



KEMENTERIAN EKONOMI
JABATAN PERANGKAAN MALAYSIA

AKAUN NEGARA *NATIONAL ACCOUNTS*



AKAUN SATELIT **PELANCONGAN** *Tourism Satellite Account*

2023

JABATAN PERANGKAAN MALAYSIA
DEPARTMENT OF STATISTICS MALAYSIA



KEMENTERIAN EKONOMI
JABATAN PERANGKAAN MALAYSIA

AKAUN SATELIT PELANCONGAN TOURISM SATELLITE ACCOUNT

2023

Pemakluman

Jabatan Perangkaan Malaysia (DOSM) telah melancarkan OpenDOSM NextGen sebagai medium yang menyediakan katalog data dan visualisasi bagi memudahkan pengguna menganalisis pelbagai data dan boleh diakses melalui portal <https://open.dosm.gov.my>.

DOSM sedang menjalankan Banci Pertanian 2024. Sila layari <https://www.myagricensus.gov.my/> untuk maklumat lanjut. Tema adalah "Banci Pertanian, Kunci Kemajuan Pertanian."

Kerajaan Malaysia telah mengisytiharkan Hari Statistik Negara (MyStats Day) pada 20 Oktober setiap tahun. Tema sambutan MyStats Day adalah "Statistik Nadi Kehidupan". DOSM menyambut ulang tahun ke 75 Jubli Intan pada tahun 2024.

Announcement

The Department of Statistics Malaysia (DOSM) has launched OpenDOSM NextGen as a medium that provides catalogue data and visualisations to facilitate users' analysis and can be accessed through <https://open.dosm.gov.my>.

DOSM is conducting the Agriculture Census 2024. Please visit <https://www.myagricensus.gov.my/> for more information. The theme is "Agriculture Census, Key to Agricultural Development."

The Government of Malaysia has declared National Statistics Day (MyStats Day) on October 20th each year. MyStats Day theme is "Statistics is the Essence of Life". DOSM commemorates its 75th Diamond Jubilee in 2024.

JABATAN PERANGKAAN MALAYSIA
DEPARTMENT OF STATISTICS MALAYSIA

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

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

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

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

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

DATO' SRI DR. MOHD UZIR MAHIDIN
Ketua Perangkawan Malaysia

September 2024

PREFACE

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

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

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

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

DATO' SRI DR. MOHD UZIR MAHIDIN
Chief Statistician Malaysia

September 2024

SINGKATAN / ABBREVIATIONS

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>

NOTA / NOTES

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

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

KANDUNGAN / CONTENTS

	Muka Surat <i>Page</i>
Kata pengantar <i>Preface</i>	i
Singkatan <i>Abbreviations</i>	iii
Kandungan <i>Contents</i>	iv
Indikator <i>Indicators</i>	vii
Penemuan utama <i>Main findings</i>	1
Ringkasan penemuan 2023 <i>Summary of findings 2023</i>	3
Rencana <i>Article</i>	19
Jadual <i>Tables</i>	Senarai jadual statistik <i>List of statistical tables</i>
1 : Perbelanjaan pelancongan <i>inbound</i> bagi pelawat mengikut produk <i>Inbound tourism expenditure of visitors by products</i>	41
1A : Perbelanjaan pelancongan <i>inbound</i> bagi pelancong mengikut produk <i>Inbound tourism expenditure of tourists by products</i>	42
1B : Perbelanjaan pelancongan <i>inbound</i> bagi pelawat harian mengikut produk <i>Inbound tourism expenditure of excursionists by products</i>	43
2 : Perbelanjaan pelancongan domestik bagi pelawat mengikut produk <i>Domestic tourism expenditure of visitors by products</i>	44
2A : Perbelanjaan pelancongan domestik bagi pelancong mengikut produk <i>Domestic tourism expenditure of tourists by products</i>	45

KANDUNGAN / CONTENTS

Jadual <i>Tables</i>	Muka Surat <i>Page</i>
2B : Perbelanjaan pelancongan domestik bagi pelawat harian mengikut produk <i>Domestic tourism expenditure of excursionists by products</i>	46
3 : Perbelanjaan pelancongan <i>outbound</i> bagi pelawat mengikut produk <i>Outbound tourism expenditure of visitors by products</i>	47
4 : Penggunaan pelancongan <i>internal</i> bagi pelawat mengikut produk <i>Internal tourism consumption of visitors by products</i>	48
5 : Akaun pengeluaran industri pelancongan pada harga semasa <i>Production accounts of tourism industry at current prices</i>	49
6 : Jumlah penawaran dan penggunaan pelancongan mengikut jenis produk <i>Total supply and tourism consumption by type of products</i>	50
7 : Guna tenaga dalam industri pelancongan <i>Employment in the tourism industry</i>	51
Nota teknikal <i>Technical notes</i>	55
Kod dan klasifikasi <i>Code and classification</i>	77



INDIKATOR PELANCONGAN INBOUND | INBOUND TOURISM INDICATORS

	Tahun Year	2019	2020	2021	2022	2023
A. Ketibaan pelancong <i>Tourist arrivals</i>		Bilangan orang <i>No. of persons</i>				
A1. Ketibaan pelancong ke Malaysia dari negara terpilih <i>Tourist arrivals to Malaysia from selected countries</i>		26,100,784	4,332,722	134,728	10,070,964	20,141,846
i. Benua Asia / Asia Continent						
Singapore		10,163,882	1,545,255	16,308	5,222,991	8,308,230
Indonesia		3,623,277	711,723	11,025	1,481,739	3,108,165
Thailand		1,884,306	394,413	59,607	715,528	1,551,282
Brunei Darussalam		1,216,123	136,020	773	301,757	811,833
China		3,114,257	405,149	7,701	212,603	1,474,114
India		735,309	155,883	3,916	324,548	671,846
Japan		424,694	74,383	3,114	83,309	229,892
Philippines		421,908	66,051	2,317	159,442	339,282
Saudi Arabia		121,444	23,390	687	35,980	51,375
ii. Benua Amerika Utara / North America Continent						
United States		269,928	48,810	2,030	108,141	229,476
Canada		87,568	16,631	471	30,656	71,981
iii. Benua Australia / Australia Continent						
Australia		368,271	72,680	1,321	152,265	343,438
New Zealand		50,140	8,794	196	18,238	42,955
iv. Benua Eropah / Europe Continent						
United Kingdom		346,485	63,868	2,676	134,667	272,297
Germany		130,221	27,458	824	57,780	125,987
Netherlands		82,110	14,486	466	31,070	68,448
v. Negara-negara lain / Other countries		3,060,861	567,728	21,296	1,000,250	2,441,245
A2. Taburan mod pengangkutan <i>Distribution mode of transport</i>		Peratus (%) <i>Percentage (%)</i>				
Udara / Air		36.8	38.3	51.5	28.8	36.7
Darat / Land		56.8	53.5	47.4	62.5	55.8
Laut / Sea		4.9	7.2	1.2	6.8	5.6
Rel / Rail		1.5	1.2	0	1.8	1.9
B. Penginapan <i>Accommodation</i>						
Bilangan hotel / No. of hotels		5,382	5,339	5,170	5,052	5,204
Bilangan bilik / No. of rooms		340,547	332,817	323,491	322,700	333,780
Bilangan tetamu / No. of guests		79,929,203	35,405,021	20,060,819	73,947,777	93,258,798
Domestik / Domestic		51,093,010	30,703,994	19,872,079	60,048,624	64,299,777
Antarabangsa / International		28,836,193	4,701,027	188,740	13,899,153	28,959,021
Purata bilangan hari menginap / Average length of stay (ALOS)		7.4	4.1*	n.a	3.8	4.5
Purata kadar penginapan (%) / Average occupancy rate (%)		58.8	30.9	28.2	46.7	52.9

* Merujuk kepada suku tahun pertama 2020
Refer to first quarter of 2020

n.a: tidak tersedia / not available

Nota: Indikator diselaraskan dengan jadual 10 seperti TSA: RMF 2008
Note: Indicators conforms with table 10 in the TSA: RMF 2008

Sumber : Tourism Malaysia
Source : Tourism Malaysia

A. Pelawat domestik Domestic visitors

A1. Pelawat domestik mengikut negeri dikunjungi ('000) Domestic visitors by state visited ('000)

Johor	239,121	131,660	65,976	171,603	213,744
Kedah	14,274	7,243	3,658	12,376	15,805
Kelantan	14,831	10,831	4,023	11,186	13,444
Melaka	10,986	6,058	1,921	6,627	7,549
Negeri Sembilan	13,979	7,275	3,878	11,757	15,559
Pahang	13,303	7,918	5,485	11,490	14,959
Pulau Pinang	18,498	9,905	3,405	13,189	16,456
Perak	15,411	8,929	5,061	10,003	13,128
Perlis	21,070	13,173	4,489	14,567	17,108
Selangor	2,088	1,193	407	1,669	1,951
Terengganu	33,589	19,715	10,212	21,990	27,579
Sabah	14,158	7,420	3,719	10,233	11,761
Sarawak	22,035	10,337	3,815	12,589	16,080
W.P. Kuala Lumpur	19,793	9,393	6,511	15,465	17,901
W.P. Labuan	22,633	12,435	9,116	16,913	22,233
W.P. Putrajaya	524	107	54	244	331
	1,949	451	223	1,306	1,900

Bilangan pelawat / No. of visitors ('000)

239,121 131,660 65,976 171,603 213,744

Bilangan pelancong / No. of tourists ('000)

84,716 46,259 14,883 65,056 79,559

Bilangan pelawat harian / No. of excursionists ('000)

154,405 85,401 51,093 106,547 134,184

Bilangan perjalanan pelancongan ('000) Numbers of tourism trips ('000)

332,378 146,990 72,399 207,785 241,474

Perjalanan harian / Same day trips ('000)

218,705 98,704 56,857 135,869 157,004

Perjalanan bermalam / Overnight trips ('000)

113,673 48,286 15,542 71,916 84,470

Purata bilangan hari menginap Average length of stay (ALOS)

2.5 1.9 2.2 2.5 2.4

A2. Taburan mod pengangkutan Distribution mode of transport

Peratus (%) Percentage (%)

Udara / Air	0.9	1.0	1.1	1.7	1.8
Air / Water	0.6	0.4	0.3	0.3	0.3
Darat / Land	98.5	98.6	98.6	98.0	97.9
Kenderaan persendirian / Private vehicles	94.5	95.2	97.2	96.7	91.7
Bas / Bus	2.1	2.0	1.3	0.8	3.2
Teksi / Taxi	3.2	2.4	1.1	1.8	4.6
Rel / Rail	0.2	0.4	0.4	0.7	0.5

B. Jenis penginapan Type of accommodation

Peratus (%) Percentage (%)

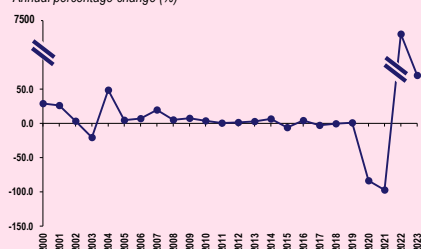
Rumah saudara dan rakan / Relatives' & friends' house	70.9	65.1	58.6	67.9	61.3
Hotel	18.5	24.1	29.5	21.2	22.3
Chalet	1.5	0.8	3.1	1.9	3.1
Apartment	3.6	2.3	2.6	3.3	3.9
Inap desa / Rumah percutan / Homestay / Vacation homes	3.8	3.8	4.5	3.4	6.7
Rumah rehat / Rest house	1.7	3.9	1.7	2.3	2.7

PELANCONGAN INBOUND / INBOUND TOURISM

Ketibaan Pelancong Tourist Arrivals

2023: 100.0%
2022: 7,375.0%

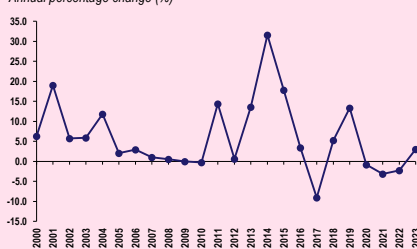
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Bilangan Hotel Number of Hotel

