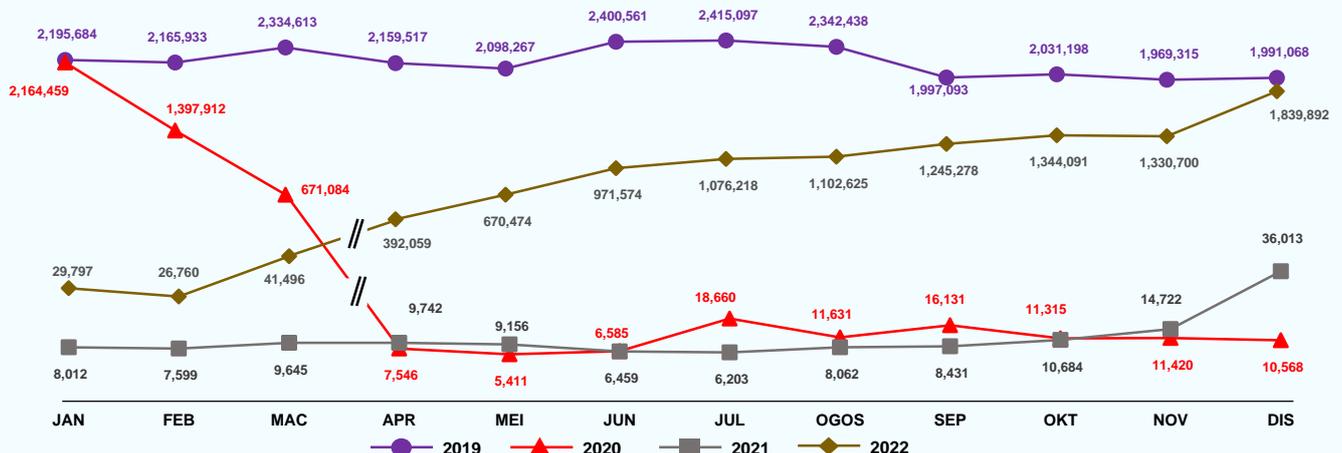
Sumber: Tourism Malaysia

PRESTASI PELANCONGAN GLOBAL

Berdasarkan UNWTO[10], ketibaan pelancong antarabangsa di peringkat global menyaksikan lebih kukuh daripada yang dijangkakan bagi tahun 2022 apabila menerima seramai 963 juta pelancong iaitu peningkatan dua kali ganda berbanding 2021. Pemulihan sebanyak 65.7 peratus daripada paras pra-pandemik ini disokong oleh permintaan aktiviti pelancongan yang besar dan kelonggaran sekatan perjalanan oleh kebanyakan negara. Ketibaan pelancong antarabangsa mengikut rantau pula menunjukkan Eropah merupakan rantau destinasi terbesar di dunia merekodkan 595 juta ketibaan pada 2022 menghampiri 79.9 peratus daripada paras pra-pandemik. Timur Tengah pula merekodkan peningkatan yang paling tinggi sebanyak 89.9 peratus daripada paras pemulihan seperti di **Carta 4**. Manakala Amerika dan Afrika pula masing-masing merekodkan 70.9 peratus dan 67.4 peratus daripada jumlah ketibaan pelancong pada tahun pra-pandemik. Senario ini berbeza dengan Asia-Pasifik yang hanya mencapai 27.9 peratus disebabkan oleh sekatan yang lebih ketat terutamanya di China. Industri pelancongan di Malaysia menunjukkan ke arah pemulihan yang lebih baik dengan ketibaan pelancong asing telah memulih kepada 38.6 peratus berbanding paras pra-pandemik dan nilai ini melebihi angka yang dicatatkan oleh rantau Asia-Pasifik seperti ditunjukkan di **Carta 4**.

Carta 4: Peratusan pemulihan ketibaan pelancong asing mengikut rantau dan Malaysia, 2022 berbanding paras 2019
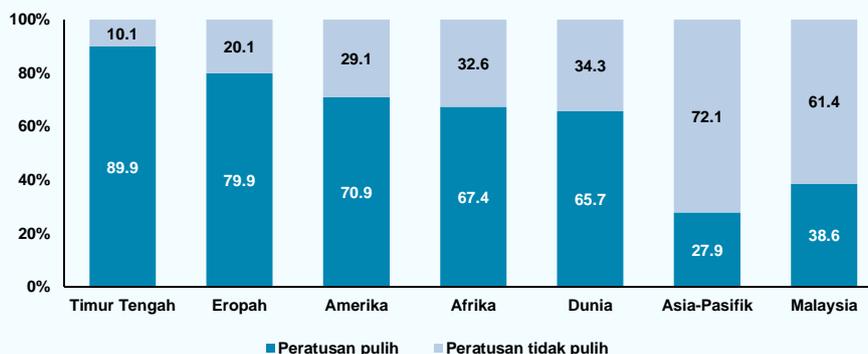
Sumber: UNWTO, Tourism Malaysia

10 NEGARA UTAMA KETIBAAN PELANCONG KE MALAYSIA

Impak daripada penularan COVID-19 juga dapat dilihat ke atas perubahan trend ketibaan pelancong sepuluh negara utama pada 2019 ke Malaysia, iaitu Singapura, Indonesia, China, Thailand, Brunei, India, Korea Selatan, Jepun, Filipina dan Vietnam seperti ditunjukkan dalam **Jadual 1**. Pada 2019, tiga negara iaitu Singapura (38.9%), Indonesia (13.9%) dan China (11.9%) menyumbang 64.7 peratus berbanding sumbangan 66.6 peratus oleh gabungan dua negara (Singapura: 51.9% dan Indonesia: 14.7%) pada 2022. Pengenalan Laluan Perjalanan Vaksinasi (VTL) Malaysia-Singapura bermula 29 November 2021 adalah antara faktor penyumbang kepada trend positif kemasukan warga Singapura ke Malaysia. Terdapat perubahan dalam senarai negara utama bagi sebelum dan selepas COVID-19 iaitu pada kedudukan pelancong dari Jepun dan Australia. China yang merupakan negara pada kedudukan ketiga teratas pada tahun 2019 dengan menyumbang 11.9 peratus (2022: 2.1%) daripada jumlah ketibaan pelancong ke Malaysia telah berubah kepada kedudukan keenam berikutan sekatan yang ketat ke atas perjalanan *outbound* oleh kerajaan negara tersebut, yang mana China merupakan pasaran *outbound* global terbesar pada tahun 2019.

Jadual 1: 10 negara utama ketibaan pelancong ke Malaysia, 2019 & 2022

2019			KEDUDUKAN	2022		
SUMBANGAN (%)	KETIBAAN PELANCONG	NEGARA		NEGARA	KETIBAAN PELANCONG	SUMBANGAN (%)
38.9	10,163,882	SINGAPURA	1	SINGAPURA	5,222,991	51.9
13.9	3,623,277	INDONESIA	2	INDONESIA	1,481,739	14.7
11.9	3,114,257	CHINA	3	THAILAND	715,528	7.1
7.2	1,884,306	THAILAND	4	INDIA	324,548	3.2
4.7	1,216,123	BRUNEI DARUSSALAM	5	BRUNEI DARUSSALAM	301,757	3.0
2.8	735,309	INDIA	6	CHINA	212,603	2.1
2.6	673,065	KOREA SELATAN	7	VIETNAM	173,763	1.7
1.6	424,694	JEPUN	8	FILIPINA	159,442	1.6
1.6	421,908	FILIPINA	9	AUSTRALIA	152,265	1.5
1.5	400,346	VIETNAM	10	KOREA SELATAN	146,384	1.5
13.2	3,443,617	LAIN-LAIN	11	LAIN-LAIN	1,179,944	11.7
100.0	26,100,784				10,070,964	100.0

Sumber: Tourism Malaysia

PRESTASI TERIMAAN PELANCONGAN

Merujuk kepada laporan Tourism Malaysia[11], terimaan pelancongan Malaysia pada 2019 berjumlah RM86,144 juta dengan pertumbuhan 2.4 peratus. Pembukaan semula pintu sempadan antarabangsa Malaysia sepenuhnya pada 1 April 2022 telah menyaksikan peningkatan drastik 118 kali ganda (RM28,228 juta) pada 2022 berbanding kejatuhan teruk pada tahun sebelumnya seperti di **Carta 5**.

Carta 5: Terimaan pelancongan Malaysia, 2019-2022

Sumber: Tourism Malaysia

Di peringkat global, laporan daripada UNWTO[10] menyatakan terimaan pelancongan antarabangsa mencecah paras USD1 trilion pada 2022, peningkatan 50.0 peratus berbanding 2021 yang didorong oleh lonjakan dalam perjalanan antarabangsa. Perbelanjaan pelancong antarabangsa ini mencapai 63.8 peratus daripada paras pra-pandemik (**Carta 6**). Peratusan pemulihan terimaan pelancongan ke paras pra-pandemik mengikut rantau menunjukkan Afrika mencatatkan 96.9 peratus berbanding paras 2019, diikuti oleh Eropah (86.9%), Timur Tengah (70.8%) dan Amerika (68.3%). Rentetan daripada penutupan sempadan yang berpanjangan, rantau Asia-Pasifik hanya menjana terimaan pelancongan sebanyak 27.6 peratus daripada terimaan pelancongan pada tahun pra-pandemik manakala Malaysia menunjukkan paras pemulihan yang lebih baik dengan 32.8 peratus daripada paras 2019.

Carta 6: Peratusan pemulihan dalam terimaan pelancongan 2022 berbanding paras 2019

	Afrika	Eropah	Timur Tengah	Amerika	Dunia	Asia-Pasifik	Malaysia
Peratusan tidak pulih	3.4	13.1	29.2	31.7	36.2	72.4	67.2
Peratusan pulih	96.6	86.9	70.8	68.3	63.8	27.6	32.8

■ Peratusan pulih ■ Peratusan tidak pulih
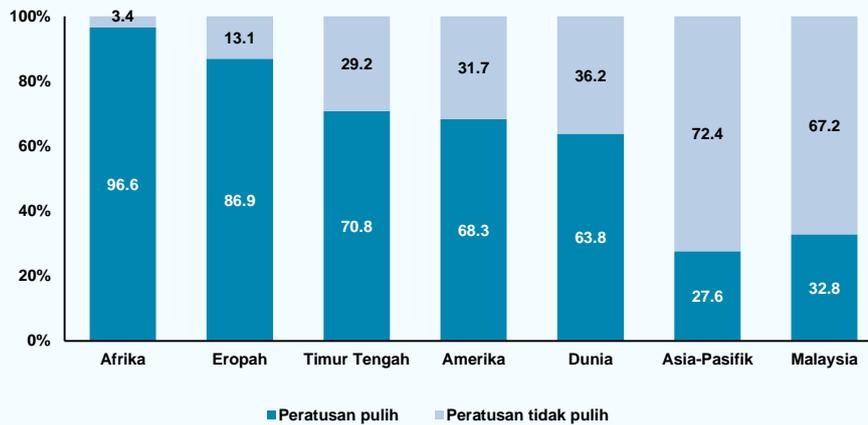
Sumber: UNWTO, Tourism Malaysia

KESIMPULAN

Secara keseluruhannya, penularan pandemik COVID-19 menjejaskan industri pelancongan Malaysia. Impak pandemik boleh dilihat berdasarkan analisis statistik ketibaan pelancong asing dan terimaan pelancongan yang menunjukkan penurunan signifikan, mengakibatkan kerugian dalam industri pelancongan sebanyak RM135 bilion pada 2020 dan RM165 bilion pada 2021. Menurut Akaun Satelit Pelancongan 2021, prestasi pelancongan menurun sebanyak 16.8 peratus bagi tahun 2020, dengan nilai RM199.7 bilion berbanding RM240.0 bilion pada tahun sebelumnya[12].

Pandemik COVID-19 telah menyebabkan banyak perubahan dalam persekitaran perniagaan pemain industri pelancongan, yang kelihatan berada di ambang muflis apabila operasi industri dihentikan sementara. Oleh itu, kerajaan berdedikasi untuk membantu pemain industri pelancongan dengan melaksanakan pelbagai inisiatif seperti Pakej Perlindungan Rakyat dan Pemulihan Ekonomi (PEMULIH), Pakej Rangsangan Ekonomi (PRE1.0) dan Pelan Pemulihan Pelancongan 2022. Pelaksanaan seperti Geran Khas PRIHATIN (GKP) dan Program Subsidi Upah juga membantu firma-firma mengelakkan pemberhentian pekerja. Sememangnya Skim Laluan Perjalanan Lengkap Vaksin (VTL) antara Malaysia dan Singapura yang membolehkan pelancong melawat ahli keluarga dan juga melancong, telah membantu memulihkan pelancongan dalam beberapa aspek.

Inisiatif lain, seperti promosi pelancongan domestik yang lebih meluas, peraturan kebersihan yang ketat, gelembung perjalanan dan digitalisasi, telah membantu perniagaan menyesuaikan diri dan menjadi kreatif dalam mencipta dan melaksanakan teknologi digital baharu untuk meningkatkan pemulihan pelancongan. Walau bagaimanapun, keputusan kerajaan membuka sempadan negara sepenuhnya bagi tujuan pelancongan sebagai peralihan kepada fasa endemik adalah paling bijak kerana kedatangan pelancong antarabangsa adalah teras industri pelancongan Malaysia. Ini boleh dilihat dengan merujuk data ketibaan pelancong dan terimaan pelancongan pada 2022, yang menunjukkan pertumbuhan menggalakkan dan menampakkan kebangkitan industri ini.

UNWTO menjangkakan industri pelancongan akan terus memulih sepanjang tahun 2023. Ketibaan pelancong antarabangsa pada 2023 dijangka boleh mencapai 80 peratus hingga 95 peratus daripada paras pra-pandemik. Kelonggaran sekatan perjalanan di China, yang merupakan pasaran *outbound* terbesar dunia sebelum wabak itu, telah memberi kesan kepada kebangkitan semula industri pelancongan di Asia-Pasifik dan peringkat global. Pengumuman

dasar kerajaan iaitu tiada diskriminasi terhadap pelancong China dengan melaksanakan pemeriksaan kesihatan yang ketat di pintu masuk boleh meningkatkan bilangan pelancong yang tiba di Malaysia melalui pengangkutan udara. Berikutan itu, sasaran Kementerian Pelancongan, Seni dan Budaya (MOTAC) bagi ketibaan pelancong China ke Malaysia ialah lima juta, dengan sasaran 16.1 juta pelancong asing dan RM49.2 bilion hasil pelancongan bagi tahun 2023.

Bagi mempergiatkan industri pelancongan, kerajaan telah memperuntukkan RM250 juta dalam Bajet 2023 untuk mempromosikan industri pelancongan. Dalam konteks promosi pelancongan, adalah penting untuk MOTAC mengambil langkah-langkah agresif termasuk melancarkan pelbagai aktiviti promosi di dalam dan luar negara untuk meningkatkan kesedaran dan tarikan ke arah Malaysia sebagai destinasi pelancongan. Selain itu, memaksimumkan penggunaan kaedah atas talian dan media sosial juga merupakan strategi yang pintar. Teknologi digital mempunyai potensi besar untuk mencapai audiens yang lebih besar dan beragam, terutama di kalangan generasi muda yang semakin aktif di platform media sosial. Pemain industri pelancongan seluruh negara disaran lebih kreatif dalam usaha menarik kehadiran pelancong ke Malaysia dengan menggunakan promosi pelancongan digital yang lebih interaktif. Selain daripada itu, golongan generasi muda yang suka merakamkan gambar kenangan di pelbagai lokasi menarik secara tidak langsung akan dapat menarik pengunjung ke destinasi tersebut. Oleh itu, penggunaan platform seperti laman web rasmi, Facebook, Instagram, TikTok dan aplikasi pelancongan, sebagai contoh Trip Advisor adalah penting dalam mempromosikan Malaysia sebagai destinasi pelancongan.

