



JABATAN PERDANA MENTERI
JABATAN PERANGKAAN MALAYSIA

AKAUN SATELIT PELANCONGAN TOURISM SATELLITE ACCOUNT 2021

Pemakluman

Jabatan Perangkaan Malaysia (DOSM) sedang menjalankan Survei Pendapatan, Perbelanjaan Isi Rumah dan Kemudahan Asas (HIES/BA) 2022 bermula dari 1 Januari 2022 sehingga 31 Disember 2022 dan Survei Ekonomi Tahunan (AES) 2022 bermula dari 15 April 2022 sehingga 30 September 2022. DOSM amat menghargai kerjasama daripada responden yang terpilih untuk memberikan maklumat kepada DOSM serta menjayakan survei ini. Sila layari www.dosm.gov.my untuk maklumat lanjut.

Penerbitan statistik ekonomi dan sosial iaitu PocketStats yang mengandungi statistik suku tahunan dan tahunan boleh diperoleh dari portal DOSM atau melalui pautan https://bit.ly/PocketStats_2022.

Dimaklumkan bahawa Kerajaan Malaysia telah mengisytiharkan Hari Statistik Negara (MyStats Day) pada 20 Oktober setiap tahun. Tema sambutan MyStats Day adalah "Connecting the World with Data We Can Trust".

Announcement

The Department of Statistics Malaysia (DOSM) is conducting the Household Income, Expenditure and Basic Amenities Survey (HIES/BA) 2022 from 1st January 2022 until 31st December 2022 and the Annual Economic Survey (AES) 2022 from 15th April 2022 until 30th September 2022. DOSM greatly appreciates the cooperation given by selected respondents by sharing their information with DOSM and making the survey a success. Please visit www.dosm.gov.my for more information.

Economic and social statistics publication namely PocketStats which contain quarterly and annual statistics can be obtained from the DOSM portal or via the link https://bit.ly/PocketStats_2022.

Please be informed that the Government of Malaysia has declared National Statistics Day (MyStats Day) on October 20 each year. MyStats Day theme is "Connecting the World with Data We Can Trust".

JABATAN PERANGKAAN MALAYSIA
DEPARTMENT OF STATISTICS MALAYSIA

Diterbitkan dan dicetak oleh / *Published and printed by:*

Jabatan Perangkaan Malaysia

Department of Statistics, Malaysia

Blok C6, Kompleks C,

Pusat Pentadbiran Kerajaan Persekutuan

62514 Putrajaya,

MALAYSIA

Tel.	: 03-8885 7000
Faks	: 03-8888 9248
Portal	: https://www.dosm.gov.my
Facebook / Twitter / Instagram/ YouTube	: StatsMalaysia
Emel / Email	: info@dosm.gov.my (pertanyaan umum / <i>general enquiries</i>) data@dosm.gov.my (pertanyaan & permintaan data / <i>data request & enquiries</i>)

Harga / Price : RM25.00

Diterbitkan pada September 2022 / *Published on September 2022*

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Tiada bahagian daripada terbitan ini boleh diterbitkan semula, disimpan untuk pengeluaran atau ditukar dalam apa-apa bentuk atau alat apa jua pun kecuali setelah mendapat kebenaran daripada Jabatan Perangkaan Malaysia.

Pengguna yang mengeluarkan sebarang maklumat dari terbitan ini sama ada yang asal atau diolah semula hendaklah meletakkan kenyataan berikut:

“Sumber : Jabatan Perangkaan Malaysia.”

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ISSN 2232 - 0237

Akaun Satelit Pelancongan adalah satu kerangka statistik untuk mengukur perkembangan industri pelancongan dan sumbangannya kepada Keluaran Dalam Negeri Kasar. Penerbitan ini membentangkan data perbelanjaan pelancongan bagi *inbound*, domestik, *outbound* dan penggunaan *internal* yang merangkumi jumlah penawaran dan penggunaan serta guna tenaga dalam industri pelancongan. 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. Bahagian kedua menyediakan jadual statistik terperinci. 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.

Jabatan merakamkan setinggi-tinggi penghargaan atas kerjasama dan sumbangan yang diberikan oleh semua pihak dalam menjayakan penerbitan ini. Semua maklum balas dan cadangan untuk penambahbaikan penerbitan ini pada masa akan datang amatlah dihargai.

DATO' SRI DR. MOHD UZIR MAHIDIN
Ketua Perangkawan Malaysia

September 2022

Tourism Satellite Account is a statistical framework to gauge the development of tourism industry and its contribution to the Gross Domestic Product. This publication presents data on tourism expenditure for inbound, domestic, outbound and internal consumption which includes total of supply and consumption as well as employment in the tourism industries. The compilation of this statistics is in accordance with the framework of Tourism Satellite Account: Recommended Methodological Framework 2008 and System of National Accounts 2008. This 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. The second part provides the detail statistical tables. 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.

The Department acknowledges all the parties concerned for their cooperation in realising this publication. All feedback and suggestions towards improving future publication are highly appreciated.

DATO' SRI DR. MOHD UZIR MAHIDIN
Chief Statistician Malaysia

September 2022

ASP	: Akaun Satelit Pelancongan
B	: Bilion / <i>Billion</i>
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 / <i>Meeting, incentive, convention, exhibition</i>
RM	: Ringgit Malaysia

CPC	: <i>Central Products Classifications</i>
DOSM	: <i>Department of Statistics, Malaysia</i>
DTS	: <i>Domestic Tourism Survey</i>
GDP	: <i>Gross Domestic Product</i>
GVA	: <i>Gross Value Added</i>
GVATI	: <i>Gross Value Added of Tourism Industries</i>
IRTS	: <i>International Recommendations for Tourism Statistics</i>
ISIC	: <i>International Standard Industrial Classification of All Economic Activities</i>
MCPA	: <i>Malaysia Classification of Products by Activity</i>
MSIC	: <i>Malaysia Standard Industrial Classification</i>
No.	: <i>Number</i>
SNA	: <i>System of National Accounts</i>
SUT	: <i>Supply and Use Table</i>
TDGDP	: <i>Tourism Direct Gross Domestic Product</i>
TDGVA	: <i>Tourism Direct Gross Value Added</i>
TSA	: <i>Tourism Satellite Account</i>
TSA: RMF	: <i>Tourism Satellite Account: Recommended Methodological Framework</i>
UNWTO	: <i>United Nations World Tourism Organization</i>

SIMBOL / SYMBOLS

-	: negatif / <i>negative</i>
..	: tidak berkenaan / <i>not applicable</i>
%	: peratus / <i>per cent</i>
&	: dan / <i>and</i>
e	: anggaran / <i>estimate</i>
p	: permulaan / <i>preliminary</i>

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.

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INDIKATOR PELANCONGAN *INBOUND* / *INBOUND TOURISM INDICATORS*

Tahun / Year	2015	2016	2017	2018	2019	2020	2021
A. Ketibaan pelancong / Tourist arrivals							
A1. Ketibaan pelancong ke Malaysia dari negara terpilih <i>Tourist arrivals to Malaysia from selected countries</i>	25,721,251	26,757,392	25,948,459	25,832,354	26,100,784	4,332,722	134,728
i. Benua Asia / Asia Continent							
Singapore	12,930,754	13,272,961	12,441,713	10,615,986	10,163,882	1,545,255	16,308
Indonesia	2,788,033	3,049,964	2,796,570	3,277,689	3,623,277	711,723	11,025
Thailand	1,343,569	1,780,800	1,836,522	1,914,692	1,884,306	394,413	59,607
Brunei Darussalam	1,133,555	1,391,016	1,660,506	1,382,031	1,216,123	136,020	773
China	1,677,163	2,124,942	2,281,666	2,944,133	3,114,257	405,149	7,701
India	722,141	638,578	552,739	600,311	735,309	155,883	3,916
Japan	483,569	413,768	392,777	394,540	424,694	74,383	3,114
Philippines	554,917	417,446	370,559	396,062	421,908	66,051	2,317
Saudi Arabia	99,754	123,878	100,549	112,263	121,444	23,390	687
ii. Benua Amerika Utara / North America Continent							
United States	237,768	217,075	198,203	253,384	269,928	48,810	2,030
Canada	79,557	72,337	67,056	84,705	87,568	16,631	471
iii. Benua Australia / Australia Continent							
Australia	486,948	377,727	351,232	351,500	368,271	72,680	1,321
New Zealand	60,846	53,352	55,923	50,698	50,140	8,794	196
iv. Benua Eropah / Europe Continent							
United Kingdom	401,019	400,269	358,818	361,335	346,485	63,868	2,676
Germany	144,910	130,276	109,816	128,895	130,221	27,458	824
Netherlands	84,584	72,200	75,885	81,651	82,110	14,486	466
v. Negara-negara lain / Other countries	2,492,164	2,220,803	2,297,925	2,882,479	3,060,861	567,728	21,296
A2. Taburan peratus mod pengangkutan (%) / Percentage distribution mode of transport (%)							
Udara / Air	24.1	27.1	25.5	34.7	36.8	38.3	51.5
Darat / Land	73.0	69.2	69.2	59.5	56.8	53.1	47.4
Laut / Sea	2.4	3.4	4.1	4.5	4.9	7.3	1.1
Rel / Rail	0.5	0.3	1.3	1.3	1.5	1.3	0
B. Penginapan / Accommodation							
Bilangan hotel / No. of hotels	4,799	4,961	4,512	4,750	5,382	5,339	5,170
Bilangan bilik / No. of rooms	111,223,165	117,519,780	106,686,945	112,495,555	124,299,655	121,478,205	120,794,195
Bilangan tetamu / No. of guests	71,512,839	72,346,128	77,275,832	82,448,869	79,929,203	35,405,021	20,060,819
Domestik / Domestic	45,941,761	46,437,227	49,245,683	52,448,312	51,093,010	30,703,994	19,872,079
Antarabangsa / International	25,571,078	25,908,901	28,030,149	30,000,557	28,836,193	4,701,027	188,740
Purata bilangan hari menginap <i>Average length of stay</i>	5.5	5.9	5.7	6.5	7.4	4.1*	n.a
Purata kadar penginapan (%) <i>Average occupancy rate (%)</i>	61.9	60.9	60.6	60.8	58.8	30.9	28.2

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

Sumber : Tourism Malaysia
Source : Tourism Malaysia

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

INDIKATOR PELANCONGAN DOMESTIK / DOMESTIC TOURISM INDICATORS

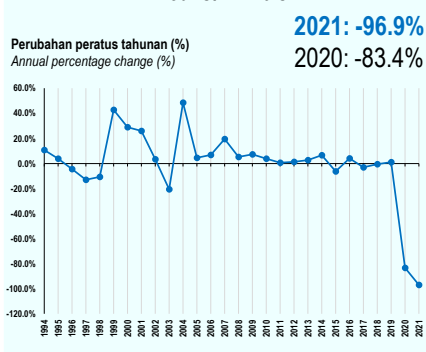
Tahun / Year	2015	2016	2017	2018	2019	2020	2021
A. Pelawat domestik / Domestic visitors							
A1. Bilangan pelawat domestik mengikut negeri dikunjungi ('000) <i>Number of domestic visitors by state visited ('000)</i>	176,937	189,253	205,408	221,272	239,121	131,660	65,976
Johor	11,589	12,207	13,141	13,487	14,274	7,243	3,658
Kedah	12,425	13,188	13,305	14,480	14,831	10,831	4,023
Kelantan	9,070	8,646	9,624	9,846	10,986	6,058	1,921
Melaka	11,552	12,268	12,625	13,123	13,979	7,275	3,878
Negeri Sembilan	9,984	10,130	10,822	12,802	13,303	7,918	5,485
Pahang	14,398	14,168	16,491	18,111	18,498	9,905	3,405
Pulau Pinang	9,341	12,565	12,643	14,450	15,411	8,929	5,061
Perak	15,966	16,783	20,110	17,553	21,070	13,173	4,489
Perlis	1,410	1,410	1,414	2,156	2,088	1,193	407
Selangor	22,063	24,124	25,491	30,179	33,589	19,715	10,212
Sabah	15,722	16,518	17,792	20,360	22,035	10,337	3,815
Terengganu	11,483	12,010	12,979	13,742	14,158	7,420	3,719
Sarawak	15,355	16,282	17,670	19,380	19,793	9,393	6,511
W.P. Kuala Lumpur	15,080	16,784	19,049	19,165	22,633	12,435	9,116
W.P. Labuan	310	354	381	545	524	107	54
W.P. Putrajaya	1,188	1,816	1,872	1,892	1,949	451	223
Bilangan pelawat ('000) / No. of visitors ('000)	176,937	189,253	205,408	221,272	239,121	131,660	65,976
Pelancong / Tourists	62,730	66,022	70,523	78,239	84,716	46,259	14,883
Pelawat harian / Excursionists	114,207	123,231	134,885	143,033	154,405	85,401	51,093
Bilangan perjalanan pelancongan <i>Number of tourism trips</i>	235,191	253,878	276,147	302,415	332,378	146,990	72,399
Perjalanan harian / Same day trips	154,628	169,166	184,648	200,868	218,705	98,704	56,857
Perjalanan bermalam / Overnight trips	80,563	84,712	91,500	101,547	113,673	48,286	15,542
Purata bilangan hari menginap <i>Average length of stay</i>	2.3	2.3	2.4	2.4	2.5	1.9	2.2
A2. Taburan peratus mod pengangkutan (%) / Percentage distribution mode of transport (%)							
Udara / Air	1.6	2.4	1.3	1.2	0.9	1.0	1.1
Air / Water	1.9	1.4	1.2	0.6	0.6	0.4	0.3
Darat / Land	96.5	96.2	97.6	98.2	98.5	98.6	98.6
Kenderaan persendirian / Private vehicles	88.0	88.6	90.7	95.0	94.5	95.2	97.2
Bas / Bus	6.6	5.6	4.9	2.7	2.1	2.0	1.3
Teksi / Taxi	3.9	4.3	3.1	2.0	3.2	2.4	1.1
Rel / Rail	1.5	1.5	1.3	0.3	0.2	0.4	0.4
B. Jenis penginapan (%) / Type of accommodation (%)							
Rumah saudara & rakan / Relatives' & friends' house	69.7	67.6	68.1	68.2	70.9	65.1	58.6
Hotel / Hotel	18.7	19.9	20.5	20.4	18.5	24.1	29.5
Chalet / Chalet	2.5	2.6	2.5	2.3	1.5	0.8	3.1
Apartmen / Apartment	4.2	4.7	4.6	4.4	3.6	2.3	2.6
Inap desa / Rumah percutan / Homestay / Vacation homes	3.1	3.5	3.5	3.0	3.8	3.8	4.5
Rumah rehat / Rest house	1.8	1.7	0.8	1.7	1.7	3.9	1.7

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

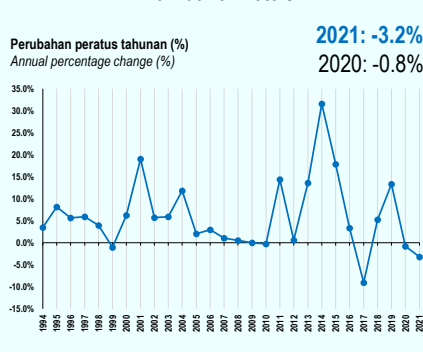
Sumber : Survei Pelancongan Domestik, Jabatan Perangkaan Malaysia (DOSM)
Source : Domestic Tourism Survey, Department of Statistics, Malaysia (DOSM)

INDIKATOR PELANCONGAN *INBOUND* / INBOUND TOURISM INDICATORS

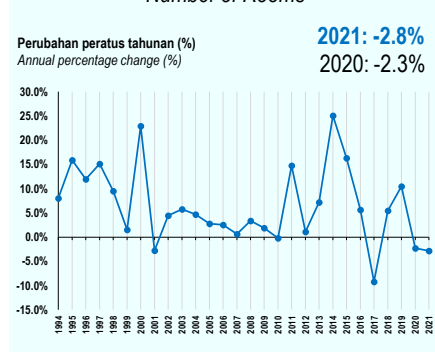
Ketibaan Pelancong Tourist Arrivals



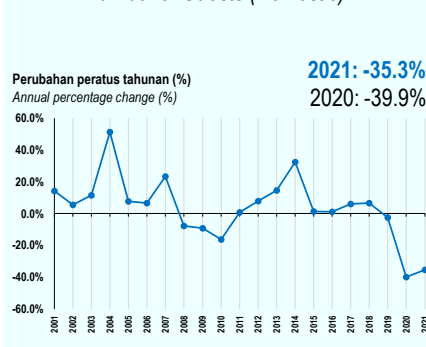
Bilangan Hotel Number of Hotels



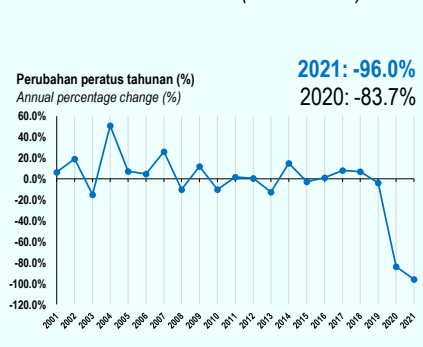
Bilangan Bilik Number of Rooms



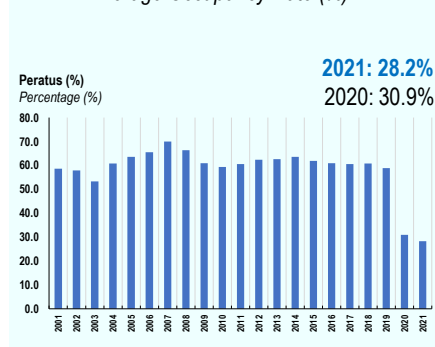
Bilangan Tetamu (Domestik) Number of Guests (Domestic)



Bilangan Tetamu (Antarabangsa) Number of Guests (International)

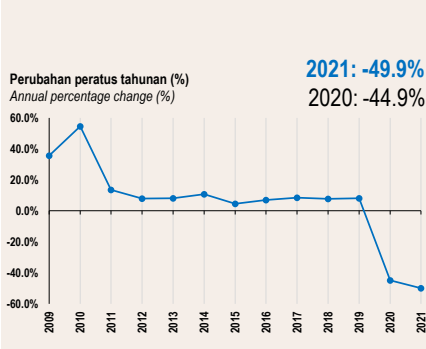


Purata Kadar Penginapan (%) Average Occupancy Rate (%)

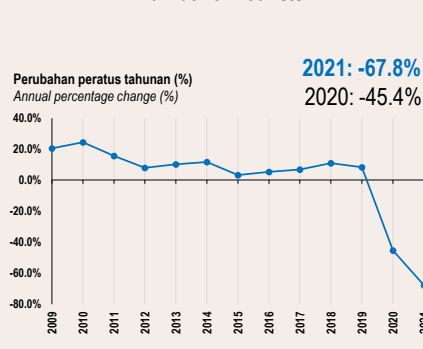


INDIKATOR PELANCONGAN DOMESTIK / DOMESTIC TOURISM INDICATORS

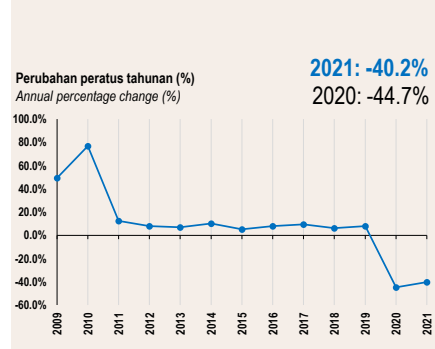
Bilangan Pelawat Number of Visitors



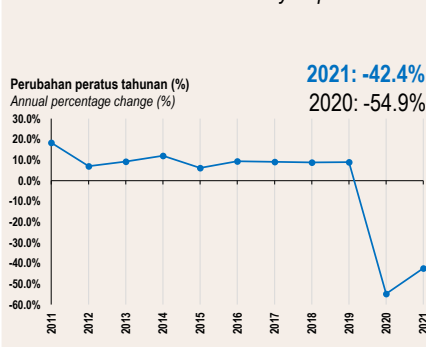
Bilangan Pelancong Number of Tourists



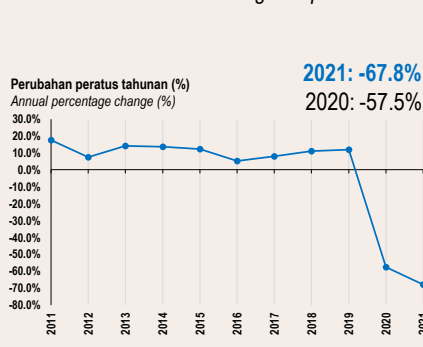
Bilangan Pelawat Harian Number of Excursionists



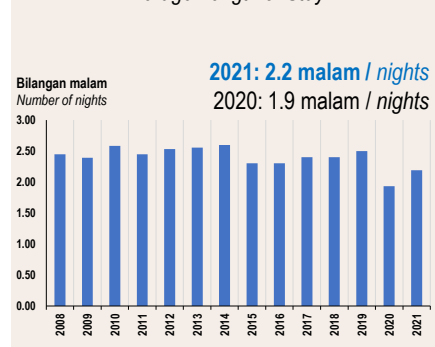
Bilangan Perjalanan Harian Number of Same Day Trips