2023: 3.0%
2022: -2.3%

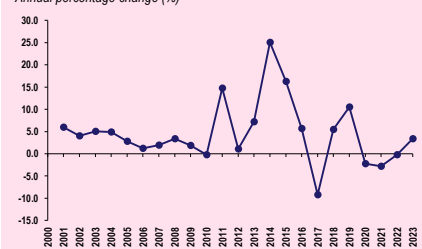
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Bilangan Bilik Number of Room

2022: 3.4%
2022: -0.2%

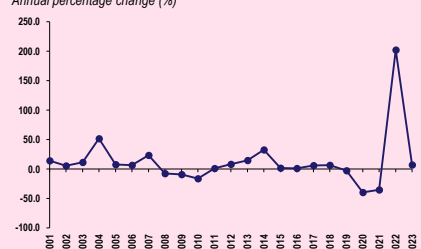
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Bilangan Tetamu Domestik Number of Domestic Guests

2023: 7.1%
2022: 202.2%

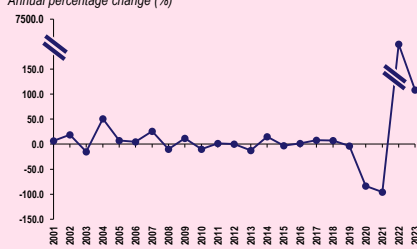
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Bilangan Tetamu Antarabangsa Number of International Guests

2023: 108.4%
2022: 7,264.2%

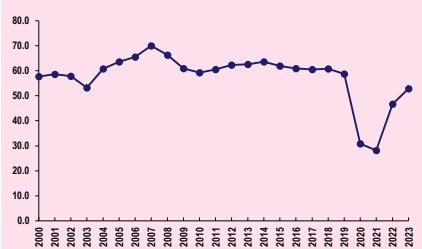
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Purata Kadar Penginapan Average Occupancy Rate

2023: 52.9%
2022: 46.7%

(%)

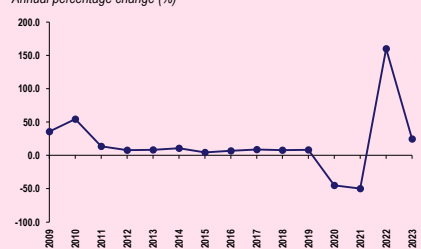


PELANCONGAN DOMESTIK / DOMESTIC TOURISM

Bilangan Pelawat Number of Visitors

2023: 24.6%
2022: 160.1%

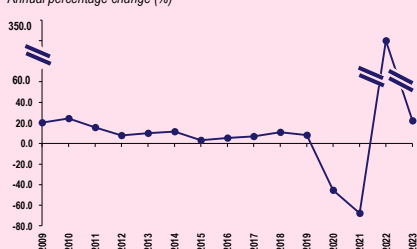
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Bilangan Pelancong Number of Tourists

2023: 22.3%
2022: 337.1%

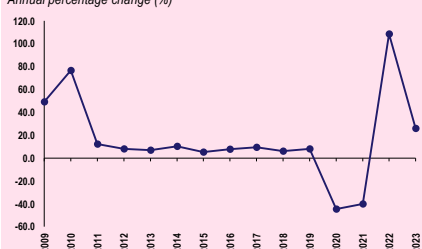
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Bilangan Pelawat Harian Number of Excursionists

2023: 25.9%
2022: 108.5%

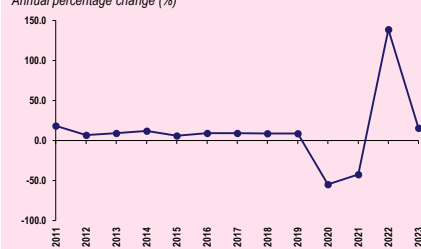
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Bilangan Perjalanan Harian Same Day Trips

2023: 15.6%
2022: 139.0%

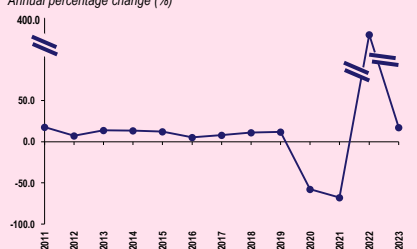
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Bilangan Perjalanan Bermalam Overnight Trips

2023: 17.5%
2022: 362.7%

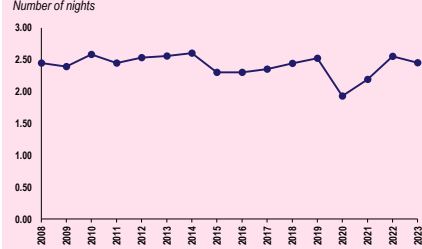
Perubahan peratusan tahunan (%)
Annual percentage change (%)



Purata Bilangan Hari Menginap Average Length of Stay

2023: 2.5 malam/nights
2022: 2.6 malam/nights

Bilangan malam
Number of nights



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



AKAUN SATELIT PELANCONGAN 2023

Industri pelancongan menyumbang 15.1 peratus kepada KDNK¹ pada 2023 (2022: 13.9%)

NDKIP²

Sumbangan
kepada
KDNK **15.1%**
2022: 13.9%

RM275.8b
2022: RM250.1b

Perubahan
peratusan tahunan
10.3%
2022: 26.0%

KDNKPL³

Sumbangan
kepada
KDNK **4.5%**
2022: 2.7%

RM81.2b
2022: RM48.0b

Perubahan
peratusan tahunan
69.2%
2022: 311.5%

Komponen utama NDKIP

53.6%
2022: 54.7%

Perdagangan runcit

16.6%
2022: 17.0%

Perkhidmatan
penyediaan
makanan & minuman

12.7%
2022: 12.7%

Perkhidmatan khusus
pelancongan negara

¹ Keluaran Dalam Negeri Kasar

² Nilai Ditambah Kasar Industri Pelancongan

³ Keluaran Dalam Negeri Kasar Pelancongan Langsung

Penggunaan Pelancongan Internal

Perbelanjaan pelancongan domestik mendominasi 50.9 peratus penggunaan pelancongan internal (2022: 63.7%)

Sumbangan
49.1%
2022: 36.3%

Perbelanjaan
pelancongan inbound
RM75.8b
2022: RM33.8b



Perbelanjaan
pelancongan domestik
RM78.7b
2022: RM59.2b

Sumbangan
50.9%
2022: 63.7%

Komponen utama perbelanjaan pelancongan inbound:

33.5%
2022: 33.4%

Membeli-belah

21.5%
2022: 21.2%

Perkhidmatan
pengangkutan
penumpang

18.9%
2022: 15.5%

Perkhidmatan
penginapan

Komponen utama perbelanjaan pelancongan domestik:

39.2%
2022: 42.1%

Membeli-belah

17.5%
2022: 16.4%

Perkhidmatan
penyediaan
makanan & minuman

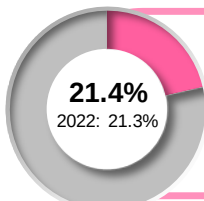
14.3%
2022: 14.9%

Jualan runcit
bahan api
kenderaan

Guna Tenaga dalam Industri Pelancongan



21.4 peratus guna tenaga terlibat dalam industri pelancongan di Malaysia (2022: 21.3%)



Sumbangan
kepada jumlah
guna tenaga

3.4
juta orang terlibat
dalam industri
pelancongan
2022: 3.2 juta orang

Jumlah guna tenaga
15.8
juta orang
2022: 15.2 juta orang

Guna tenaga dalam industri pelancongan disumbang oleh:

37.1%
2022: 36.5%

Perdagangan
runcit

36.8%
2022: 36.9%

Perkhidmatan
penyediaan
makanan & minuman

11.0%
2022: 11.3%

Perkhidmatan khusus⁴
pelancongan negara

⁴ Spa, MICE, kesihatan dan lain-lain

Sumber: Akaun Satelit Pelancongan 2023
Jabatan Perangkaan Malaysia (DOSM)



TOURISM SATELLITE ACCOUNT 2023

Tourism industry contributed 15.1 per cent to GDP¹ in 2023 (2022: 13.9%)

GVATI²

Share to GDP **15.1%**
2022: 13.9%

RM275.8b
2022: RM250.1b

Annual percentage change
10.3%
2022: 26.0%

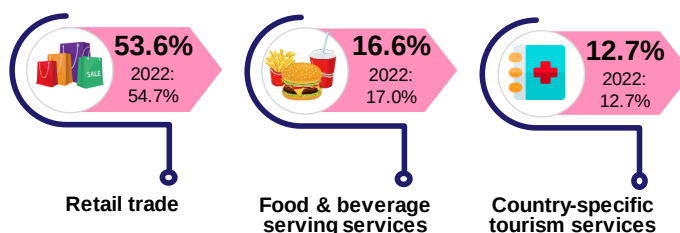
TDGDP³

Share to GDP **4.5%**
2022: 2.7%

RM81.2b
2022: RM48.0b

Annual percentage change
69.2%
2022: 311.5%

Main components of GVATI



¹ Gross Domestic Product

² Gross Value Added of Tourism Industries

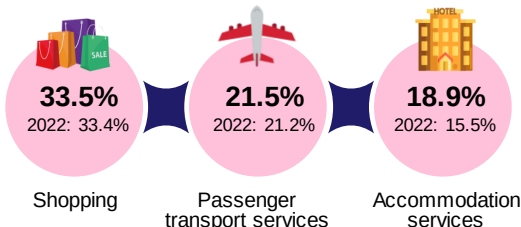
³ Tourism Direct Gross Domestic Product

Internal Tourism Consumption

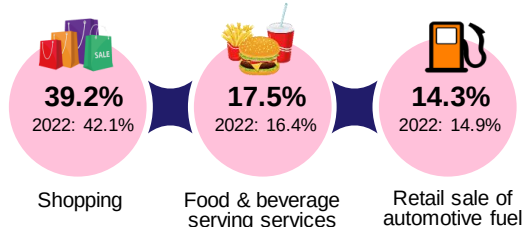
Domestic tourism expenditure dominated 50.9 per cent of internal tourism consumption (2022: 63.7%)



Main components of inbound tourism expenditure:

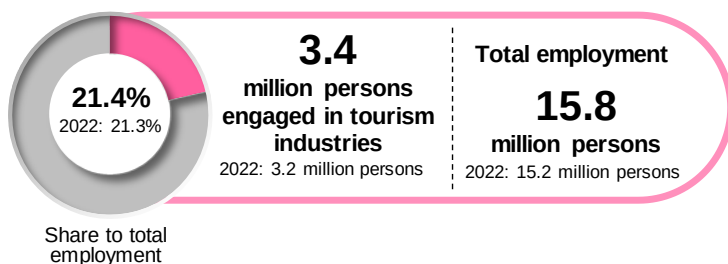


Main components of domestic tourism expenditure:

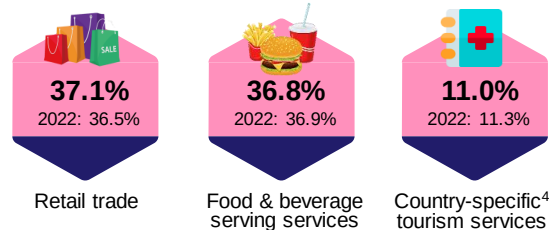


Employment in Tourism Industries

21.4 per cent of employment engaged in the tourism industry in Malaysia (2022: 21.3%)



Employment in the tourism industry attributed by:



⁴ Spa, MICE, health and others

1.0 / PENGENALAN

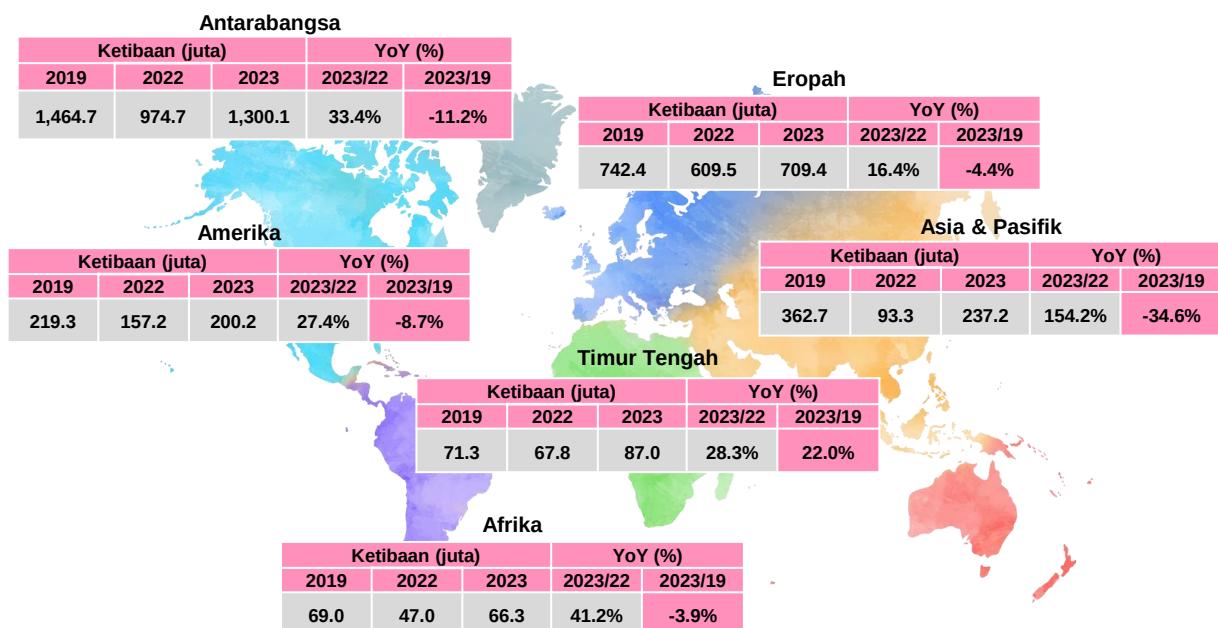
Akaun Satelit Pelancongan (ASP) Malaysia bagi tahun 2023 menyediakan statistik mengenai Nilai Ditambah Kasar Industri Pelancongan (NDKIP), Keluaran Dalam Negeri Kasar Pelancongan Langsung (KDNKPL), perbelanjaan pelancongan bagi *inbound*, domestik, *outbound*, penggunaan pelancongan *internal* dan guna tenaga dalam industri pelancongan. Statistik dipaparkan mengikut industri dan produk pelancongan. ASP adalah perluasan daripada *System of National Accounts (SNA) 2008* dan penyusunan ini memaparkan maklumat mengenai penawaran dan permintaan dalam sektor pelancongan.

2.0 / SENARIO PELANCONGAN GLOBAL

UNWTO *World Tourism Barometer* melaporkan bilangan ketibaan pelancong antarabangsa pada 2023 adalah seramai 1,300.1 juta orang berbanding 974.7 juta orang pada tahun sebelumnya (**Paparan 1**). Namun begitu, pelancongan antarabangsa pada 2023 masih 11.2 peratus di bawah paras tahun 2019.

Ketibaan pelancong ke Timur Tengah melebihi paras pra-pandemik sebanyak 22.0 peratus, menjadikannya satu-satunya wilayah yang telah pulih. Sementara itu, ketibaan pelancong di Afrika, Eropah dan Amerika masih di bawah 10.0 peratus daripada paras pra-pandemik pada tahun 2023. Wilayah yang paling terjejas dalam pelancongan adalah Asia dan Pasifik yang mencatatkan penurunan 34.6 peratus berbanding paras pra-pandemik.

Paparan 1 Bilangan ketibaan pelancong di peringkat global



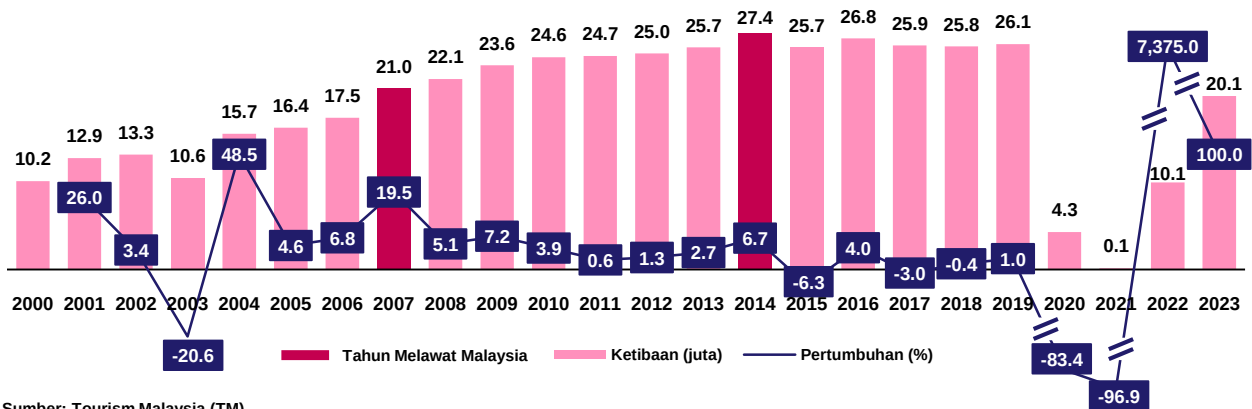
YoY (%) : Perubahan peratusan tahunan

Sumber: <https://www.unwto.org/tourism-data/global-and-regional-tourism-performance>

3.0 / SENARIO PELANCONGAN DI MALAYSIA

Ketibaan pelancong di Malaysia pada tahun 2023 mencatatkan pertumbuhan sebanyak 100.0 peratus atau 20.1 juta orang pelancong seperti di **Carta 1**. Walau bagaimanapun, ketibaan pelancong masih 22.8 peratus di bawah paras pra-pandemik.

Carta 1 Bilangan ketibaan pelancong di Malaysia, 2000-2023



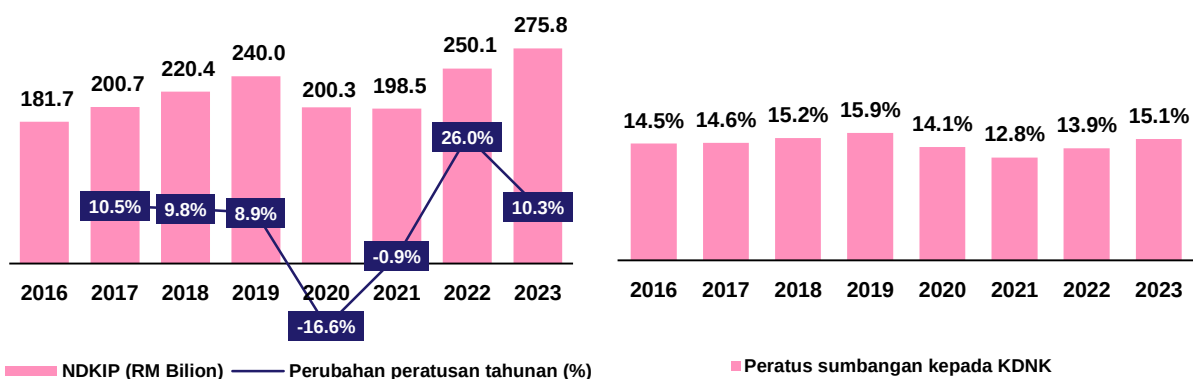
Singapore menyumbang 41.2 peratus (2022: 51.9%) kepada jumlah ketibaan pelancong di Malaysia pada 2023. Ini diikuti oleh ketibaan pelancong dari Indonesia, Thailand dan China dengan sumbangan masing-masing 15.4 peratus, 7.7 peratus dan 7.3 peratus.

4.0 / PRESTASI PELANCONGAN 2023

4.1 Nilai Ditambah Kasar Industri Pelancongan (NDKIP)

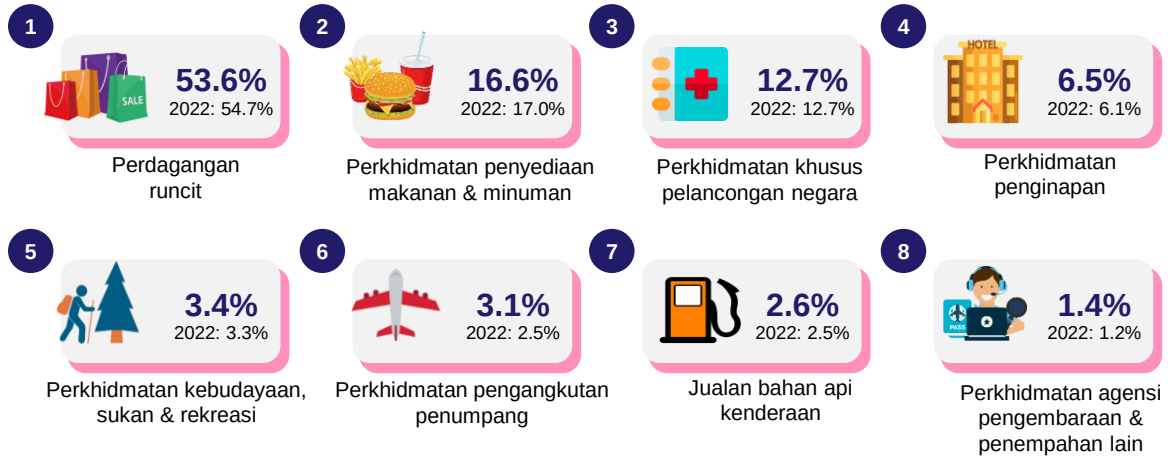
Industri pelancongan Malaysia mencatatkan sumbangan 15.1 peratus kepada Keluaran Dalam Negeri Kasar (KDNK) pada 2023 berbanding 13.9 peratus pada tahun sebelumnya. NDKIP mencatatkan nilai RM275.8 bilion yang bertumbuh sebanyak 10.3 peratus (2022: 26.0%) seperti di **Carta 2**.

Carta 2 NDKIP - Nilai, perubahan peratusan tahunan dan peratus sumbangan kepada KDNK, 2016-2023



Industri pelancongan disokong oleh Perdagangan runcit dengan sumbangan sebanyak 53.6 peratus. Ini diikuti oleh Perkhidmatan penyediaan makanan & minuman (16.6%) dan Perkhidmatan khusus pelancongan negara (12.7%). Ketiga-tiga industri tersebut menyumbang 82.9 peratus kepada keseluruhan NDKIP (**Paparan 2**).

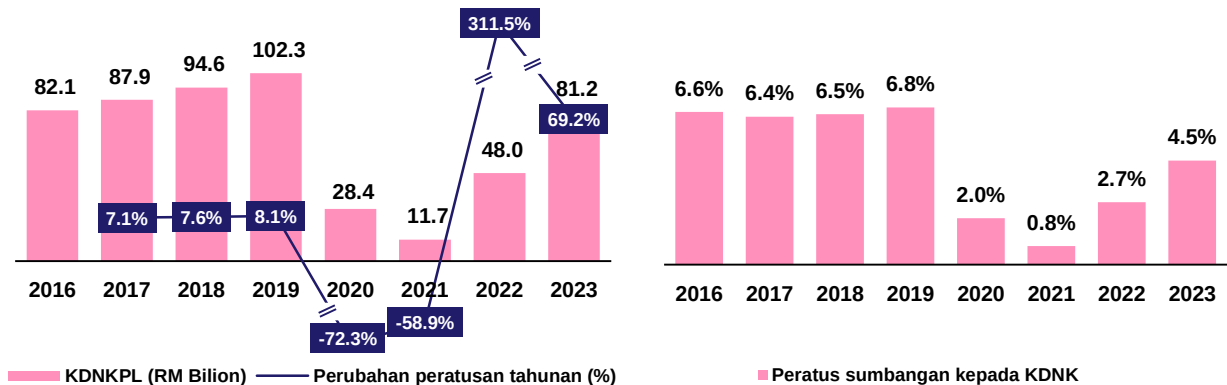
Paparan 2 NDKIP – Peratus sumbangan mengikut industri pelancongan, 2023



4.2 Keluaran Dalam Negeri Kasar Pelancongan Langsung (KDNKPL)

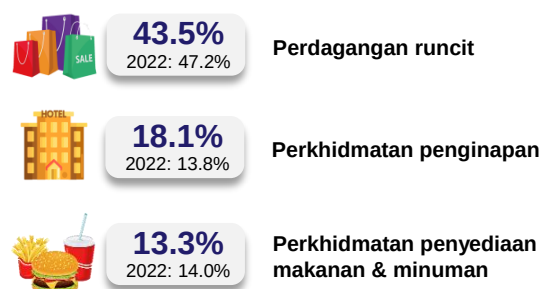
KDNKPL menyumbang 4.5 peratus kepada KDNK 2023 berjumlah RM81.2 bilion berbanding RM48.0 bilion pada tahun sebelumnya. KDNKPL bertumbuh pada 69.2 peratus tetapi kekal di bawah paras pra-pandemik seperti di **Carta 3**.