PENAFIAN

Rencana ini adalah pandangan penulis dan tidak mencerminkan pandangan Jabatan Perangkaan Malaysia (DOSM)

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POST PANDEMIC COVID-19: MALAYSIA TOWARDS THE RECOVERY OF THE TOURISM INDUSTRY

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INTRODUCTION

Tourism has grown steadily throughout the decades, resulting in a wide range of tourism types, making it one of the world's fastest-expanding economic industries. According to the World Tourism Organisation (UNWTO)[1] report for the year 2019, before the onset of the COVID-19 pandemic, this industry received a total of 1.5 billion tourists, contributing as much as USD1.48 trillion to global income, compared to 880 million tourists and USD852 billion in 2009. Tourism's modern-day expansion has resulted in the rise of new tourist locations, making tourism the primary driver of socioeconomic advancement, accounting for 10.4 per cent of the global Gross Domestic Product (GDP) and providing 334 million employment worldwide[2]. This demonstrates that tourism has grown to be a significant industry in international trade, as well as one of the primary sources of income for most developing countries. Most tourist sites across the world have seen extraordinary development in international tourist arrivals, owing to enhanced transportation infrastructure, advanced technology and increasingly favourable economic situations.

In accordance with worldwide trends, Malaysia's tourism industry performed well in 2019, generating 15.9 per cent of GDP with a value of RM240.2 billion. Tourism Satellite Account's publication 2019 also states that tourism contributed 27.9 per cent to the Services sector as a whole and 23.6 per cent to overall employment[3]. According to the UNWTO[4] report, Malaysia's tourist arrivals and tourism receipts ranked 14th and 23rd in the world's top countries. Based on these numbers, the tourism industry is an essential sector that drives the Malaysia's economy. Thus, in accordance with Vision 2020's goal of being a developed and inclusive country, Tourism Malaysia set a target of 36.0 million tourist arrivals and RM168 billion in tourism revenue by 2020 under the Malaysia Tourism Transformation Plan[5].

However, the challenges posed by the exceptional COVID-19 pandemic catastrophe in 2020 have globally influenced the performance of the business, society and community. Tourism, as an industry that is easily affected by global socioeconomic turmoil, has been badly hampered as a result of most countries closing international borders to prevent the spread of the pandemic. Due to an upsurge in cases of COVID-19 infection, the Malaysian government enacted the Movement Control Order (MCO), which went into effect on 18th March 2020. The implementation of the MCO, which included a comprehensive ban on all international travel, a ban on the entry of all tourists and foreign visitors into the country, and a ban on all movements and mass assemblies nationwide including religious, sports, social and cultural gatherings, resulted in a period of inactivity in the tourism industry. The prolonged MCO period for several years has resulted in a long-term decline in demand for tourism activities.
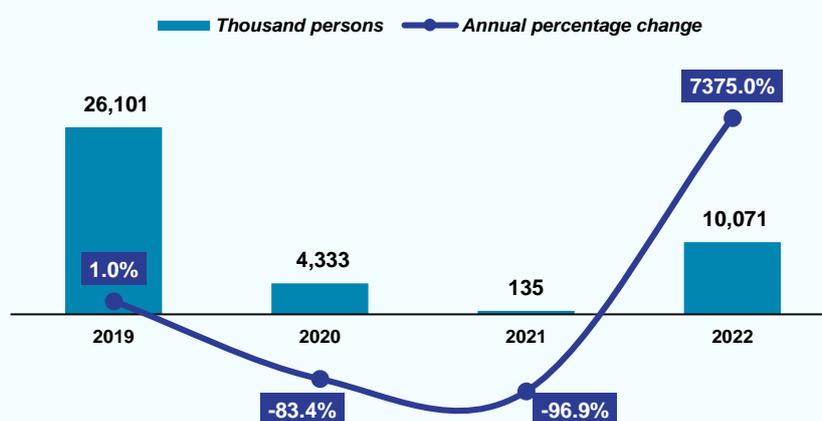
The COVID-19 pandemic had a significant impact on Malaysia's economy by recorded the lowest contraction of 5.5 per cent in 2020, since 1998 (-7.4%) due to global economic crisis. Tourism-related industries such as the food & beverage and accommodation subsector dropped 26.7 per cent[6]. The Malaysian economy 2021 regained its momentum with 3.3 per cent growth. Nonetheless, food & beverage and accommodation still declined by 10.4 per cent. Although the COVID-19 virus continues to exist, the opening of all economic activities as a whole and the re-opening of borders gates on 1st April 2022 expands the Malaysia's GDP for 2022, with an increase of 8.7 per cent as compared to previous year (2021: 3.3%). Likewise, the food & beverage and accommodation subsectors rose by 33.0 per cent in 2022 and this economic trend

points to a healthy rebound for Malaysia's tourism industry. However, it may not return to its pre-pandemic levels in the immediate future. The goal of this article is to look at the performance of the post-pandemic tourism industry in Malaysia and globally. Tourism performance in 2019 is referred to as the pre-pandemic levels.

TOURIST ARRIVALS TO MALAYSIA

Looking at the context of tourism, the statistical measurement of tourist arrivals by Tourism Malaysia is one of the instruments to assess the performance of this industry. The growth of these statistics were directly proportional to the tourism earnings as well as increasing the overall economy of the country. Based on UNWTO, the peak number of international tourist arrivals reached 1.5 billion in 2019, grew by 4.0 per cent as compared to the previous year where this growth was also projected for 2020[7]. The outbreak of the COVID-19 pandemic crisis has influenced the ability of the growth trajectory of global tourist arrivals by experiencing the worst record in 2020 which contracted by 72.3 per cent[8]. This situation equals to the record number of tourist arrivals in the past 30 years, which was in 1990 that amounted to 439.4 million tourists[9]. In addition, Malaysia was likewise experiencing the changes in trend of foreign tourist arrivals.

Chart 1: Number of tourist arrivals to Malaysia, 2019-2022

Thousand persons — Annual percentage change

	2019	2020	2021	2022
Thousand persons	26,101	4,333	135	10,071
Annual percentage change	1.0%	-83.4%	-96.9%	7375.0%

Source: Tourism Malaysia

Chart 1 *shows the arrival of tourists to Malaysia for the year 2019 to 2022. Malaysia received a total of 26.1 million tourists in 2019, with a growth of 1.0 per cent. As a result of the spread of the COVID-19 pandemic, the arrival of foreign tourists to Malaysia registered a significant declined in 2020 and 2021, recording 83.4 per cent and 96.9 per cent respectively.* **Chart 2** *shows the arrival of foreign tourists on a quarterly basis starting to decrease in the first quarter of 2020 where the global spread of COVID-19 began, with a total of 4.23 million arrivals declining by 29.3 per cent in the first quarter of 2020. This situation continues to plummet in the next quarter causing the average quarterly arrival of inbound tourists in 2020 to only reached 1.08 million which decreased 83.5 per cent as compared to the previous year. The recovery of the tourism sector and various ongoing national initiatives had an effect in the rapid recovery of the tourism industry. After almost two years of being hit by the pandemic crisis, the recovery of the tourism sector began to increase with a quarterly average of foreign tourist arrivals reached 2.52 million (2021: 33.7 thousand). This situation is driven by the government's efforts to implement several initiatives including introducing the Langkawi International Travel Bubble (LITB) from 15th November 2021. The rapid arrival of foreign tourists is further supported by the full opening of the country's borders from 1st April 2022, in accordance with the announcement of the country's transition to the endemic phase.*

Chart 2: Quarterly arrivals of foreign tourist to Malaysia, 2019-2022

('000)
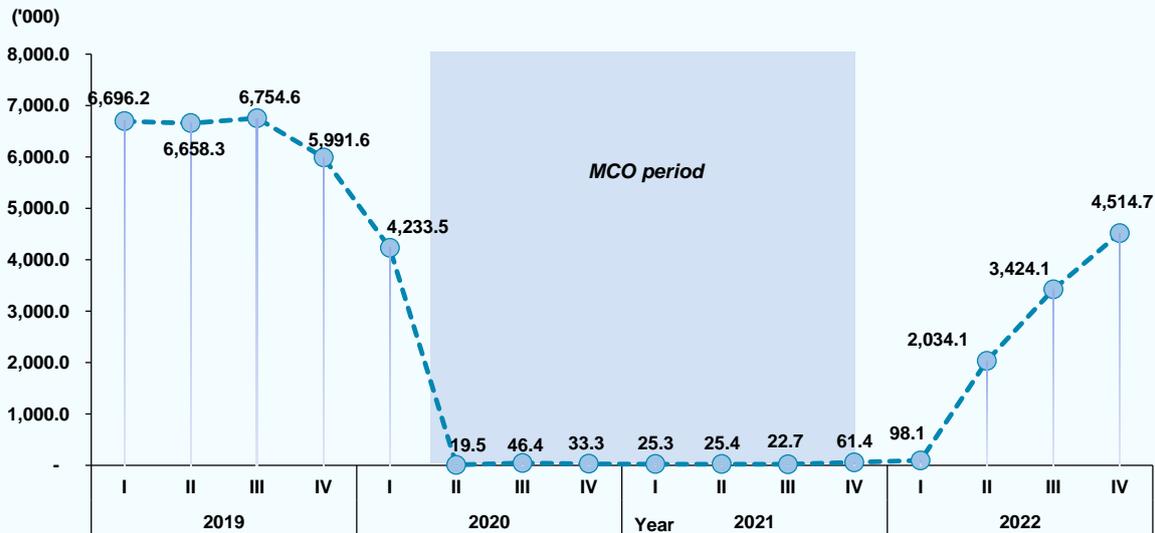
Source: Tourism Malaysia

Chart 3 shows the monthly arrival of foreign tourists for the year 2019 to 2022. The arrival of foreign tourists showed an increase in July 2020 which was 18,660 tourists as compared to 6,585 in the previous month following the opening of the national border between Thailand for travel purposes which involved the essential economic sector only. However, a positive growth recorded in November 2021 when the government allowed the entry of international tourists for tourism purposes on Langkawi Island. This increasing trend continues in 2022 where the monthly arrivals of foreign tourists for 2019 and 2022 shows a smaller gap (**Chart 3**). The arrival of foreign tourists to Malaysia in 2022 gradually recovered but was still below the pre-pandemic level. For instance, in terms of level, the foreign tourist arrivals in December 2022 amounted 1.84 million as compared to 1.99 million in December 2019.

**Chart 3: Monthly tourist arrivals to Malaysia, 2019-2022**

Source: Tourism Malaysia

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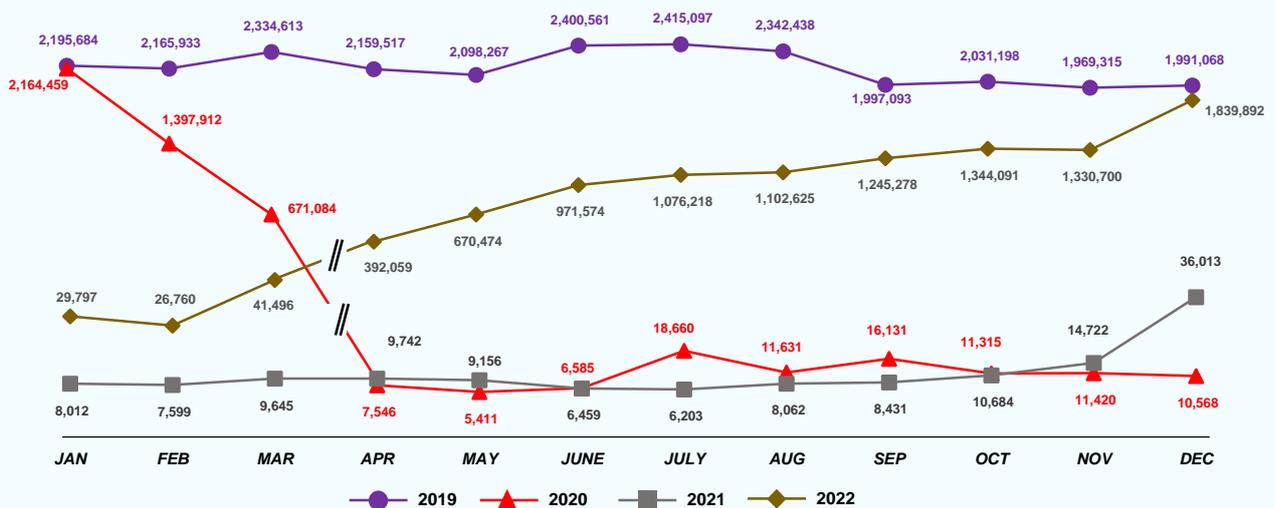
GLOBAL TOURISM PERFORMANCE

*Based on UNWTO[10], international tourist arrivals at the global level were stronger than expected for 2022, when receiving a total of 963 million tourists, a double increase as compared to 2021. This recovery of 65.7 per cent from the pre-pandemic level was supported by the large pent-up demand for tourism activities and the relaxation of travel restrictions in most countries. International tourist arrivals by region showed that Europe, as the world's largest destination region, recorded 595 million arrivals in 2022, approaching 79.9 per cent of the pre-pandemic level. The Middle East accounted for the highest increase of 89.9 per cent from the recovery level, as shown in **Chart 4**. Meanwhile, Americas and Africa each recorded 70.9 per cent and 67.4 per cent of the number of tourist arrivals in the pre-pandemic year. The scenario was different in Asia & the Pacific which reached only 27.9 per cent due to stronger pandemic-related restrictions, especially in China. The tourism industry in Malaysia was showing a better rebound with foreign tourist arrivals have recovered to 38.6 per cent as compared to the pre-pandemic levels and exceeds the figures recorded by the Asia & the Pacific region as depicted in **Chart 4**.*

Chart 4: Recovery percentage of foreign tourist arrivals by region and Malaysia, 2022 as compared to the 2019 levels
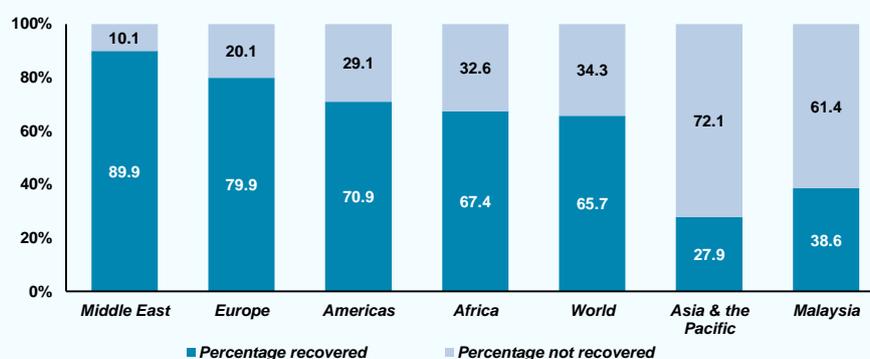
Source: UNWTO, Tourism Malaysia