Bilangan Perjalanan Bermalam Number of Overnight Trips



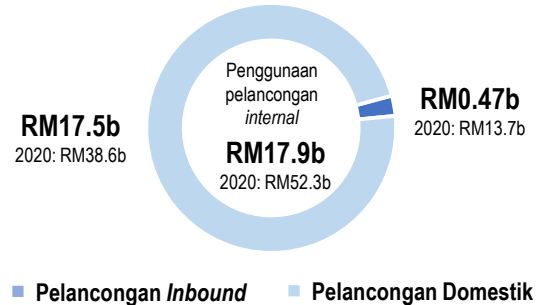
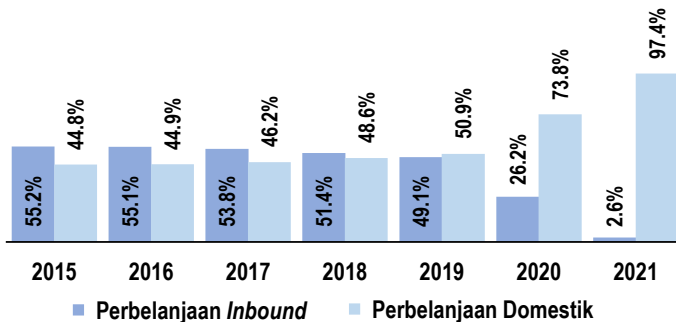
Purata Bilangan Hari Menginap Average Length of Stay



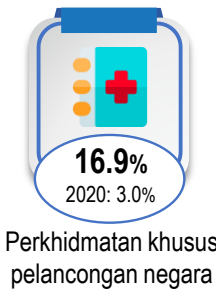
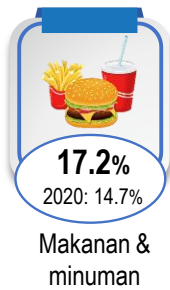
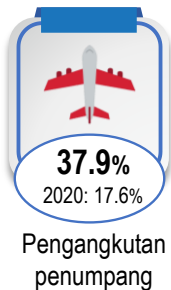
Sumber : Jabatan Perangkaan Malaysia (DOSM) dan Tourism Malaysia
Source : Department of Statistics, Malaysia (DOSM) and Tourism Malaysia

AKAUN SATELIT PELANCONGAN 2021

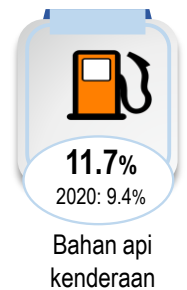
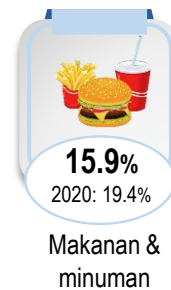
Pelancongan domestik mendominasi 97.4 peratus kepada perbelanjaan pelancongan (2020: 73.8%)



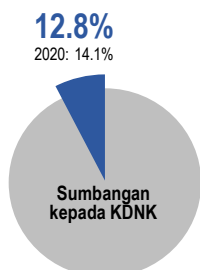
Komponen utama perbelanjaan pelancongan *inbound*:



Komponen utama perbelanjaan pelancongan domestik:



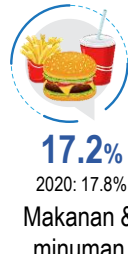
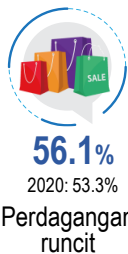
Industri pelancongan menyumbang 12.8 peratus pada tahun 2021



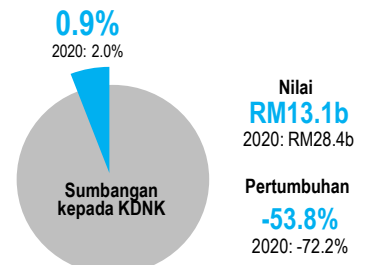
Nilai
RM197.9b
2020: RM199.7b

Pertumbuhan
-0.9%
2020: -16.8%

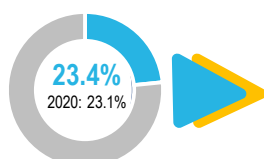
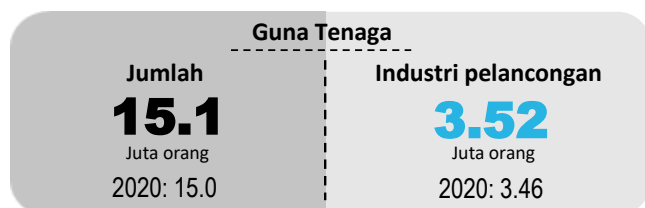
Komponen utama NDKIP¹



KDNKPL²



Guna tenaga dalam industri pelancongan



Peratus guna tenaga yang terlibat secara langsung dalam industri pelancongan

Guna tenaga dalam industri pelancongan disumbangkan oleh:



35.4%
2020: 34.5%

Makanan & minuman



33.6%
2020: 33.4%

Perdagangan runcit



17.6%
2020: 17.4%

Perkhidmatan khusus pelancongan negara

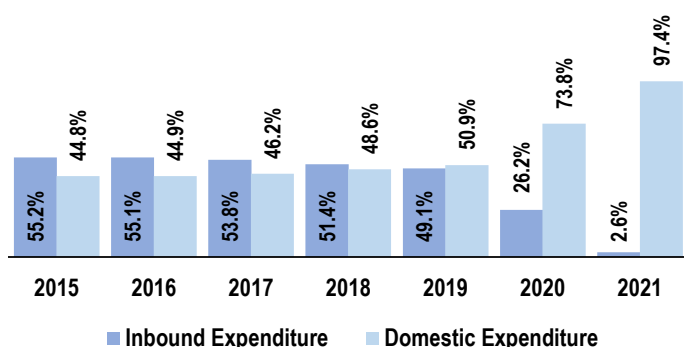
¹ NDKIP: Nilai Ditambah Kasar Industri Pelancongan

² KDNKPL: Keluaran Dalam Negeri Kasar Pelancongan Langsung

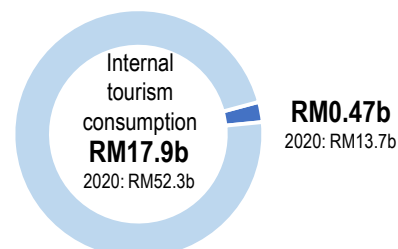
Sumber: Akaun Satelit Pelancongan 2021
Jabatan Perangkaan Malaysia (DOSM)

TOURISM SATELLITE ACCOUNT 2021

Domestic tourism dominated with 97.4 per cent to tourism expenditure (2020: 73.8%)

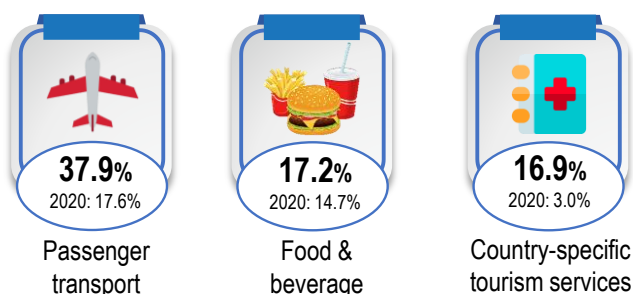


RM17.5b
2020: RM38.6b

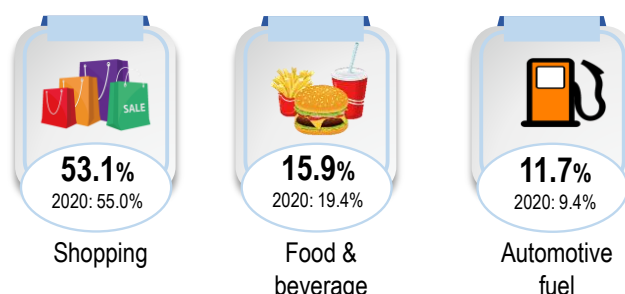


■ Inbound Tourism ■ Domestic Tourism

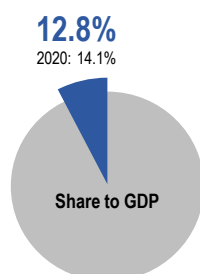
Main components of inbound tourism expenditure:



Main components of domestic tourism expenditure:



Tourism industry contributed 12.8 per cent in 2021



Main components of GVATI¹

Value
RM197.9b
2020: RM199.7b

Growth
-0.9%
2020: -16.8%



56.1%
2020: 53.3%

Retail trade



17.2%
2020: 17.8%

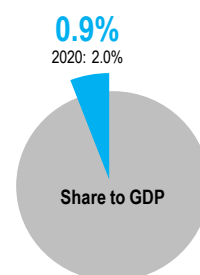
Food & beverage



15.1%
2020: 14.5%

Country-specific tourism services

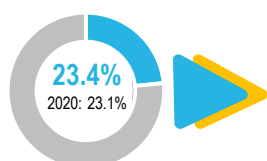
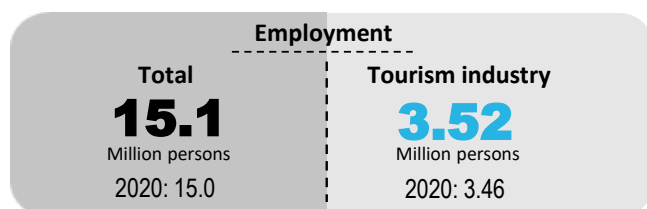
TDGDP²



Value
RM13.1b
2020: RM28.4b

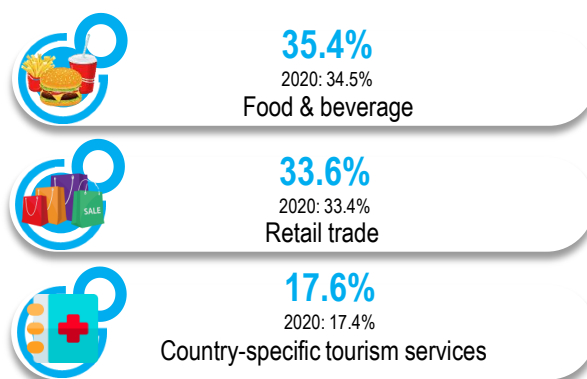
Growth
-53.8%
2020: -72.2%

Employment in tourism industries



The percentage of employment directly involved in the tourism industry in Malaysia

Employment in the tourism industry attributed by:



¹ GVATI: Gross Value Added of Tourism Industries

² TDGDP: Tourism Direct Gross Domestic Product

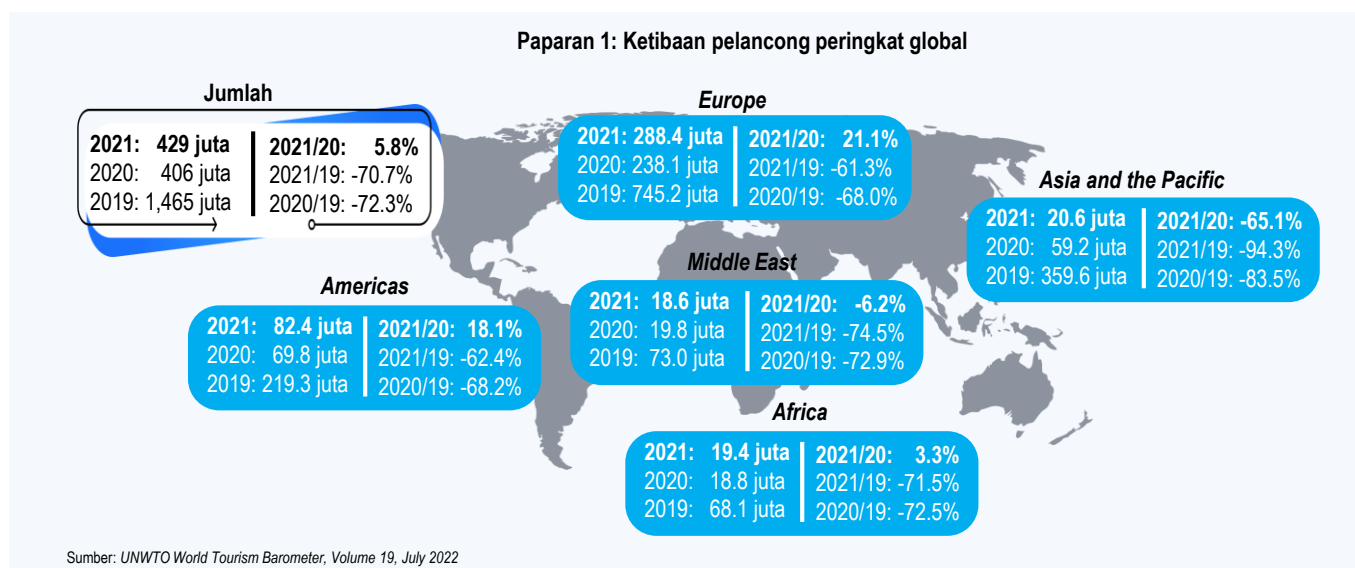
Source: Tourism Satellite Account 2021
Department of Statistics, Malaysia (DOSM)

1.0 PENGENALAN

Statistik Akaun Satelit Pelancongan (ASP) Malaysia bagi tahun 2021 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

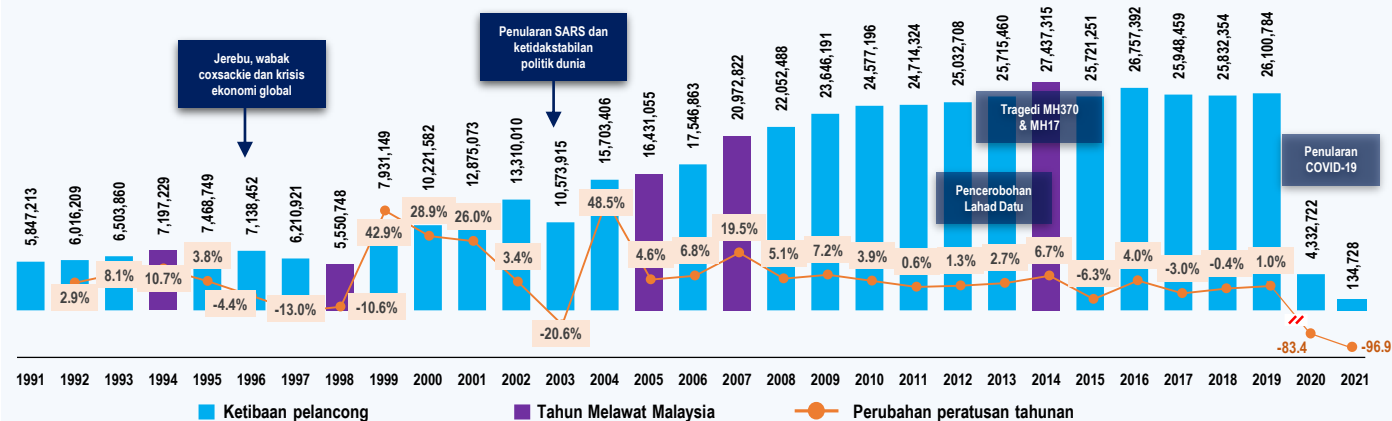
Berdasarkan UNWTO *World Tourism Barometer*, bilangan ketibaan pelancong yang direkodkan di seluruh dunia pada 2021 berjumlah 429 juta orang berbanding 406 juta orang pada tahun sebelumnya. Pertambahan lebih daripada 23 juta pelancong telah menunjukkan prestasi pelancongan beransur pulih dengan pertumbuhan 5.8 peratus (**Paparan 1**). Walau bagaimanapun, bilangan ketibaan antarabangsa masih rendah pada 70.7 peratus di bawah paras pra-pandemik (2019), dimana tahun 2020 merupakan tahun paling terjejas dalam rekod pelancongan semasa wabak COVID-19.



3.0 SENARIO PELANCONGAN DI MALAYSIA

Ketibaan pelancong *inbound* terus mencatatkan penurunan kepada 96.9 peratus pada 2021 berbanding negatif 83.4 peratus pada tahun sebelumnya (**Carta 1**). Prestasi kurang memberangsangkan ini adalah disebabkan penutupan sempadan antarabangsa negara bagi aktiviti pelancongan. Ketibaan bilangan pelancong pada 2021 hanya merekodkan 0.13 juta orang berbanding 4.3 juta orang pada tahun 2020.

Carta 1: Ketibaan pelancong di Malaysia, 1991-2021



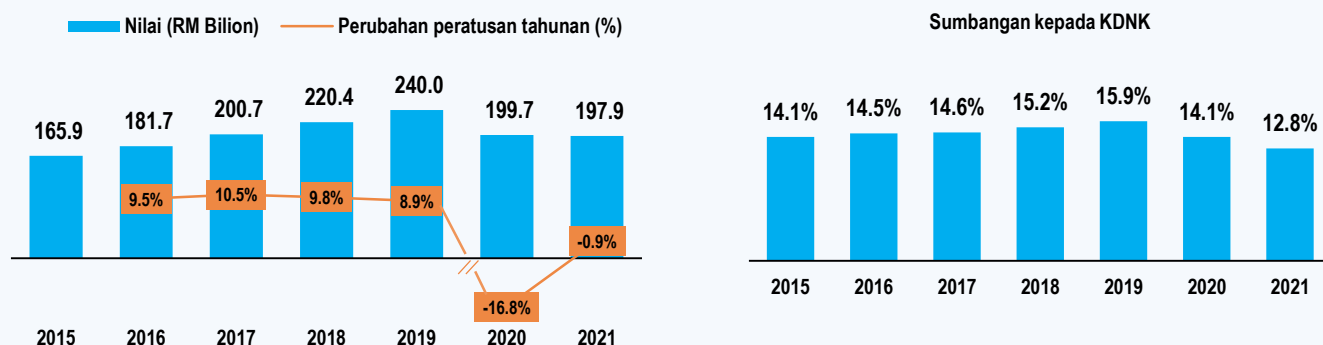
Sumber: Tourism Malaysia (TM)

4.0 PRESTASI PELANCONGAN 2021

4.1 Nilai Ditambah Kasar Industri Pelancongan (NDKIP)

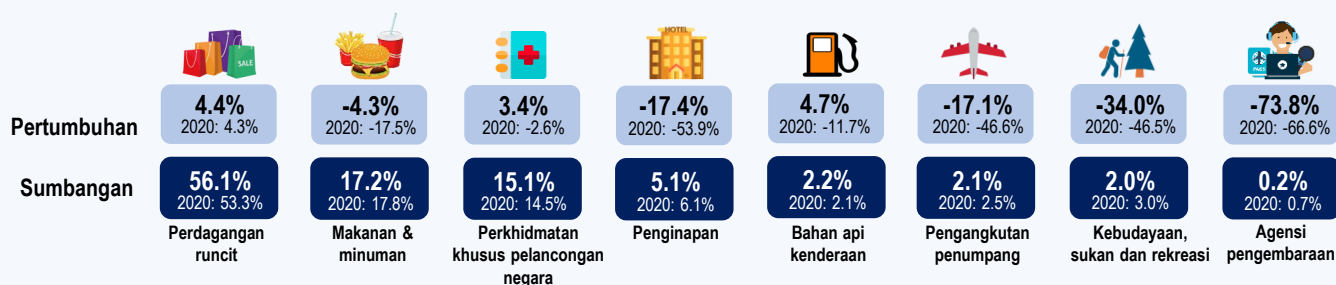
NDKIP berjumlah RM197.9 bilion dengan menyumbang sebanyak 12.8 peratus kepada KDNK berbanding 14.1 peratus pada 2020 seperti ditunjukkan dalam **Carta 2**.

Carta 2: NDKIP - Nilai, perubahan peratusan tahunan dan peratus sumbangan



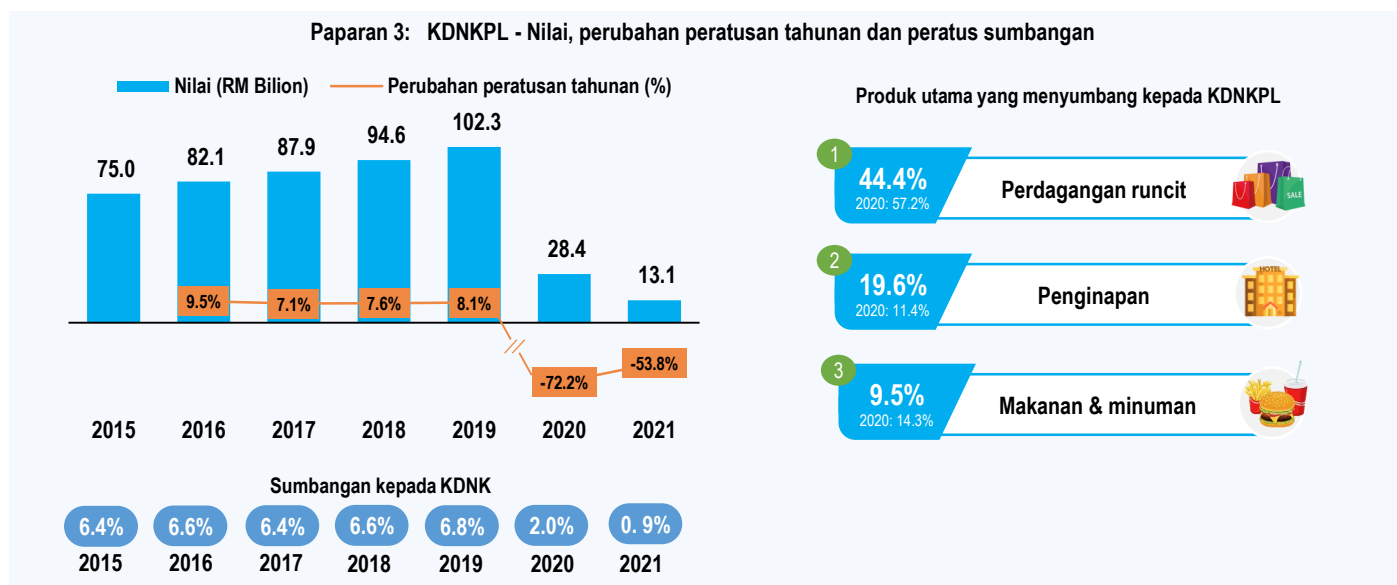
Berdasarkan prestasi subsektor pelancongan, hampir semua industri telah merekodkan kadar pertumbuhan negatif kecuali Jualan runcit bahan api kenderaan (4.7%), Perdagangan runcit (4.4%) dan Perkhidmatan khusus pelancongan negara (3.4%) seperti di **Paparan 2**. Perdagangan runcit kekal sebagai penyumbang utama dalam industri pelancongan dengan sumbangan sebanyak 56.1 peratus. Ini diikuti oleh Perkhidmatan penyediaan makanan & minuman (17.2%) dan Perkhidmatan khusus pelancongan negara (15.1%).