Carta 3 KDNKPL - Nilai, perubahan peratusan tahunan dan peratus sumbangan kepada KDNK, 2016-2023



Industri utama penyumbang kepada KDNKPL adalah Perdagangan runcit, Perkhidmatan penginapan dan Perkhidmatan penyediaan makanan & minuman dengan kombinasi sumbangan sebanyak 74.9 peratus pada 2023 (**Paparan 3**).

Paparan 3 Industri utama penyumbang kepada KDNKPL, 2023

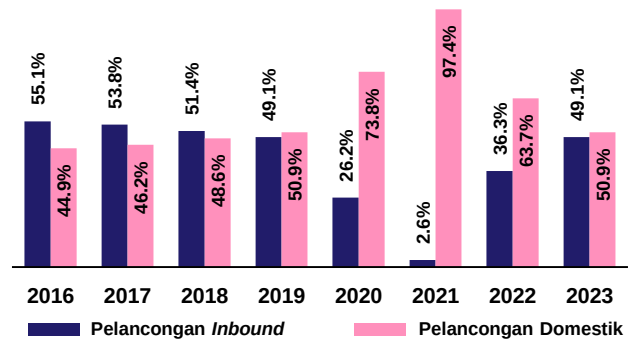


4.3 Penggunaan Pelancongan *Internal*

Penggunaan pelancongan *internal* adalah merangkumi perbelanjaan pelancongan *inbound* dan perbelanjaan pelancongan domestik. Penggunaan pelancongan *internal* kekal didominasi oleh perbelanjaan pelancongan domestik dengan sumbangan 50.9 peratus pada 2023 (Carta 4).

Carta 4

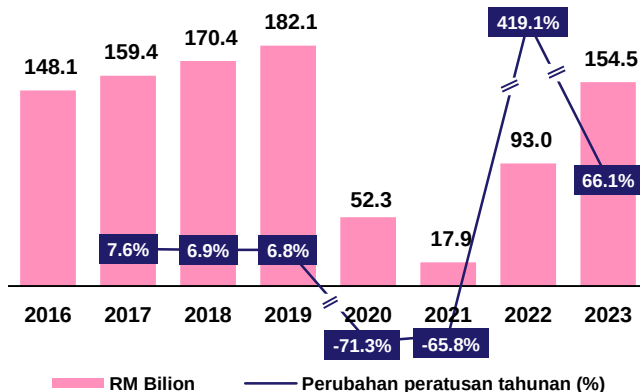
Sumbangan pelancongan *inbound* dan pelancongan domestik kepada penggunaan pelancongan *internal*, 2016-2023



Penggunaan pelancongan *internal* mencatatkan peningkatan sebanyak 66.1 peratus dengan nilai RM154.5 bilion pada 2023 berbanding RM93.0 bilion pada tahun sebelumnya. Penggunaan pelancongan *internal* disumbangkan oleh aktiviti Membeli-belah (36.4%) diikuti oleh Perkhidmatan penginapan (16.2%) dan Perkhidmatan penyediaan makanan & minuman (15.8%) seperti di Paparan 4.

Paparan 4

Penggunaan pelancongan *internal* - Nilai, perubahan peratusan tahunan dan sumbangan utama kepada penggunaan pelancongan *internal*



Sumbangan utama, 2023


36.4%

2022: 38.9%

Membeli-belah


16.2%

2022: 12.0%

Perkhidmatan penginapan


15.8%

2022: 16.5%

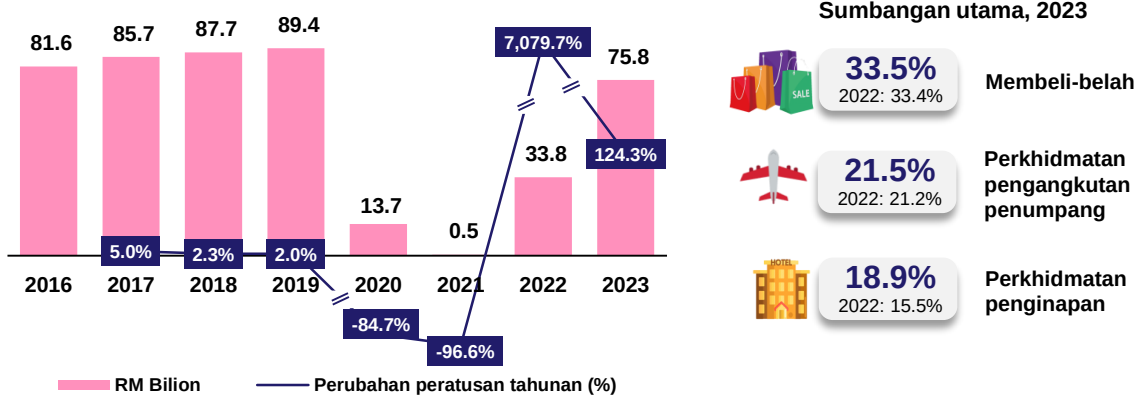
Perkhidmatan penyediaan makanan & minuman

4.3.1 Perbelanjaan Pelancongan *Inbound*

Perbelanjaan pelancongan *inbound* meningkat 124.3 peratus kepada RM75.8 bilion pada tahun 2023 daripada RM33.8 bilion pada tahun 2022 (Paparan 5). Walau bagaimanapun, perbelanjaan pelancongan *inbound* masih di bawah paras pra-pandemik. Dari segi komposisi pelawat, 96.3 peratus perbelanjaan pelancongan *inbound* disumbangkan oleh kategori pelancong dan selebihnya 3.7 peratus adalah pelawat harian.

Paparan 5

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



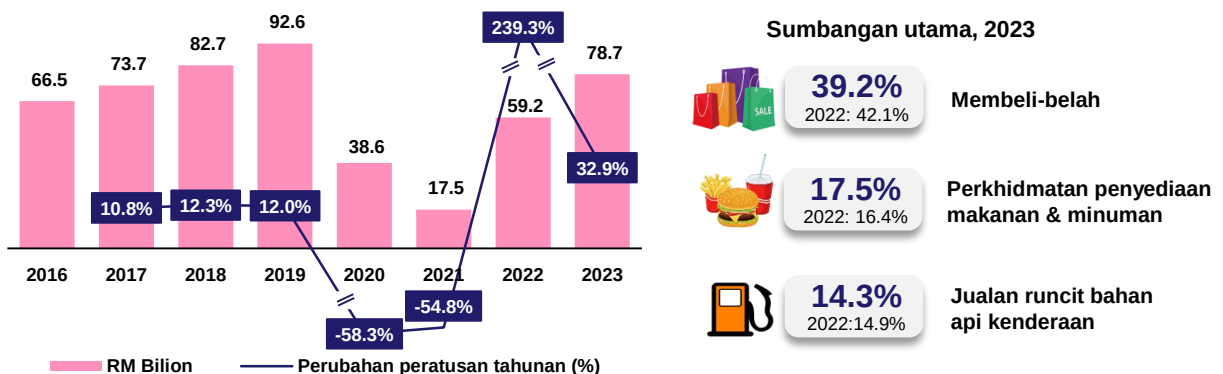
Perbelanjaan pelancongan *inbound* didominasi oleh aktiviti Membeli-belah dengan sumbangan 33.5 peratus, diikuti oleh Perkhidmatan pengangkutan penumpang (21.5%) dan Perkhidmatan penginapan (18.9%) seperti di **Paparan 5**. Berbanding dengan tahap pra-pandemik, Perkhidmatan pengangkutan penumpang, Perkhidmatan kebudayaan, sukan & rekreasi dan Jualan runcit bahan api kenderaan telah melepasi paras pra-pandemik.

4.3.2 Perbelanjaan Pelancongan Domestik

Perbelanjaan pelancongan domestik bertumbuh 32.9 peratus atau RM78.7 bilion pada tahun 2023 berbanding RM59.2 bilion pada tahun sebelumnya (**Paparan 6**). Walau bagaimanapun, perbelanjaan pelancongan domestik masih 15.1 peratus di bawah paras pra-pandemik. Dari segi komposisi pelawat, pelancong terdiri daripada 60.4 peratus dan 39.6 peratus adalah pelawat harian.

Paparan 6

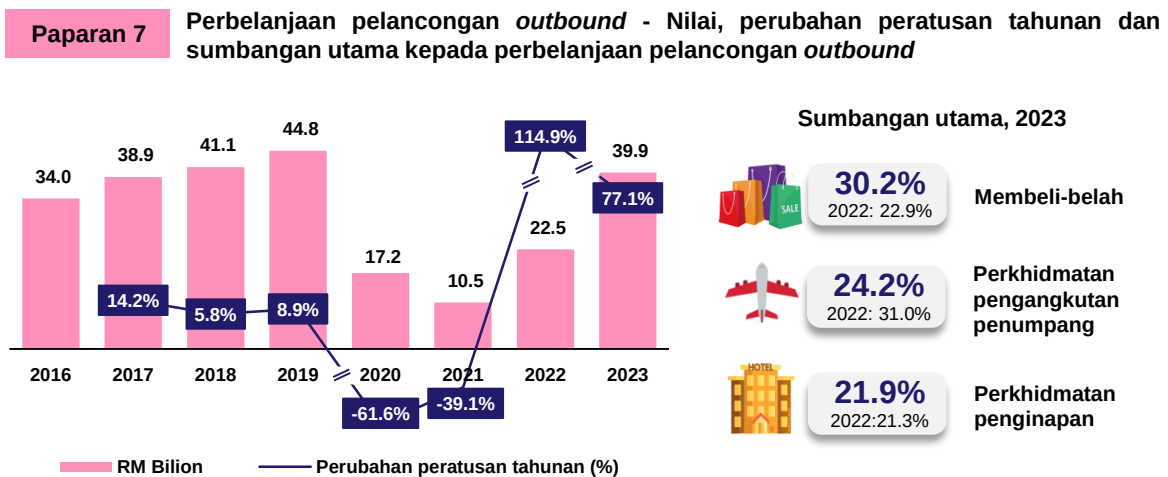
Perbelanjaan pelancongan domestik – Nilai, perubahan peratusan tahunan dan sumbangan utama kepada perbelanjaan pelancongan domestik



Perbelanjaan pelancongan domestik disumbangkan oleh aktiviti Membeli-belah (39.2%), Perkhidmatan penyediaan makanan & minuman (17.5%) dan Jualan runcit bahan api kenderaan (14.3%) seperti di **Paparan 6**. Berdasarkan tahap pra-pandemik, Perkhidmatan penginapan dan Perkhidmatan kebudayaan, sukan & rekreasi melebihi paras pra-pandemik.