TOP 10 COUNTRY OF TOURIST ARRIVALS TO MALAYSIA

*The impact of the spread of COVID-19 can also be seen in the changes trend of tourist arrivals from ten main countries to Malaysia in 2019, namely Singapore, Indonesia, China, Thailand, Brunei, India, South Korea, Japan, Philippines and Vietnam as shown in **Table 1**. In 2019, three countries, namely Singapore (38.9%), Indonesia (13.9%) and China (11.9%) contributed 64.7 per cent compared to the 66.6 per cent contribution by the combination of the two countries (Singapore: 51.9% and Indonesia: 14.7%) in 2022. The introduction of the Malaysia-Singapore Vaccinated Travel Lane (VTL) on 29th November 2021 was one of the contributing factors to the positive trend of Singaporeans entering Malaysia. There was also a change in the list of main countries for pre and post COVID-19 in the ranking of tourists from Japan and Australia. China, which was the country in the top three rank in 2019 by contributing 11.9 per cent (2022: 2.1%) of the total number of tourist arrivals to Malaysia, has changed to the sixth rank due to stringent restrictions on outbound travel by the country's government, where China was the largest global outbound market in 2019.*

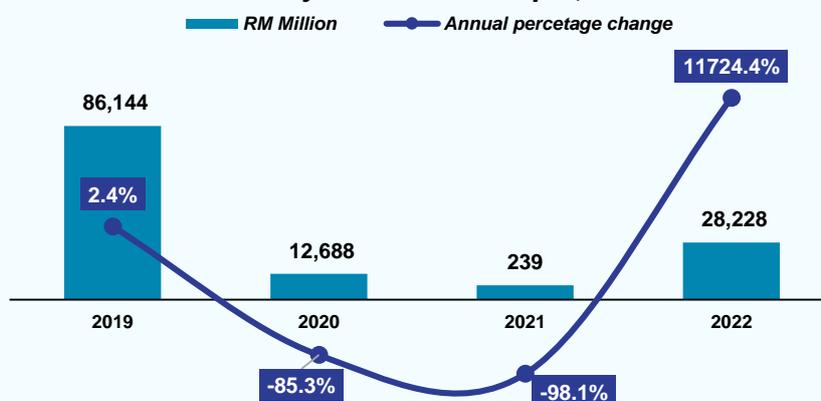## Table 1: Top 10 country of tourist arrivals to Malaysia, 2019 & 2022

2019			RANK	2022		
SHARE (%)	Tourist Arrival	COUNTRY		COUNTRY	Tourist Arrival	SHARE (%)
38.9	10,163,882	SINGAPORE	1	SINGAPORE	5,222,991	51.9
13.9	3,623,277	INDONESIA	2	INDONESIA	1,481,739	14.7
11.9	3,114,257	CHINA	3	THAILAND	715,528	7.1
7.2	1,884,306	THAILAND	4	INDIA	324,548	3.2
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2.8	735,309	INDIA	6	CHINA	212,603	2.1
2.6	673,065	SOUTH KOREA	7	VIETNAM	173,763	1.7
1.6	424,694	JAPAN	8	PHILIPPINES	159,442	1.6
1.6	421,908	PHILIPPINES	9	AUSTRALIA	152,265	1.5
1.5	400,346	VIETNAM	10	SOUTH KOREA	146,384	1.5
13.2	3,443,617	OTHERS	11	OTHERS	1,179,944	11.7
100.0	26,100,784				10,070,964	100.0

Source: Tourism Malaysia

TOURISM RECEIPTS PERFORMANCE

Referring to the Tourism Malaysia's report[11], Malaysia's tourism receipts in 2019 amounted RM86,144 million, with a growth of 2.4 per cent. The full reopening of Malaysia's international border on 1st April 2022 has seen a drastic increase a 118 times (RM28,228 million) in 2022 as compared to a severe drop in previous year as **Chart 5**.
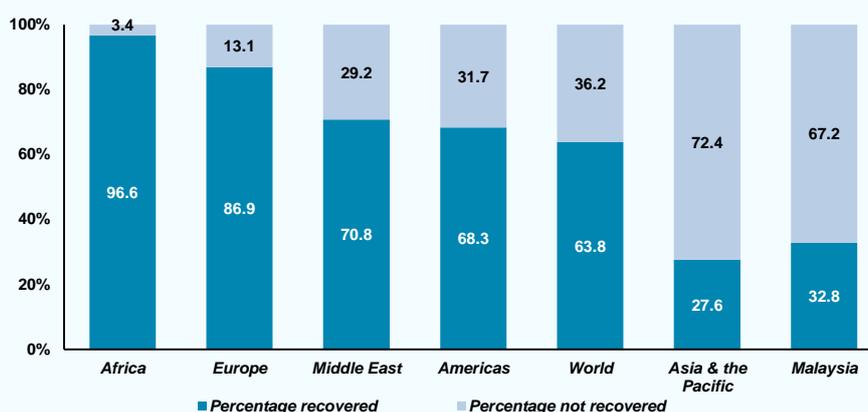
Chart 5: Malaysia tourist receipts, 2019-2022

RM Million — Annual percetage change

- 2019: 86,144 (2.4%)
- 2020: 12,688 (-85.3%)
- 2021: 239 (-98.1%)
- 2022: 28,228 (11724.4%)

Source: Tourism Malaysia

At the global level, a report from the UNWTO[10] states that international tourism receipts hit the USD1 trillion mark in 2022, a 50.0 per cent increase as compared to 2021 driven by a surge in international travel. International tourist expenditure reached 63.8 per cent of pre-pandemic levels (**Chart 6**). The percentage recovery of tourism receipts to pre-pandemic levels by region shows Africa recorded 96.9 per cent of 2019 levels, followed by Europe (86.9%), the Middle East (70.8%) and Americas (68.3%). Due to the prolonged closure of borders, the Asia & the Pacific region only generated 27.6 per cent of tourism receipts from the pre-pandemic year while Malaysia shows a better level of recovery with 32.8 per cent of 2019 levels.

Chart 6: Percentage recovery in tourism receipts 2022 as compared to 2019 levels

	Africa	Europe	Middle East	Americas	World	Asia & the Pacific	Malaysia
Percentage not recovered	3.4	13.1	29.2	31.7	36.2	72.4	67.2
Percentage recovered	96.6	86.9	70.8	68.3	63.8	27.6	32.8

■ Percentage recovered   ■ Percentage not recovered

Sources: UNWTO, Tourism Malaysia

CONCLUSION

Overall, the spread of the COVID-19 pandemic harmed Malaysia's tourism industry. The impact of the pandemic can be expressed based on a statistical analysis of foreign tourist arrivals and tourism receipts that showed a significant drop, resulted in losses in the tourism industry of RM135 billion in 2020 and RM165 billion in 2021. According to the Tourism Satellite Account 2021, tourist performance declined by 16.8 per cent for the year 2020, with a value of RM199.7 billion compared to RM240.0 billion in the previous year[12].

The COVID-19 pandemic has caused many changes in the business environment of tourism industry players, who appear to be on the verge of bankruptcy when the industry's operations are temporarily halted. As a result, the government is dedicated to assist tourism industry players by implementing various initiatives such as the National People's Well-Being and Economic Recovery Package (PEMULIH), the Economic Stimulus Package (PRE 1.0), and the Tourism Recovery Plan 2022. Implementations like the PRIHATIN Special Grant (GKP) and the Wage Subsidy Programme also help firms avoid layoffs. Indeed, the Vaccinated Travel Lane (VTL) between Malaysia and Singapore, which allows tourists to visit family as well as travel, has helped to restore tourism to some extent.

Other initiatives, such as greater domestic tourist promotion, tight cleanliness rules, the travel bubble and digitalisation, have assisted the business in adapting and being creative in creating and implementing new digital technologies to boost tourism recovery. However, the government's decision to open the country's borders totally for tourism purposes as a transition to the endemic phase is the wisest because the arrival of international tourists is the core of Malaysia's tourism industry. This may be seen by looking at the data for tourist arrivals and tourism receipts in 2022, which indicate favourable growth and demonstrate the industry's revival.

The UNWTO anticipates that the tourism industry will continue to recover through 2023. International tourist arrivals in 2023 could reach 80 per cent to 95 per cent of pre-pandemic levels. The relaxation of travel restrictions in China, which was the world's largest outbound market before the pandemic, has had an impact on the revival of the tourist industry in the Asia & the Pacific and globally. The announcement of the government's policy of no discrimination against Chinese tourists by undertaking rigorous health screening at the gate may increase the number of tourists arriving in Malaysia via air transport. Following that, Ministry of Tourism, Arts & Culture (MOTAC)'s aim for Chinese tourist arrivals in Malaysia is five million, with a target of 16.1 million foreign tourists and RM49.2 billion in tourism revenue for the year 2023.

To intensify the tourism industry, the government has allocated RM250 million in Budget 2023 for promoting the tourism industry. In the context of tourism promotion, it is crucial for the MOTAC to take aggressive steps, including launching various promotional activities both domestically and internationally, to enhance awareness and attraction towards Malaysia as a tourism destination. Furthermore, maximizing the use of online methods and social media is also a smart strategy. Digital technology has the tremendous potential to reach a larger and more diverse audience, especially among the younger generation who are increasingly active on social media platforms. Tourism industry players across the country are advised to be more creative in their efforts to attract tourists to Malaysia by utilizing more interactive digital tourism promotions. Other than that, younger generation who enjoy capturing memories in various attractive locations indirectly will attract visitors to the destination. Therefore, platforms such as official websites, Facebook, Instagram, TikTok and tourism apps, for example Trip Advisor are crucial in promoting Malaysia as tourism destination.

DISCLAIMER

This article is an authors' view and does not reflect the view of Department of Statistics, Malaysia (DOSM)

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JADUAL STATISTIK
STATISTICAL TABLES

1: Perbelanjaan pelancongan *inbound* bagi pelawat mengikut produk
Inbound tourism expenditure of visitors by products

Produk/ *Products*	2018	2019	2020	2021	2022ᵖ
RM Juta/ *RM Million*					
Perkhidmatan penginapan *Accommodation services*	21,622.8	22,007.3	3,144.0	64.8	4,914.1
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	11,784.7	12,019.2	2,011.2	78.6	5,603.5
Perkhidmatan pengangkutan penumpang *Passenger transport services*	15,188.0	16,023.7	2,413.0	178.0	7,161.4
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	3,869.6	4,047.1	582.5	0.5	740.8
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	2,366.3	2,526.7	395.1	9.8	1,755.9
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	615.6	467.2	24.0	0.1	325.9
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	29,373.7	29,924.4	4,717.9	44.4	11,289.5
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	2,861.7	2,405.3	406.0	94.8	1,646.0
Jumlah *Total*	**87,682.4**	**89,421.0**	**13,693.7**	**470.9**	**33,437.1**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**2.3**	**2.0**	**-84.7**	**-96.6**	**7000.2**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penginapan *Accommodation services*	24.7	24.6	23.0	13.8	14.7
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	13.4	13.4	14.7	16.7	16.8
Perkhidmatan pengangkutan penumpang *Passenger transport services*	17.3	17.9	17.6	37.8	21.4
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	4.4	4.5	4.3	0.1	2.2
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	2.7	2.8	2.9	2.1	5.3
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	0.7	0.5	0.2	0.0	1.0
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	33.5	33.5	34.5	9.4	33.8
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	3.3	2.7	3.0	20.1	4.9
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Jadual
Table **1A:** **Perbelanjaan pelancongan *inbound* bagi pelancong mengikut produk**
Inbound tourism expenditure of tourists by products

Produk/ *Products*	2018	2019	2020	2021	2022ᵖ
RM Juta/ *RM Million*					
Perkhidmatan penginapan *Accommodation services*	21,622.8	22,007.3	3,144.0	64.8	4,914.1
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	11,274.1	11,517.1	1,907.2	49.7	5,338.2
Perkhidmatan pengangkutan penumpang *Passenger transport services*	14,639.4	15,456.2	2,297.3	168.4	6,834.3
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	3,702.0	3,878.0	552.4	0.4	705.7
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	2,263.8	2,421.2	374.7	7.8	1,672.8
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	589.0	447.7	22.8	0.0	310.5
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	28,101.2	28,674.2	4,473.9	10.8	10,755.0
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	2,737.7	2,304.8	385.0	87.8	1,568.1
Jumlah *Total*	**84,929.9**	**86,706.5**	**13,157.3**	**389.8**	**32,098.8**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**2.4**	**2.1**	**-84.8**	**-97.0**	**8133.8**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penginapan *Accommodation services*	25.5	25.4	23.9	16.6	15.3
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	13.3	13.3	14.5	12.8	16.6
Perkhidmatan pengangkutan penumpang *Passenger transport services*	17.2	17.8	17.5	43.2	21.3
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	4.4	4.5	4.2	0.1	2.2
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	2.7	2.8	2.8	2.0	5.2
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	0.7	0.5	0.2	0.0	1.0
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	33.1	33.1	34.0	2.8	33.5
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	3.2	2.7	2.9	22.5	4.9
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Produk/ *Products*	2018	2019	2020	2021	2022ᵖ
RM Juta/ *RM Million*					
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	510.5	502.1	104.0	28.8	265.3
Perkhidmatan pengangkutan penumpang *Passenger transport services*	548.6	567.5	115.7	9.6	327.0
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	167.6	169.1	30.1	0.1	35.1
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	102.5	105.6	20.4	2.0	83.1
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	26.7	19.5	1.2	0.0	15.4
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	1,272.5	1,250.2	244.0	33.6	534.5
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	124.0	100.5	21.0	7.0	77.9
Jumlah *Total*	**2,752.5**	**2,714.5**	**536.5**	**81.1**	**1,338.4**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**-2.0**	**-1.4**	**-80.2**	**-84.9**	**1550.4**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	18.5	18.5	19.4	35.6	19.8
Perkhidmatan pengangkutan penumpang *Passenger transport services*	19.9	20.9	21.6	11.8	24.4
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	6.1	6.2	5.6	0.1	2.6
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	3.7	3.9	3.8	2.4	6.2
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	1.0	0.7	0.2	0.1	1.2
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	46.2	46.1	45.5	41.4	39.9
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	4.5	3.7	3.9	8.6	5.8
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Sumber : Jabatan Perangkaan Malaysia
      Lembaga Penggalakan Pelancongan Malaysia (Tourism Malaysia)

Sources : Department of Statistics, Malaysia
      Malaysia Tourism Promotion Board (Tourism Malaysia)

Jadual
Table **2:** **Perbelanjaan pelancongan domestik bagi pelawat mengikut produk**
Domestic tourism expenditure of visitors by products