Paparan 2: NDKIP – Perubahan peratusan tahunan dan sumbangan mengikut industri pelancongan



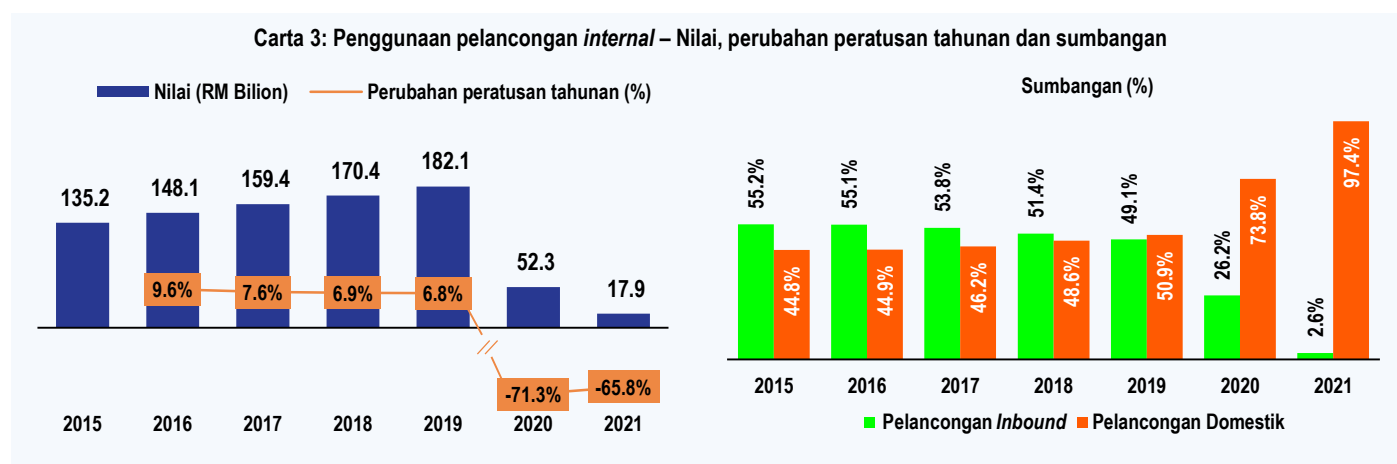
4.2 Keluaran Dalam Negeri Kasar Pelancongan Langsung (KDNKPL)

KDNKPL telah merekodkan RM13.1 bilion berbanding RM28.4 bilion pada 2020, menyusut 53.8 peratus (2020: -72.2%). Secara keseluruhan, KDNKPL menyumbang 0.9 peratus kepada KDNK berbanding 2.0 peratus pada tahun sebelumnya. Tiga produk utama dalam KDNKPL adalah Perdagangan runcit, Penginapan dan Perkhidmatan penyediaan makanan & minuman dengan kombinasi sumbangan sebanyak 73.5 peratus pada 2021 (**Paparan 3**).



4.3 Penggunaan Pelancongan *Internal*

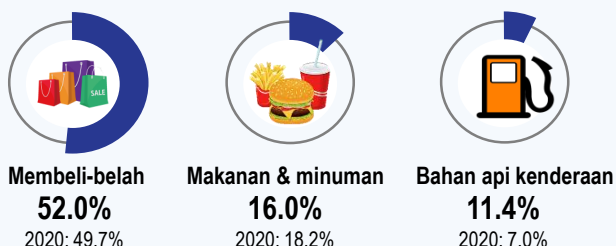
Penggunaan pelancongan *internal* adalah merangkumi perbelanjaan pelancongan *inbound* dan perbelanjaan pelancongan domestik. Pada 2021, penggunaan pelancongan *internal* merekodkan RM17.9 bilion berbanding RM52.3 bilion pada tahun sebelumnya. Penyusutan berterusan sebanyak 65.8 peratus dalam penggunaan pelancongan *internal* (2020:-71.3%) disebabkan oleh sekatan perjalanan yang berterusan. Pelancongan domestik menunjukkan prestasi yang signifikan dengan menyumbang 97.4 peratus kepada jumlah penggunaan pelancongan *internal* manakala pelancongan *inbound* hanya mencatatkan sumbangan 2.6 peratus.



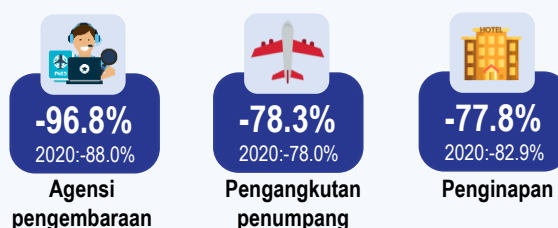
Dari segi penyumbang terbesar, Membeli-belah (52.0%) mendominasi penggunaan pelancongan *internal* dan diikuti Perkhidmatan penyediaan makanan & minuman (16.0%) dan Jualan runcit bahan api kenderaan (11.4%) seperti ditunjukkan di **Paparan 4**.

Pertumbuhan Agensi pengembaraan, Perkhidmatan pengangkutan penumpang dan Penginapan masing-masing menurun 96.8 peratus, 78.3 peratus dan 77.8 peratus (**Paparan 5**).

Paparan 4: Sumbangan utama dalam penggunaan pelancongan *internal*



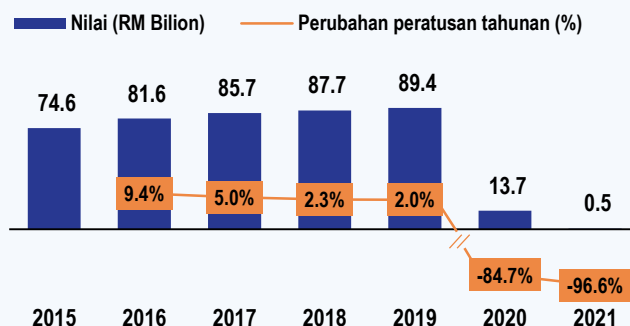
Paparan 5: Perubahan peratusan tahunan bagi komponen terpilih



4.3.1 Perbelanjaan Pelancongan *Inbound*

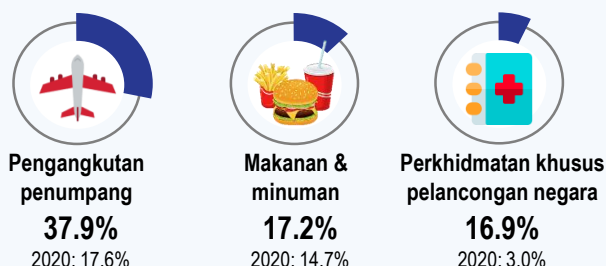
Perbelanjaan pelancongan *inbound* telah menyusut 96.6 peratus pada 2021 seiring dengan penurunan bilangan ketibaan pelancong asing ke Malaysia seperti di **Carta 4**.

Carta 4: Perbelanjaan pelancongan *inbound* – Nilai dan perubahan peratusan tahunan

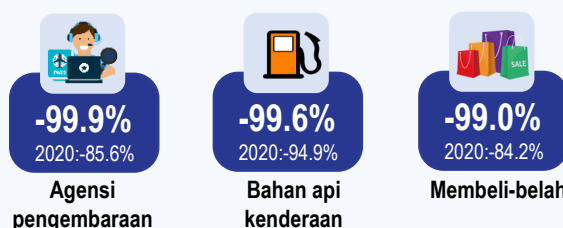


Perkhidmatan pengangkutan penumpang merupakan komponen utama bagi perbelanjaan pelancongan *inbound* dengan sumbangan sebanyak 37.9 peratus mengatasi Membeli-belah yang merupakan penyumbang utama pada tahun sebelumnya. Ini diikuti oleh Perkhidmatan penyediaan makanan & minuman (17.2%) dan Perkhidmatan khusus bercirikan pelancongan negara (16.9%) seperti di **Paparan 6**.

Paparan 6: Sumbangan utama dalam perbelanjaan pelancongan *inbound*



Paparan 7: Perubahan peratusan tahunan bagi komponen terpilih

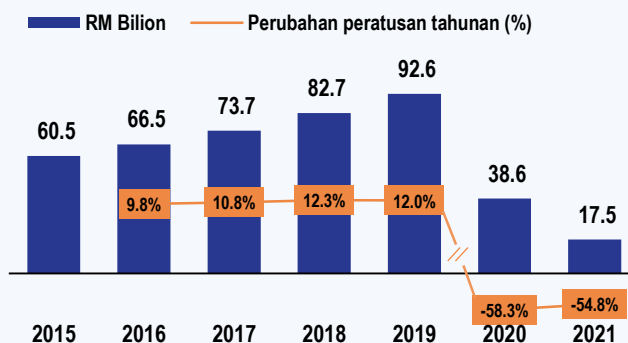


Perkhidmatan agensi pengembaraan telah mencatatkan penurunan ketara 99.9 peratus, diikuti Jualan runcit bahan api kenderaan (-99.6%) dan Membeli-belah (-99.0%) seperti ditunjukkan di **Paparan 7**.

4.3.2 Perbelanjaan Pelancongan Domestik

Perbelanjaan pelancongan domestik bernilai RM17.5 bilion pada tahun 2021 berbanding RM38.6 bilion pada tahun sebelumnya, dengan penurunan 54.8 peratus (2020: -58.3%) seperti dipaparkan di **Carta 5**.

Carta 5: Perbelanjaan pelancongan domestik – Nilai dan perubahan peratusan tahunan

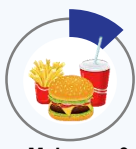


Prestasi pelancongan domestik bagi 2021 secara umumnya didorong oleh perbelanjaan aktiviti Membeli-belah (53.1%), Perkhidmatan penyediaan makanan & minuman (15.9%) dan Jualan runcit bahan api kenderaan (11.7%) seperti di **Paparan 8**.

Paparan 8: Sumbangan utama dalam perbelanjaan pelancongan domestik



Membeli-belah
53.1%
 2020: 55.0%



Makanan & minuman
15.9%
 2020: 19.4%



Bahan api kenderaan
11.7%
 2020: 9.4%

Paparan 9: Perubahan peratusan tahunan bagi komponen terpilih



-77.7%
 2020: -94.1%
Agensi pengembaraan



-64.5%
 2020: -60.7%
Pengangkutan penumpang



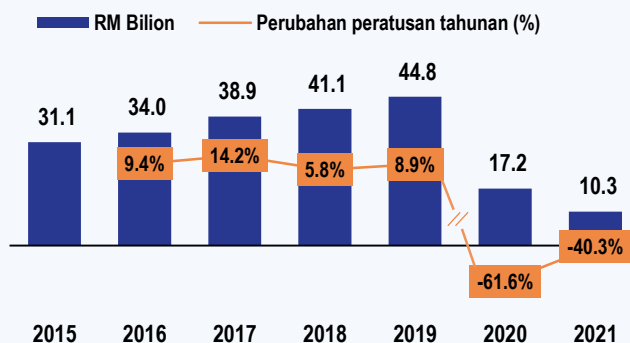
-62.9%
 2020: -49.0%
Makanan & minuman

Tiga produk pelancongan yang mencatatkan penyusutan dua digit yang ketara adalah Perkhidmatan agensi pengembaraan (-77.7%), diikuti Perkhidmatan pengangkutan penumpang (-64.5%) dan Perkhidmatan penyediaan makanan & minuman (-62.9%) seperti di **Paparan 9**.

4.4 Perbelanjaan Pelancongan *Outbound*

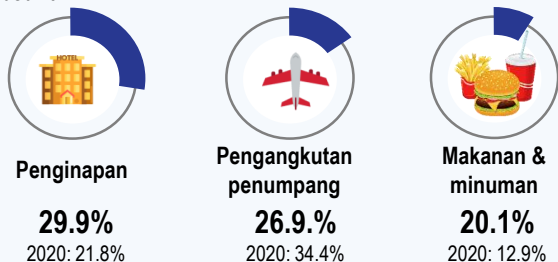
Perbelanjaan pelancongan *outbound* mencatatkan RM10.3 bilion pada tahun 2021 dengan penurunan 40.3 peratus berbanding negatif 61.6 peratus pada tahun sebelumnya (**Carta 6**). Ini selaras dengan penutupan pintu sempadan antarabangsa oleh kebanyakan negara.

Carta 6: Perbelanjaan pelancongan *outbound* – Nilai dan perubahan peratusan tahunan

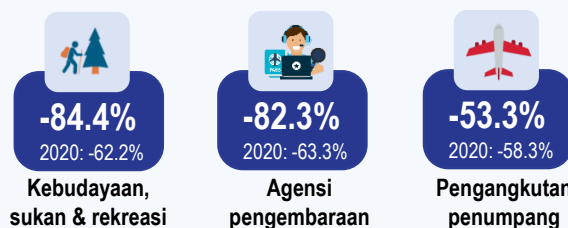


Komponen utama dalam perbelanjaan pelancongan *outbound* adalah Penginapan (29.9%), diikuti oleh Pengangkutan penumpang (26.9%) dan Perkhidmatan penyediaan makanan & minuman (20.1%) seperti ditunjukkan di **Paparan 10**.

Paparan 10: Sumbangan utama dalam perbelanjaan pelancongan *outbound*



Paparan 11: Perubahan peratusan tahunan bagi komponen terpilih



Perbelanjaan dalam Perkhidmatan kebudayaan, sukan & rekreasi, Perkhidmatan agensi pengembaraan dan Perkhidmatan pengangkutan penumpang, masing-masing menyusut 84.4 peratus, 82.3 peratus dan 53.3 peratus pada tahun 2021 (**Paparan 11**).

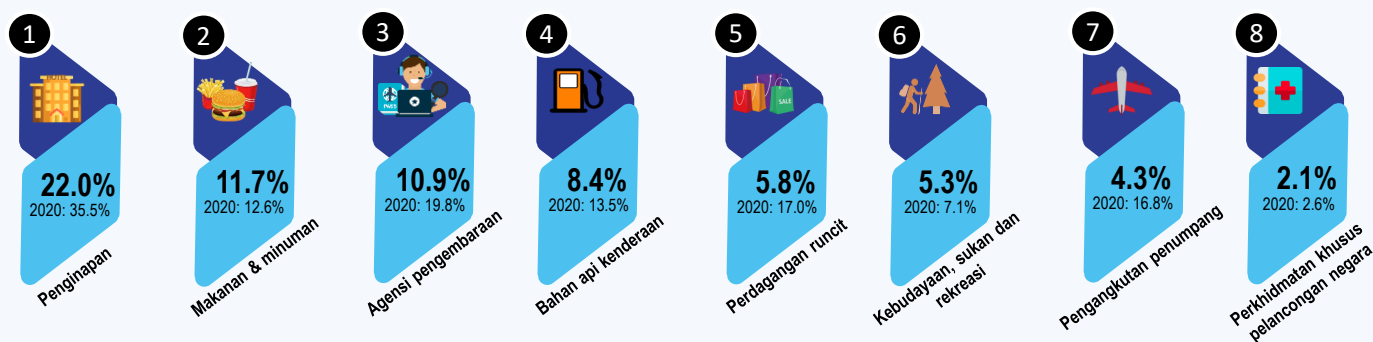
4.5 Kadar Pelancongan



6.1%
2020:14.2%

Kadar pelancongan mengukur tahap penggunaan pelancongan *internal* terhadap penawaran domestik dalam industri pelancongan. Kadar pelancongan pada tahun 2021 mencatatkan 6.1 peratus berbanding 14.2 peratus pada tahun sebelumnya. Perkhidmatan penginapan mencatatkan kadar pelancongan tertinggi 22.0 peratus diikuti Perkhidmatan penyediaan makanan & minuman (11.7%) dan Agensi pengembaraan (10.9%) seperti yang ditunjukkan dalam **Paparan 12**. Dari segi penggunaan pelancongan, Membeli-belah merekodkan nilai produk tertinggi RM9.3 bilion. Sementara itu, industri Perdagangan runcit mencatatkan RM159.4 bilion dalam penawaran pelancongan.

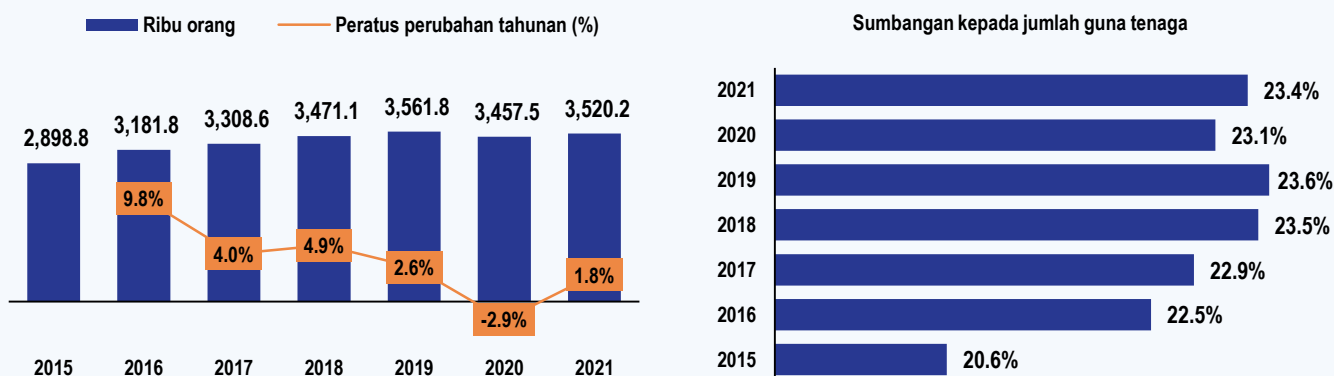
Paparan 12: Kadar pelancongan mengikut subsektor pelancongan



4.6 Guna Tenaga Dalam Industri Pelancongan

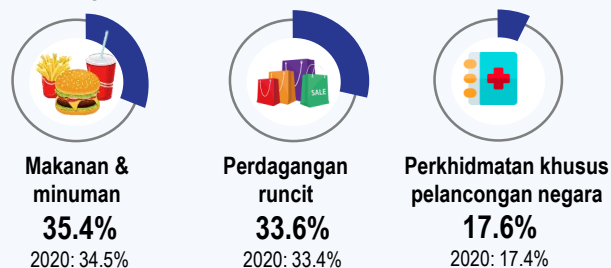
Guna tenaga industri pelancongan melibatkan 3.52 juta orang pada 2021 (2020: 3.46 juta orang) dan menyumbang sebanyak 23.4 peratus kepada keseluruhan guna tenaga. Guna tenaga industri ini telah pulih 1.8 peratus daripada negatif 2.9 peratus pada tahun sebelumnya (**Carta 7**).

Carta 7: Guna tenaga dalam industri pelancongan – Nilai, perubahan peratusan tahunan dan sumbangan kepada jumlah guna tenaga

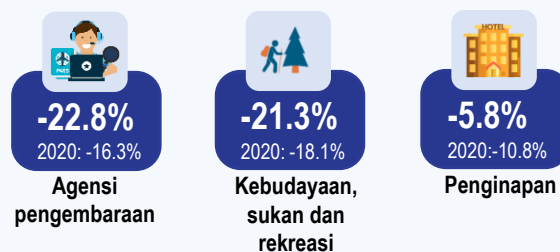


Industri Perkhidmatan penyediaan makanan & minuman adalah penyumbang guna tenaga terbesar dalam sektor pelancongan iaitu 35.4 peratus. Ini diikuti oleh Perdagangan runcit dan Perkhidmatan khusus bercirikan pelancongan negara dengan masing-masing menyumbang 33.6 peratus dan 17.6 peratus (**Paparan 13**).