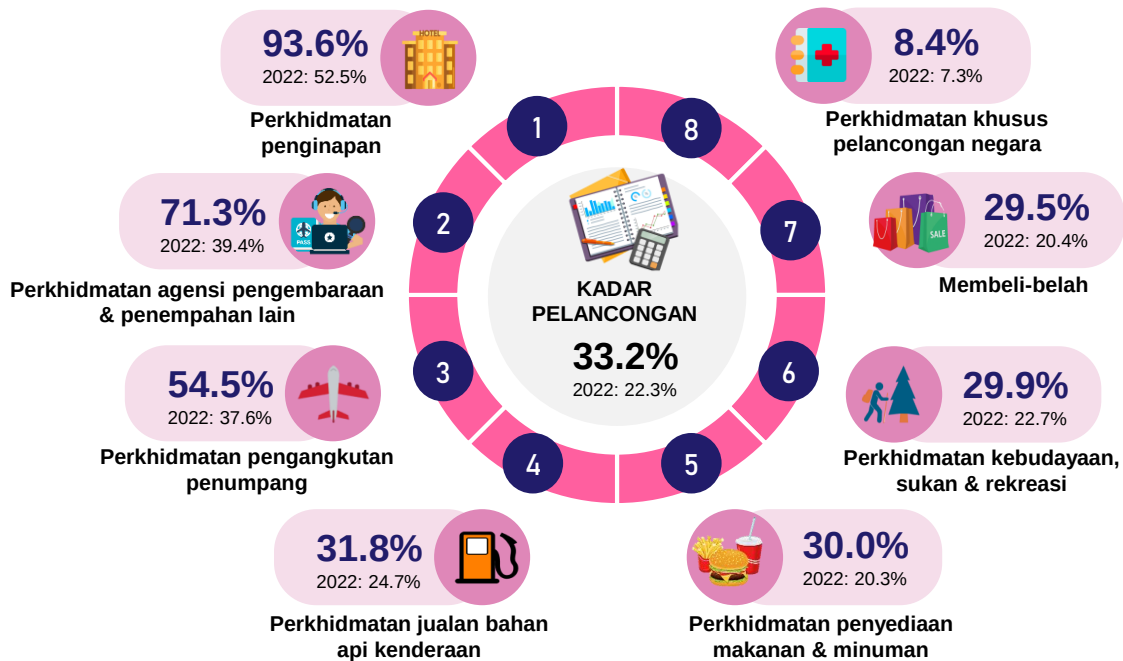
4.4 Perbelanjaan Pelancongan *Outbound*

Perbelanjaan pelancongan *outbound* bertumbuh 77.1 peratus pada tahun 2023 berjumlah RM39.9 bilion berbanding RM22.5 bilion pada tahun sebelumnya. Walau bagaimanapun, pertumbuhan tersebut masih di bawah paras pra-pandemik tahun 2019. Perbelanjaan pelancongan *outbound* terutamanya disumbangkan oleh aktiviti Membeli-belah (30.2%), Perkhidmatan pengangkutan penumpang (24.2%) dan Perkhidmatan penginapan (21.9%) seperti di **Paparan 7**.

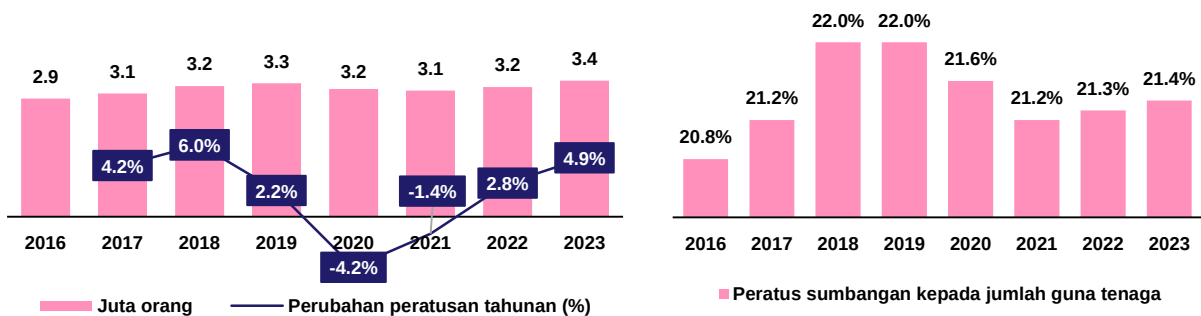


4.5 Kadar Pelancongan

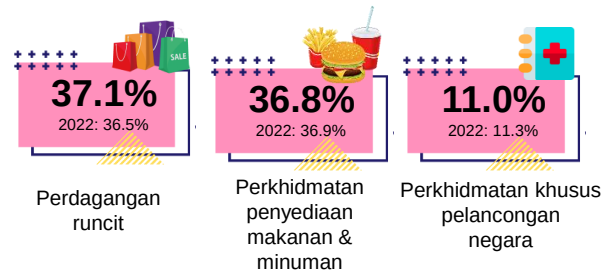
Pengukuran kadar pelancongan merujuk kepada tahap penggunaan pelancongan *internal* terhadap penawaran domestik dalam industri pelancongan. Kadar pelancongan pada tahun 2023 mencatatkan 33.2 peratus berbanding 22.3 peratus pada tahun sebelumnya. Perkhidmatan penginapan mencatatkan kadar tertinggi sebanyak 93.6 peratus diikuti Perkhidmatan agensi pengembaraan & penempahan lain (71.3%) dan Perkhidmatan pengangkutan penumpang (54.5%) seperti di **Paparan 8**.

Paparan 8 Kadar pelancongan mengikut produk pelancongan, 2023**4.6 Guna Tenaga Dalam Industri Pelancongan**

Guna tenaga industri pelancongan melibatkan 3.4 juta orang pada 2023 (2022: 3.2 juta orang) dan menyumbang sebanyak 21.4 peratus kepada keseluruhan guna tenaga di Malaysia. Guna tenaga industri ini meningkat 4.9 peratus berbanding 2.8 peratus pada tahun sebelumnya.

Carta 5 Guna tenaga dalam industri pelancongan - Nilai, perubahan peratusan tahunan dan peratus sumbangan kepada jumlah guna tenaga, 2016-2023

Guna tenaga industri pelancongan didominasi oleh Perdagangan runcit dengan sumbangan 37.1 peratus. Ini diikuti oleh Perkhidmatan penyediaan makanan dan minuman (36.8%) dan Perkhidmatan khusus pelancongan negara (11.0%) seperti di **Paparan 9**.

Paparan 9**Sumbangan utama guna tenaga dalam industri pelancongan, 2023**

1.0 INTRODUCTION

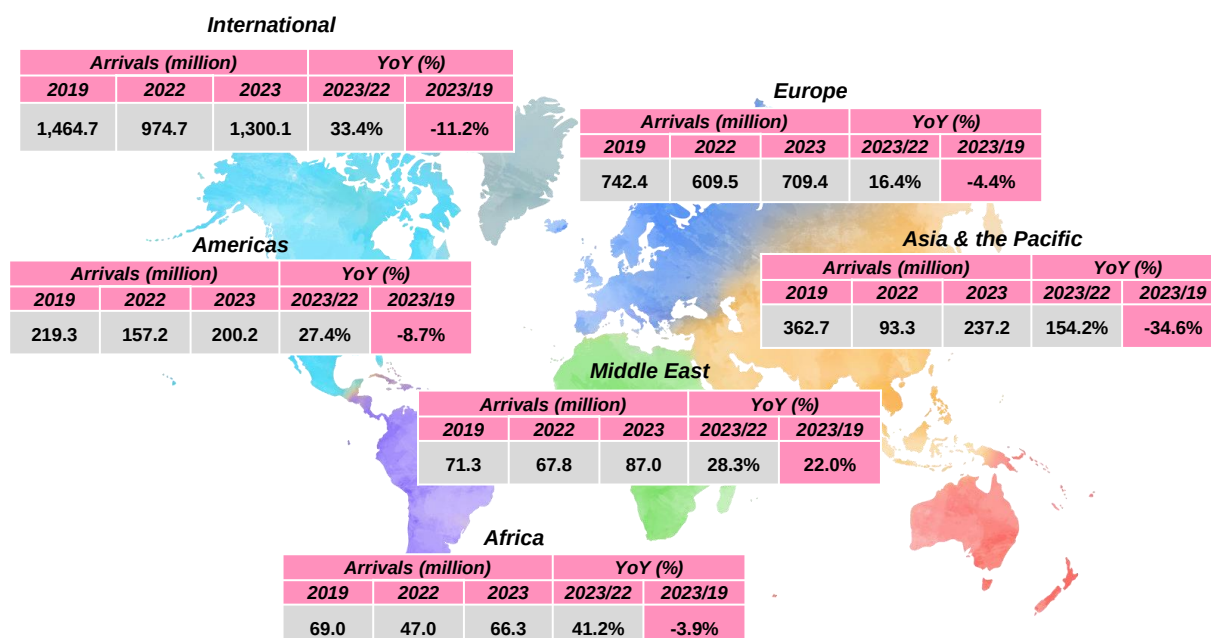
Tourism Satellite Account (TSA) of Malaysia for the year 2023 provides statistics on the Gross Value Added of Tourism Industries (GVATI), Tourism Direct Gross Domestic Product (TDGDP), tourism expenditure for inbound, domestic, outbound, internal tourism consumption and employment in the tourism industry. The statistics is presented by industry and products of tourism. TSA is an extension of the System of National Accounts (SNA) 2008 and this compilation presents information on supply and demand in the tourism sector.

2.0 GLOBAL TOURISM SCENARIO

The UNWTO World Tourism Barometer reports that the number of international tourist arrivals in 2023 was 1,300.1 million people as compared to 974.7 million people in the previous year (**Exhibit 1**). Nevertheless, international tourism in 2023 below by 11.2 per cent of 2019 levels.

Tourist arrivals in Middle East exceeded by 22.0 per cent of pre-pandemic levels being the only region has recovered. Meanwhile, tourist arrivals in Africa, Europe and the Americas is still below by 10.0 per cent of pre-pandemic levels in 2023. The most effected tourism was in Asia and the Pacific region which posted below by 34.6 per cent of pre-pandemic levels.

Exhibit 1 Number of global tourist arrivals



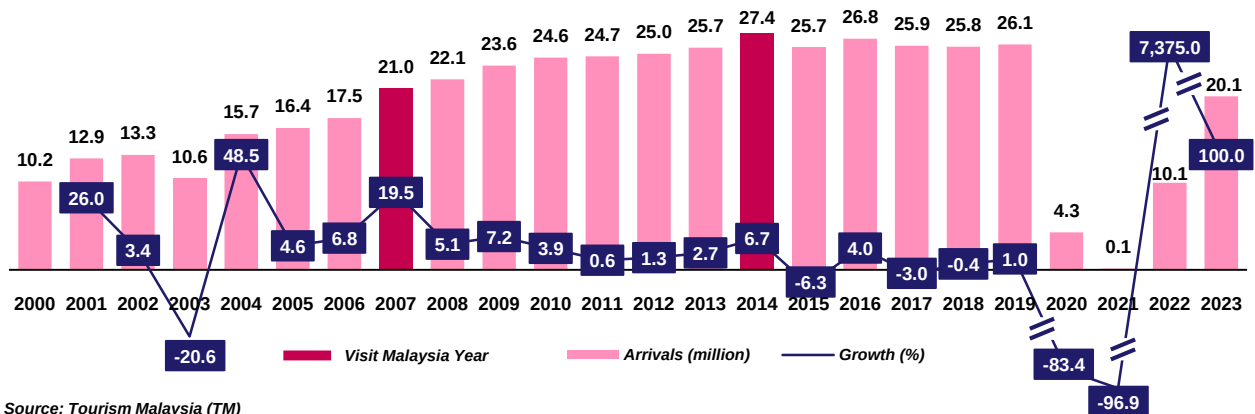
YoY (%) : Annual percentage change

Source: <https://www.unwto.org/tourism-data/global-and-regional-tourism-performance>

3.0 TOURISM SCENARIO IN MALAYSIA

Malaysia's tourist arrivals in 2023 posted a growth of 100.0 per cent or 20.1 million people as shown in **Chart 1**. However, tourist arrivals was still below 22.8 per cent of the pre-pandemic levels.