Produk/ *Products*	2018	2019	2020	2021	2022
RM Juta/ *RM Million*					
Perkhidmatan penginapan *Accommodation services*	7,882.8	8,625.7	2,087.9	1,087.4	5,956.5
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	12,785.6	14,702.4	7,497.4	2,783.2	9,725.2
Perkhidmatan pengangkutan penumpang *Passenger transport services*	5,777.4	6,384.5	2,506.3	888.9	4,816.7
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	1,400.9	1,603.5	94.6	21.1	774.5
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	1,390.2	1,695.3	569.1	457.0	2,022.4
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	13,710.3	15,498.5	3,627.2	2,038.8	8,839.7
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	34,757.9	39,033.4	21,267.4	9,263.9	24,939.2
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	5,036.4	5,094.9	984.9	910.8	2,142.9
Jumlah *Total*	**82,741.4**	**92,638.2**	**38,634.6**	**17,451.0**	**59,217.0**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**12.3**	**12.0**	**-58.3**	**-54.8**	**239.3**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penginapan *Accommodation services*	9.5	9.3	5.4	6.2	10.1
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	15.5	15.9	19.4	15.9	16.4
Perkhidmatan pengangkutan penumpang *Passenger transport services*	7.0	6.9	6.5	5.1	8.1
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	1.7	1.7	0.2	0.1	1.3
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	1.7	1.8	1.5	2.6	3.4
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	16.6	16.7	9.4	11.7	14.9
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	42.0	42.1	55.0	53.1	42.1
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	6.1	5.5	2.5	5.2	3.6
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Sumber : Jabatan Perangkaan Malaysia
Sources : Department of Statistics, Malaysia

Jadual
Table **2A:** **Perbelanjaan pelancongan domestik bagi pelancong mengikut produk**
Domestic tourism expenditure of tourists by products

Produk/ *Products*	2018	2019	2020	2021	2022
RM Juta/ *RM Million*					
Perkhidmatan penginapan *Accommodation services*	7,882.8	8,625.7	2,087.9	1,087.4	5,956.5
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	8,372.5	9,756.1	4,969.6	1,153.8	6,186.5
Perkhidmatan pengangkutan penumpang *Passenger transport services*	5,063.4	5,617.4	2,110.9	693.4	4,205.5
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	1,392.0	1,596.5	93.7	20.6	773.2
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	684.3	757.8	232.8	199.8	1,318.1
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	9,603.5	10,533.5	2,109.9	889.3	5,078.8
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	16,187.6	18,803.1	9,526.1	2,176.9	10,310.1
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	2,377.1	2,896.3	743.3	694.1	1,159.7
Jumlah *Total*	**51,563.2**	**58,586.5**	**21,874.2**	**6,915.3**	**34,988.5**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**11.4**	**13.6**	**-62.7**	**-68.4**	**406.0**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penginapan *Accommodation services*	15.3	14.7	9.5	15.7	17.0
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	16.2	16.7	22.7	16.7	17.7
Perkhidmatan pengangkutan penumpang *Passenger transport services*	9.8	9.6	9.7	10.0	12.0
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	2.7	2.7	0.4	0.3	2.2
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	1.3	1.3	1.1	2.9	3.8
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	18.6	18.0	9.6	12.9	14.5
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	31.4	32.1	43.5	31.5	29.5
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	4.6	4.9	3.4	10.0	3.3
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Sumber : **Jabatan Perangkaan Malaysia**
Sources : Department of Statistics, Malaysia

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2B: Perbelanjaan pelancongan domestik bagi pelawat harian mengikut produk
Domestic tourism expenditure of excursionists by products

Produk/ *Products*	2018	2019	2020	2021	2022
RM Juta/ *RM Million*					
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	4,413.1	4,946.4	2,527.7	1,629.4	3,538.6
Perkhidmatan pengangkutan penumpang *Passenger transport services*	714.1	767.1	395.3	195.5	611.2
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	8.9	7.0	0.8	0.5	1.3
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	705.9	937.5	336.3	257.2	704.3
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	4,106.7	4,964.9	1,517.3	1,149.4	3,760.8
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	18,570.3	20,230.2	11,741.3	7,087.0	14,629.1
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	2,659.2	2,198.6	241.6	216.7	983.1
Jumlah *Total*	**31,178.2**	**34,051.7**	**16,760.5**	**10,535.7**	**24,228.5**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**13.8**	**9.2**	**-50.8**	**-37.1**	**130.0**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	14.2	14.5	15.1	15.5	14.6
Perkhidmatan pengangkutan penumpang *Passenger transport services*	2.3	2.3	2.4	1.9	2.5
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	0.0	0.0	0.0	0.0	0.0
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	2.3	2.8	2.0	2.4	2.9
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	13.2	14.6	9.1	10.9	15.5
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	59.6	59.4	70.1	67.3	60.4
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	8.5	6.5	1.4	2.1	4.1
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Sumber : Jabatan Perangkaan Malaysia
Sources : Department of Statistics, Malaysia

Produk/ *Products*	2018	2019	2020	2021	2022ᵖ
RM Juta/ *RM Million*					
Perkhidmatan penginapan *Accommodation services*	9,624.1	10,080.0	3,747.6	3,133.1	4,792.2
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	5,470.1	5,824.0	2,213.4	2,107.6	3,757.3
Perkhidmatan pengangkutan penumpang *Passenger transport services*	13,000.8	14,224.0	5,927.5	2,822.7	6,974.6
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	1,451.8	1,568.0	575.8	104.9	787.5
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	1,275.0	1,568.0	592.3	94.4	472.5
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	9,731.1	10,886.4	3,675.3	1,887.4	5,152.2
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	575.8	649.6	487.3	335.5	562.5
Jumlah *Total*	**41,128.7**	**44,800.1**	**17,219.2**	**10,485.6**	**22,498.7**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**5.8**	**8.9**	**-61.6**	**-39.1**	**114.6**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penginapan *Accommodation services*	23.4	22.5	21.8	29.9	21.3
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	13.3	13.0	12.9	20.1	16.7
Perkhidmatan pengangkutan penumpang *Passenger transport services*	31.6	31.8	34.4	26.9	31.0
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	3.5	3.5	3.3	1.0	3.5
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	3.1	3.5	3.4	0.9	2.1
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	23.7	24.3	21.3	18.0	22.9
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	1.4	1.5	2.8	3.2	2.5
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Produk/ *Products*	2018	2019	2020	2021	2022ᵖ
RM Juta/ *RM Million*					
Perkhidmatan penginapan *Accommodation services*	29,505.5	30,633.0	5,231.9	1,152.2	10,870.6
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	24,570.2	26,721.7	9,508.6	2,861.7	15,328.7
Perkhidmatan pengangkutan penumpang *Passenger transport services*	20,965.4	22,408.3	4,919.3	1,066.9	11,978.0
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	5,270.5	5,650.6	677.1	21.6	1,515.3
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	3,756.5	4,222.0	964.2	466.8	3,778.3
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	14,325.9	15,965.7	3,651.2	2,038.9	9,165.6
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	64,131.6	68,957.8	25,985.2	9,308.3	36,228.7
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	7,898.1	7,500.2	1,390.9	1,005.5	3,788.9
Jumlah *Total*	**170,423.8**	**182,059.1**	**52,328.4**	**17,921.9**	**92,654.1**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**6.9**	**6.8**	**-71.3**	**-65.8**	**417.0**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penginapan *Accommodation services*	17.3	16.8	10.0	6.4	11.7
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	14.4	14.7	18.2	16.0	16.5
Perkhidmatan pengangkutan penumpang *Passenger transport services*	12.3	12.3	9.4	6.0	12.9
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	3.1	3.1	1.3	0.1	1.6
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	2.2	2.3	1.8	2.6	4.1
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	8.4	8.8	7.0	11.4	9.9
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	37.6	37.9	49.7	51.9	39.1
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	4.6	4.1	2.7	5.6	4.1
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Sumber : **Jabatan Perangkaan Malaysia**
Lembaga Penggalakan Pelancongan Malaysia (Tourism Malaysia)
Sources : Department of Statistics, Malaysia
Malaysia Tourism Promotion Board (Tourism Malaysia)

Jadual
Table
5:
Akaun pengeluaran industri pelancongan pada harga semasa
Production accounts of tourism industry at current prices

Industri/ *Industry*	2018	2019	2020	2021ᵉ	2022ᵖ
RM Juta/ *RM Million*					
Perkhidmatan penginapan *Accommodation services*	24,733.1	26,406.8	12,137.9	9,732.6	14,761.3
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	37,782.1	43,166.7	35,571.2	34,035.8	43,044.7
Perkhidmatan pengangkutan penumpang *Passenger transport services*	8,798.6	9,379.5	4,863.0	3,896.6	8,107.6
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	3,818.9	4,226.9	1,641.5	982.9	3,881.9
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	10,482.2	11,307.1	6,307.6	4,185.0	7,633.2
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	4,467.9	4,725.9	4,181.6	4,399.9	6,294.9
Perdagangan runcit *Retail trade*	102,523.9	111,121.6	106,560.0	111,271.9	136,127.2
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	27,778.3	29,695.0	29,036.5	30,044.1	31,619.6
Jumlah Nilai Ditambah Kasar Industri Pelancongan *Total Gross Value Added of Tourism Industries*	**220,385.0**	**240,029.5**	**200,299.2**	**198,548.9**	**251,470.2**
Nilai Ditambah Kasar Pelancongan Langsung *Tourism Direct Gross Value Added*	94,535.4	102,233.3	28,314.8	11,544.8	47,885.1
Keluaran Dalam Negeri Kasar Pelancongan Langsung *Tourism Direct Gross Domestic Product*	94,575.4	102,272.3	28,350.8	11,583.7	47,928.2
Keluaran Dalam Negeri Kasar *Gross Domestic Product*	1,447,759.6	1,512,737.8	1,418,490.9	1,548,898.0	1,791,357.5
Perubahan peratusan tahunan/ *Annual percentage change (%)*					
Nilai Ditambah Kasar Industri Pelancongan *Gross Value Added of Tourism Industries*	9.8	8.9	-16.6	-0.9	26.7
Keluaran Dalam Negeri Kasar Pelancongan Langsung *Tourism Direct Gross Domestic Product*	7.6	8.1	-72.3	-59.1	313.8
Keluaran Dalam Negeri Kasar *Gross Domestic Product*	5.5	4.5	-6.2	9.2	15.7
Peratus sumbangan/ *Percentage share (%)*					
Nilai Ditambah Kasar Industri Pelancongan kepada KDNK *Gross Value Added of Tourism Industries to GDP*	15.2	15.9	14.1	12.8	14.0
Nilai Ditambah Kasar Pelancongan Langsung kepada keseluruhan Nilai Ditambah Kasar *Tourism Direct Gross Value Added to overall Gross Value Added*	6.6	6.8	2.0	0.8	2.7
KDNK Pelancongan Langsung kepada KDNK *Tourism Direct Gross Domestic Product to GDP*	6.5	6.8	2.0	0.8	2.7

Sumber : Jabatan Perangkaan Malaysia
Sources : Department of Statistics, Malaysia

Jadual / Table 6: Jumlah penawaran dan penggunaan pelancongan mengikut jenis produk
Total supply and tourism consumption by type of products

Produk/ *Products*	2018	2019	2020	2021e	2022p
Penawaran mengikut industri (RM Juta)/ *Supply by industries (RM Million)*					
Perkhidmatan penginapan *Accommodation services*	31,647.4	31,824.3	18,490.3	5,499.2	24,897.2
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	87,025.2	96,026.7	75,318.3	24,784.5	76,376.3
Perkhidmatan pengangkutan penumpang *Passenger transport services*	38,609.9	42,379.5	31,300.1	24,886.7	35,758.3
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	6,861.3	6,973.1	3,943.1	215.4	4,430.9
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	23,227.1	24,776.6	13,993.9	9,637.5	15,877.7
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	44,232.9	47,612.6	27,042.4	24,294.2	36,982.3
Perdagangan runcit *Retail trade*	147,239.8	159,423.4	153,134.5	159,177.6	175,513.3
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	51,805.6	55,584.1	53,316.3	47,701.3	50,480.8
Jumlah *Total*	**430,649.2**	**464,600.4**	**376,538.9**	**296,196.4**	**420,317.1**
Penggunaan mengikut produk (RM Juta)/ *Consumption by products (RM Million)*					
Perkhidmatan penginapan *Accommodation services*	29,505.5	30,633.0	5,231.9	1,152.2	10,870.6
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	24,570.2	26,721.7	9,508.6	2,861.7	15,328.7
Perkhidmatan pengangkutan penumpang *Passenger transport services*	20,965.4	22,408.3	4,919.3	1,066.9	11,978.0
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	5,270.5	5,650.6	677.1	21.6	1,515.3
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	3,756.5	4,222.0	964.2	466.8	3,778.3
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	14,325.9	15,965.7	3,651.2	2,038.9	9,165.6
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	64,131.6	68,957.8	25,985.2	9,308.3	36,228.7
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	7,898.1	7,500.2	1,390.9	1,005.5	3,788.9
Jumlah *Total*	**170,423.8**	**182,059.1**	**52,328.4**	**17,921.9**	**92,654.1**
Kadar pelancongan / *Tourism ratio*					
Perkhidmatan penginapan *Accommodation services*	0.932	0.963	0.283	0.210	0.437
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	0.282	0.278	0.126	0.115	0.201
Perkhidmatan pengangkutan penumpang *Passenger transport services*	0.543	0.529	0.157	0.043	0.335
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	0.768	0.810	0.172	0.100	0.342
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	0.162	0.170	0.069	0.048	0.238
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	0.324	0.335	0.135	0.084	0.248
Barang khusus bercirikan pelancongan negara *Country-specific tourism characteristics goods*	0.436	0.433	0.170	0.058	0.206
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	0.152	0.135	0.026	0.021	0.075
Kadar pelancongan *Tourism ratio*	**0.396**	**0.392**	**0.139**	**0.061**	**0.220**

Sumber : Jabatan Perangkaan Malaysia
       Lembaga Penggalakan Pelancongan Malaysia (Tourism Malaysia)

Sources : Department of Statistics, Malaysia
*   Malaysia Tourism Promotion Board (Tourism Malaysia)*

Jadual
Table **7:** Guna tenaga dalam industri pelancongan
Employment in the tourism industry

Industri/ *Industry*	2018	2019	2020	2021	2022
Ribu orang/ *Thousand persons*					
Perkhidmatan penginapan *Accommodation services*	222.4	233.8	208.5	196.3	201.0
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	1,183.0	1,237.7	1,191.6	1,245.5	1,266.8
Perkhidmatan pengangkutan penumpang *Passenger transport services*	171.3	177.3	165.2	162.1	166.2
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	38.7	40.7	34.1	26.3	28.1
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	80.9	81.2	66.5	52.3	53.5
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	34.6	34.7	34.3	34.4	35.2
Perdagangan runcit *Retail trade*	1,147.9	1,158.1	1,156.2	1,181.9	1,211.6
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	592.3	598.5	601.3	621.3	645.6
Jumlah *Total*	**3,471.1**	**3,561.8**	**3,457.5**	**3,520.2**	**3,608.0**
Perubahan peratusan tahunan (%) *Annual percentage change (%)*	**4.9**	**2.6**	**-2.9**	**1.8**	**2.5**
Peratus sumbangan/ *Percentage share (%)*					
Perkhidmatan penginapan *Accommodation services*	6.4	6.6	6.0	5.6	5.6
Perkhidmatan penyediaan makanan dan minuman *Food and beverage serving services*	34.1	34.7	34.5	35.4	35.1
Perkhidmatan pengangkutan penumpang *Passenger transport services*	4.9	5.0	4.8	4.6	4.6
Perkhidmatan agensi pengembaraan dan penempahan lain *Travel agencies and other reservation services*	1.1	1.1	1.0	0.7	0.8
Perkhidmatan kebudayaan, sukan dan rekreasi *Cultural, sports and recreational services*	2.3	2.3	1.9	1.5	1.5
Jualan runcit bahan api kenderaan *Retail sale of automotive fuel*	1.0	1.0	1.0	1.0	1.0
Perdagangan runcit *Retail trade*	33.1	32.5	33.4	33.6	33.6
Perkhidmatan khusus bercirikan pelancongan negara *Country-specific tourism characteristic services*	17.1	16.8	17.4	17.6	17.9
Jumlah *Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Sumber : Jabatan Perangkaan Malaysia
Sources : Department of Statistics, Malaysia

NOTA TEKNIKAL

TECHNICAL NOTES

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1. PENGENALAN

Penyediaan Akaun Satelit Pelancongan (ASP) Malaysia adalah berdasarkan *Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF) *2008* dan *International Recommendations for Tourism Statistics* (IRTS) yang diterbitkan oleh *United Nations World Tourism Organization* (UNWTO). Konsep dan definisi ASP yang digunakan telah diselaraskan mengikut keperluan Malaysia.