Paparan 13: Sumbangan utama guna tenaga dalam industri pelancongan



Paparan 14: Perubahan peratusan tahunan bagi komponen terpilih



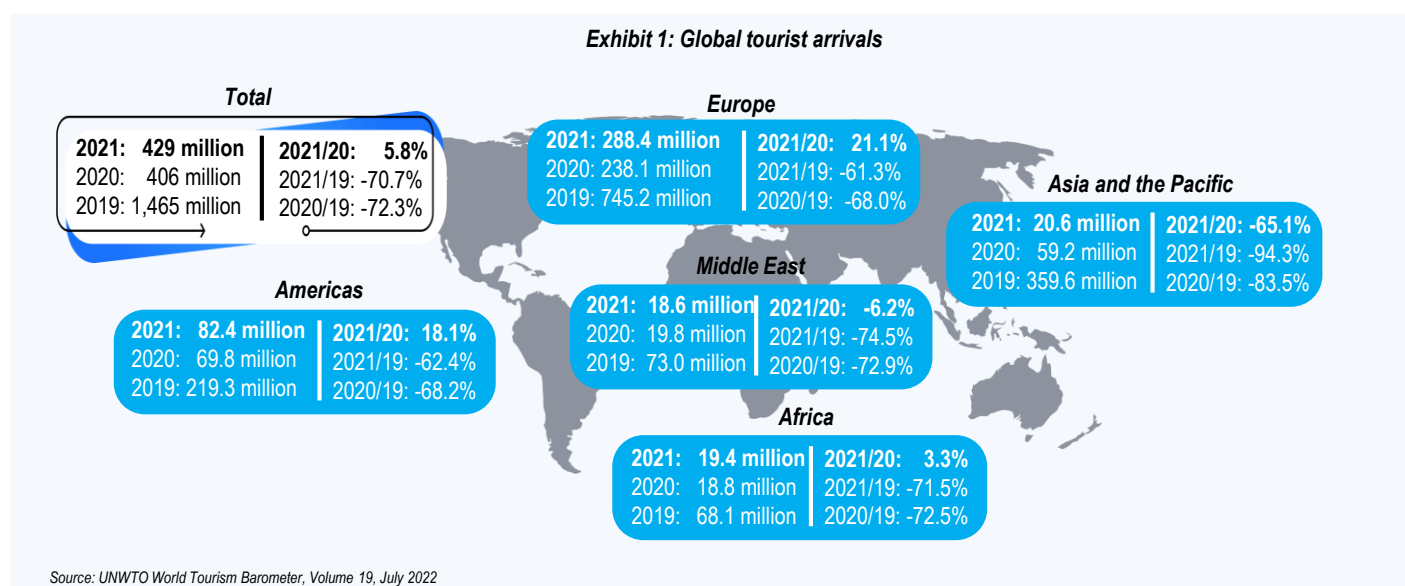
Guna tenaga dalam Agensi pengembaraan paling terjejas dengan penyusutan 22.8 peratus kesan daripada pengehadan operasi aktiviti pelancongan, diikuti oleh Perkhidmatan kebudayaan, sukan & rekreasi yang menyusut 21.3 peratus seperti di **Paparan 14**.

1.0 INTRODUCTION

Statistics of Tourism Satellite Account (TSA) of Malaysia for the year 2021 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

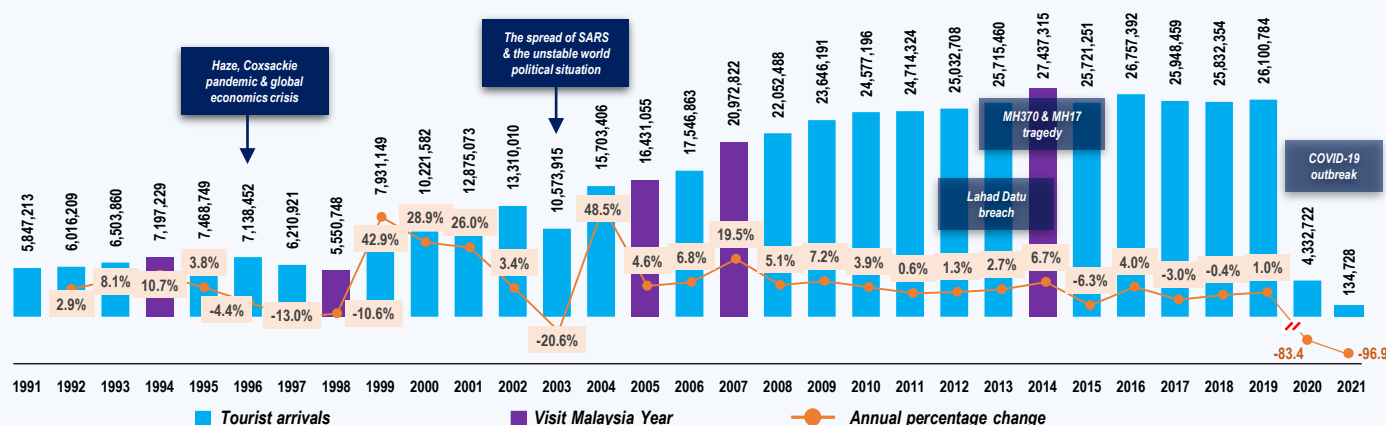
Based on the UNWTO World Tourism Barometer, the number of tourist arrivals recorded worldwide in 2021 amounted to 429 million people as against to 406 million people in the previous year. The increase of more than 23 million tourists showed that the tourism performance is gradually recovering with a growth of 5.8 per cent (**Exhibit 1**). However, number of international arrivals are still lower at 70.7 per cent below of pre-pandemic levels (2019) as the year 2020 was the worst year on record for tourism industries amid COVID-19 outbreak.



3.0 TOURISM SCENARIO IN MALAYSIA

Inbound tourist arrivals continued to record a decline of 96.9 per cent in 2021 as compared to a negative 83.4 per cent in the previous year (**Chart 1**). The unfavorable performance was due to the closure of the country's international border for tourism activities. The number of tourist arrivals in 2021 only recorded 0.13 million people compared to 4.3 million people in 2020.

Chart 1: Tourist arrivals to Malaysia, 1991-2021



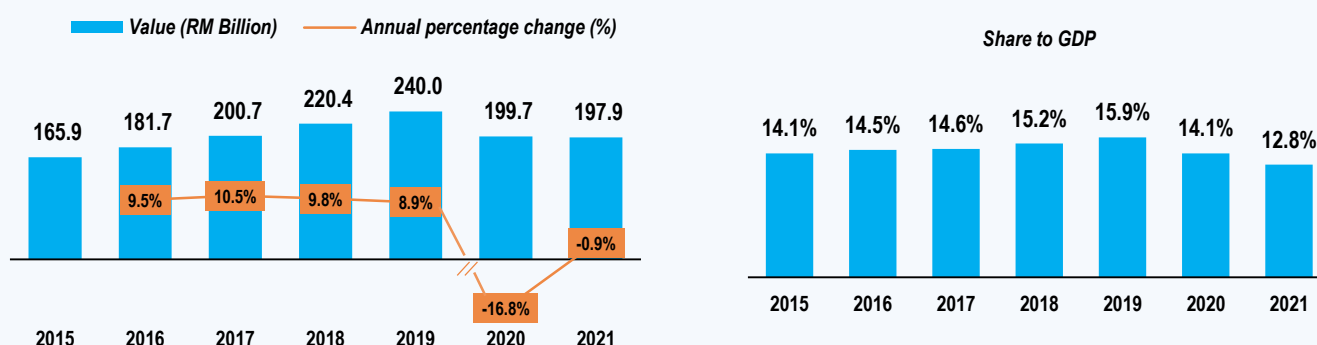
Source: Tourism Malaysia (TM)

4.0 TOURISM PERFORMANCE 2021

4.1 Gross Value Added of Tourism Industries (GVATI)

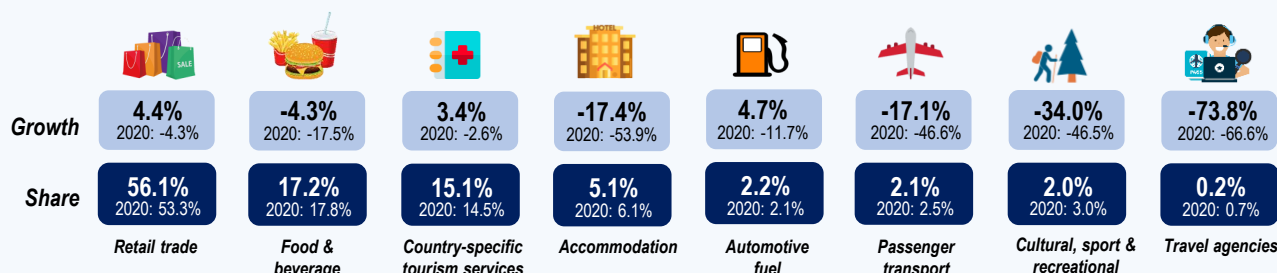
GVATI amounted to RM197.9 billion contributing 12.8 per cent to GDP compared to 14.1 per cent in 2020 as shown in **Chart 2**.

Chart 2: GVATI – Value, annual percentage change and percentage share



Based on the tourism subsectors performance, almost all industries have recorded negative growth rate, except Retail sale of automotive fuel (4.7%), Retail trade (4.4%) and Country-specific tourism services (3.4%) as in **Exhibit 2**. Retail trade remained the main contributor to the tourism industry with a share of 56.1 per cent. This was followed by Food & beverage serving services (17.2%) and Country-specific tourism services (15.1%).

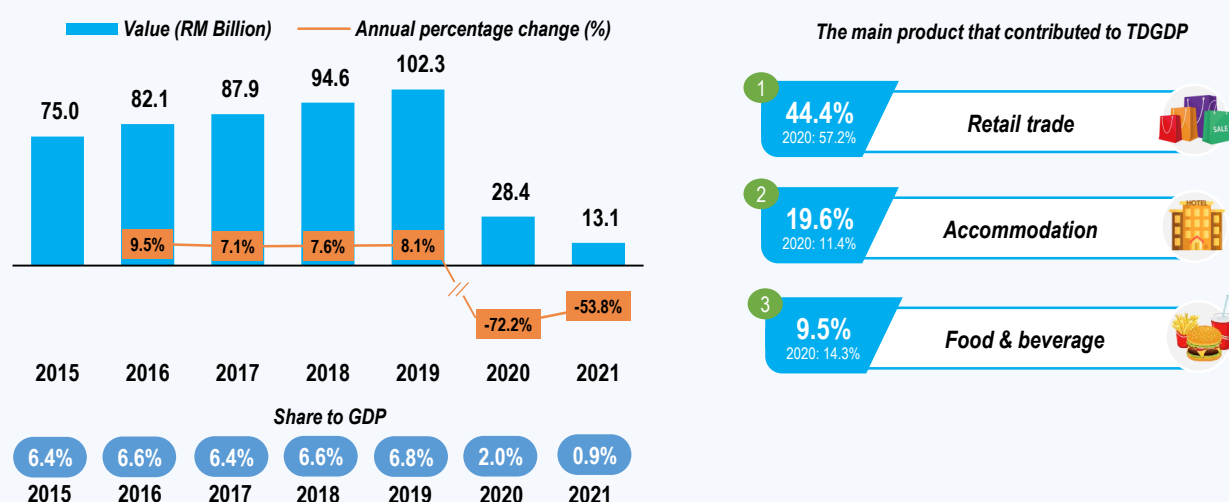
Exhibit 2: GVATI – Annual percentage change and percentage share by tourism industry



4.2 Tourism Direct Gross Domestic Product (TDGDP)

TDGDP recorded RM13.1 billion compared to RM28.4 billion in 2020, tumbled 53.8 per cent (2020: -72.2%). Overall, TDGDP contributed 0.9 per cent to GDP as against 2.0 per cent in the previous year. The three main products in TDGDP were Retail trade, Accommodation and Food & beverage serving services with a combined share of 73.5 per cent in 2021 (**Exhibit 3**).

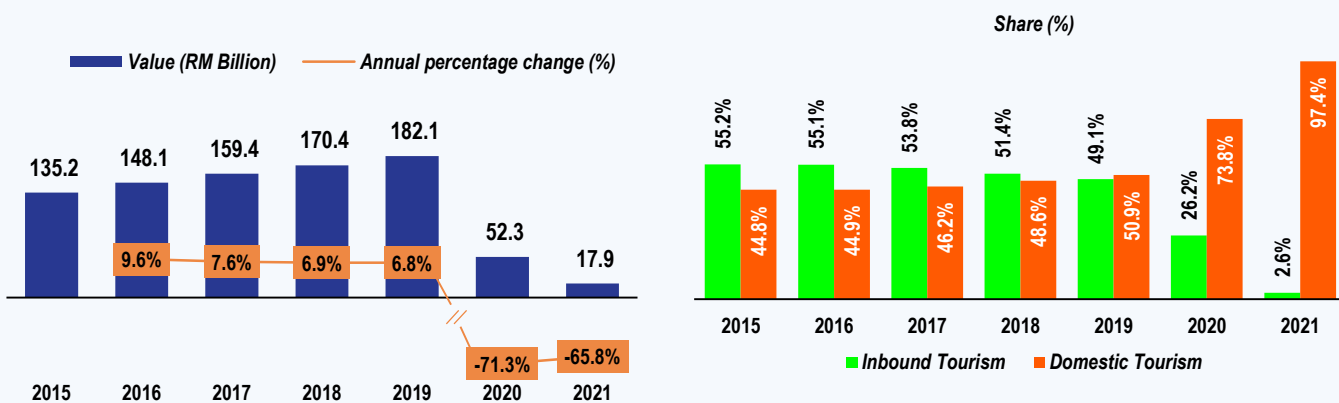
Exhibit 3: TDGDP – Value, annual percentage change and percentage share by tourism industry



4.3 Internal Tourism Consumption

Internal tourism consumption comprises inbound tourism expenditure and domestic tourism expenditure. In 2021, internal tourism consumption recorded RM17.9 billion compared to RM52.3 billion in the preceding year. The continuous decline of 65.8 per cent in the internal tourism consumption (2020:-71.3%) was caused by the ongoing travel restrictions. Domestic tourism showed a significant performance by contributing 97.4 per cent to the total internal tourism consumption while inbound tourism recorded 2.6 per cent.

Chart 3: Internal tourism consumption – Value, annual percentage change and share



In terms of major contributor, Shopping (52.0%) dominated internal tourism consumption and followed by Food & beverage serving services (16.0%) and Automotive fuel (11.4%) as shown in **Exhibit 4**.

Growth of Travel agencies, Passenger transport services and Accommodation declined by 96.8 per cent, 78.3 per cent and 77.8 per cent respectively (**Exhibit 5**).

Exhibit 4: Major contribution in the internal tourism consumption

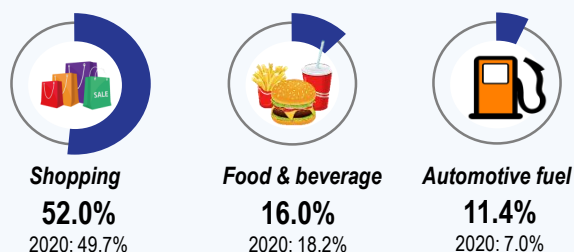
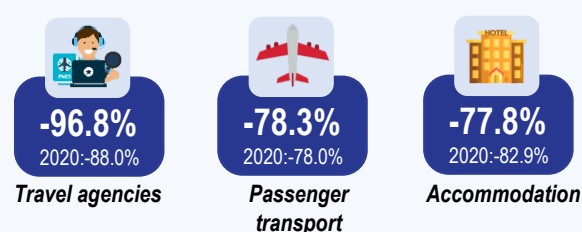


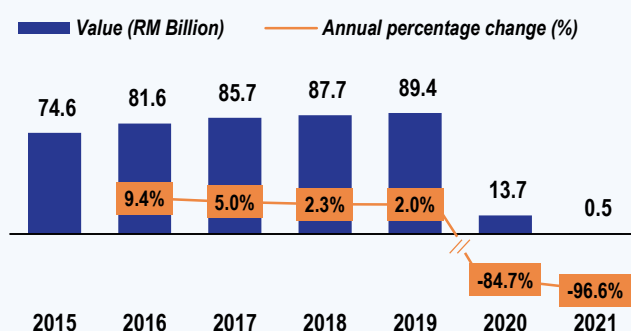
Exhibit 5: Annual percentage change for selected products



4.3.1 Inbound Tourism Expenditure

Inbound tourism expenditure plunged 96.6 per cent to RM0.47 billion in 2021 in tandem with the decline in the number of foreign tourist arrivals to Malaysia as in **Chart 4**.

Chart 4: Inbound tourism expenditure – Value and annual percentage change



Passenger transport services was the main component for inbound tourism expenditure with a contribution of 37.9 per cent, surpassed shopping which being the top contributor in the previous year. This was followed by Food & beverage serving services (17.2%) and Country-specific tourism services (16.9%) as per **Exhibit 6**.

Exhibit 6: Major contribution in inbound tourism expenditure

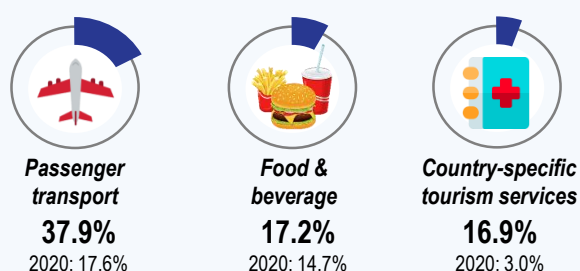
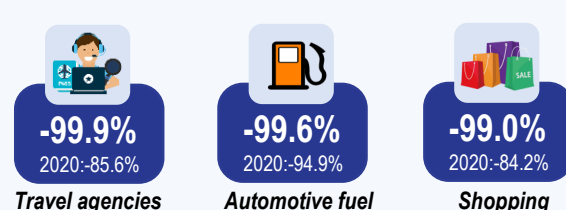


Exhibit 7: Annual percentage change for selected products

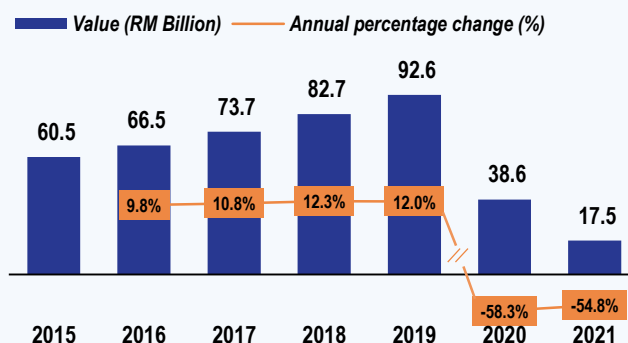


Travel agencies services recorded a significant decrease of 99.9 per cent, followed by Retail sale of automotive fuel (-99.6%) and Shopping (-99.0%) as shown in **Exhibit 7**.

4.3.2 Domestic Tourism Expenditure

Domestic tourism expenditure value at RM17.5 billion in 2021 compared to RM38.6 billion in the previous year with a decrease of 54.8 per cent (2020: -58.3%) as shown in **Chart 5**.

Chart 5: Domestic tourism expenditure – Value and annual percentage change



The performance of domestic tourism in 2021 was generally driven by spending on Shopping activities (53.1%), Food & beverage serving services (15.9%) and Retail sale of automotive fuel (11.7%) as in **Exhibit 8**.

Exhibit 8: Major contribution in domestic tourism expenditure

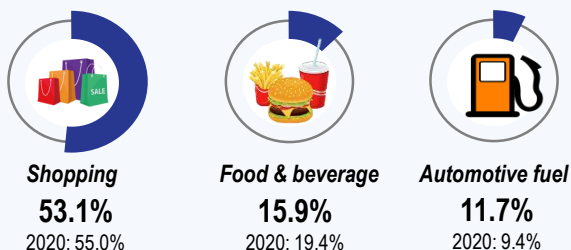
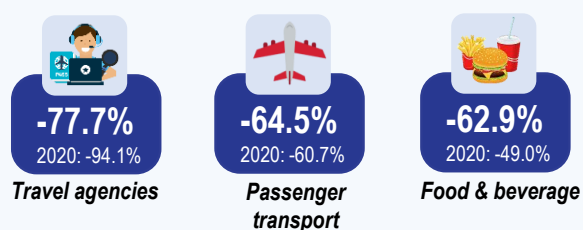


Exhibit 9: Annual percentage change for selected products

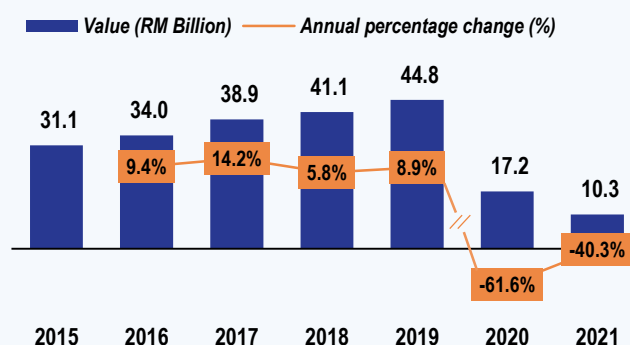


The three tourism products that recorded a significant double-digit decline were Travel agency services (-77.7%), followed by Passenger transport services (-64.5%) and Food & beverage serving services (-62.9%) as shown in **Exhibit 9**.

4.4 Outbound Tourism Expenditure

Outbound tourism expenditure posted RM10.3 billion in 2021 with a decline of 40.3 per cent compared to negative 61.6 per cent in the previous year (**Chart 6**). This was in line with the closure of international border by most countries.

Chart 6: Outbound tourism expenditure – Value and annual percentage change



The main component in outbound tourism expenditure was Accommodation (29.9%), followed by Passenger transport (26.9%) and Food and beverage serving services (20.1%) as shown in **Exhibit 10**.