Chart 1 Number of tourist arrivals in Malaysia, 2000-2023



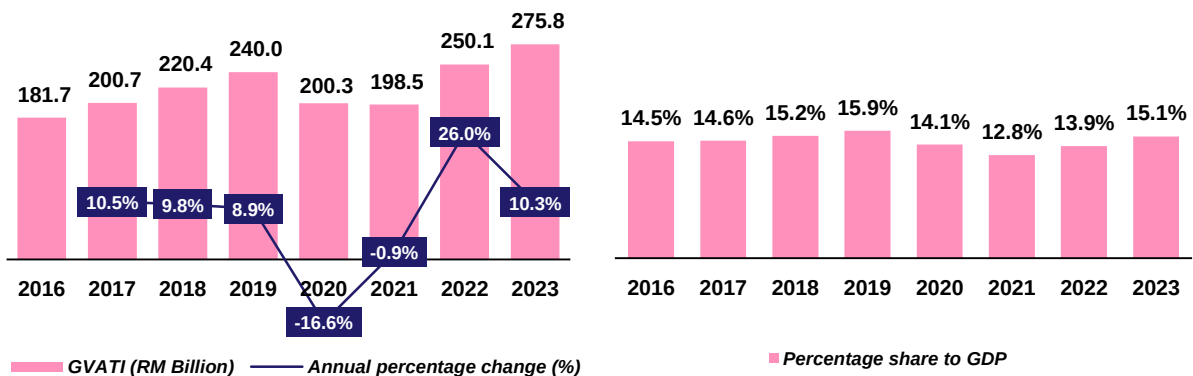
Singapore contributed 41.2 per cent (2022: 51.9%) to the total tourist arrivals in Malaysia in 2023. This was followed by Indonesia, Thailand and China with the share of 15.4 per cent, 7.7 per cent and 7.3 per cent respectively.

4.0 TOURISM PERFORMANCE 2023

4.1 Gross Value Added of Tourism Industries (GVATI)

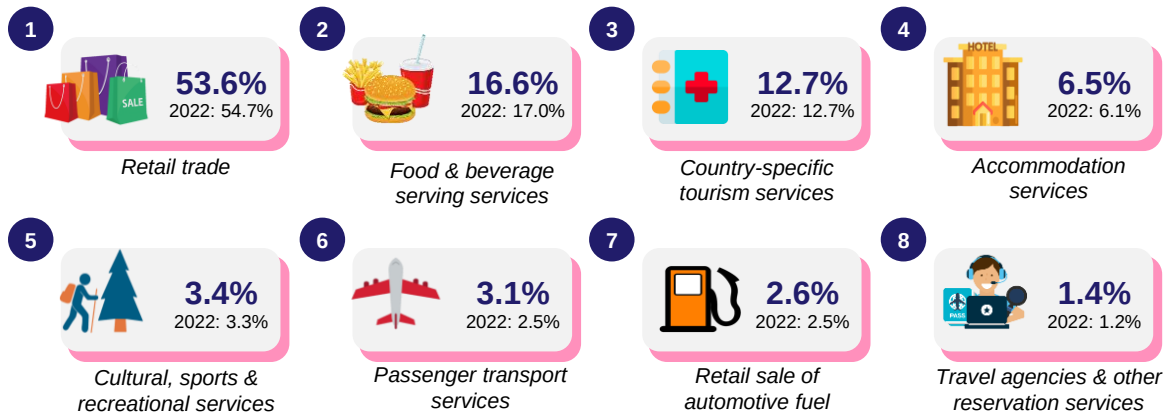
Malaysia's tourism industry recorded a share of 15.1 per cent to Gross Domestic Product (GDP) in 2023 as compared to 13.9 per cent in the previous year. The GVATI posted a value of RM275.8 billion which grew at 10.3 per cent (2022: 26.0%) as shown in **Chart 2**.

Chart 2 GVATI – Value, annual percentage change and percentage share to GDP, 2016-2023



Tourism industry was backed by Retail trade with a share of 53.6 per cent. This was followed by Food & beverage serving services (16.6%) and Country-specific tourism services (12.7%). Collectively, these three industries contributed 82.9 per cent to the total GVATI (**Exhibit 2**).

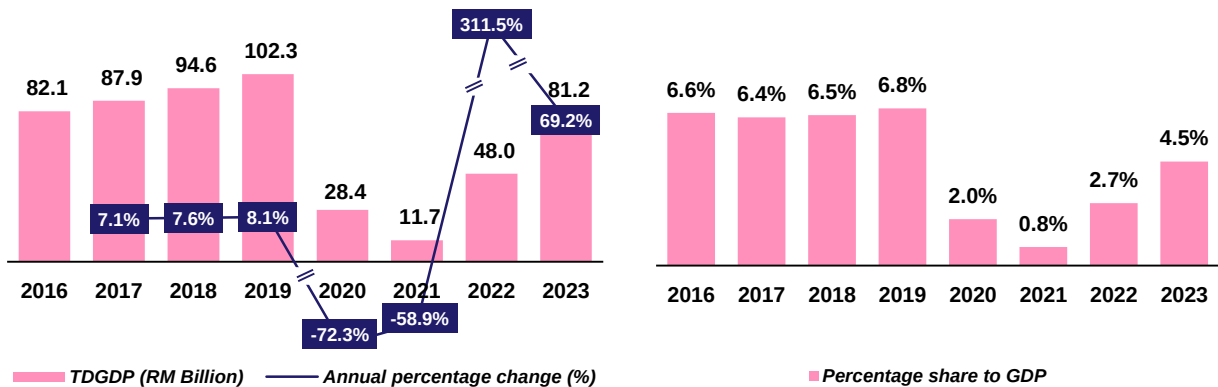
Exhibit 2 GVATI – Percentage share by tourism industries, 2023



4.2 Tourism Direct Gross Domestic Product (TDGDP)

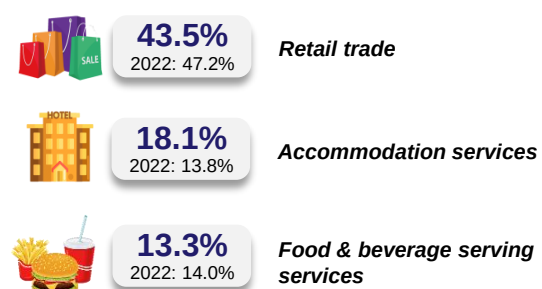
The TDGDP contributed 4.5 per cent to GDP in 2023 amounted RM81.2 billion as compared to RM48.0 billion in the previous year. The TDGDP grew at 69.2 per cent but the level was remain below the pre-pandemic levels as shown in **Chart 3**.

Chart 3 TDGDP – Value, annual percentage change and percentage share to GDP, 2016-2023



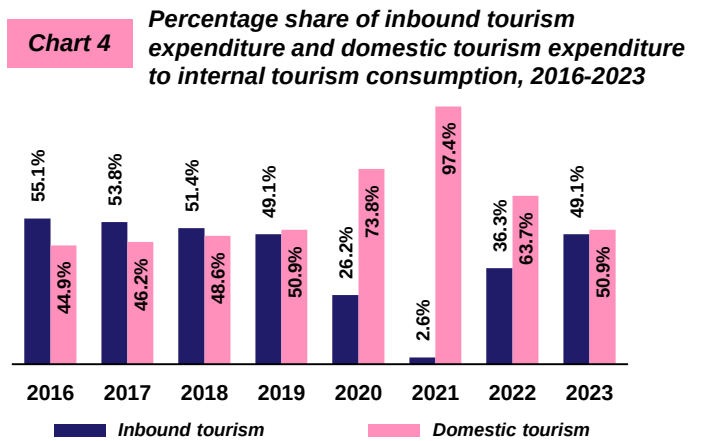
The main contributor industries to TDGDP were Retail trade, Accommodation and Food & beverage serving services with a combination share of 74.9 per cent in 2023 (**Exhibit 3**).

Exhibit 3 The main industries contributed to TDGDP, 2023



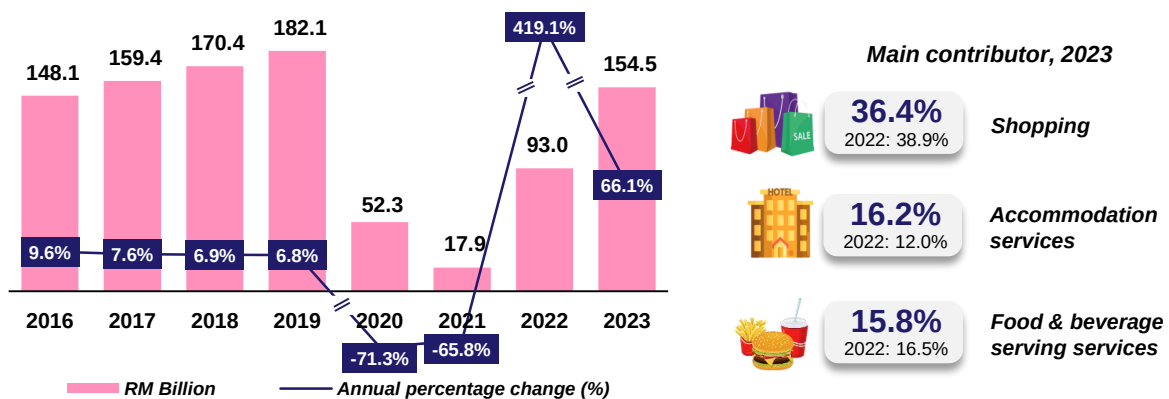
4.3 Internal Tourism Consumption

The internal tourism consumption comprises inbound tourism expenditure and domestic tourism expenditure. Internal tourism consumption dominated by domestic tourism expenditure with a contribution of 50.9 per cent in 2023 (Chart 4).



Internal tourism consumption recorded an increase of 66.1 per cent with a value of RM154.5 billion in 2023 as compared to RM93.0 billion in the previous year. The internal tourism consumption was mainly contributed by Shopping activities (36.4%), Accommodation services (16.2%) and Food & beverage serving services (15.8%) as shown in Exhibit 4.

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

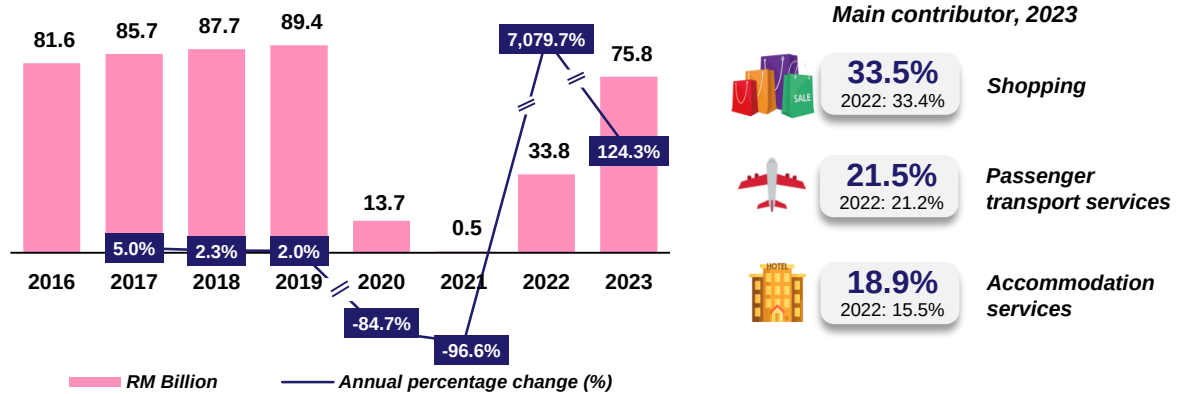


4.3.1 Inbound Tourism Expenditure

Inbound tourism expenditure increased by 124.3 per cent to RM75.8 billion in 2023 from RM33.8 billion in 2022 (Exhibit 5). Nevertheless, inbound tourism expenditure is still below the pre-pandemic levels. In terms of visitors composition, 96.3 per cent of inbound tourism expenditure was contributed by tourists and the remainder 3.7 per cent was excursionists.

Exhibit 5

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



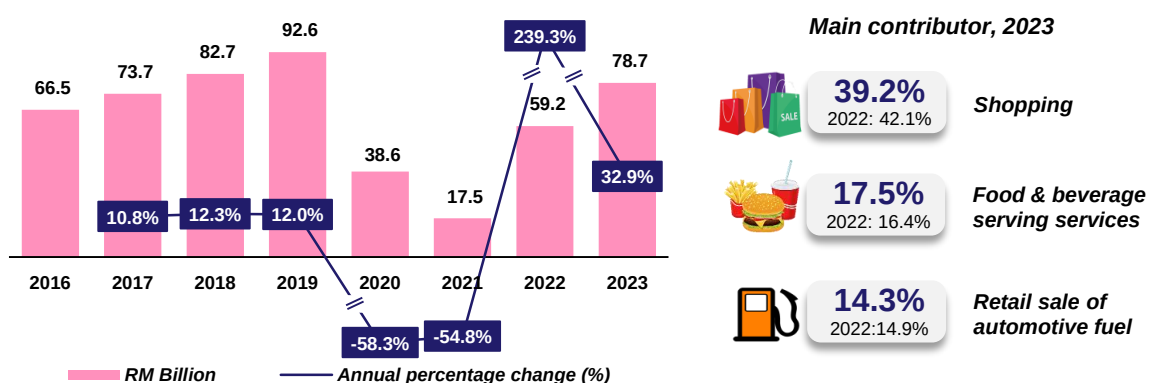
Inbound tourism expenditure was dominated by Shopping activities with a share of 33.5 per cent, followed by Passenger transport services (21.5%) and Accommodation services (18.9%) as shown in **Exhibit 5**. In comparison with pre-pandemic levels, Passenger transport services, Cultural, sports & recreational services and Retail sales of automotive fuel have exceeded the pre-pandemic levels.