Bahagian ini akan menerangkan konsep dan definisi yang dipraktikkan oleh Malaysia dalam menyusun jadual-jadual ASP.

2. KONSEP DAN DEFINISI

2.1 Pelawat

Pelawat merujuk kepada *traveller* yang melakukan aktiviti perjalanan ke destinasi utama di luar dari persekitaran biasa dalam tempoh tidak melebihi 12 bulan, selain daripada diambil bekerja oleh entiti residen negara tersebut atau tempat yang dilawati. Berikut ialah senarai tujuan utama lawatan seperti yang disenaraikan dalam IRTS:

      a. Perniagaan dan profesional;
      b. Percutian, mengisi masa lapang dan rekreasi;
      c. Melawat rakan dan saudara-mara;
      d. Pendidikan dan latihan;
      e. Kesihatan dan rawatan perubatan;
      e. Hal-hal keagamaan/ menziarahi ke tempat suci keagamaan;
      g. Membeli-belah; dan
      h. Transit.

Bagi situasi di Malaysia, senario balik kampung yang diamalkan oleh residen semasa musim perayaan juga didefinisikan sebagai pelancongan. Pelawat boleh diklasifikasikan kepada dua kategori:

    i. Pelancong   -   Jika perjalanannya melibatkan tidur bermalam

    ii. Pelawat harian   -   Jika perjalanannya mengambil masa kurang daripada 24 jam

2.2 Persekitaran biasa

Persekitaran biasa seseorang individu merupakan konsep utama dalam pelancongan yang merujuk kepada kawasan geografi (walaupun tidak semestinya mempunyai sempadan), yang mana seseorang individu menjalankan rutin kehidupan seharian.

Persekitaran biasa bagi seseorang individu itu termasuklah tempat tinggal biasa, tempat bekerja atau belajar dan tempat-tempat yang selalu dikunjungi walaupun tempat tersebut jauh dari tempat tinggal biasa atau berada di kawasan yang lain. Oleh itu, pelawat yang kerap berulang-alik di antara tempat tinggal biasa dan tempat bekerja, atau tempat belajar, atau tempat yang kerap dikunjungi di dalam rutin kehidupan semasa adalah tidak diliputi dalam penyusunan ASP. Walau bagaimanapun, konsep ini mungkin berbeza antara negara mengikut kepada ciri-ciri negara tersebut.

Di Malaysia, penentuan persekitaran biasa menjadi elemen penting terutamanya bagi pelancongan domestik. Oleh yang demikian, seperti yang dicadangkan oleh UNWTO, Malaysia telah menetapkan kriteria berikut bagi menentukan seseorang itu adalah pelawat:

a. Mereka yang membuat perjalanan pergi dan balik sekurang-kurangnya 50 kilometer dari kawasan kediaman mereka untuk tujuan pelancongan, berada di luar persekitaran biasa mereka dan memperuntukkan masa sekurang-kurangnya 4 jam di lokasi tersebut; dan

b. Mereka yang membuat perjalanan pergi dan balik kurang daripada 50 kilometer pula, masa yang digunakan hendaklah minimum 4 jam dan lebih serta menggunakan kemudahan pelancongan seperti kemudahan pengangkutan, penginapan, makanan & minuman dan rekreasi.

3. JENIS-JENIS PELANCONGAN

3.1 Pelancongan *inbound*
Terdiri daripada aktiviti pelawat bukan residen yang membuat perjalanan ke negara rujukan (Malaysia) bagi perjalanan *inbound*.

3.2 Pelancongan domestik
Terdiri daripada aktiviti pelawat residen yang membuat perjalanan dalam negara rujukan (Malaysia) sama ada sebahagian daripada perjalanan domestik atau sebahagian daripada perjalanan *outbound*.

3.3 Pelancongan *outbound*
Terdiri daripada aktiviti pelawat residen yang membuat perjalanan di luar negara rujukan (Malaysia) sama ada sebahagian daripada perjalanan *outbound* atau sebahagian daripada perjalanan domestik.

3.4 Pelancongan *internal*

Terdiri daripada pelancongan domestik dan pelancongan *inbound*, iaitu aktiviti pelawat residen dan bukan residen di dalam negara rujukan (Malaysia) sama ada sebahagian daripada perjalanan domestik atau antarabangsa.

3.5 Pelancongan nasional

Terdiri daripada pelancongan domestik dan pelancongan *outbound*, iaitu aktiviti pelawat residen dalam dan luar negara rujukan (Malaysia) sama ada sebahagian daripada perjalanan domestik atau *outbound*.

3.6 Pelancongan antarabangsa

Terdiri daripada pelancongan *inbound* dan pelancongan *outbound*, iaitu aktiviti pelawat residen di luar negara rujukan (Malaysia) sama ada sebahagian daripada perjalanan domestik atau *outbound* dan aktiviti pelawat bukan residen dalam negara rujukan (Malaysia) bagi perjalanan *inbound*.

Rajah di bawah menunjukkan jenis-jenis perbelanjaan pelancongan:

Jenis-jenis perbelanjaan pelancongan

JUMLAH PERBELANJAAN PELANCONGAN

PERBELANJAAN PELANCONGAN *INBOUND*

PERBELANJAAN PELANCONGAN DOMESTIK

PERBELANJAAN PELANCONGAN *OUTBOUND*

PENGGUNAAN PELANCONGAN *INTERNAL*

PENGGUNAAN PELANCONGAN NASIONAL

PERBELANJAAN PELANCONGAN ANTARABANGSA
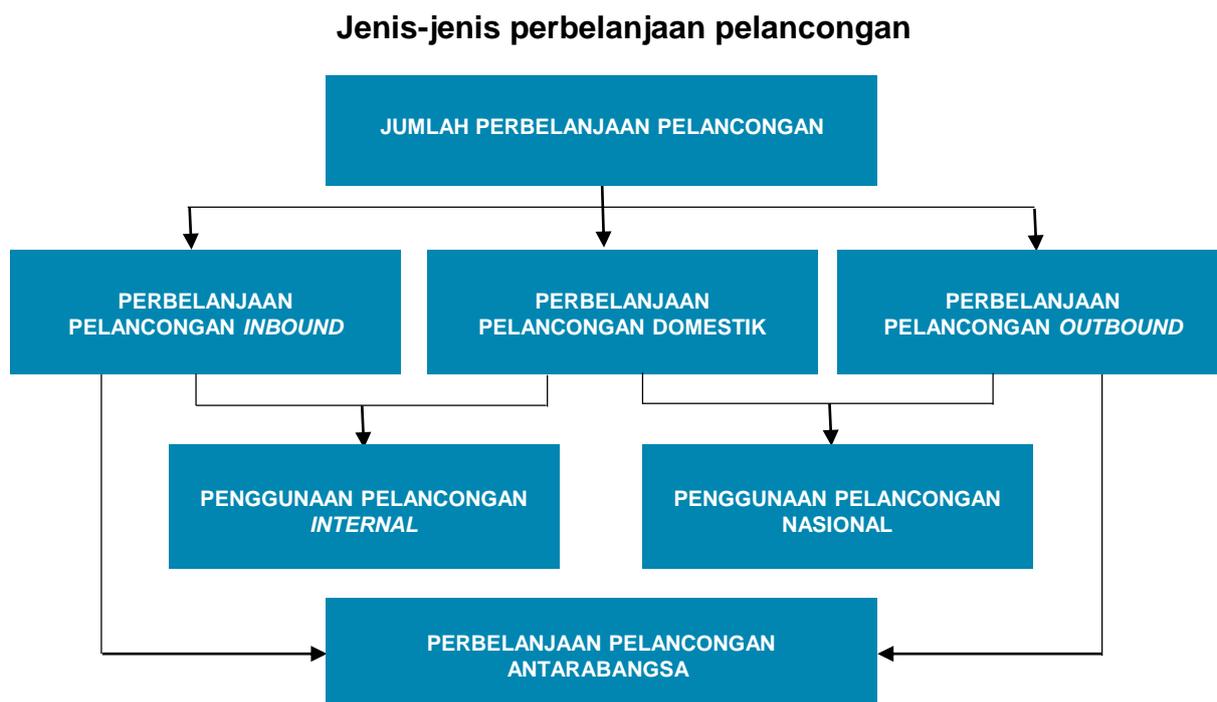
4. PERBELANJAAN PELANCONGAN

Perbelanjaan pelancongan merujuk kepada jumlah yang dibayar bagi perolehan penggunaan barangan & perkhidmatan dan barang berharga, untuk kegunaan sendiri atau untuk diberi ketika dan semasa perjalanan pelancongan. Ia termasuk perbelanjaan oleh pelawat sendiri dan perbelanjaan yang dibayar atau dibayar balik oleh orang lain. Secara prinsipnya, perolehan barangan dan perkhidmatan semasa perjalanan pelancongan adalah sebahagian daripada perbelanjaan pelancongan. Kesemua perkhidmatan yang diterima sebelum perjalanan dibuat dan berkaitan dengan perjalanan (contoh: vaksinasi, perkhidmatan pasport, kawalan perubatan, perkhidmatan agensi pengembaraan dan sebagainya) adalah termasuk dalam perbelanjaan pelancongan. Semua barangan yang diperoleh sebelum perjalanan, yang akan digunakan semasa perjalanan (contoh: pakaian khusus, ubat-ubatan, dan sebagainya) atau dibawa sebagai hadiah juga diambil kira.

4.1 Perbelanjaan pelancongan *inbound*
Perbelanjaan pelancongan bagi pelawat bukan residen dalam ekonomi rujukan (Malaysia).

4.2 Perbelanjaan pelancongan domestik
Perbelanjaan pelancongan bagi pelawat residen dalam ekonomi rujukan (Malaysia).

4.3 Perbelanjaan pelancongan *outbound*
Perbelanjaan pelancongan bagi pelawat residen di luar ekonomi rujukan (Malaysia).

4.4 Perbelanjaan pelancongan *internal*
Terdiri daripada perbelanjaan pelancongan bagi pelawat residen dan bukan residen di dalam ekonomi rujukan (Malaysia). Ia merupakan jumlah keseluruhan perbelanjaan pelancongan domestik dan perbelanjaan pelancongan *inbound*.

4.5 Perbelanjaan pelancongan nasional
Terdiri daripada semua perbelanjaan pelancongan bagi pelawat residen di dalam dan di luar ekonomi rujukan (Malaysia). Ia adalah jumlah perbelanjaan pelancongan domestik dan pelancongan *outbound*.

4.6 Perbelanjaan pelancongan antarabangsa
Gabungan perbelanjaan pelancongan bagi pelawat bukan residen di dalam ekonomi rujukan (eksport perkhidmatan) dengan perbelanjaan pelancongan pelawat residen di luar ekonomi rujukan (import perkhidmatan). Ia adalah jumlah perbelanjaan pelancongan *inbound* dan perbelanjaan pelancongan *outbound*.

4.7 Jumlah perbelanjaan pelancongan

Gabungan perbelanjaan pelancongan bagi pelawat bukan residen di dalam ekonomi rujukan (Malaysia) dengan perbelanjaan pelancongan pelawat residen di dalam dan di luar ekonomi rujukan (Malaysia). Ini merupakan jumlah perbelanjaan pelancongan *inbound*, perbelanjaan pelancongan domestik dan perbelanjaan pelancongan *outbound*.

5. INDUSTRI PELANCONGAN

Industri pelancongan meliputi semua pertubuhan yang mana aktiviti utamanya adalah berkaitan dengan aktiviti bercirikan pelancongan sama ada pertubuhan tersebut menyediakan perkhidmatan secara terus kepada pelawat dan bukan pelawat. Pertubuhan dikelaskan mengikut aktiviti utama, yang mana ditentukan oleh aktiviti yang menghasilkan nilai ditambah yang paling tinggi.

6. PRODUK-PRODUK PELANCONGAN

Produk pelancongan dikelaskan kepada dua kumpulan utama iaitu produk penggunaan dan produk bukan penggunaan.

6.1 Produk Penggunaan

Produk bercirikan pelancongan boleh diklasifikasikan kepada produk perbandingan antarabangsa bercirikan pelancongan dan produk khusus bercirikan pelancongan negara.

a. Produk perbandingan antarabangsa bercirikan pelancongan

Produk perbandingan antarabangsa bercirikan pelancongan merupakan produk utama bagi perbandingan antarabangsa untuk perbelanjaan pelancongan. Sesuatu produk boleh dikelaskan sebagai produk bercirikan pelancongan sekiranya perbelanjaan pelawat terhadap sesuatu produk adalah signifikan. Contoh produk bercirikan pelancongan adalah perkhidmatan penginapan, perkhidmatan penyediaan makanan & minuman, perkhidmatan pengangkutan penumpang, perkhidmatan penyewaan kenderaan, perkhidmatan agensi pengembaraan & penempahan lain, dan perkhidmatan kebudayaan, sukan & rekreasi.

b. Produk khusus bercirikan pelancongan negara

Di Malaysia, produk khusus bercirikan pelancongan negara terbahagi kepada dua kategori iaitu barang khusus bercirikan pelancongan negara dan perkhidmatan khusus bercirikan pelancongan negara.

Barang khusus bercirikan pelancongan negara adalah merujuk kepada aktiviti membeli-belah (produk bagi permintaan pelancongan) dan juga perdagangan runcit dalam industri pelancongan.

Manakala produk yang dikenal pasti di bawah 'perkhidmatan khusus bercirikan pelancongan negara' adalah perbelanjaan lain yang menunjukkan sumbangan yang signifikan dalam perbelanjaan pelancongan, contohnya kesihatan, pendidikan, spa dan MICE.

7. AKAUN PENGELUARAN

Berdasarkan *System of National Accounts 2008*, akaun pengeluaran merekodkan aktiviti pengeluaran barangan dan perkhidmatan. Akaun pengeluaran menunjukkan output sebagai sumber dan penggunaan perantaraan sebagai penggunaan dan nilai ditambah sebagai item pengimbang.