Exhibit 10: Major contribution in outbound tourism expenditure

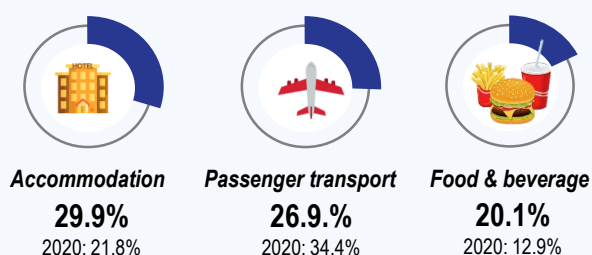


Exhibit 11: Annual percentage change for selected products



Expenditure on Cultural, sports & recreation services, Travel agencies and Passenger transport services decreased by 84.4 per cent, 82.3 per cent and 53.3 per cent respectively in 2021 (**Exhibit 11**).

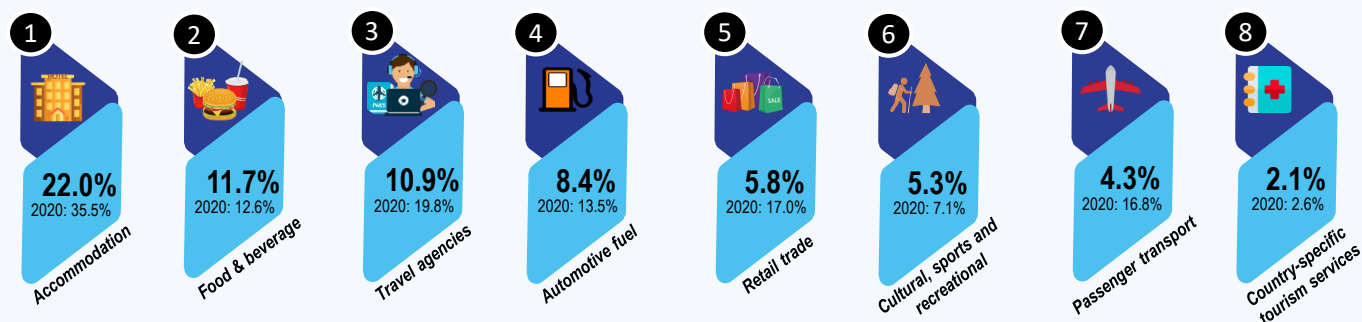
4.5 Tourism Ratio



6.1%
2020: 14.2%

The tourism ratio measures the level of internal tourism consumption to domestic supply in the tourism industry. The tourism ratio in 2021 recorded 6.1 per cent compared to 14.2 per cent in the previous year. Accommodation services accounted for the highest tourism ratio of 22.0 per cent followed by Food & beverage serving services (11.7%) and Travel agencies (10.9%) as shown in **Exhibit 12**. In term of tourism consumption, Shopping recorded the highest product value of RM9.3 billion. Meanwhile, Retail trade industry logged RM159.4 billion in tourism supply.

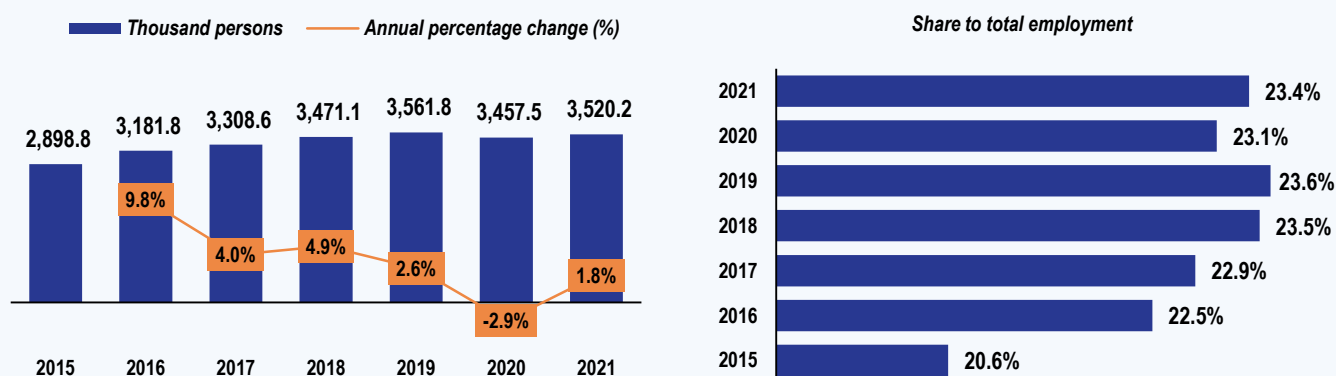
Exhibit 12: Tourism ratio by tourism subsector



4.6 Employment in Tourism Industry

The tourism industry employed 3.52 million persons in 2021 (2020: 3.46 million persons) which contributed 23.4 per cent to the total employment. The employment of this industry has recovered to 1.8 per cent from a negative 2.9 per cent in the previous year (**Chart 7**).

Chart 7: Employment in tourism industry - Value, annual percentage change and share to total employment



The Food & beverage serving services industry was the largest contributor to employment in the tourism sector at 35.4 per cent. This was followed by Retail trade and Country-specific tourism services with the share of 33.6 per cent and 17.6 per cent respectively (**Exhibit 13**).

Exhibit 13: Main contribution employment in tourism industry

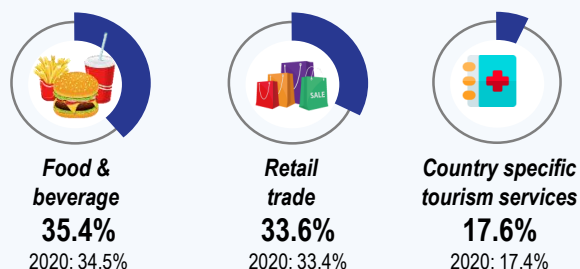


Exhibit 14: Annual percentage change for selected industry



Employment in Travel agencies was affected the most with a decline of 22.8 per cent due to the restriction in tourism activities, followed by Cultural, sports & recreation services which decreased by 21.3 per cent as shown in **Exhibit 14**.

KRONOLOGI PERINTAH KAWALAN PERGERAKAN (PKP) 2021



13 Jan 2021

Perintah Kawalan Pergerakan (PKP 2.0) membatikan enam negeri iaitu Pulau Pinang, Selangor, Wilayah Persekutuan (Kuala Lumpur, Putrajaya dan Labuan), Melaka, Johor dan Sabah selama 14 hari



20 Feb 2021

Buat pertama kali sebanyak 312,390 dos vaksin COVID-19 telah tiba di Malaysia



24 Feb 2021

Program Imunisasi COVID-19 Kebangsaan telah dilancarkan



17 Mac 2021

Kerajaan bersetuju menyalurkan Geran Bantuan Khas secara 'one-off' sebanyak RM3,000 kepada lebih 5,000 agensi pelancongan MOTAC

Gelembung Pelancongan Bersasar berkuatkuasa 10 Mac 2021

Pergerakan antara negeri-negeri berstatus PKPP sahaja dibenarkan termasuk Pulau Langkawi

Diwajibkan menggunakan agensi pelancongan yang berdaftar dengan MOTAC



1 Apr 2021

1,367 pemandu pelancong yang berdaftar dengan MOTAC juga akan menerima bantuan tunai *one-off* bernilai RM600 seorang.



4 Mei 2021

Gelembung Pelancongan Bersasar digantung serta-merta



1 Jun 2021

Perintah Kawalan Pergerakan (PKP 3.0) atau *total lockdown* di seluruh negara



29 Ogos 2021

Bantuan *one-off* kepada 3,957 individu untuk industri pelancongan dan seni di Sabah RM 300



11 Okt 2021

Rentas negeri dibenarkan bagi mereka yang lengkap mengambil 2 dos vaksin



11 Okt 2021

Seramai 21,073,482 individu atau 90 peratus daripada populasi dewasa telah menerima dua dos suntikan vaksin COVID-19



16 Sep 2021

Pulau Langkawi dibuka kepada pelancong tempatan. MOTAC sasar 200,000 pelancong kunjungi Langkawi



14 Sep 2021

LADA menjangkakan sekitar 400,000 pelancong mengunjungi Langkawi dengan hasil sekitar RM165 juta.



18 Okt 2021

Mesyuarat secara bersemuka, Insentif, Konvensyen dan Pameran (MICE) dibenarkan di negeri PPN Fasa 3 yang melibatkan individu yang telah diberi vaksin sepenuhnya



18 Okt 2021

Jemaah dibenarkan mengerjakan umrah selaras dengan keputusan memansuhkan keperluan *MyTravel Pass* untuk ke luar negara



29 Okt 2021

Kehadiran penonton yang lengkap divaksin ke acara sukan dan rekreasi dibenarkan

1 Apr 2022

Kerajaan mengumumkan sempadan negara dibuka semula sepenuhnya



23 Dis 2021

Malaysia menggantung sementara jualan tiket bas dan penerbangan khas untuk VTL sehingga 20 Jan 2022



29 Nov 2021

Pengenalan *Vaccinated Travel Lane (VTL)* Malaysia - Singapore



15 Nov 2021

Pulau Langkawi dibuka kepada pelancong antarabangsa

Nota:

- i. MOTAC: Kementerian Pelancongan, Seni dan Budaya Malaysia
- ii. LADA: Lembaga Pembangunan Langkawi
- iii. PPN: Pelan Pemulihan Negara

CHRONOLOGY OF MOVEMENT CONTROL ORDER (MCO) 2021



13 Jan 2021

Movement Control Order (MCO 2.0) involves six states namely Penang, Selangor, Federal Territories (Kuala Lumpur, Putrajaya and Labuan), Melaka, Johor and Sabah for 14 days



20 Feb 2021

For the first time, 312,390 doses of COVID-19 vaccine have arrived in Malaysia



24 Feb 2021

The National COVID-19 Immunization Program has been launched



17 Mar 2021

The government agreed to channel a 'one-off' Special Assistance Grant of RM3,000 to more than 5,000 MOTAC travel agencies

Targeted Travel Bubble effective 10 March 2021

Movement between states with RMCO status is only allowed including Langkawi Island

Mandatory to use a travel agency registered with MOTAC



1 Apr 2021

1,367 tour guides registered with the MOTAC will also receive a one-off cash assistance worth RM600 per person.



4 May 2021

The Targeted Tourism Bubble is suspended immediately



1 Jun 2021

The Movement Control Order (MCO 3.0) or total lockdown across the country



29 Aug 2021

One-off assistance to 3,957 individuals for tourism and arts industries in Sabah RM 300



11 Oct 2021

Cross-state travel is allowed for those who have completed two doses of the COVID-19 vaccine



11 Oct 2021

A total of 21,073,482 individuals or 90 per cent of the adult population have received two doses of the COVID-19 vaccine



16 Sep 2021

Langkawi Island is open to local tourists. MOTAC targets 200,000 tourists to Langkawi



14 Sep 2021

LADA expects around 400,000 tourists to visit Langkawi with a revenue of around RM165 million.



18 Oct 2021

Face-to-face Meetings, Incentives, Conventions and Exhibitions (MICE) are allowed in NRP Phase 3 states involving individuals who have been fully vaccinated



18 Oct 2021

Pilgrims are allowed to perform Umrah in line with the decision to abolish the MyTravel Pass requirement for going abroad



29 Oct 2021

Spectators who are fully vaccinated are allowed to sports and recreational events

1 Apr 2022

The government announced that the country's borders fully reopened



23 Dec 2021

Malaysia temporarily suspends the sale of special bus and flight tickets for VTL until 20 Jan 2022



29 Nov 2021

Introduction to Vaccinated Travel Lane (VTL) Malaysia - Singapore



15 Nov 2021

Langkawi Island is open to international tourists

Notes:

- i. MOTAC: Ministry of Tourism, Arts and Culture
- ii. LADA: Langkawi Development Authority
- iii. NRP: National Recovery Plan

RENCANA *ARTICLES*



Penyertaan Wanita dalam Industri Pelancongan: Perspektif Malaysia¹

Oleh: Nurul Aini Abdul Wahab² dan Nurul Nadiyah Abd Ghani³

^{2,3}Bahagian Perangkaan Akaun Negara, Jabatan Perangkaan Malaysia (DOSM)

1.0 Pendahuluan

Wanita di Malaysia meliputi hampir separuh daripada populasi negara ini. Wanita bukan sahaja menyumbang kepada pembangunan negara sebagai isteri dan ibu, malah mereka juga sebahagian daripada pasaran buruh yang membantu dalam pertumbuhan ekonomi di Malaysia. Peralihan sektor ekonomi daripada pertanian kepada perindustrian dan perkhidmatan telah merubah corak pekerjaan di Malaysia serta menyebabkan model tenaga buruh mengalami perubahan demografik yang ketara dengan peningkatan penyertaan wanita sejak 1957 (Ghazali, Ahmad & Tan, 2015). Transformasi ini mengakibatkan perubahan kadar penyertaan tenaga buruh wanita meningkat daripada 47.8 peratus pada 1990 kepada 55.3 peratus pada 2020. Walau bagaimanapun, Rancangan Malaysia Kesebelas (2016-2020) menasaskan penyertaan wanita 59.0 peratus dalam pasaran kerja pada 2020. Ismail & Sulaiman (2014) menyatakan penyertaan wanita dalam pasaran buruh pada era pemodenan ini banyak menyumbang kepada pembangunan ekonomi. Dallakyan dan Bakhtavoryan (2012) menjelaskan peningkatan kadar penyertaan tenaga buruh wanita telah meningkatkan produktiviti buruh, mengurangkan kemiskinan dan membaik pulih keseluruhan pembangunan sosioekonomi. Namun, menurut Abiddin dan Ismail (2021) meskipun banyak peluang wujud dalam inovasi teknologi, revolusi dan kemajuan, tetapi muncul cabaran yang besar dalam konteks ketidaksamaan kenaikan pendapatan, jurang kemiskinan yang melebar serta kekurangan penyertaan tenaga buruh wanita.

Laporan Survei Tenaga Buruh (2020) menunjukkan kadar penyertaan tenaga buruh wanita telah meningkat setiap tahun namun didapati jurang gender atau perbezaan penglibatan wanita berbanding lelaki di Malaysia masih wujud dengan perbezaan 25.3 peratus pada 2020. Manakala, *International Labour Organization* (ILO, 2022) melaporkan jurang gender dalam penglibatan tenaga buruh wanita dan lelaki di peringkat global adalah 25.0 peratus bagi 2021. Hal ini mungkin berlaku kerana wanita yang berhasrat untuk bekerja sering mengalami kesukaran dalam mendapatkan pekerjaan berbanding lelaki. Faktor seperti peranan gender, agama, budaya dan kepercayaan bahawa wanita hanya membantu dalam kerja-kerja rumah merupakan kekangan yang dihadapi wanita untuk menyertai sektor ekonomi sama ada sebagai majikan atau pekerja. Ghose, Majid dan Ernst (2008) berpendapat wujud kepercayaan yang dipegang secara meluas bahawa penyertaan tenaga buruh wanita banyak dipengaruhi oleh norma agama dan budaya. Malahan, wanita juga cenderung untuk bekerja dalam pekerjaan yang tidak stabil seperti bekerja sendiri dan pekerja keluarga tanpa gaji yang juga dikenali sebagai pekerjaan terancam.

¹ Rencana ini adalah pandangan penulis dan tidak mencerminkan pandangan Jabatan Perangkaan Malaysia (DOSM)

Berdasarkan *World Tourism Organization* (UNWTO, 2010), sumbangan pelancongan kepada guna tenaga dianggarkan antara 6.0 ke 7.0 peratus daripada keseluruhan bilangan pekerjaan di seluruh dunia sama ada pekerjaan secara langsung atau tidak langsung. Laporan tersebut juga menyatakan satu daripada dua belas pekerja dunia sedang bekerja dalam industri pengembaraan dan pelancongan. Ini menjadikan pelancongan adalah salah satu industri terbesar di mana pada 2019 industri ini menyumbang 10.3 peratus kepada Keluaran Dalam Negeri Kasar (KDNK) dunia, namun menurun kepada 5.3 peratus pada 2020 berikutan sekatan berterusan terhadap mobiliti pelancong (*World Travel & Tourism Council*, 2022). Di Malaysia, Akaun Satelit Pelancongan merekodkan industri pelancongan telah menjana RM199.4 bilion iaitu 14.1 peratus kepada KDNK Malaysia pada 2020 (2019:15.9%).

Pemeriksaan wanita untuk menyertai pembangunan ekonomi dalam setiap peringkat dan sektor adalah penting bagi membina ekonomi yang kuat dan stabil. Umum ketahui bahawa wanita banyak berkecimpung dalam sektor perkhidmatan terutamanya industri pelancongan. Di samping itu, industri pelancongan juga mampu membantu wanita miskin untuk memutuskan rantai kemiskinan melalui pekerjaan formal atau tidak formal, keusahawanan dan latihan (UNWTO, 2010). Meskipun begitu, bukan keseluruhan manfaat daripada pembangunan industri pelancongan disalurkan kepada semua wanita akibat ketidaksemaan gender dalam ekonomi yang sedia ada.

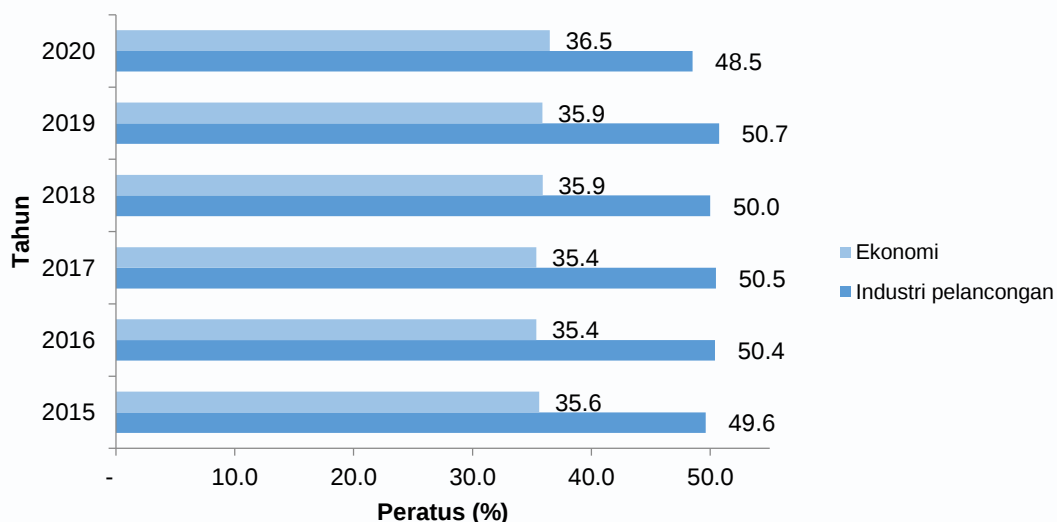
Lazimnya, industri pelancongan di kebanyakan negara didominasi oleh pekerja wanita. Berdasarkan UNWTO (2019), wanita meliputi majoriti tenaga buruh industri pelancongan di peringkat global dengan nilai sebanyak 54.0 peratus. Namun, pekerja wanita dalam industri pelancongan sebahagian besar bekerja dalam bidang bukan profesional atau bukan berjawatan pengurusan. Menurut Simpson (2017), sektor perkhidmatan penginapan dan penyediaan makanan & minuman biasanya dikendalikan oleh wanita, namun majoriti mengisi jawatan berkemahiran rendah seperti penyambut tetamu, pembantu rumah, pekerja cucian kering, pelayan dan sebagainya. Malahan, wujud jurang pendapatan antara gender dalam industri pelancongan kerana wanita memperoleh pendapatan kurang daripada lelaki untuk kerja yang setara. Bukan itu sahaja, UNWTO (2022) juga mendapati ramai pekerja wanita dalam industri pelancongan bekerja tanpa gaji iaitu sebahagian besar daripada mereka bekerja terlibat dalam peniagaan keluarga. Rencana ini bertujuan untuk meneliti corak guna tenaga wanita dalam industri pelancongan di Malaysia berdasarkan bilangan guna tenaga, gaji & upah serta taraf pekerjaan.

2.0 Majoriti guna tenaga dalam industri pelancongan adalah wanita

UNWTO (2019) menyatakan peratusan wanita bekerja dalam ekonomi di peringkat antarabangsa ialah 39.0 peratus. Sebaliknya dalam konteks industri pelancongan global pula, pekerja wanita merupakan majoriti (54.0%) dalam industri tersebut. UNWTO (2020) merekodkan peratusan pekerja wanita dalam industri pelancongan bagi tahun 2018 mengikut rantau adalah seperti berikut; *Africa* (69.0%), *Americas* (57.0%), *Europe* (53.0%), *Asia & the Pacific* (53.0%) dan *Middle East* (8.0%). Walau bagaimanapun, data tersebut hanya menggunakan statistik guna tenaga

dalam perkhidmatan penginapan dan penyediaan makanan & minuman sebagai proksi kepada industri pelancongan. Merujuk kepada **Carta 1**, industri pelancongan di Malaysia telah didominasi oleh wanita di mana peratus guna tenaga wanita dalam industri tersebut bagi tahun 2016 sehingga 2019 adalah melebihi 50.0 peratus. Ini menggambarkan industri pelancongan Malaysia menyediakan peluang pekerjaan yang sama rata tanpa mengira gender berbanding dalam ekonomi secara keseluruhan. Penemuan ini adalah selari dengan kenyataan UNWTO (2022) iaitu wanita merupakan majoriti pekerja dalam industri pelancongan.