4.3.2 Domestic Tourism Expenditure

Domestic tourism expenditure grew at 32.9 per cent or RM78.7 billion in 2023 as compared to RM59.2 billion in the previous year (**Exhibit 6**). However, domestic tourism expenditure saw below by 15.1 per cent of pre-pandemic levels. In terms of visitors composition, tourists constituted 60.4 per cent and excursionists accounted 39.6 per cent.

Exhibit 6

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

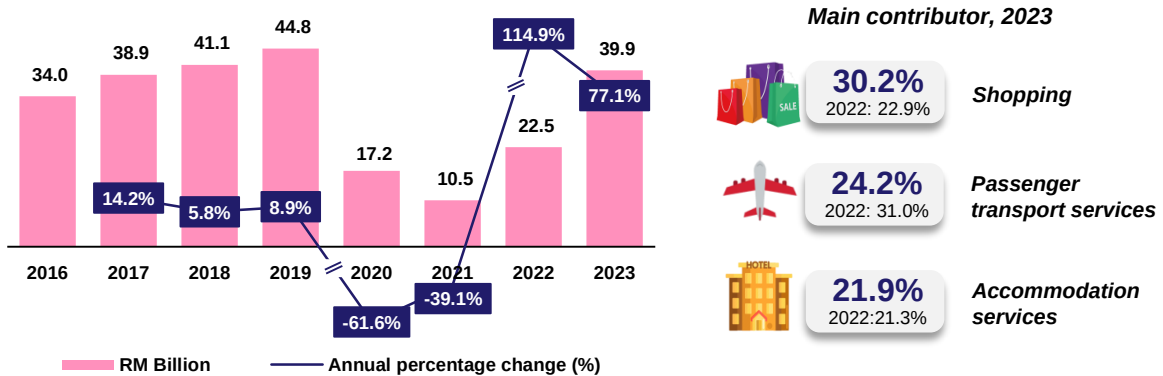


Domestic tourism expenditure was mainly attributed to Shopping activities (39.2%), Food & beverage serving services (17.5%) and Retail sale of automotive fuel (14.3%) as shown in **Exhibit 6**. Based on the pre-pandemic levels, Accommodation services and Cultural, sports & recreational services have exceeded the pre-pandemic levels.

4.4 Outbound Tourism Expenditure

Outbound tourism expenditure grew at 77.1 per cent in 2023, amounted RM39.9 billion as compared to RM22.5 billion in the previous year. However, the growth is still below the pre-pandemic levels of 2019. The outbound tourism expenditure was mainly from Shopping activities (30.2%), Passenger transport services (24.2%) and Accommodation services (21.9%) as shown in **Exhibit 7**.

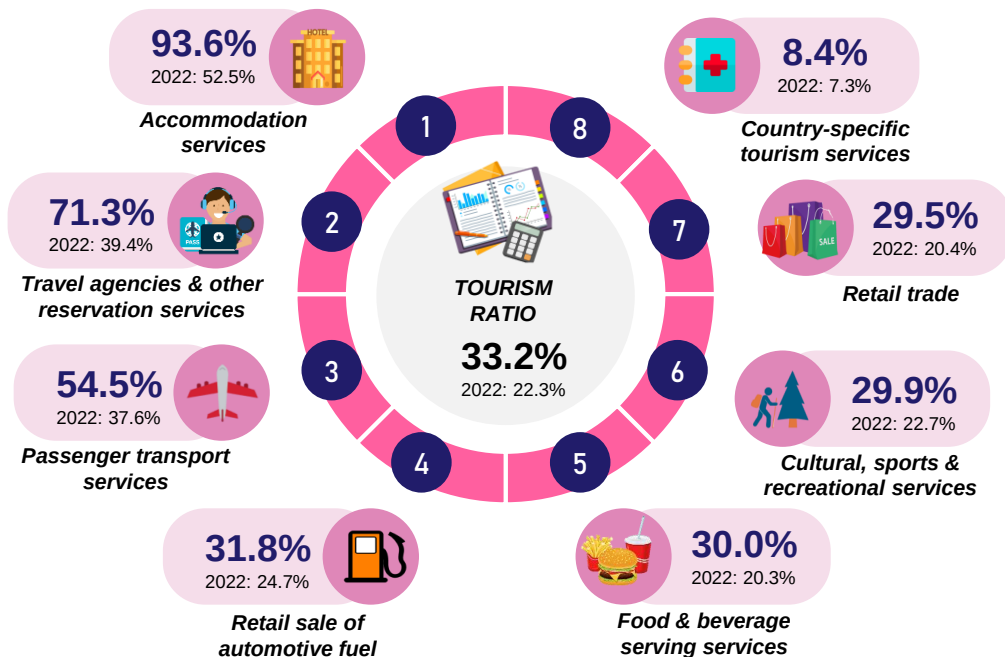
Exhibit 7 Outbound tourism expenditure – Value, annual percentage change and main contributor to outbound tourism expenditure



4.5 Tourism Ratio

The measurement of tourism ratio refers to the level of internal tourism consumption relative to domestic supply in the tourism industry. In 2023, tourism ratio recorded 33.2 per cent as compared to 22.3 per cent in the previous year. Accommodation services recorded the highest ratio at 93.6 per cent followed by Travel agencies & other reservation services (71.3%) and Passenger transport services (54.5%) as shown in **Exhibit 8**.

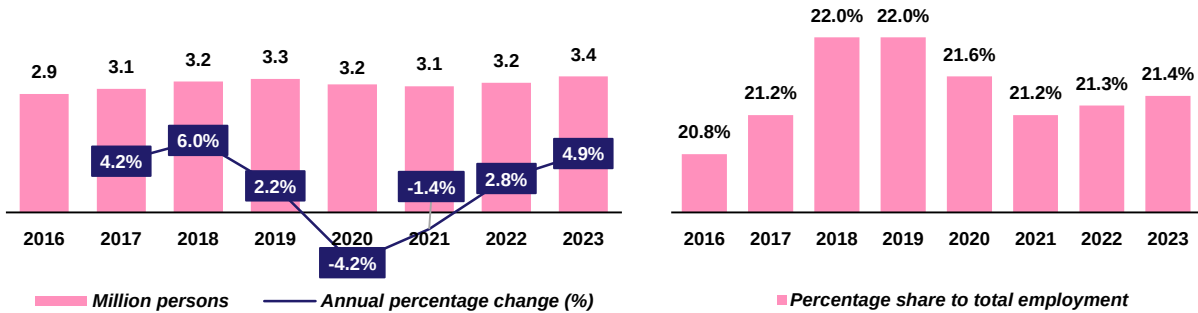
Exhibit 8 Tourism ratio by tourism products, 2023



4.6 Employment In Tourism Industry

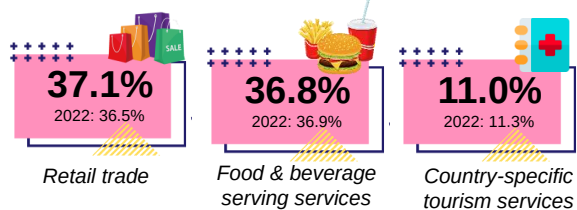
Tourism industry employed 3.4 million persons in 2023 (2022: 3.2 million persons) and contributed 21.4 per cent to the total employment in Malaysia. Employment in this industry rose to 4.9 per cent as compared to 2.8 per cent in the previous year.

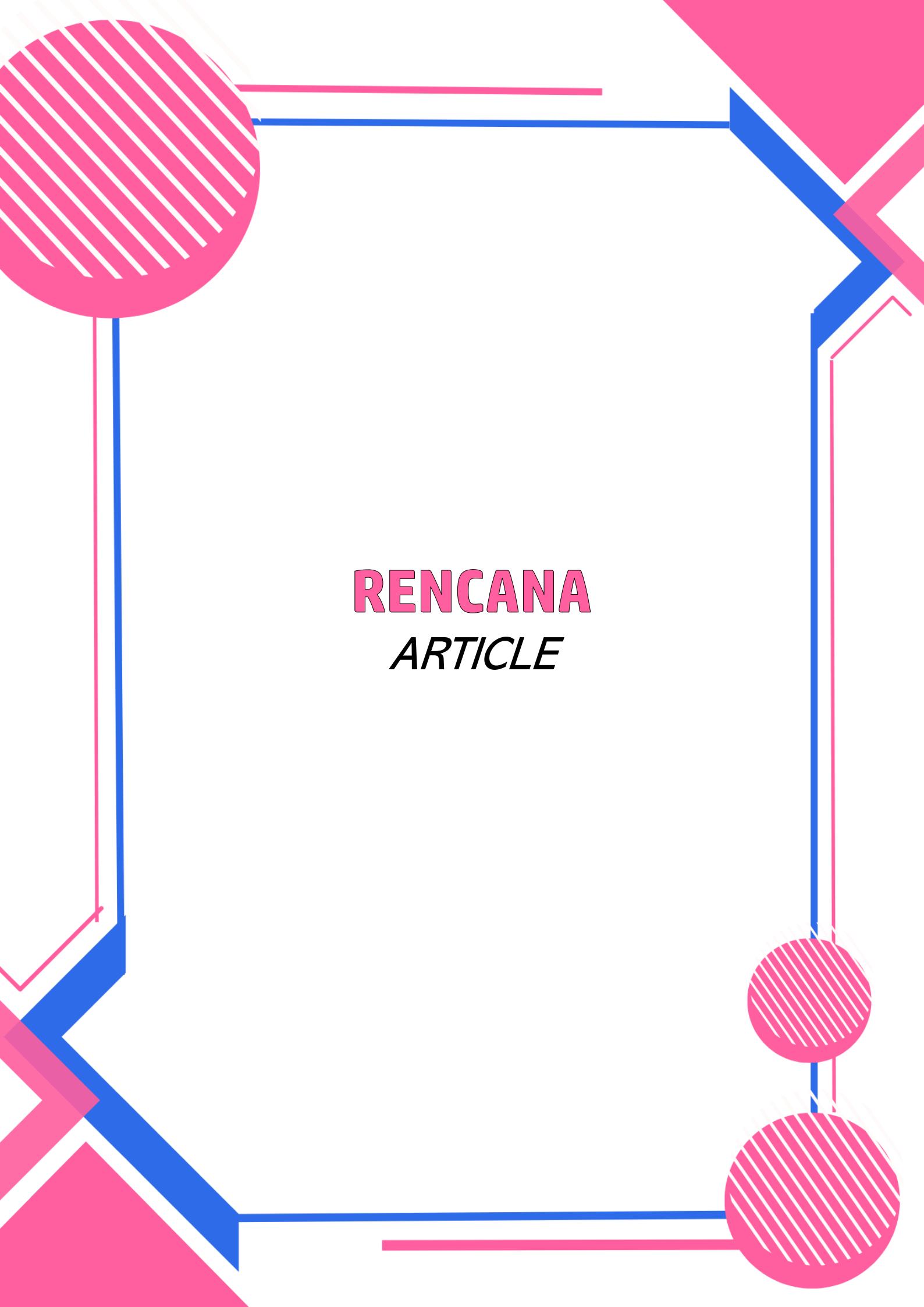
Chart 5 Employment in tourism industries - Value, annual percentage change and percentage share to total employment, 2016-2023



Tourism employment was dominated by Retail trade with a share of 37.1 per cent. This was followed by Food & beverage serving services (36.8%) and Country-specific tourism services (11.0%) as shown in **Exhibit 9**.