8. NILAI DITAMBAH

Nilai ditambah merupakan 'nilai' yang ditambah oleh pengeluar ke atas bahan mentah barangan dan perkhidmatan yang dibeli semasa proses pengeluaran. Ianya adalah nilai output yang ditolak dengan nilai penggunaan perantaraan.

8.1 NDKIP

Nilai Ditambah Kasar Industri Pelancongan ialah jumlah nilai ditambah kasar bagi semua pertubuhan yang berada di dalam industri pelancongan, tanpa mengira sama ada semua output disediakan kepada pelawat dan juga pengkhususan bagi proses pengeluaran.

8.2 NDKPL

Nilai Ditambah Kasar Pelancongan Langsung adalah jumlah daripada sebahagian nilai ditambah kasar yang dijanakan oleh industri pelancongan dan industri ekonomi lain yang menyediakan perkhidmatan secara langsung kepada pelawat bagi memenuhi penggunaan pelancongan *internal*.

8.3 KDNKPL

Keluaran Dalam Negeri Kasar Pelancongan Langsung adalah jumlah daripada sebahagian nilai ditambah kasar (pada harga asas) yang dijana oleh semua industri bagi memenuhi penggunaan pelancongan *internal*. Jumlah cukai bersih ke atas produk dan import diambil kira dalam nilai perbelanjaan pada harga pembeli.

Jadual menunjukkan perbandingan agregat penawaran:

Perbandingan agregat penawaran

Agregat	Nilai Ditambah Kasar Industri Pelancongan	Nilai Ditambah Kasar Pelancongan Langsung	Keluaran Dalam Negeri Kasar Pelancongan Langsung
NDK (pada harga asas) dijana daripada penawaran kepada pelawat oleh industri pelancongan	Ya	Ya	Ya
NDK (pada harga asas) dijana daripada penawaran kepada bukan pelawat oleh industri pelancongan	Ya	Tidak	Tidak
NDK (pada harga asas) dijana daripada penawaran kepada pelawat oleh industri lain	Tidak	Ya	Ya
NDK (pada harga asas) dijana daripada penawaran kepada bukan pelawat oleh industri lain	Tidak	Tidak	Tidak
Cukai bersih ke atas produk dan import termasuk nilai penggunaan pelancongan *internal* (pada harga pembeli)	Tidak	Tidak	Ya

9. KADAR PELANCONGAN

Kadar pelancongan merupakan kadaran daripada penggunaan pelancongan *internal* oleh pelawat dibahagikan dengan penawaran domestik yang terdiri daripada output pengeluar domestik, import, cukai ditolak subsidi ke atas produk dan import serta margin perdagangan dan pengangkutan.

METODOLOGI & SUMBER DATA

1. Penyusunan akaun satelit

Penyusunan ASP adalah dihasilkan rentetan daripada pelaksanaan *System of National Accounts* di Malaysia. Terma "akaun satelit" digunakan bagi menggambarkan dengan jelas akaun yang dibangunkan. Ia merupakan "satelit" kepada set utama Akaun Negara yang mana ia memberikan maklumat tambahan di luar daripada maklumat sedia ada di dalam Akaun Negara.

Maklumat satelit memfokuskan kepada aspek ekonomi tertentu contoh pelancongan yang membolehkan pengukuran dilaksanakan. Ia juga membolehkan hubungkait yang lebih banyak kepada maklumat tambahan yang spesifik bagi pelancongan seperti guna tenaga, jumlah pelancongan luar negara dan statistik penggunaan penginapan. Pelancongan contohnya terdiri daripada industri seperti pengangkutan, penginapan, aktiviti penyediaan makanan & minuman, rekreasi, hiburan dan agensi pengembaraan.

Pembangunan akaun satelit merupakan pengukuran statistik yang sistematik yang mana ia merangkumi konsep, klasifikasi dan definisi berdasarkan piawaian antarabangsa bagi membolehkan perbandingan di antara negara dilaksanakan. Pelbagai maklumat diperoleh daripada agensi yang berbeza dikumpulkan di dalam akaun ini untuk memberikan gambaran yang lebih baik dan holistik berkenaan impak industri pelancongan di Malaysia.

2. Penyusunan ASP Malaysia

Tujuan ASP disusun adalah untuk menganalisis dengan lebih terperinci semua aspek permintaan bagi barang dan perkhidmatan yang berkaitan dengan aktiviti pelawat; bagi mendapatkan interaksi penawaran barang dan perkhidmatan pelancongan dalam ekonomi; serta aktiviti ekonomi lain di dalam atau di luar Malaysia. Penyusunan ASP telah bermula pada tahun 2003 dan Survei Pelancongan Domestik (DTS) secara rasminya dilaksanakan pada tahun 2006.

3. Indikator pelancongan Malaysia

Penyusunan ASP turut memuatkan indikator bukan monetori seperti yang disarankan dalam manual TSA: RMF 2008. Indikator tersebut terdiri daripada:

> a. Bilangan pelancong
> - mengikut negara/ negeri;
> - mod pengangkutan; dan

b. Statistik penginapan

Indikator tersebut diselaraskan dengan Jadual 10 seperti yang di dalam TSA: RMF 2008.

4. Jadual utama ASP Malaysia

Berdasarkan manual TSA: RMF 2008, ASP Malaysia mempunyai tujuh jadual utama yang akan dijelaskan seperti berikut:

Jadual 1: Perbelanjaan pelancongan *inbound* mengikut produk dan pengkelasan pelawat

Jadual 1 terdiri daripada jumlah hasil terimaan dalam Ringgit Malaysia (RM) dan peratus agihan perbelanjaan pelancongan. Data perbelanjaan pelancongan *inbound* diperolehi daripada komponen perjalanan, Perangkaan Imbangan Pembayaran dan yang mengambil kira perbelanjaan penumpang antarabangsa bagi udara, laut dan pengangkutan lain. Selain itu, statistik ini turut mengguna pakai maklumat daripada dapatan *Departing Visitor Survey* (DVS) yang dijalankan oleh Tourism Malaysia (TM).

Jadual 2: Perbelanjaan pelancongan domestik mengikut produk dan pengkelasan pelawat

Jadual 2 diperoleh daripada Survei Pelancongan Domestik (DTS) yang dijalankan oleh DOSM. Survei ini meliputi individu yang menetap di Malaysia sekurang-kurangnya satu tahun dan lebih. Selain warganegara dan residen tetap, ekspatriat dan bukan warganegara turut diambil kira. Jumlah perbelanjaan pelancongan domestik di Jadual 2 adalah berbeza dengan jumlah perbelanjaan pelancongan domestik yang diterbitkan di laporan Survei Pelancongan Domestik disebabkan oleh perbezaan konsep perbelanjaan bagi perkhidmatan penginapan dan perkhidmatan penyediaan makanan & minuman. Penyusunan ASP tidak mengambil kira perbelanjaan yang tidak dilakukan oleh pelawat seperti penginapan dan makanan & minuman yang disediakan di rumah saudara atau rakan.

Jadual 3: Perbelanjaan pelancongan *outbound* mengikut produk dan pengkelasan pelawat

Data bagi perbelanjaan pelancongan *outbound* di Jadual 3 diperoleh daripada data perangkaan imbangan pembayaran bagi komponen perbelanjaan perjalanan ke luar negara melalui udara, menziarahi tempat keagamaan dan rawatan perubatan. Perbelanjaan penumpang antarabangsa bagi udara, laut dan pengangkutan lain juga turut diambil kira seperti saranan TSA: RMF 2008.

Jadual 4: Penggunaan pelancongan *internal* mengikut produk

Data bagi Jadual 4 diperoleh daripada perbelanjaan pelancongan *inbound* dan perbelanjaan pelancongan domestik. Gabungan kedua-dua jadual ini memberikan maklumat bagi penggunaan pelancongan *internal*.

Jadual 5: Akaun pengeluaran industri pelancongan

Jadual Penawaran dan Penggunaan (SUT) merupakan sumber data utama bagi penyusunan Jadual 5. Oleh itu, data pengeluaran industri pelancongan bagi tahun 2015 diperoleh dari Jadual SUT 2015. Bagi tahun-tahun seterusnya, data adalah berdasarkan KDNK Tahunan.

Jadual 6: Jumlah penawaran dan penggunaan mengikut jenis produk

Jadual 6 dijana daripada akaun pengeluaran industri pelancongan & industri lain di Jadual 5 dan penggunaan pelancongan *internal* di Jadual 4.

Jadual 7: Guna tenaga dalam industri pelancongan

Guna tenaga dalam industri pelancongan, data disusun berdasarkan Survei Tenaga Buruh, Survei Ekonomi Tahunan, Survei Perkhidmatan Suku Tahunan dan Survei Perdagangan Borong & Runcit Bulanan yang diterbitkan oleh DOSM.

SIMBOL

-	:	negatif
%	:	peratus
&	:	dan
e	:	anggaran
p	:	permulaan
n.a	:	tidak berkenaan

1. INTRODUCTION

The compilation on Tourism Satellite Account (TSA) of Malaysia are based on Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF) 2008 and International Recommendations for Tourism Statistics (IRTS) published by the United Nations World Tourism Organization (UNWTO). The concepts and definitions of TSA are adapted and according to Malaysia's need.

This section will present the concepts and definitions practiced by Malaysia in constructing TSA tables.

2. CONCEPTS AND DEFINITIONS

2.1 Visitor

A visitor refers to a traveller taking a trip to a main destination outside his/ her usual environment, not more than 12 months other than to be employed by resident entity in the country or place visited. The following list is incorporated in IRTS as the main purpose of visit:

> *a. Business and professional;*
> *b. Holiday, leisure and recreation;*
> *c. Visiting friends and relatives;*
> *d. Education and training;*
> *e. Health and medical care;*
> *f. Religion/ pilgrimage;*
> *g. Shopping; and*
> *h. Transit.*

In the context of Malaysia, scenario 'balik kampung' by residents during festive seasons is also defined as tourism. A visitor is classified into two categories:

i. Tourist	-	*If his/ her trip includes an overnight stay*
ii. Excursionist	-	*If his/ her trip takes less than 24 hours*

2.2 Usual environment

The usual environment of an individual, a key concept in tourism is defined as the geographical area (though not necessarily a contiguous one) within which an individual conducts his/ her regular life routines.

The usual environment of an individual includes the place of usual residence of the household to which he/ she belongs, his/ her own place of work or study and any other place that he/ she visits regularly, even the place is located far away from his/ her place of usual residence or in another locality. Hence, travellers who are commuting regularly between their place of usual residence and place of work or study, or frequently visiting places within their current life routine will be not covered in TSA compilation. However, the concept may be differs among countries according to their nature.

In Malaysia, determination of usual environment seems to be significant especially for domestic tourism. Thus, as suggested by the UNWTO, Malaysia has decided the following criteria to determine a visitor:

a. *Those who take a trip from their residence for tourism purposes at least 50 kilometers to and return, outside their usual environment and spend a minimum 4 hours at the location; and*

b. *Those who take a trip for a distance less than 50 kilometers to and return, the period should be a minimum of 4 hours and more and using tourism facilities such as transport, accommodation, food & beverage and recreation.*

3. TYPES OF TOURISM

3.1 Inbound tourism
Comprises the activities of a non-resident visitor within the country of reference (Malaysia) on an inbound trip.

3.2 Domestic tourism
Comprises the activities of a resident visitor within the country of reference (Malaysia) either as part of a domestic trip or part of an outbound trip.

3.3 Outbound tourism
Comprises the activities of a resident visitor outside the country of reference (Malaysia), either as part of an outbound trip or as part of a domestic trip.

3.4 Internal tourism
Comprises domestic tourism and inbound tourism, that is the activities of resident and non-resident visitors within the country of reference (Malaysia) as part of domestic or international trips.

3.5 National tourism

Comprises domestic tourism and outbound tourism, that is the activities of resident visitors within and outside the country of reference (Malaysia) either as part of domestic or outbound trip.

3.6 International tourism

Comprises inbound tourism and outbound tourism, that is, the activities of resident visitors outside the country of reference (Malaysia) either as part of domestic or outbound trip and the activities of non-resident visitors within the country of reference (Malaysia) on inbound trip.

Types of tourism expenditure illustrated below:

Types of tourism expenditure
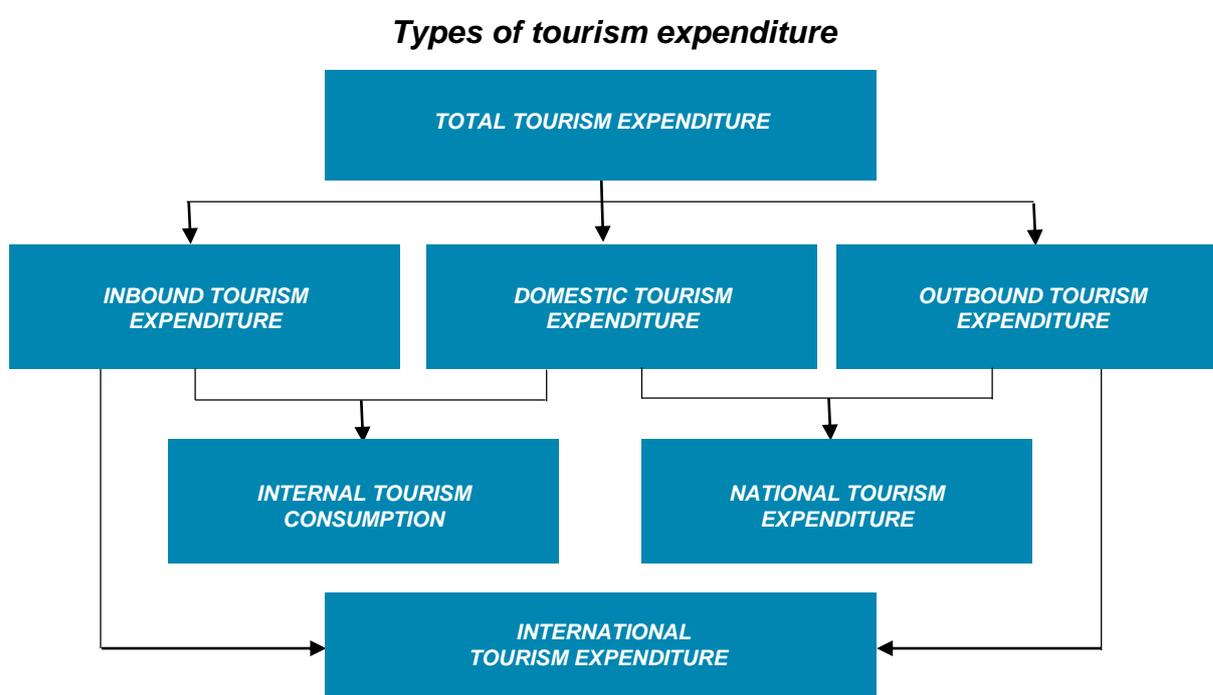
4. TOURISM EXPENDITURE

Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others. The acquisition of all goods and services during a tourism trip is in principal, part of tourism expenditure. All services delivered before the trip and clearly related to the trip (e.g. vaccination, passport services, medical control, service of travel agency, etc.) are included in tourism expenditure. All goods acquired before the trip that are intended to be used on the trip (specific clothes, medicines, etc.) or brought along as gifts, should also be included.