Carta 1: Peratusan guna tenaga wanita di Malaysia, 2015-2020

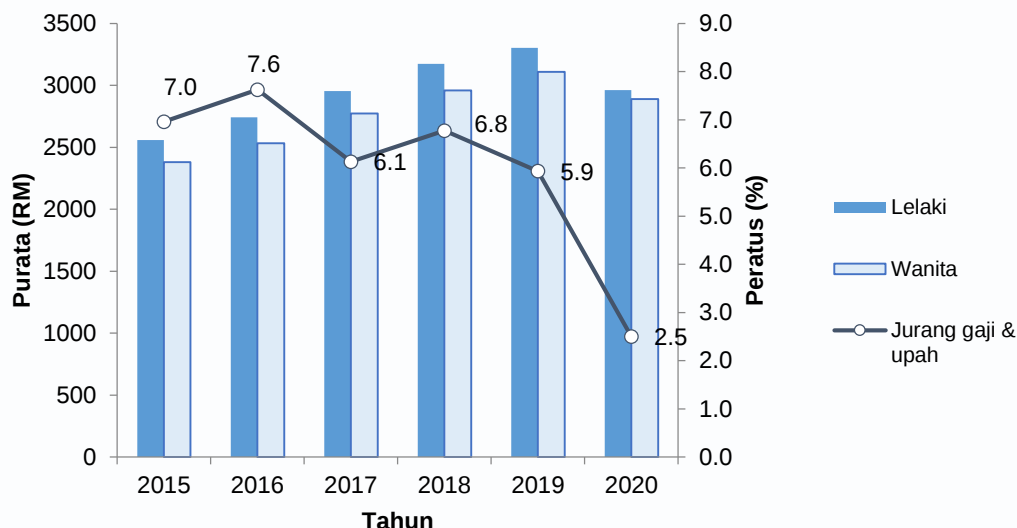


Sumber: Statistik Survei Tenaga Buruh, DOSM

3.0 Jurang pendapatan antara gender dalam industri pelancongan

Jurang pendapatan gender ialah indikator pengukuran ketidaksamaan dalam pendapatan antara wanita dan lelaki. Walaupun jurang pendapatan gender telah menurun di beberapa negara dari semasa ke semasa, secara keseluruhannya jurang tersebut masih signifikan. Berdasarkan laporan ILO (2018), wanita secara purata menerima pendapatan 20.0 peratus kurang daripada lelaki di seluruh dunia. Laporan Survei Gaji & Upah yang diterbitkan oleh DOSM juga menunjukkan purata gaji & upah lelaki adalah lebih tinggi berbanding purata gaji & upah wanita secara konsisten sejak tahun 2015 (**Carta 2**). Walau bagaimanapun, didapati jurang gaji & upah gender di Malaysia semakin mengecil berbanding di peringkat global.

Carta 2: Purata gaji & upah bulanan mengikut gender, Malaysia, 2015-2020



Sumber: Laporan Survei Gaji & Upah (2020), DOSM

UNWTO (2019) melaporkan jurang pendapatan gender dalam industri pelancongan adalah lebih kecil berbanding dengan sektor ekonomi secara umum. **Jadual 1** menunjukkan perbezaan pendapatan wanita berbanding lelaki dalam industri pelancongan dan ekonomi secara keseluruhan bagi negara terpilih. Secara global, wanita yang bekerja dalam industri pelancongan menerima pendapatan 85.3 peratus daripada pendapatan lelaki. Manakala wanita dalam sektor ekonomi keseluruhan menerima pendapatan 83.2 peratus daripada pendapatan lelaki dalam sektor yang sama. Industri perhotelan dan perkhidmatan makanan & minuman digunakan sebagai proksi kepada industri pelancongan secara keseluruhan berikutan kekangan ketersediaan data pendapatan industri pelancongan di peringkat agregat. Didapati pendapatan wanita yang bekerja dalam industri pelancongan di Asia Tenggara termasuk Malaysia adalah rendah berbanding sektor ekonomi secara keseluruhan.

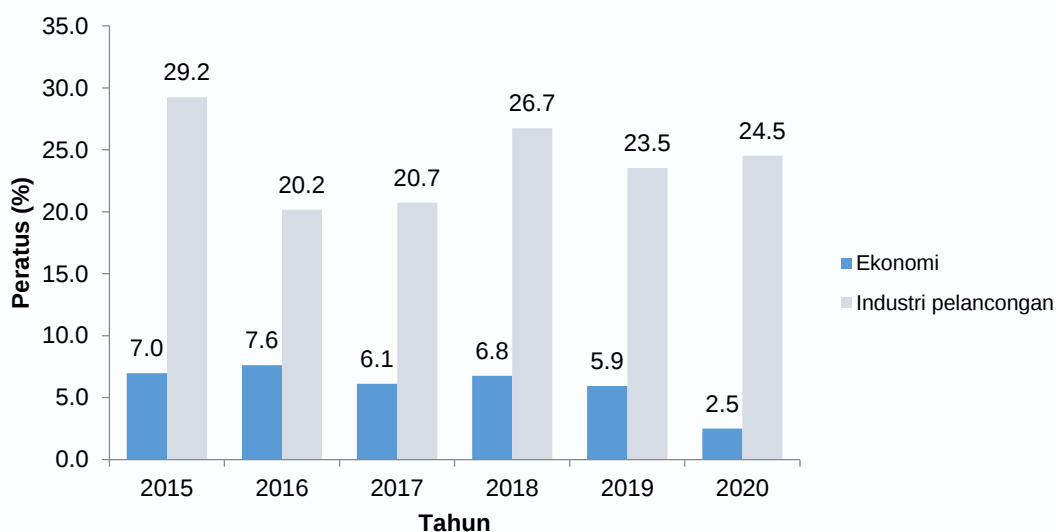
Jadual 1: Jurang pendapatan gender dalam pelancongan bagi negara terpilih dengan data tersedia, 2014-2018 (%)

Negara	Peratusan pendapatan wanita berbanding lelaki		Perbezaan
	Ekonomi	Perkhidmatan penginapan dan makanan	
Saudi Arabia	93.64	126.14	32.5
South Korea	63.90	77.82	13.9
Italy	82.47	93.45	11.0
United Kingdom	65.76	71.00	5.2
United States	77.63	81.88	4.3
Brunei Darussalam	92.38	96.05	3.7
Japan	73.35	73.49	0.1
Indonesia	83.04	69.93	-13.1
Cambodia	79.96	65.66	-14.3
Philippines	105.32	89.97	-15.4
Thailand	99.50	81.65	-17.9
Malaysia	95.92	77.01	-18.9
Global	83.20	85.30	2.1

Sumber: *Global Report on Women in Tourism Second Edition*

Pada 2020, wanita di sektor ekonomi secara keseluruhan telah menerima gaji & upah 2.5 peratus kurang daripada lelaki berbanding 5.9 peratus pada tahun sebelumnya (**Carta 3**). Sementara itu, wanita Malaysia yang bekerja dalam industri pelancongan secara purata bagi tempoh 2015 hingga 2020 menerima gaji & upah 24.2 peratus kurang daripada lelaki walaupun hampir 50.0 peratus daripada jumlah guna tenaga industri tersebut adalah wanita. Jurang yang besar ini menunjukkan masih terdapat diskriminasi pendapatan dalam industri pelancongan memandangkan lelaki banyak mendominasi peranan penting dalam industri tersebut (Scheyvens, 2000 & Barry, 2010). Manakala, wanita pula banyak memainkan peranan dalam kerja-kerja bersifat reproduktif seperti kerja pembersihan dan penyediaan makanan (Walter, 2013). Peranan wanita dalam industri ini diklasifikasikan sebagai pekerjaan berkemahiran rendah dan mempunyai gaji yang lebih rendah daripada pekerjaan lelaki.

Carta 3: Jurang gaji & upah wanita dalam ekonomi dan industri pelancongan*, Malaysia, 2015-2020



* Perkhidmatan penginapan dan makanan & minuman sahaja sebagai proksi kepada pelancongan
 Sumber: Laporan Survei Gaji & Upah (2020), DOSM

4.0 Wanita sebagai pekerja keluarga tanpa gaji

Industri pelancongan secara tradisinya menggaji sejumlah besar pekerja daripada kalangan keluarga lebih daripada sektor ekonomi secara keseluruhan. Kajian Ordenez, M. (2001) menunjukkan ramai daripada pekerja ini adalah berstatus pekerja keluarga tidak bergaji. Laporan UNWTO (2010) juga mendapati bahawa wanita telah menyumbang sejumlah besar tenaga buruh tanpa gaji terutamanya dalam industri pelancongan informal atau perniagaan keluarga.

Jadual 2 menunjukkan perbandingan wanita sebagai pekerja keluarga dalam industri pelancongan adalah lebih tinggi berbanding sektor ekonomi secara keseluruhan kecuali di Asia. Secara global, purata wanita bekerja dalam industri pelancongan perniagaan keluarga adalah 70.3 peratus berbanding 56.0 peratus dalam sektor ekonomi secara keseluruhan manakala Asia telah menunjukkan nilai yang paling rendah antara semua benua iaitu 54.0 peratus berbanding 64.0 peratus.

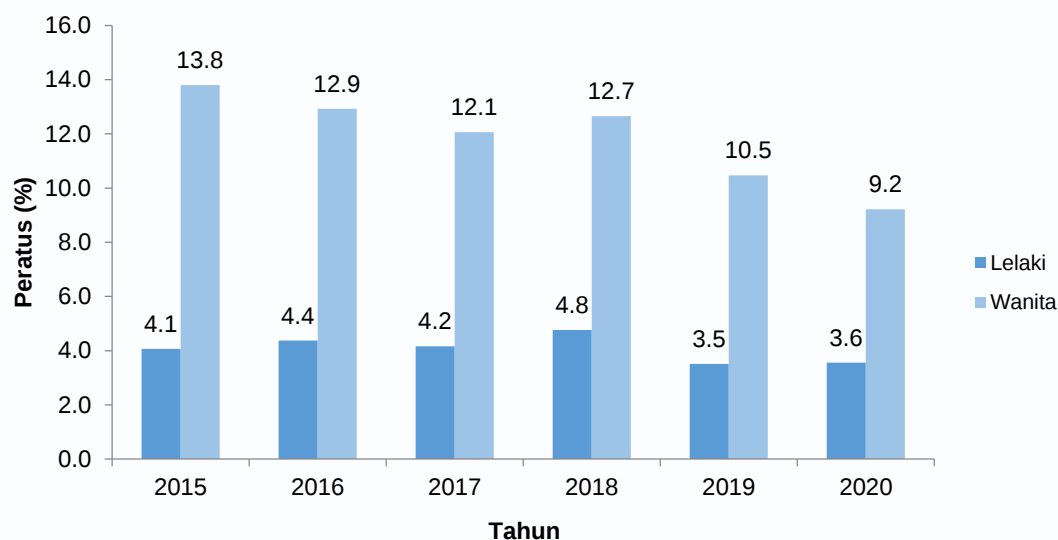
Jadual 2: Sumbangan wanita sebagai pekerja keluarga mengikut rantau*

Rantau	Ekonomi	Hotel dan restoran
Caribbean	51.0	84.0
Africa	56.0	73.0
Latin America	53.0	70.0
Asia	64.0	54.0
Purata	56.0	70.3

* Data tersedia hanya untuk 34 negara sahaja. Data hampir lengkap bagi rantau Asia.
Sumber: ILOSTAT Database

Industri pelancongan di Malaysia telah menunjukkan peratusan wanita sebagai pekerja keluarga tanpa gaji adalah lebih tinggi berbanding lelaki dalam industri yang sama. Pada tahun 2020, peratusan wanita berstatus pekerja keluarga tanpa gaji dalam industri pelancongan adalah 9.2 peratus berbanding lelaki 3.6 peratus (**Carta 4**). Walaupun nilai peratusan menunjukkan penurunan sejak tahun 2015, namun masih terdapat jurang antara wanita dan lelaki dari segi bilangan guna tenaga berstatus pekerja keluarga tanpa gaji.

Carta 4: Peratusan pekerja keluarga tanpa gaji mengikut gender dalam industri pelancongan, Malaysia, 2015-2020



Sumber: Statistik Survei Tenaga Buruh, DOSM

Secara global, wanita menanggung jumlah masa yang tidak seimbang melakukan kerja rumah tangga dan penjagaan kanak-kanak tanpa gaji berbanding lelaki (ILO, 2018). Ini menyebabkan wanita menghadapi kekangan untuk mengambil bahagian dalam pasaran buruh sepenuhnya. Kebiasaannya, tugas dan agihan kerja untuk wanita dalam perniagaan keluarga tidak dapat dilihat, tidak diiktiraf dan tidak dibayar (Rodríguez-Modroño, Gálvez-Muñoz & Agenjo-Calderón, 2015). Walau bagaimanapun, masih kurang kajian berkaitan pekerja keluarga tanpa gaji dalam industri pelancongan dan ketidakseimbangan gender.

5.0 Kesimpulan

Wanita membentuk majoriti guna tenaga dalam industri pelancongan. Namun wujud jurang pendapatan antara wanita dan lelaki dalam industri pelancongan Malaysia sebanyak 24.5 peratus pada 2020. Dari sudut taraf pekerjaan, didapati peratusan wanita sebagai pekerja keluarga tanpa gaji adalah lebih tinggi berbanding lelaki masing-masing dengan nilai 9.2 peratus dan 3.6 peratus pada 2020. Berdasarkan kajian ini, pembangunan pelancongan mengikut perspektif gender adalah penting dalam meningkatkan kemajuan sosial dan ekonomi seterusnya turut mempengaruhi kehidupan wanita ke arah yang lebih baik. Walau bagaimanapun, kajian lanjut menggunakan kesemua data industri berkaitan dengan pelancongan perlu dibangunkan bagi mendapatkan pemahaman yang lebih jelas tentang wanita dalam pelancongan. UNWTO (2022) juga menekankan kebimbangan untuk mencapai kesaksamaan gender dan memperkasakan wanita seperti mana yang digariskan dalam Matlamat Pembangunan Mampan Kelima (SDG 5). Ia merujuk akses kepada kemudahan yang sama dalam sumber dan peluang tanpa mengira gender, termasuk penyertaan ekonomi dan pembuat keputusan.

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Women's Participation in Tourism Industry: Malaysia Perspective¹

By: Nurul Aini Abdul Wahab² and Nurul Nadiah Abd Ghani³

^{2,3}National Accounts Statistics Division, Department of Statistics, Malaysia (DOSM)

1.0 Introduction

Women in Malaysia cover almost half of the country's population. Women not only contribute to the nation's development as wives and mothers, but they are also part of labour market who help in the Malaysia's economy growth. The transition of the economic sector from agriculture to industry and services has changed the employment pattern in Malaysia and caused the labour force model to experience significant demographic changes with the increase in women's participation since 1957 (Ghazali, Ahmad & Tan, 2015). This transformation resulted in a change of female labour force participation rate which increased from 47.8 per cent in 1990 to 55.3 per cent in 2020. However, the Eleventh Malaysia Plan (2016-2020) targets women's participation in the labour market at 59.0 per cent in 2020. Ismail & Sulaiman (2014) stated that women's participation in the labour market in this era of modernisation contributed greatly to the economic development. Dallakyan and Bakhtavoryan (2012) explained that increasing female labour force participation rate has raised labour productivity, reduced poverty and improved overall socioeconomic development. However, according to Abiddin and Ismail (2021) although many opportunities exist in technological innovation, revolution and advancement, but there are big challenges in the context of rising income inequality, the widening poverty gap and the lack of female labour force participation.

Labour Force Survey Report (2020) shows that the female labour force participation rate has increased every year, but it was found that the gender gap or the difference in the involvement of women compared to men in Malaysia still exists with a difference of 25.3 per cent in 2020. Meanwhile, the International Labour Organization (ILO, 2022) reported a gap in gender participation of women and men in the global labour force is 25.0 per cent for 2021. This may happen because women who intend to work often experience difficulties in getting a job compared to men. Factors such as gender roles, religion, culture and the belief that women only help in housework are the constraints faced by women to participate in the economic sector either as employers or employees. Ghose, Majid and Ernst (2008) argued that there is a widely held belief that women's labour force participation is heavily influenced by religious and cultural norms. In fact, women also tend to work in unstable jobs such as self-employment and unpaid family workers also known as vulnerable jobs.

Based on the World Tourism Organization (UNWTO, 2010), tourism's contribution to employment is estimated between 6.0 to 7.0 per cent of the total number of employments worldwide, whether direct or indirect. The report also states that one in twelve global workers are employed in the travel and

¹ This article is an authors' view and does not reflect the view of Department of Statistics, Malaysia (DOSM)

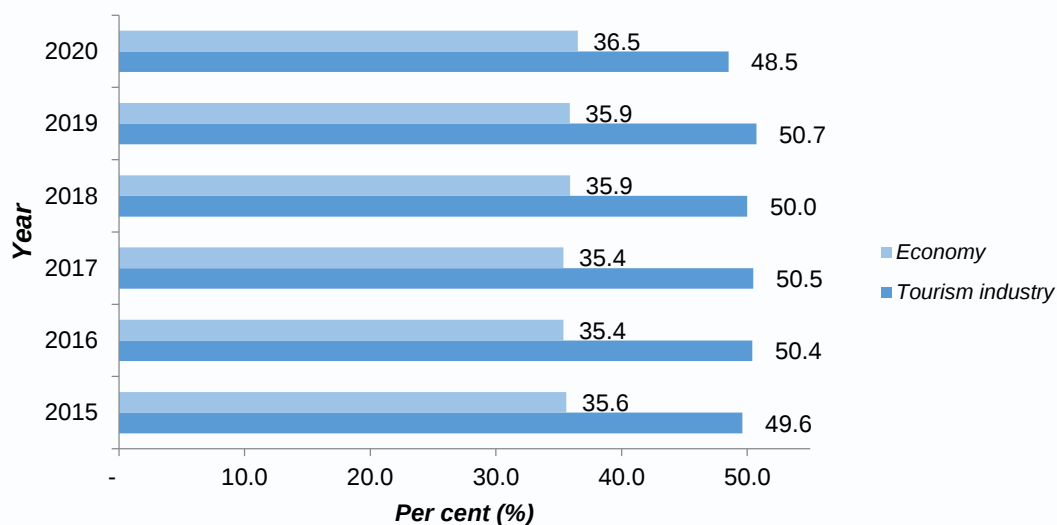
tourism industry. This makes tourism one of the largest industry where in 2019 this industry contributed 10.3 per cent to the world's Gross Domestic Product (GDP), but decreased to 5.3 per cent in 2020 due to continued restrictions on tourist mobility (World Travel & Tourism Council, 2022). In Malaysia, the Tourism Satellite Account recorded that the tourism industry has generated RM199.4 billion which is 14.1 per cent to Malaysia's GDP in 2020 (2019: 15.9%).

Empowering women to participate in economic development at every level and sector is essential in building a strong and stable economy. It is common that women are mostly involved in the services sector, especially the tourism industry. In addition, tourism industry is also able to help poor women to break the poverty chain through formal or informal employment, entrepreneurship and training (UNWTO, 2010). Despite that, not all the benefits from the development of the tourism industry are channeled to all women due to gender inequality in the existing economy.

Typically, the tourism industry in most countries is dominated by female workers. Based on UNWTO (2019), women covered the majority of the workforce in the tourism industry globally with a value of 54.0 per cent. However, female workers in the tourism industry are largely employed in non-professional or non-managerial positions. According to Simpson (2017), the accommodation and food & beverage services industry is usually run by women, but majority filled the low-skilled positions such as receptionists, housekeepers, dry cleaners, waiters and so on. In fact, there is a gender pay gap in the tourism industry as women earn less than men for equivalent work. Not only that, UNWTO (2022) also found that many female workers in tourism industry are unpaid workers which majority of them work in family tourism related businesses. This article aims to examine the pattern of employment of women in the tourism industry in Malaysia based on the number of employments, salaries & wages and status of employment.