4.1 Inbound tourism expenditure

Tourism expenditure of a non-resident visitor within the economy of reference (Malaysia).

4.2 Domestic tourism expenditure

Tourism expenditure of a resident visitor within the economy of reference (Malaysia).

4.3 Outbound tourism expenditure

Tourism expenditure of a resident visitor outside the economy of reference (Malaysia).

4.4 Internal tourism consumption

Comprises all tourism expenditure of visitors, both resident and non-resident, within the economy of reference (Malaysia). It is the sum of domestic tourism expenditure and inbound tourism expenditure.

4.5 National tourism expenditure

Comprises all tourism expenditure of resident visitors within and outside the economy of reference (Malaysia). It is the sum of domestic tourism expenditure and outbound tourism expenditure.

4.6 International tourism expenditure

A combination of tourism expenditure of non-resident visitors within the economy of reference (export of services) with tourism expenditure of resident visitors outside this economy of reference (import of services). It is the sum of inbound tourism expenditure and outbound tourism expenditure.

4.7 Total tourism expenditure

A combination of tourism expenditure of non-resident visitors within the economy of reference (Malaysia) with tourism expenditure of resident visitors within and outside the economy of reference (Malaysia). It is the sum of inbound tourism expenditure, domestic tourism expenditure and outbound tourism expenditure.

5. TOURISM INDUSTRY

The tourism industry comprises all establishments for which the principal activity is a tourism characteristic activity whether the establishments serves directly to visitors as well as non-visitors. Establishments are classified according to their main activity, which in turn determined by the activity that generates the most value added.

6. TOURISM PRODUCTS

Tourism products are defined into two main subgroups namely consumption products and non-consumption products.

6.1 Consumption products

Tourism characteristic products can be further classified into internationally comparable tourism characteristic products and country-specific tourism characteristic products.

a. Internationally comparable tourism characteristic products

Internationally comparable tourism characteristic products represent the core products for international comparison of tourism expenditure. A product is classified as a tourism characteristic product if the visitor's expenditure on the products is significant. Examples of tourism characteristic products are accommodation services, food & beverage serving services, passenger transport services, transport equipment rental services, travel agencies & other reservation services and cultural, sports & recreational services.

b. Country-specific tourism characteristic products

In Malaysia, country-specific tourism characteristic products are divided into two categories which are country-specific tourism characteristic goods and country-specific tourism characteristic services.

Country-specific tourism characteristic goods is referring to shopping activities (tourism-related goods) and retail trade in tourism industries.

Meanwhile, products identified under 'country-specific tourism characteristic services' are other expenses that represent a significant share of tourism expenditure i.e. health, education, spa and MICE.

7. PRODUCTION ACCOUNTS

The production account records the activity of producing goods and services as defined within the System of National Accounts 2008. The production account shows output as resources and intermediate consumption as uses and the balancing item is value added.

8. VALUE ADDED

Value added is the 'value' that a producer adds to the raw material of goods and services it purchases in the process of production. It is the value of output less the value of intermediate consumption.

8.1 GVATI

Gross Value Added of Tourism Industries is the total gross value added of all establishments in the tourism industry, regardless of whether all their output is provided to visitors and the specialisation of their production process.

8.2 TDGVA

Tourism Direct Gross Value Added is the part of gross value added generated by tourism industry and other industries of the economy that directly serve visitors in response to internal tourism consumption.

8.3 TDGDP

Tourism Direct Gross Domestic Product is the sum of the part gross value added (at basic prices) generated by all industries in response to internal consumption. The amount of net taxes on products and imports are included within the value of this expenditure at purchasers' price.

Table shows the comparison of supply aggregates:

Comparison of supply aggregates

Aggregates	*Gross Value Added of Tourism Industries*	*Tourism Direct Gross Value Added*	*Tourism Direct Gross Domestic Product*
GVA (at basic prices) generated by the supply to visitors by the tourism industry	*Yes*	*Yes*	*Yes*
GVA (at basic prices) generated by the supply to non - visitors by the tourism industry	*Yes*	*No*	*No*
GVA (at basic prices) generated by the supply to visitors by other industries	*No*	*Yes*	*Yes*
GVA (at basic prices) generated by the supply to non - visitors by other industries	*No*	*No*	*No*
Net taxes on products and imports included in the value of internal tourism consumption (at purchaser's prices)	*No*	*No*	*Yes*

9. TOURISM RATIO

Tourism ratio is the proportion of the internal tourism consumption consumed by visitors over domestic supply which consists of output of domestic producers, imports, taxes less subsidies on products produced and imported as well as trade and transport margins.

METHODOLOGY & DATA SOURCES

1. Establishment of satellite account

The compilation of TSA is made possible due to the System of National Accounts is well established in Malaysia. The term "satellite account" is adopted to reflect the nature of the account that has been developed. It is a "satellite" to the core set of National Accounts that presents additional information which is outside from the available information provided in the National Accounts.

This satellite information focuses on a particular aspect of the economy i.e. tourism which allows the measurement to be implemented. It also permits further linkages to additional information specific to tourism such as employment, overseas tourist numbers and accommodation occupancy statistics. Tourism, for example consists of industries such as transportation, accommodation, food & beverage service activities, recreation, entertainment and travel agencies.

Development of satellite account is a systematic statistical measurement which applies concept, classification and definition which are based on international standard so as to enable comparison among countries. Various information available in different agencies is put together in this account to provide holistic and better picture of the impact of tourism industry in Malaysia.

2. Establishment of Malaysia's TSA

The purpose of TSA is to analyse in detail all the aspects of demand for goods and services associated with the activity of visitors; to observe the interactions with the supply of such goods and services of tourism within the economy; as well as with other economic activities within or outside Malaysia. TSA initiated in 2003 and Domestic Tourism Survey (DTS) officially conducted in 2006.

3. Malaysia tourism indicators

This TSA publication had also includes the non-monetary indicators as per TSA: RMF 2018 manual guideline. Indicators are consists of:

   a. No. of tourist arrivals
   - *by country/ state;*
   - *mode of transports; and*
   b. Accommodation statistics

These indicators conforms with Table 10 in the TSA: RMF 2008.

4. *Main tables Malaysia's TSA*

Based on the manual of TSA: RMF 2008, Malaysia's TSA comprises of seven main tables which will be described as follows:

Table 1: Inbound tourism expenditure by products and classes of visitors

Table 1 consists of total inbound tourist receipts in Ringgit Malaysia (RM) and percentage distribution breakdown of tourism expenditure. Inbound tourism expenditure data obtain from travel component of Balance of Payment. Which include the international passenger expenses for air, sea and other transportation. Besides, it also use the findings from Departing Visitor Survey (DVS) that conducted by Tourism Malaysia (TM).

Table 2: Domestic tourism expenditure by products and classes of visitors

Table 2 is derived from the Domestic Tourism Survey (DTS) which is conducted by the DOSM. This survey covers those who stay in Malaysia for at least a year and above. Beside citizen and permanent resident, expatriate and non-citizen are also inclusive. Total expenditure on domestic tourism in Table 2 is different from the total domestic tourism expenditure published in Domestic Tourism Survey report due to conceptual difference in expenditures of accommodation services and food & beverage serving services. TSA compilation does not take into account the expenditures that are not paid by visitors such as accommodation services and food & beverage consumed at relatives' and friends' house.

Table 3: Outbound tourism expenditure by products and classes of visitors

Data for outbound tourism expenditure in Table 3 extracted from balance of payments statistics from the components such as travel abroad by air, pilgrimage to the holy places and medical treatment. International passenger expenses for air, sea and other transportation are also included as recommended in TSA: RMF 2008.

Table 4: Internal tourism consumption by products

Data for Table 4 derived from inbound tourism expenditure and domestic tourism expenditure. Combination of these two tables becomes internal tourism consumption.

Table 5: Production accounts of tourism industry

Supply and Use Table (SUT) is the main source of data for the compilation of Table 5. Thus, data on tourism industry production for 2015 are derived from SUT 2015. For the subsequent years, data is based on published Annual GDP.

Table 6: Total supply and tourism consumption by type of products

Table 6 is derived from production accounts of tourism industry & other industries in Table 5 and internal tourism consumption in Table 4.

Table 7: Employment in the tourism industry

Employment in the tourism industry, data are compiled based from the Labour Force Survey, Annual Economic Survey, Quarterly Services Survey & Monthly Distributive Trade Survey produced by DOSM.

SYMBOLS

-	: *negative*
%	: *per cent*
&	: *and*
e	: *estimate*
p	: *preliminary*
n.a	: *not available*

KOD DAN KLASIFIKASI
CODE AND CLASSIFICATION

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Klasifikasi industri pelancongan adalah berdasarkan kepada Piawaian Klasifikasi Industri Malaysia 2008 Ver. 1.0 yang telah diselaraskan dengan *International Standard Industrial Classification of All Economic Activities (ISIC) Rev. 4.* Klasifikasi bagi produk pelancongan adalah berdasarkan *Malaysia Classification of Products by Activity (MCPA) 2009* yang juga telah diselaraskan dengan *Central Products Classifications (CPC) Ver. 2.*

INDUSTRI PELANCONGAN

Keterangan bagi ISIC Rev. 4			ISIC Rev. 4	MSIC 2008
1. Perkhidmatan penginapan				
1.1	Aktiviti penginapan jangka pendek		5510	55101, 55102, 55103, 55104, 55105, 55106, 55107, 55108, 55109
1.2	Tapak perkhemahan, taman kenderaan rekreasi dan taman treler		5520	55200
1.3	Penginapan lain		5590	55900
1.4	Aktiviti hartanah bagi harta milikan sendiri atau pajakan		6810	68101, 68102, 68103
1.5	Aktiviti hartanah berdasarkan bayaran atau kontrak		6820	68201
2. Perkhidmatan penyediaan makanan & minuman				
2.1	Restoran dan aktiviti perkhidmatan makanan bergerak		5610	56101, 56103, 56104, 56105, 56106, 56107
2.2	Aktiviti perkhidmatan makanan lain		5629	56290
2.3	Aktiviti perkhidmatan minuman		5630	56301, 56302, 56303, 56304, 56309
3. Perkhidmatan pengangkutan penumpang				
3.1	Perkhidmatan pengangkutan penumpang kereta api			
	3.1.1	Pengangkutan penumpang rel antara bandar	4911	49110
	3.1.2	Pengangkutan darat penumpang bandar dan pinggir bandar	4921	49212
3.2	Perkhidmatan pengangkutan penumpang darat			
	3.2.1	Pengangkutan darat penumpang bandar dan pinggir bandar	4921	49211
	3.2.2	Pengangkutan darat penumpang lain	4922	49221, 49224, 49225, 49229
3.3	Perkhidmatan pengangkutan penumpang laut			
	3.3.1	Pengangkutan penumpang laut dan pesisir pantai	5011	50111, 50112, 50113
	3.3.2	Pengangkutan penumpang air pedalaman	5021	50211, 50212
3.4	Perkhidmatan pengangkutan penumpang udara			
	3.4.1	Pengangkutan penumpang udara	5110	51101, 51102, 51103

Keterangan bagi ISIC Rev. 4			ISIC Rev. 4	MSIC 2008
3.5	Perkhidmatan penyewaan kelengkapan pengangkutan			
	3.5.1	Penyewaan dan pemajakan kenderaan bermotor	7710	77101, 77102
	3.5.2	Penyewaan dan pajakan mesin, kelengkapan dan barang ketara lain	7730	77302, 77303, 77304
4. Perkhidmatan agensi pengembaraan dan penempahan lain				
4.1	Aktiviti agensi pengembaraan		7911	79110
4.2	Aktiviti operator pelancongan		7912	79120
4.3	Khidmat penempahan dan aktiviti berkaitan		7990	79900
5. Perkhidmatan kebudayaan				
5.1	Aktiviti penayangan wayang gambar		5914	59140
5.2	Aktiviti kesenian, hiburan dan kreatif		9000	90001, 90002, 90003, 90007, 90009
5.3	Aktiviti muzium dan operasi tapak dan bangunan bersejarah		9102	91021, 91022
5.4	Aktiviti taman botani dan zoologi dan rizab semula jadi		9103	91031, 91032
6. Perkhidmatan sukan dan rekreasi				
6.1	Penyewaan dan pemajakan barang rekreasi dan sukan		7721	77211, 77212, 77213, 77219
6.2	Aktiviti perjudian dan pertaruhan		9200	92000
6.3	Operasi bagi kemudahan acara sukan dalam dan luar bangunan		9311	93111, 93112, 93113, 93114, 93115, 93116, 93117, 93118, 93119
6.4	Aktiviti kelab sukan		9312	93120
6.5	Aktiviti sukan lain		9319	93191, 93192, 93193, 93199
6.6	Aktiviti taman hiburan dan taman tema		9321	93210
6.7	Aktiviti hiburan dan rekreasi lain t.t.t.l.		9329	93291, 93292, 93293, 93294, 93295, 93296, 93297, 93299
7. Jualan runcit bahan api kenderaan				
7.1	Jualan runcit di kedai khusus yang menjual bahan api kenderaan		4730	47300
8. Perdagangan runcit				
8.1	Perdagangan jual runcit, kecuali kenderaan bermotor dan motosikal		47	Semua termasuk kecuali 47300, 4791 dan 47991
9. Perkhidmatan khusus bercirikan pelancongan negara				
9.1	Pemberian kredit lain		6492	64922
9.2	Insurans am		6512	65121, 65122
9.3	Pembrokeran sekuriti dan kontrak komoditi		6612	66124 , 66125

	Keterangan bagi ISIC Rev. 4	ISIC Rev. 4	MSIC 2008
9.4	Pendidikan menengah am	8521	85212
9.5	Pendidikan menengah teknik dan vokasional	8522	85222
9.6	Pendidikan tinggi	8530	85302
9.7	Pendidikan sukan dan rekreasi	8541	85411, 85412, 85419
9.8	Pendidikan kebudayaan	8542	85421, 85429
9.9	Pendidikan lain yang t.t.t.l.	8549	85499
9.10	Perkhidmatan sokongan pendidikan	8550	85500
9.11	Aktiviti hospital dan rumah bersalin	8610	86101
9.12	Aktiviti amalan perubatan dan pergigian	8620	86201, 86202, 86203
9.13	Aktiviti kesihatan kemanusiaan lain	8690	86902, 86903, 86904, 86905, 86909
9.14	Pengurusan konvensyen dan pameran perdagangan	8230	82301, 82302
9.15	Aktiviti perkhidmatan lain t.t.t.l	9609	96091
9.16	Aktiviti fotografi	7420	74200
9.17	Penyewaan dan pemajakan barang persendirian dan isi rumah lain	7729	77291, 77293, 77296, 77299
9.18	Aktiviti fotokopi, penyediaan dokumen dan lain-lain aktiviti sokongan pejabat khusus	8219	82199