2.0 The majority of employees in the tourism industry are women

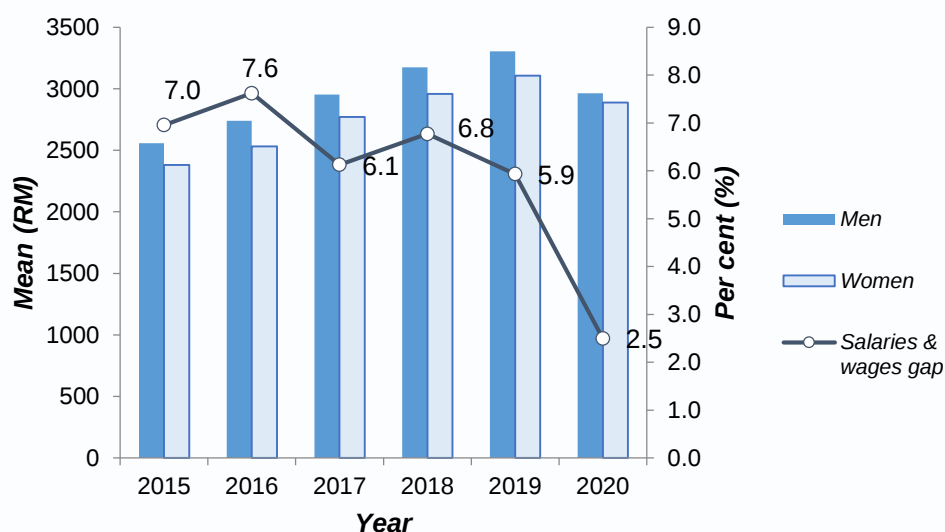
UNWTO (2019) states that the percentage of women working in the economy globally is 39.0 per cent. On the other hand, in the context of the global tourism industry, female workers are the majority (54.0%) in the industry. UNWTO (2020) recorded the percentage of female workers in the tourism industry for 2018 by region as follows; Africa (69.0%), Americas (57.0%), Europe (53.0%), Asia & the Pacific (53.0%) and Middle East (8.0%). However, the data only uses employment statistics in accommodation services and the food & beverages serving services as a proxy for the tourism industry. Referring to **Chart 1**, the tourism industry in Malaysia has been dominated by women where the percentage of female employment in the industry for the years 2016 to 2019 is more than 50.0 per cent. This illustrates that Malaysia's tourism industry provides equal employment opportunities regardless of gender compared to the economy as a whole. This finding is in line with the UNWTO (2022) statement that women are the majority of employment in the tourism industry.

Chart 1: The percentage of female employment in Malaysia, 2015-2020

Source: Statistics of Labour Force Survey, DOSM

3.0 Gender pay gap in the tourism industry

The gender pay gap is an indicator to measure income inequality between women and men. Although the gender pay gap has decreased over the time in some countries, overall the gap is still significant. Based on the report of ILO (2018), women on average received income 20.0 per cent less than men worldwide. The Salary & Wages Survey report published by DOSM also shows that the mean salaries & wages of men is higher than the mean salaries & wages of women consistently since 2015 (Chart 2). However, it was found that the gender income gap in Malaysia is narrowing compared to the global.

Chart 2: Mean monthly salaries & wages by gender, Malaysia, 2015-2020

Source: Salaries & Wages Survey Report (2020), DOSM

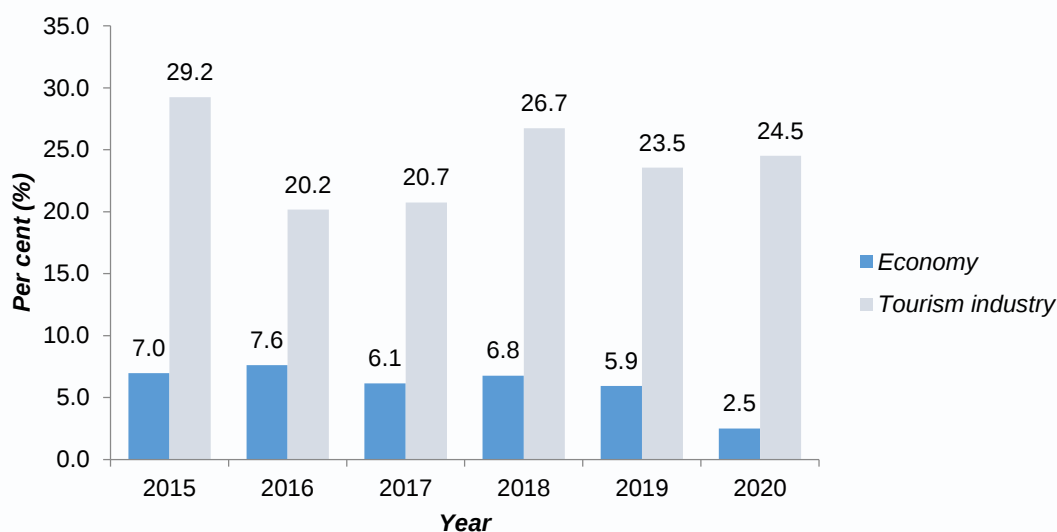
UNWTO (2019) reports noted that the gender pay gap in the tourism industry is smaller compared to the economic in general. **Table 1** shows the difference in income of women compared to men in the tourism industry and the economy as a whole for selected countries. Globally, women who work in the tourism industry received 85.3 per cent of the income of men. While women in the overall economic sector received 83.2 per cent income compared to men in the same sector. The accommodation and food & beverage services are used as a proxy for the tourism industry as a whole due to the limited availability of tourism industry income data at aggregate level. It was found that the income of women working in the tourism industry in Southeast Asia including Malaysia is low compared to the economic sector as a whole.

Table 1: Gender pay gap in tourism for selected countries with available data, 2014-2018 (%)

Country	Women's earnings as percentage of men's earnings		Difference
	Economy	Accommodation and food services	
Saudi Arabia	93.64	126.14	32.5
South Korea	63.90	77.82	13.9
Italy	82.47	93.45	11.0
United Kingdom	65.76	71.00	5.2
United States	77.63	81.88	4.3
Brunei Darussalam	92.38	96.05	3.7
Japan	73.35	73.49	0.1
Indonesia	83.04	69.93	-13.1
Cambodia	79.96	65.66	-14.3
Philippines	105.32	89.97	-15.4
Thailand	99.50	81.65	-17.9
Malaysia	95.92	77.01	-18.9
Global	83.20	85.30	2.1

Source: Global Report on Women in Tourism Second Edition

In 2020, women in the economic sector as a whole have received salaries & wages 2.5 per cent less than men compared to 5.9 per cent in the previous year (**Chart 3**). Meanwhile, Malaysian women who work in the tourism industry on average for the period of 2015 to 2020 received salaries & wages 24.2 per cent less than men even though almost 50.0 per cent of the industry's total employment is female. This large gap indicates that there is still income discrimination in the tourism industry considering that men has dominated the important roles in the industry (Scheyvens, 2000 & Barry, 2010). Meanwhile, women play many roles in reproductive work such as cleaning and food preparation (Walter, 2013). Women's roles in this industry are classified as low-skilled jobs and have lower wages than men's jobs.

Chart 3: Women's pay gap in the economy and tourism industry*, Malaysia, 2015-2020

* Accommodation and food & beverage services only as proxy to tourism
 Source: Salaries & Wages Survey Report (2020), DOSM

4.0 Women as unpaid family workers

The tourism industry traditionally employs a larger number of family workers than the economy as a whole. Ordonez, M.'s (2001) study described that many of these workers are unpaid family workers. The UNWTO report (2010) also found that women have contributed a large amount of unpaid labour especially in the informal tourism industry or family businesses.

Table 2 shows the comparison of women as family workers in the tourism industry is higher than the economy sector as a whole except in Asia. Globally, the average number of women working in the family business tourism industry is 70.3 per cent compared to 56.0 per cent in the economy as a whole, while Asia has shown the lowest value among all continents at 54.0 per cent compared to 64.0 per cent.

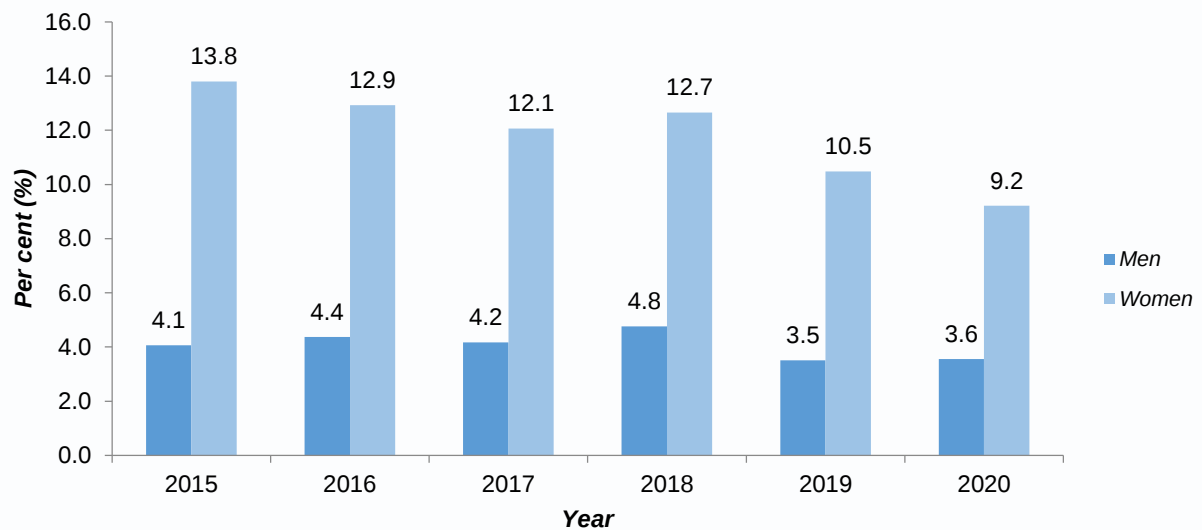
Table 2: Women contributing as family workers by region*

Region	Economy	Hotel and restaurant
Caribbean	51.0	84.0
Africa	56.0	73.0
Latin America	53.0	70.0
Asia	64.0	54.0
Average	56.0	70.3

* Data were available for only 34 out of 172 countries. Data are most complete for Asia
 Source: ILOSTAT Database

The tourism industry in Malaysia has shown that the percentage of women as unpaid family workers is higher than men in the same industry. In 2020, the percentage of women with unpaid family worker status in the tourism industry is 9.2 per cent compared to 3.6 per cent of men (**Chart 4**). Although the percentage value recorded a decrease since 2015, there is still a gap between women and men in terms of the number of unemployed family workers.

Chart 4: Percentage of unpaid family workers by gender in the tourism industry, Malaysia, 2015-2020



Source: Statistics of Labour Force Survey, DOSM

Globally, women bear a disproportionate amount of time doing unpaid housework and childcare compared to men (ILO, 2018). This causes women to face constraints to fully participate in the labour market. Usually, the tasks and distribution of work for women in family businesses are invisible, unrecognized and unpaid (Rodríguez-Modroño, Gálvez-Muñoz & Agenjo-Calderón, 2015). However, there is still lack of research related to unpaid family workers in the tourism industry and gender inequality.

5.0 CONCLUSION

Women formed the majority of the workforce in the tourism industry. However, there is an pay gap between women and men in the Malaysian tourism industry of 24.5 per cent in 2020. In terms of employment status, it was observed that the percentage of women as unpaid family workers is higher than men at 9.2 per cent and 3.6 per cent in 2020 respectively. Based on this study, the development of tourism according to the gender perspective is important in improving social and economic progress and also affects the lives of women. However, further study using all industry data related to tourism needs to be developed to gain a better understanding on women in tourism. UNWTO (2022) also emphasises the concern to achieve gender equality and empower women as outlined in the Fifth Sustainable Development Goal (SDG 5). It refers to equal access to resources and opportunities regardless of gender, including in the economic and decision-making participation.

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JADUAL-JADUAL STATISTIK *STATISTICS TABLE*



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

Produk Products	2015	2016	2017	2018	2019	2020	2021 ^P
RM Juta RM Million							
Perkhidmatan penginapan Accommodation services	17,656.4	20,142.5	21,034.2	21,622.8	22,007.3	3,144.0	73.2
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	10,106.2	10,602.9	11,446.0	11,784.7	12,019.2	2,011.2	80.8
Perkhidmatan pengangkutan penumpang Passenger transport services	13,362.5	14,476.1	14,850.5	15,188.0	16,023.7	2,413.0	178.1
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	4,165.0	4,612.8	4,217.0	3,869.6	4,047.1	582.5	0.8
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	2,200.2	2,424.1	2,555.6	2,366.3	2,526.7	395.1	11.4
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	646.3	657.7	602.4	615.6	467.2	24.0	0.1
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	23,827.5	25,920.9	28,141.7	29,373.7	29,924.4	4,717.9	46.0
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	2,673.5	2,782.8	2,883.3	2,861.7	2,405.3	406.0	79.1
Jumlah Total	74,637.6	81,619.7	85,730.8	87,682.4	89,421.0	13,693.7	469.4
Perubahan peratusan tahunan Annual percentage change	..	9.4	5.0	2.3	2.0	-84.7	-96.6
Peratus sumbangan (%) Percentage share (%)							
Perkhidmatan penginapan Accommodation services	23.7	24.7	24.5	24.7	24.6	23.0	15.6
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	13.5	13.0	13.4	13.4	13.4	14.7	17.2
Perkhidmatan pengangkutan penumpang Passenger transport services	17.9	17.7	17.3	17.3	17.9	17.6	37.9
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	5.6	5.7	4.9	4.4	4.5	4.3	0.2
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	2.9	3.0	3.0	2.7	2.8	2.9	2.4
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	0.9	0.8	0.7	0.7	0.5	0.2	0.0
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	31.9	31.8	32.8	33.5	33.5	34.5	9.8
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	3.6	3.4	3.4	3.3	2.7	3.0	16.9
Jumlah Total	100.0	100.0	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 1A: Perbelanjaan pelancongan *inbound* bagi pelancong mengikut produk
Table 1A: Inbound tourism expenditure of tourists by products

Produk Products	2015	2016	2017	2018	2019	2020	2021 ^P
RM Juta RM Million							
Perkhidmatan penginapan <i>Accommodation services</i>	17,656.4	20,142.5	21,034.2	21,622.8	22,007.3	3,144.0	73.2
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	9,727.4	10,190.2	10,928.0	11,274.1	11,517.1	1,907.2	51.7
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	12,952.3	14,011.7	14,297.4	14,639.4	15,456.2	2,297.3	168.4
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	4,008.9	4,433.3	4,026.1	3,702.0	3,878.0	552.4	0.6
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	2,117.7	2,329.8	2,439.9	2,263.8	2,421.2	374.7	9.0
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	622.1	632.1	575.2	589.0	447.7	22.8	0.0
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristics goods</i>	22,934.4	24,912.0	26,868.0	28,101.2	28,674.2	4,473.9	12.1
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	2,573.3	2,674.4	2,752.8	2,737.7	2,304.8	385.0	72.1
Jumlah <i>Total</i>	72,592.5	79,325.9	82,921.5	84,929.9	86,706.5	13,157.3	387.2
Perubahan peratusan tahunan <i>Annual percentage change</i>	..	9.3	4.5	2.4	2.1	-84.8	-97.1
Peratus sumbangan (%) Percentage share (%)							
Perkhidmatan penginapan <i>Accommodation services</i>	24.3	25.4	25.4	25.5	25.4	23.9	18.9
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	13.4	12.8	13.2	13.3	13.3	14.5	13.4
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	17.8	17.7	17.2	17.2	17.8	17.5	43.5
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	5.5	5.6	4.9	4.4	4.5	4.2	0.2
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	2.9	2.9	2.9	2.7	2.8	2.8	2.3
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	0.9	0.8	0.7	0.7	0.5	0.2	0.0
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristics goods</i>	31.6	31.4	32.4	33.1	33.1	34.0	3.1
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	3.5	3.4	3.3	3.2	2.7	2.9	18.6
Jumlah <i>Total</i>	100.0	100.0	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 1B: Perbelanjaan pelancongan inbound bagi pelawat harian mengikut produk
Table 1B: Inbound tourism expenditure of excursionists by products

Produk Products	2015	2016	2017	2018	2019	2020	2021 ^P
	RM Juta RM Million						
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	378.8	412.7	518.1	510.5	502.1	104.0	29.1
Perkhidmatan pengangkutan penumpang Passenger transport services	410.2	464.4	553.2	548.6	567.5	115.7	9.7
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	156.1	179.5	190.9	167.6	169.1	30.1	0.2
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	82.5	94.4	115.7	102.5	105.6	20.4	2.4
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	24.2	25.6	27.3	26.7	19.5	1.2	0.0
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	893.1	1,008.9	1,273.8	1,272.5	1,250.2	244.0	33.8
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	100.2	108.3	130.5	124.0	100.5	21.0	7.1
Jumlah Total	2,045.1	2,293.8	2,809.3	2,752.5	2,714.5	536.5	82.2
Perubahan peratusan tahunan Annual percentage change	..	12.2	22.5	-2.0	-1.4	-80.2	-84.7
	Peratus sumbangan (%) Percentage share (%)						
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	18.5	18.0	18.4	18.5	18.5	19.4	35.3
Perkhidmatan pengangkutan penumpang Passenger transport services	20.1	20.2	19.7	19.9	20.9	21.6	11.8
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	7.6	7.8	6.8	6.1	6.2	5.6	0.2
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	4.0	4.1	4.1	3.7	3.9	3.8	2.9
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	1.2	1.1	1.0	1.0	0.7	0.2	0.1
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	43.7	44.0	45.3	46.2	46.1	45.5	41.1
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	4.9	4.7	4.6	4.5	3.7	3.9	8.6
Jumlah Total	100.0	100.0	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 2: Perbelanjaan pelancongan domestik bagi pelawat mengikut produk
Table 2: Domestic tourism expenditure of visitors by products

Produk Products	2015	2016	2017	2018	2019	2020	2021
RM Juta RM Million							
Perkhidmatan penginapan <i>Accommodation services</i>	6,133.3	6,598.3	7,164.1	7,882.8	8,625.7	2,087.9	1,087.4
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	9,317.8	10,311.7	11,450.4	12,785.6	14,702.4	7,497.4	2,783.2
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	4,560.0	4,868.3	5,215.1	5,777.4	6,384.5	2,506.3	888.9
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	1,054.6	1,264.8	1,284.0	1,400.9	1,603.5	94.6	21.1
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	968.9	1,055.3	1,234.2	1,390.2	1,695.3	569.1	457.0
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	11,480.5	11,939.4	12,599.4	13,710.3	15,498.5	3,627.2	2,038.8
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristics goods</i>	23,192.1	26,376.8	30,149.2	34,757.9	39,033.4	21,267.4	9,263.9
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	3,833.7	4,083.1	4,565.7	5,036.4	5,094.9	984.9	910.8
Jumlah <i>Total</i>	60,541.1	66,497.7	73,662.1	82,741.4	92,638.2	38,634.6	17,451.0
Perubahan peratusan tahunan <i>Annual percentage change</i>	..	9.8	10.8	12.3	12.0	-58.3	-54.8
Peratus sumbangan (%) Percentage share (%)							
Perkhidmatan penginapan <i>Accommodation services</i>	10.1	9.9	9.7	9.5	9.3	5.4	6.2
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	15.4	15.5	15.5	15.5	15.9	19.4	15.9
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	7.5	7.3	7.1	7.0	6.9	6.5	5.1
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	1.7	1.9	1.7	1.7	1.7	0.2	0.1
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	1.6	1.6	1.7	1.7	1.8	1.5	2.6
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	19.0	18.0	17.1	16.6	16.7	9.4	11.7
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristics goods</i>	38.3	39.7	40.9	42.0	42.1	55.0	53.1
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	6.3	6.1	6.2	6.1	5.5	2.5	5.2
Jumlah <i>Total</i>	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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

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

Produk Products	2015	2016	2017	2018	2019	2020	2021
RM Juta RM Million							
Perkhidmatan penginapan <i>Accommodation services</i>	6,133.3	6,598.3	7,164.1	7,882.8	8,625.7	2,087.9	1,087.4
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	6,295.7	6,813.8	7,449.2	8,372.5	9,756.1	4,969.6	1,153.8
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	3,985.3	4,338.2	4,629.4	5,063.4	5,617.4	2,110.9	693.4
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	994.9	1,255.9	1,274.9	1,392.0	1,596.5	93.7	20.6
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	485.4	496.3	560.6	684.3	757.8	232.8	199.8
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	9,197.3	8,535.3	9,109.0	9,603.5	10,533.5	2,109.9	889.3
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristics goods</i>	8,464.2	10,714.3	14,064.5	16,187.6	18,803.1	9,526.1	2,176.9
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	1,948.3	2,056.5	2,019.4	2,377.1	2,896.3	743.3	694.1
Jumlah <i>Total</i>	37,504.5	40,808.4	46,271.1	51,563.2	58,586.5	21,874.2	6,915.3
Perubahan peratusan tahunan <i>Annual percentage change</i>	..	8.8	13.4	11.4	13.6	-62.7	-68.4
Peratus sumbangan (%) Percentage share (%)							
Perkhidmatan penginapan <i>Accommodation services</i>	16.4	16.2	15.5	15.3	14.7	9.5	15.7
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	16.8	16.7	16.1	16.2	16.7	22.7	16.7
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	10.6	10.6	10.0	9.8	9.6	9.7	10.0
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	2.7	3.1	2.8	2.7	2.7	0.4	0.3
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	1.3	1.2	1.2	1.3	1.3	1.1	2.9
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	24.5	20.9	19.7	18.6	18.0	9.6	12.9
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristics goods</i>	22.6	26.3	30.4	31.4	32.1	43.5	31.5
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	5.2	5.0	4.4	4.6	4.9	3.4	10.0
Jumlah <i>Total</i>	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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

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

Produk Products	2015	2016	2017	2018	2019	2020	2021
RM Juta RM Million							
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	3,022.1	3,497.9	4,001.1	4,413.1	4,946.4	2,527.7	1,629.4
Perkhidmatan pengangkutan penumpang Passenger transport services	574.7	530.1	585.7	714.1	767.1	395.3	195.5
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	59.7	9.0	9.2	8.9	7.0	0.8	0.5
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	483.5	559.1	673.6	705.9	937.5	336.3	257.2
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	2,283.2	3,404.1	3,490.4	4,106.7	4,964.9	1,517.3	1,149.4
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	14,727.9	15,662.5	16,084.7	18,570.3	20,230.2	11,741.3	7,087.0
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	1,885.4	2,026.7	2,546.3	2,659.2	2,198.6	241.6	216.7
Jumlah Total	23,036.6	25,689.3	27,391.0	31,178.2	34,051.7	16,760.5	10,535.7
Perubahan peratusan tahunan Annual percentage change	..	11.5	6.6	13.8	9.2	-50.8	-37.1
Peratus sumbangan (%) Percentage share (%)							
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	13.1	13.6	14.6	14.2	14.5	15.1	15.5
Perkhidmatan pengangkutan penumpang Passenger transport services	2.5	2.1	2.1	2.3	2.3	2.4	1.9
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	2.1	2.2	2.5	2.3	2.8	2.0	2.4
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	9.9	13.3	12.7	13.2	14.6	9.1	10.9
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	63.9	61.0	58.7	59.6	59.4	70.1	67.3
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	8.2	7.9	9.3	8.5	6.5	1.4	2.1
Jumlah Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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

Jadual 3: Perbelanjaan pelancongan *outbound* bagi pelawat mengikut produk
Table 3: Outbound tourism expenditure of visitors by products

Produk Products	2015	2016	2017	2018	2019	2020	2021 ^p
RM Juta RM Million							
Perkhidmatan penginapan <i>Accommodation services</i>	8,184.9	8,238.0	9,072.3	9,624.1	10,080.0	3,747.6	3,076.1
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	3,423.4	3,914.8	4,748.5	5,470.1	5,824.0	2,213.4	2,066.5
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	11,795.0	12,220.9	13,789.9	13,000.8	14,224.0	5,927.5	2,767.7
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	809.2	987.2	1,158.2	1,451.8	1,568.0	575.8	101.8
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	746.9	851.0	1,042.4	1,275.0	1,568.0	592.3	92.5
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristics goods</i>	5,819.7	7,387.0	8,570.4	9,731.1	10,886.4	3,675.3	1,850.6
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	342.3	442.5	501.9	575.8	649.6	487.3	325.9
Jumlah <i>Total</i>	31,121.4	34,041.4	38,883.5	41,128.7	44,800.1	17,219.2	10,281.2
Perubahan peratusan tahunan <i>Annual percentage change</i>	..	9.4	14.2	5.8	8.9	-61.6	-40.3
Peratus sumbangan (%) Percentage share (%)							
Perkhidmatan penginapan <i>Accommodation services</i>	26.3	24.2	23.3	23.4	22.5	21.8	29.9
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	11.0	11.5	12.2	13.3	13.0	12.9	20.1
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	37.9	35.9	35.5	31.6	31.8	34.4	26.9
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	2.6	2.9	3.0	3.5	3.5	3.3	1.0
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	2.4	2.5	2.7	3.1	3.5	3.4	0.9
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristics goods</i>	18.7	21.7	22.0	23.7	24.3	21.3	18.0
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	1.1	1.3	1.3	1.4	1.5	2.8	3.2
Jumlah <i>Total</i>	100.0	100.0	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 4: Penggunaan pelancongan *internal* bagi pelawat mengikut produk
Table 4: Internal tourism consumption of visitors by products

Produk Products	2015	2016	2017	2018	2019	2020	2021 ^p
RM Juta RM Million							
Perkhidmatan penginapan Accommodation services	23,789.7	26,740.8	28,198.3	29,505.5	30,633.0	5,231.9	1,160.6
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	19,424.0	20,914.6	22,896.4	24,570.2	26,721.7	9,508.6	2,863.9
Perkhidmatan pengangkutan penumpang Passenger transport services	17,922.5	19,344.3	20,065.6	20,965.4	22,408.3	4,919.3	1,067.0
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	5,219.6	5,877.7	5,501.0	5,270.5	5,650.6	677.1	21.9
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	3,169.1	3,479.5	3,789.9	3,756.5	4,222.0	964.2	468.4
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	12,126.8	12,597.0	13,201.8	14,325.9	15,965.7	3,651.2	2,038.9
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	47,019.6	52,297.7	58,290.9	64,131.6	68,957.8	25,985.2	9,309.9
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	6,507.2	6,865.9	7,449.0	7,898.1	7,500.2	1,390.9	989.9
Jumlah Total	135,178.7	148,117.4	159,392.9	170,423.8	182,059.1	52,328.4	17,920.4
Perubahan peratusan tahunan Annual percentage change	..	9.6	7.6	6.9	6.8	-71.3	-65.8
Peratus sumbangan (%) Percentage share (%)							
Perkhidmatan penginapan Accommodation services	17.6	18.1	17.7	17.3	16.8	10.0	6.5
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	14.4	14.1	14.4	14.4	14.7	18.2	16.0
Perkhidmatan pengangkutan penumpang Passenger transport services	13.3	13.1	12.6	12.3	12.3	9.4	6.0
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	3.9	4.0	3.5	3.1	3.1	1.3	0.1
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	2.3	2.3	2.4	2.2	2.3	1.8	2.6
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	9.0	8.5	8.3	8.4	8.8	7.0	11.4
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	34.8	35.3	36.6	37.6	37.9	49.7	52.0
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	4.8	4.6	4.7	4.6	4.1	2.7	5.5
Jumlah Total	100.0	100.0	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 4 = Penjumlahan jadual 1 dan jadual 2
Table 4 = summation of table 1 and table 2

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

Industri Industry	2015	2016	2017	2018	2019	2020 ^e	2021 ^p
RM Juta RM Million							
Perkhidmatan penginapan Accommodation services	19,810.0	21,269.0	22,948.4	24,733.1	26,406.8	12,169.1	10,054.0
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	26,355.7	29,380.0	33,154.9	37,782.1	43,166.7	35,610.7	34,077.5
Perkhidmatan pengangkutan penumpang Passenger transport services	7,331.1	7,834.5	8,352.1	8,798.6	9,379.5	5,010.5	4,154.3
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	2,897.8	3,139.6	3,453.0	3,818.9	4,226.9	1,411.5	369.1
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	8,987.0	9,440.2	9,895.3	10,482.2	11,307.1	6,050.3	3,992.4
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	3,170.6	3,490.5	3,985.4	4,467.9	4,725.9	4,172.5	4,368.1
Perdagangan runcit Retail trade	74,792.8	82,570.4	92,847.3	102,523.9	111,121.6	106,327.7	110,964.0
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	22,593.0	24,545.0	26,045.4	27,778.3	29,695.0	28,915.3	29,904.8
Jumlah Nilai Ditambah Kasar Industri Pelancongan Total Gross Value Added of Tourism Industries	165,938.0	181,669.1	200,681.9	220,385.0	240,029.5	199,667.6	197,884.2
Nilai Ditambah Kasar Pelancongan Langsung Tourism Direct Gross Value Added	74,923.3	82,055.5	87,851.0	94,535.4	102,233.3	28,406.6	13,089.8
Keluaran Dalam Negeri Kasar Pelancongan Langsung Tourism Direct Gross Domestic Product	74,956.9	82,093.4	87,895.1	94,575.4	102,272.3	28,442.6	13,128.8
Keluaran Dalam Negeri Kasar Gross Domestic Product	1,176,941.2	1,249,697.7	1,372,310.0	1,447,759.6	1,512,737.8	1,418,000.3	1,545,371.6
Perubahan peratusan tahunan (%) Annual percentage change (%)							
Nilai Ditambah Kasar Industri Pelancongan Gross Value Added of Tourism Industries	..	9.5	10.5	9.8	8.9	(16.8)	(0.9)
Keluaran Dalam Negeri Kasar Pelancongan Langsung Tourism Direct Gross Domestic Product	..	9.5	7.1	7.6	8.1	(72.2)	(53.8)
Keluaran Dalam Negeri Kasar Gross Domestic Product	..	6.2	9.8	5.5	4.5	(6.3)	9.0
Peratus sumbangan (%) Percentage share (%)							
Nilai Ditambah Kasar Industri Pelancongan kepada KDNK Gross Value Added of Tourism Industries to GDP	14.1	14.5	14.6	15.2	15.9	14.1	12.8
Nilai Ditambah Kasar Pelancongan Langsung kepada keseluruhan Nilai Ditambah Kasar Tourism Direct Gross Value Added to overall Gross Value Added	6.5	6.7	6.5	6.6	6.8	2.0	0.9
KDNK Pelancongan Langsung kepada KDNK Tourism Direct Gross Domestic Product to GDP	6.4	6.6	6.4	6.5	6.8	2.0	0.8

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

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

Produk Products	2015	2016	2017	2018	2019	2020 ^e	2021 ^p
RM Juta / RM Million							
Perkhidmatan penginapan Accommodation services	25,793.5	28,663.3	30,806.8	31,647.4	31,824.3	14,729.7	5,284.2
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	63,907.1	70,692.4	79,928.0	87,025.2	96,026.7	75,483.7	24,425.7
Perkhidmatan pengangkutan penumpang Passenger transport services	33,286.9	35,284.2	37,460.3	38,609.9	42,379.5	29,278.9	25,012.0
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	6,379.7	6,840.2	6,861.4	6,861.3	6,973.1	3,423.6	200.7
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	19,982.8	21,080.7	21,886.0	23,227.1	24,776.6	13,614.1	8,879.2
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	36,759.0	40,203.6	41,300.3	44,232.9	47,612.6	27,035.0	24,295.0
Perdagangan runcit Retail trade	106,878.9	118,858.8	133,617.0	147,239.8	159,423.4	152,804.1	159,362.4
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	42,099.2	45,592.1	48,625.2	51,805.6	55,584.1	53,296.6	47,522.4
Jumlah penawaran mengikut produk Total supply by products	335,087.2	367,215.3	400,484.9	430,649.2	464,600.4	369,665.7	294,981.7
RM Juta / RM Million							
Perkhidmatan penginapan Accommodation services	23,789.7	26,740.8	28,198.3	29,505.5	30,633.0	5,231.9	1,160.6
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	19,424.0	20,914.6	22,896.4	24,570.2	26,721.7	9,508.6	2,863.9
Perkhidmatan pengangkutan penumpang Passenger transport services	17,922.5	19,344.3	20,065.6	20,965.4	22,408.3	4,919.3	1,067.0
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	5,219.6	5,877.7	5,501.0	5,270.5	5,650.6	677.1	21.9
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	3,169.1	3,479.5	3,789.9	3,756.5	4,222.0	964.2	468.4
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	12,126.8	12,597.0	13,201.8	14,325.9	15,965.7	3,651.2	2,038.9
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristics goods	47,019.6	52,297.7	58,290.9	64,131.6	68,957.8	25,985.2	9,309.9
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	6,507.2	6,865.9	7,449.0	7,898.1	7,500.2	1,390.9	989.9
Jumlah penggunaan mengikut produk Total consumption by products	135,178.7	148,117.4	159,392.9	170,423.8	182,059.1	52,328.4	17,920.4
Kadar pelancongan / Tourism ratio							
Perkhidmatan penginapan Accommodation services	0.922	0.933	0.915	0.932	0.963	0.355	0.220
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	0.304	0.296	0.286	0.282	0.278	0.126	0.117
Perkhidmatan pengangkutan penumpang Passenger transport services	0.538	0.548	0.536	0.543	0.529	0.168	0.043
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	0.818	0.859	0.802	0.768	0.810	0.198	0.109
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	0.159	0.165	0.173	0.162	0.170	0.071	0.053
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	0.330	0.313	0.320	0.324	0.335	0.135	0.084
Perdagangan runcit Retail trade	0.440	0.440	0.436	0.436	0.433	0.170	0.058
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	0.155	0.151	0.153	0.152	0.135	0.026	0.021
Kadar pelancongan mengikut produk Tourism ratio by products	0.403	0.403	0.398	0.396	0.392	0.142	0.061

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

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

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

Industri Industry	2015	2016	2017	2018	2019	2020	2021
Bilangan orang ('000) <i>No. of person ('000)</i>							
Perkhidmatan penginapan <i>Accommodation services</i>	184.1	207.4	210.5	222.4	233.8	208.5	196.3
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	912.7	1,002.6	1,087.0	1,183.0	1,237.7	1,191.6	1,245.5
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	159.2	164.5	162.5	171.3	177.3	165.2	162.1
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	32.7	35.8	40.1	38.7	40.7	34.1	26.3
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	75.6	74.8	78.9	80.9	81.2	66.5	52.3
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	32.9	33.4	34.4	34.6	34.7	34.3	34.4
Perdagangan runcit <i>Retail trade</i>	992.5	1,106.0	1,104.5	1,147.9	1,158.1	1,156.2	1,181.9
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	509.0	557.2	590.7	592.3	598.5	601.3	621.3
Jumlah <i>Total</i>	2,898.8	3,181.8	3,308.6	3,471.1	3,561.8	3,457.5	3,520.2
Perubahan peratusan tahunan <i>Annual percentage change</i>	..	9.8	4.0	4.9	2.6	-2.9	1.8
Peratus sumbangan (%) <i>Percentage share (%)</i>							
Perkhidmatan penginapan <i>Accommodation services</i>	6.4	6.5	6.4	6.4	6.6	6.0	5.6
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	31.5	31.5	32.9	34.1	34.7	34.5	35.4
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	5.5	5.2	4.9	4.9	5.0	4.8	4.6
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	1.1	1.1	1.2	1.1	1.1	1.0	0.7
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	2.6	2.4	2.4	2.3	2.3	1.9	1.5
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	1.1	1.1	1.0	1.0	1.0	1.0	1.0
Perdagangan runcit <i>Retail trade</i>	34.2	34.8	33.4	33.1	32.5	33.4	33.6
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	17.6	17.5	17.9	17.1	16.8	17.4	17.6
Jumlah <i>Total</i>	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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

NOTA TEKNIKAL

TECHNICAL NOTES



1. PENGENALAN

Akaun Satelit Pelancongan (ASP) Malaysia 2020 telah disediakan 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:

1. Perniagaan dan profesional;
2. Percutian, mengisi masa lapang dan rekreasi;
3. Melawat rakan dan saudara-mara;
4. Pendidikan dan latihan;
5. Kesihatan dan rawatan perubatan;
6. Hal-hal keagamaan / menziarahi ke tempat suci keagamaan;
7. Membeli-belah; dan
8. 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:

1. **Pelancong** - Jika perjalanannya melibatkan tidur bermalam
2. **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.

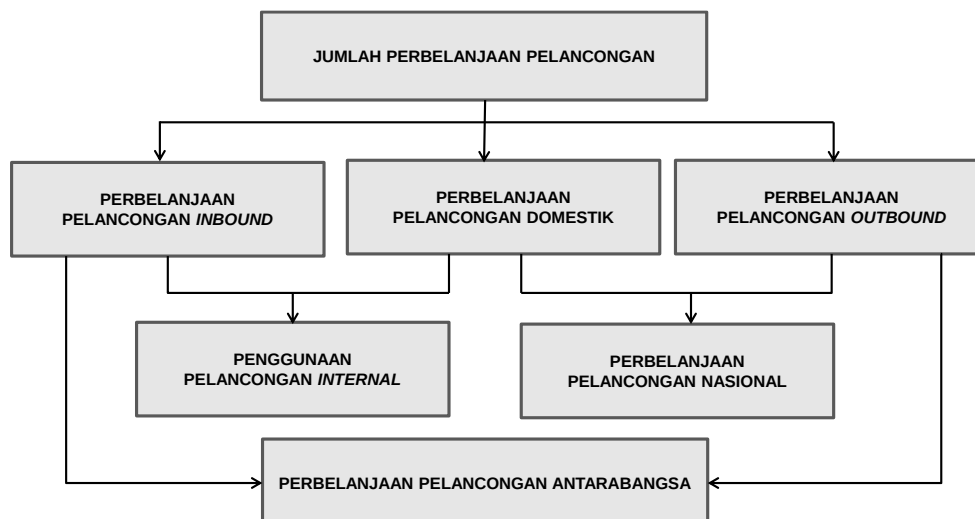
3.5 Pelancongan nasional

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:



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 diperolehi 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 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*, 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 <i>internal</i> (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 pengeluaran domestik, import, cukai yang ditolak subsidi ke atas produk negara 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 bagi membolehkan pengukuran pelancongan 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 diperolehi 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:

- i. Bilangan pelancong
 - mengikut negara/ negeri;
 - mod pengangkutan; dan
- ii. 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 diperolehi daripada Penyiasatan Pelancongan Domestik (DTS) yang dijalankan oleh DOSM. Penyiasatan 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 penyiasatan 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 diperolehi daripada data perangkaan imbalan 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 diperolehi 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 diperolehi 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

Bagi guna tenaga dalam industri pelancongan, data diperolehi daripada Survei Tenaga Buruh dan Survei Ekonomi Tahunan yang diterbitkan oleh DOSM.

1. INTRODUCTION

The compilation on Tourism Satellite Account (TSA) of Malaysia 2020 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 briefly 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:

1. Business and professional;
2. Holiday, leisure and recreation;
3. Visiting friends and relatives;
4. Education and training;
5. Health and medical care;
6. Religion / pilgrimage;
7. Shopping; and
8. 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:

1. **Tourist** – If his / her trip includes an overnight stay
2. **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 four 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 four 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.

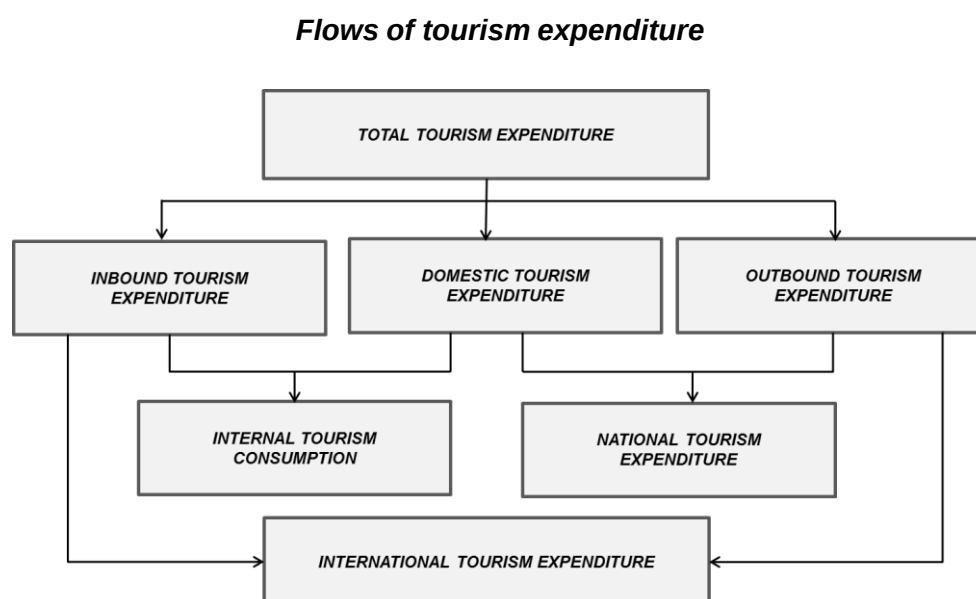
3.5 National tourism

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.

Flows of tourism expenditure illustrated below:



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 international 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.

Shopping activities identified for 'country-specific tourism characteristic goods' are retail trade of tourism-related goods.

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. 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 nationally 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 that otherwise could not be easily measured. 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) conducted in 2006.

3. Malaysia tourism indicators

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

- i. No. of tourist arrivals
 - by country / state;
 - mode of transports; and
- ii. 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

For employment in the tourism industry, data are obtained from the Labour Force Survey and Annual Economic Survey produced by DOSM.

KOD DAN KLASIFIKASI

CODE AND CLASSIFICATION



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
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

Keterangan bagi ISIC Rev. 4		ISIC Rev. 4	MSIC 2008
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 - Barang khusus bercirikan pelancongan negara (membeli-belah)			
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
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

Keterangan bagi ISIC Rev. 4		ISIC Rev. 4	MSIC 2008
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
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

Keterangan bagi CPC Ver. 2		CPC Ver. 2	MCPA 2009 (5 Digit)
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 amatir 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
7. Jualan runcit bahan api kenderaan			
7.1	Jualan runcit bahan api kenderaan di kedai khusus	62291	47300
8. Perdagangan runcit - 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

Keterangan bagi CPC Ver. 2		CPC Ver. 2	MCPA 2009 (5 Digit)
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
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

Description of ISIC Rev.4		ISIC Rev. 4	MSIC 2008
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 of country-specific tourism characteristic goods (shopping)			
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
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

<i>Description of ISIC Rev.4</i>		<i>ISIC Rev. 4</i>	<i>MSIC 2008</i>
9.11	<i>Hospital and maternity home activities</i>	8610	86101
9.12	<i>Medical and dental practice activities</i>	8620	86201, 86202, 86203
9.13	<i>Other human health activities</i>	8690	86902, 86903, 86904, 86905, 86909
9.14	<i>Organization of conventions and trade shows</i>	8230	82301, 82302
9.15	<i>Other service activities n.e.c.</i>	9609	96091
9.16	<i>Photographic activities</i>	7420	74200
9.17	<i>Renting and leasing of other personal and household goods</i>	7729	77291, 77293, 77296, 77299
9.18	<i>Photocopying, document preparation and other specialized office support activities</i>	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. Retail trade activity - 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
9.2	Insurance / takaful	71322, 71331, 71332, 71333, 71334, 71335, 71337, 71339	65121, 65122

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