PRODUK PELANCONGAN

Keterangan bagi CPC Ver. 2		CPC Ver. 2	MCPA 2009 (5 Digit)
1. Perkhidmatan penginapan			
1.1	Aktiviti penginapan jangka masa pendek	63111, 63112, 63113, 63114, 63120, 63130, 63210, 63290	55101, 55102, 55103, 55104, 55105, 55106, 55107, 55108, 55109, 55200, 55900
1.2	Aktiviti hartanah	72111, 72122, 72123, 72221, 72223, 72211, 72213, 72130	68101, 68201,68102, 68103
2. Perkhidmatan penyediaan makanan & minuman			
2.1	Restoran dan aktiviti perkhidmatan makanan bergerak	63310, 63320, 63399, 63393	56101, 56102,56103, 56104, 56105,56106, 56107, 56290
2.2	Aktiviti perkhidmatan minuman	63400	56301, 56302, 56303, 56304, 56309
3. Perkhidmatan pengangkutan			
3.1	Pengangkutan penumpang keretapi	64131, 64210	49110
3.2	Pengangkutan penumpang darat	64114, 64115, 64116, 64117, 64118, 64119, 64132, 64221, 64222, 64223	49221, 49211, 49212, 49224, 49225, 49229
3.3	Pengangkutan penumpang air	64121, 64122, 64129, 64133, 64231, 64232, 64239	50111, 50112, 50113, 50211, 50212
3.4	Pengangkutan penumpang udara	64134, 64241, 64242, 64243, 64250, 64244	51101, 51102, 51103
3.5	Penyewaan dan pemajakan kenderaan darat, air dan udara serta peralatan rekreasi tanpa operator	73111, 73112, 73240, 73113, 73115	77101,77102, 77211, 77212, 77213,77219, 77302, 77303, 77304
4. Perkhidmatan agensi pengembaraan dan tempahan lain			
4.1	Aktiviti agensi pengembaraan	85511, 85512, 85513, 85514, 85519, 85521, 85523, 85524	79110
4.2	Aktiviti operator pelancongan	85540	79120
4.3	Khidmat penempahan dan aktiviti berkaitan dan peralatan untuk rekreasi	85539, 85550, 85562	79900

Keterangan bagi CPC Ver. 2		CPC Ver. 2	MCPA 2009 (5 Digit)
5. Perkhidmatan kebudayaan			
5.1	Perkhidmatan penerbit teater, penyanyi kumpulan pancaragam dan hiburan orkestra	96220, 96310	90001
5.2	Operasi dewan konsert dan teater serta kemudahan kesenian lain		
5.3	Operasi semua jenis muzium	96411	91021
5.4	Operasi tapak dan bangunan bersejarah	96412	91022
5.5	Operasi taman botani dan zoologi	96421	91031
5.6	Operasi rizab semula jadi, termasuk pemeliharaan hidupan liar	96422	91032
6. Perkhidmatan sukan dan rekreasi			
6.1	Aktiviti perjudian dan pertaruhan	96929	92000
6.2	Bola sepak, hoki, kriket, besbol, badminton, futsal, paintball	96520	93111
6.3	Litar perlumbaan untuk kenderaan bermotor		93112
6.4	Kelab ekuestrian		93113
6.5	Stadium dan kolam renang, arena luncur ais		93114
6.6	Padang stadium dan balapan		93115
6.7	Padang golf		93116
6.8	Pusat boling		93117
6.9	Pusat kesihatan		93118
6.10	Penganjuran dan operasi acara sukan dalam dan luar bangunan untuk profesional atau amatur oleh organisasi dengan kemudahan sukan sendiri		93119
6.11	Aktiviti penganjur atau promosi acara sukan, dengan atau tanpa kemudahan	96590	93191
6.12	Aktiviti taman hiburan dan taman tema	96910	93210
6.13	Sewaan peralatan riadah sebagai kelengkapan untuk kemudahan rekreasi	96930	93293
6.14	Aktiviti taman rekreasi dan pantai	96990	93291
6.15	Operasi pesta dan pertunjukan rekreasi semula jadi		93294
6.16	Operasi kelab malam dan lantai tari		93295

Keterangan bagi CPC Ver. 2		CPC Ver. 2	MCPA 2009 (5 Digit)
7. Jualan runcit bahan api kenderaan			
7.1	Jualan runcit bahan api kenderaan di kedai khusus	62291	47300
8. Barang khusus bercirikan pelancongan negara (membeli-belah)			
8.1	Perdagangan jual runcit kecuali kenderaan bermotor dan motorsikal	621, 622, 624	47
9. Perkhidmatan khusus bercirikan pelancongan negara			
9.1	Kewangan	71134, 71139, 71592	64922, 66124, 66125
9.2	Insurans/ takaful	71322, 71331, 71332, 71333, 71334, 71335, 71337, 71339	65121, 65122
9.3	Pendidikan	92310, 92320, 92330, 92410, 92420, 92510, 92520, 92911, 92912, 92919, 92920	85212, 85222, 85302, 85411, 85412, 85419, 85421, 85429, 85499, 85500
9.4	Kesihatan	93111, 93112, 93113, 93119, 93121, 93122, 93123, 93193, 93195, 93197, 93199	86101, 86201, 86202, 86203, 86902, 86903, 86904, 86905, 86909
9.5	Mesyuarat, insentif, konvensyen, pameran (MICE)	85531, 85961, 85962	82301, 82302
9.6	Aktiviti sauna, mandian stim, salon mengurut	97230	96091
9.7	Lain-lain	38941, 38942, 73250, 73260, 73290, 83811, 83812, 83813, 83814, 83815, 83819, 83820, 85954	74200, 77291, 77293, 77296, 77299, 82199

The classification of tourism industry based on Malaysia Standard Industrial Classification (MSIC) 2008 Ver 1.0 which is in concordance with International Standard Industrial Classification of All Economic Activities (ISIC) Rev. 4. The classification of tourism products based on Malaysia Classification of Products by Activity (MCPA) 2009 which conforms with Central Product Classification (CPC) Ver. 2.

TOURISM INDUSTRY

	Description of ISIC Rev.4	*ISIC Rev. 4*	*MSIC 2008*
1. Accommodation services			
1.1	Short term accommodation activities	*5510*	*55101, 55102, 55103, 55104, 55105, 55106, 55107, 55108, 55109*
1.2	Camping grounds, recreational vehicle parks and trailer parks	*5520*	*55200*
1.3	Other accommodation	*5590*	*55900*
1.4	Real estate activities with own or leased property	*6810*	*68101, 68102, 68103*
1.5	Real estate activities on a fee or contract basis	*6820*	*68201*
2. Food & beverage serving services			
2.1	Restaurants and mobile food service activities	*5610*	*56101, 56103, 56104, 56105, 56106, 56107*
2.2	Other food service activities	*5629*	*56290*
2.3	Beverage serving activities	*5630*	*56301, 56302, 56303, 56304, 56309*
3. Passenger transport services			
3.1	Railway passenger transport			
	3.1.1 Passenger rail transport, interurban	*4911*	*49110*
	3.1.2 Urban and suburban passenger land transport	*4921*	*49212*
3.2	Road passenger transport			
	3.2.1 Urban and suburban passenger land transport	*4921*	*49211*
	3.2.2 Other passenger land transport	*4922*	*49221, 49224, 49225, 49229*
3.3	Water passenger transport			
	3.3.1 Sea and coastal passenger water transport	*5011*	*50111, 50112, 50113*
	3.3.2 Inland passenger water transport	*5021*	*50211, 50212*
3.4	Air passenger transport			
	3.4.1 Passenger air transport	*5110*	*51101, 51102, 51103*

		Description of ISIC Rev.4	ISIC Rev. 4	MSIC 2008
3.5		*Transport equipment rental*		
	3.5.1	*Renting and leasing of motor vehicles*	*7710*	*77101, 77102*
	3.5.2	*Renting and leasing of other machinery, equipment and tangible goods*	*7730*	*77302, 77303, 77304*
4. Travel agencies and other reservation services				
4.1		*Tourism agencies activities*	*7911*	*79110*
4.2		*Tour operator activities*	*7912*	*79120*
4.3		*Other reservation service and related activities*	*7990*	*79900*
5. Cultural services				
5.1		*Motion picture projection activities*	*5914*	*59140*
5.2		*Creative, arts and entertainment activities*	*9000*	*90001, 90002, 90003, 90007, 90009*
5.3		*Museums activities and operation of historical sites and buildings*	*9102*	*91021, 91022*
5.4		*Botanical and zoological gardens and nature reserves activities*	*9103*	*91031, 91032*
6. Sports and recreational services				
6.1		*Renting and leasing of recreational and sports goods*	*7721*	*77211, 77212, 77213, 77219*
6.2		*Gambling and betting activities*	*9200*	*92000*
6.3		*Operation of sports facilities for indoor or outdoor sports events*	*9311*	*93111, 93112, 93113, 93114, 93115, 93116, 93117, 93118, 93119*
6.4		*Activities of sports clubs*	*9312*	*93120*
6.5		*Other sports activities*	*9319*	*93191, 93192, 93193, 93199*
6.6		*Activities of amusement parks and theme parks*	*9321*	*93210*
6.7		*Other amusement and recreation activities n.e.c.*	*9329*	*93291, 93292, 93293, 93294, 93295, 93296, 93297, 93299*
7. Retail sale of automotive fuel				
7.1		*Retail sale of automotive fuel in specialized*	*4730*	*47300*
8. Retail trade				
8.1		*Retail trade, except of motor vehicles and motorcycles*	*47*	*All except for 47300 4791 and 47991*
9. Country-specific tourism characteristic services				
9.1		*Other credit granting*	*6492*	*64922*
9.2		*General insurance*	*6512*	*65121, 65122*
9.3		*Security and commodity contracts brokerage*	*6612*	*66124, 66125*

	Description of ISIC Rev.4	*ISIC Rev. 4*	*MSIC 2008*
9.4	*General secondary education*	*8521*	*85212*
9.5	*Technical and vocational secondary education*	*8522*	*85222*
9.6	*Higher education*	*8530*	*85302*
9.7	*Sports and recreation education*	*8541*	*85411, 85412, 85419*
9.8	*Cultural education*	*8542*	*85421, 85429*
9.9	*Other education n.e.c.*	*8549*	*85499*
9.10	*Educational support services*	*8550*	*85500*
9.11	*Hospital and maternity home activities*	*8610*	*86101*
9.12	*Medical and dental practice activities*	*8620*	*86201, 86202, 86203*
9.13	*Other human health activities*	*8690*	*86902, 86903, 86904, 86905, 86909*
9.14	*Organization of conventions and trade shows*	*8230*	*82301, 82302*
9.15	*Other service activities n.e.c.*	*9609*	*96091*
9.16	*Photographic activities*	*7420*	*74200*
9.17	*Renting and leasing of other personal and household goods*	*7729*	*77291, 77293, 77296, 77299*
9.18	*Photocopying, document preparation and other specialized office support activities*	*8219*	*82199*

TOURISM PRODUCTS

	Description CPC Ver. 2	CPC Ver. 2	MCPA 2009 (5 Digits)
1. Accommodation services			
1.1	Short term accommodation activities	63111, 63112, 63113, 63114, 63120, 63130, 63210, 63290	55101, 55102, 55103, 55104, 55105, 55106, 55107, 55108, 55109, 55200, 55900
1.2	Real-estate activities	72111, 72122, 72123, 72211, 72213, 72221, 72223, 72130	68101, 68201, 68102, 68103
2. Food & beverage serving services			
2.1	Restaurant and mobile food service activities	63310, 63320, 63399, 63393	56101, 56103, 56104, 56105,56106, 56107 , 56290
2.2	Beverage service activities	63400	56301, 56302, 56303, 56304, 56309
3. Transportation services			
3.1	Railway passenger transport services	64131, 64210	49110
3.2	Road passenger transport services	64114, 64115, 64116, 64117, 64118, 64119, 64132, 64221, 64222, 64223	49221, 49211, 49212, 49224, 49225, 49229
3.3	Water passenger transport services	64133, 64121, 64122, 64129, 64231, 64232, 64239	50111, 50112, 50113, 50211, 50212
3.4	Air passenger transport services	64134, 64241, 64242, 64243, 64244, 64250	51101, 51102, 51103
3.5	Transport equipment rental services for land, water and air recreational equipment without operator	73111, 73112, 73240, 73113, 73115	77101, 77102, 77211, 77212, 77213, 77219, 77302, 77303, 77304
4. Travel agencies and other reservation services			
4.1	Travel agency activities	85511, 85512, 85513, 85514, 85519, 85521, 85523, 85524	79110
4.2	Tour operator activities	85540	79120
4.3	Other reservation service and related activities and recreational equipment	85539, 85550, 85562	79900

	Description CPC Ver. 2	CPC Ver. 2	MCPA 2009 (5 Digits)
5. Cultural services			
5.1	Theatrical producer, singer group band and orchestra entertainment services	96220, 96310	90001
5.2	Operation of concert and theatre halls and other arts facilities		
5.3	Operation of museums of all kinds	96411	91021
5.4	Operation of historical sites and buildings	96412	91022
5.5	Operation of botanical and zoological gardens	96421	91031
5.6	Operation of nature reserves, including wildlife preservation	96422	91032
6. Sports and recreational services			
6.1	Gambling and betting activities	96929	92000
6.2	Football, hockey, cricket, baseball, badminton, futsal, paintball	96520	93111
6.3	Racetracks for auto		93112
6.4	Equestrian clubs		93113
6.5	Swimming pools and stadiums, ice-skating arenas		93114
6.6	Track and field stadium		93115
6.7	Golf courses		93116
6.8	Bowling centre		93117
6.9	Fitness centres		93118
6.10	Organization and operation of outdoor or indoor sports events for professionals or amateurs by organizations with own facilities		93119
6.11	Activities of producers or promoters of sports events, with or without facilities	96590	93191
6.12	Activities of amusement parks and theme parks	96910	93210
6.13	Renting of leisure and pleasure equipment as an integral part of recreational facilities	96930	93293
6.14	Activities of recreation parks and beaches	96990	93291
6.15	Operation of fairs and shows of a recreational nature		93294
6.16	Operation of discotheques and dance floors		93295
7. Retail sale of automotive fuel			
7.1	Retail sale of automotive fuel in specialized store	62291	47300
8. Country-specific tourism characteristic goods (shopping)			
8.1	Retail trade, except of motor vehicles and motorcycles	621, 622, 624	47
9. Country-specific tourism characteristic services			
9.1	Finance	71134, 71139, 71592	64922, 66124, 66125

	Description CPC Ver. 2	*CPC Ver. 2*	*MCPA 2009 (5 Digits)*
9.2	*Insurance/ takaful*	*71322, 71331, 71332, 71333, 71334, 71335, 71337, 71339*	*65121, 65122*
9.3	*Education*	*92310, 92320, 92330, 92410, 92420, 92510, 92520, 92911, 92912, 92919, 92920*	*85212, 85222, 85302, 85411, 85412, 85419, 85421, 85429, 85499, 85500*
9.4	*Health*	*93111, 93112, 93113, 93119, 93121, 93122, 93123, 93193, 93195, 93197, 93199*	*86101, 86201,86202, 86203, 86902, 86903, 86904, 86905, 86909*
9.5	*Meeting, incentive, convention, exhibition (MICE)*	*85961, 85962, 85531*	*82301, 82302*
9.6	*Activities of sauna, steam baths, massage salons*	*97230*	*96091*
9.7	*Others*	*38941, 38942, 73250, 73260, 73290, 83811, 83812, 83813, 83814, 83815, 83819, 83820, 85954*	*74200, 77291, 77293, 77296, 77299, 82199*

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