Exhibit 9 Main percentage share for employment in tourism industries, 2023



The background features a complex geometric pattern. It includes a large pink circle with diagonal white stripes in the top-left corner. A thick blue line runs horizontally across the top, and another runs horizontally across the bottom. Vertical blue lines connect these horizontal lines on the left and right sides. Pink lines also run horizontally and vertically, intersecting the blue lines. In the bottom-right corner, there are two smaller pink circles with diagonal white stripes, one above the other. The overall design is modern and abstract, using a color palette of pink, blue, and white.

RENCANA *ARTICLE*

MEMANFAATKAN DATA RAYA UNTUK MENENTUKAN FAKTOR UTAMA YANG MEMPENGARUHI HARGA BILIK DALAM INDUSTRI PELANCONGAN MALAYSIA

Nurul Aini Abdul Wahab¹, Nur Hafizan Che Nah¹ dan Nurul Nadiyah Abd Ghani¹

¹Bahagian Perangkaan Akaun Negara, Jabatan Perangkaan Malaysia

Abstrak

Sektor pelancongan adalah salah satu pemacu utama pertumbuhan ekonomi global, mewujudkan pekerjaan dan pertukaran budaya. Di Malaysia, industri penginapan telah bergelut akibat pandemik COVID-19, yang menyebabkan penurunan bilangan hotel dan peningkatan persaingan daripada penginapan sewaan jangka pendek (STRA) yang menawarkan diskaun yang ketara. Bagi memahami situasi dinamik tersebut, kajian ini menggunakan data raya daripada Booking.com yang dikumpul setiap minggu sepanjang 2023, untuk menganalisis faktor yang mempengaruhi harga bilik hotel di Malaysia. Kajian ini menggunakan model regresi harga hedonik kuasa dua terkecil biasa (OLS) dan model regresi kuantil untuk menilai cara atribut seperti penarafan hotel, lokasi, kemudahan dan jarak ke tarikan pelancongan yang mempengaruhi kadar bilik. Walaupun kedua-dua model menunjukkan beberapa persamaan, terdapat juga perbezaan terutamanya dalam cara faktor-faktor tertentu mempengaruhi harga pada pelbagai kuantil. Contohnya, OLS menunjukkan kebanyakan faktor memberi kesan ketara terhadap harga bilik kecuali jarak ke restoran, manakala regresi kuantil menunjukkan kepelbagaian faktor bergantung pada taburan harga bilik. Kajian ini menekankan nilai data raya dalam memahami trend harga dan mengoptimumkan strategi hospitaliti.

Kata kunci

Pengikisan web; Hedonik; Penentu harga; Bilik hotel; Regresi kuantil

1.0 Pendahuluan

Sektor pelancongan telah muncul sebagai sektor penting kepada ekonomi global, memacu pertumbuhan ekonomi yang signifikan dan pertukaran sosio-budaya. Ia dianggap penting untuk kesihatan ekonomi keseluruhan sesebuah negara atau rantau kerana sumbangannya seperti pendapatan pertukaran mata wang asing, pewujudan pekerjaan, pembangunan infrastruktur serta menggalakkan pertukaran budaya dan juga hubungan antarabangsa. Dalam sektor pelancongan yang lebih luas, industri penginapan menonjol sebagai komponen asas, menyediakan perkhidmatan penting yang memudahkan perjalanan dan penginapan untuk jutaan pelancong di seluruh dunia.

Malaysia yang terkenal dengan kepelbagaian budaya dan keindahan semula jadi, telah tampil sebagai pemain utama dalam sektor hospitaliti global (Knight Frank, 2023). Namun, pandemik COVID-19 telah memberi kesan buruk kepada industri pelancongan, menjejaskan agensi pelancongan, pengendali pelancongan dan hotel. Menurut statistik Tourism Malaysia, bilangan hotel di Malaysia menurun 6.1 peratus, daripada 5,382 buah pada 2019 sebelum pandemik, kepada 5,052 buah pada 2022. Pencambahan apartmen milik persendirian atau penginapan sewaan jangka pendek (STRA) sebagai penginapan alternatif pelancong juga telah mengganggu

paradigma industri hotel tradisional (Raafat & Weller, 2019). Bagi kumpulan atau keluarga, menyewa keseluruhan pangsapuri atau rumah boleh menjimatkan kos berbanding menempah beberapa bilik hotel. Ciri-ciri seperti dapur, ruang tamu dan kemudahan dobi juga meningkatkan daya tarikan STRA.

Menurut CBRE Hotels (2020), STRA sering menawarkan diskaun sekitar 5.0 peratus, yang boleh meningkat kepada 20.0 hingga 30.0 peratus di kawasan bandar. Hotel kerap melaraskan harga mereka untuk bersaing dengan diskaun tersebut. Oleh itu, penetapan harga yang kompetitif adalah penting bagi pemulihan industri hotel terutamanya selepas pandemik COVID-19. Strategi penetapan harga yang berkesan mampu menarik pelbagai kategori tetamu daripada pengembara bajet kepada pengembara mewah. Ia adalah penting untuk mencapai kadar penghunian tinggi yang diperlukan untuk pendapatan dan operasi semasa fasa pemulihan (Pohland & Kesgin, 2018). Faktor utama yang mempengaruhi harga bilik hotel termasuk penarafan bintang hotel, lokasi, kemudahan, jenis bilik dan faktor luaran seperti permintaan pasaran, musim, acara tempatan dan persaingan berdekatan.

Sektor pelancongan telah mengalami transformasi yang signifikan akibat kemajuan teknologi apabila data raya menjadi alat penting untuk pemahaman dan membuat keputusan. Data raya dalam pelancongan adalah termasuk maklumat daripada agensi pelancongan atas talian, media sosial, laman web ulasan dan saluran digital lain dimana pelancong boleh berkongsi pengalaman mereka. Kajian ini menggunakan perisian Octoparse untuk mengumpulkan data mingguan harga bilik hotel daripada Booking.com sepanjang 2023, menunjukkan bagaimana penggunaan data raya dalam industri. Kaedah ini mengumpulkan maklumat yang luas mengenai trend harga merentasi pelbagai penginapan termasuk hotel dan STRA. Dengan menganalisis data ini, kajian dapat mengenal pasti faktor utama yang mempengaruhi harga bilik di Malaysia, memberikan pemahaman kepada pengusaha hotel untuk mengoptimumkan strategi penetapan harga mereka dan untuk penggubal dasar membangunkan polisi pelancongan yang berasaskan data bagi meningkatkan daya saing dan kemampanan sektor tersebut.

2.0 Sorotan Karya

Pendapatan hotel adalah penting untuk kelangsungan dan pertumbuhan hotel. Ia bukan sahaja menampung perbelanjaan operasi tetapi juga membantu perkembangan dan inovasi dalam industri ini. Hasil yang mencukupi penting untuk menampung perbelanjaan harian seperti gaji kakitangan, bil utiliti, sewa dan kos penyelenggaraan. Pendapatan membolehkan hotel melabur dalam penambahbaikan dan daya cipta yang meningkatkan pengalaman tetamu. Ini termasuk pengubahsuaian, kemudahan baru, kemajuan teknologi atau amalan mampan yang penting untuk kekal berdaya saing dalam pasaran dan memenuhi permintaan pengguna yang semakin berkembang. Pendapatan bilik biasanya menyumbang sebahagian besar daripada pendapatan hotel, sekitar 70.0 peratus daripada jumlah pendapatan (Lavi, 2023). Oleh itu, penentuan kadar bilik yang optimum adalah langkah signifikan bagi pengurusan hotel untuk meningkatkan pendapatan. Hotel kerap menyesuaikan kadar bilik mereka berdasarkan pelbagai faktor seperti turun naik permintaan, kadar penghunian, trend musim dan strategi harga kompetitif yang digunakan oleh hotel lain dalam pasaran.

Lozano, Pereira dan Miranda (2021) menekankan harga bilik hotel di mana-mana destinasi dipengaruhi oleh pelbagai jenis pemboleh ubah. Soler dan Gemar (2018) mencadangkan bahawa penetapan harga bilik hotel boleh dipengaruhi dengan cara yang berbeza oleh atribut yang berkaitan dengan lokasi dan situasi hotel. Faktor-faktor seperti lokasi hotel, ciri fizikal dan persekitaran memainkan peranan penting dalam membentuk strategi penetapan harga. Atribut lokasi adalah merujuk kepada aspek fizikal atau struktur hotel seperti saiz, kelas, usia dan kualiti perkhidmatannya (Zhang et al., 2011a). Sebaliknya, atribut situasi merujuk kepada ciri-ciri persekitaran hotel, seperti berdekatan dengan lapangan terbang, stesen pengangkutan dan tarikan pelancong. Ini menunjukkan bahawa keputusan penetapan harga tidak hanya ditentukan oleh satu atau dua faktor sahaja, tetapi sebaliknya dibentuk oleh gabungan beberapa elemen. Model harga hedonik (HPMs), seperti yang disebut oleh Zhang et al. (2011a), digunakan untuk mengenal pasti penentu harga bilik hotel. HPMs menggunakan regresi OLS untuk menganalisis bagaimana harga bilik dipengaruhi oleh pelbagai faktor lokasi dan situasi. Pendekatan ini mengandaikan bahawa harga bilik boleh dimodelkan sebagai fungsi linear daripada pelbagai faktor ini.

Banyak kajian telah mengaitkan harga bilik dengan atribut hotel. Pada asasnya, atribut hotel yang mempengaruhi kadar bilik adalah lokasi, kemudahan dan fasiliti, kualiti perkhidmatan, penarafan bintang, suasana, dan sebagainya (Thrane, 2007). Menurut Stojchevska, Naumoski dan Mitreski (2018), kemudahan hotel secara khusus merujuk kepada fasiliti seperti ketersediaan TV, teres, balkoni, tab mandi atau tempat letak kereta. Sebaliknya, Santos et al. (2021) mendapati bahawa pemboleh ubah yang berkaitan dengan kemudahan seperti WiFi dan penghawa dingin adalah yang paling kerap menjadi perhatian, manakala kemudahan seperti gimnasium dan spa adalah yang paling kurang. Selain itu, Chen dan Rothschild (2010) menganalisis pelbagai atribut hotel yang mempengaruhi kadar bilik seperti bilik mandi dengan tab mandi dan pancuran, sarapan pagi, bufet, TV LED, pusat perniagaan, bar/kafe, akses internet, bas ulang-alik, kemudahan persidangan, kolam renang, pusat kecergasan, tempat letak kereta percuma dan perkhidmatan bilik.

Schamel (2012) dan Lozano, Pereira & Miranda (2021) mengkaji hubungan antara kadar bilik dan penarafan atas talian yang menunjukkan kesan positif di antara kedua-duanya. Penarafan atas talian boleh datang daripada pelbagai sumber seperti TripAdvisor, HotelTravel.com, Trivago.com dan lain-lain. Walau bagaimanapun, Schamel (2012) menyatakan bahawa penarafan daripada Booking.com mempunyai kelebihan dari segi kebolehpercayaan kerana platform tersebut hanya membenarkan tetamu sebenar untuk mengemukakan ulasan selepas penginapan mereka. Meskipun kebanyakan literatur menumpukan kepada bagaimana ulasan atas talian mempengaruhi proses membuat keputusan pengguna, terdapat juga kajian yang meneliti bagaimana isyarat kualiti ini mempengaruhi kadar bilik hotel. Zhang, Ye dan Law (2011b) merupakan antara penyelidik yang telah menerokai aspek ini. Kajian-kajian ini secara kolektif mencadangkan bahawa penarafan dan ulasan atas talian yang lebih tinggi cenderung berkorelasi dengan kadar bilik yang lebih tinggi.

Kim, Lee dan Roehl (2016) menekankan kepentingan mempertimbangkan acara dan faktor musim dalam menentukan harga. Santos et al. (2021) meneliti harga bilik di Seville pada pelbagai tempoh; musim puncak (hari bekerja dan hujung minggu), luar musim (hari bekerja dan hujung minggu), Holy Week (sebagai acara khas) dan April Fair (sebagai acara penting). Lozano, Pereira

dan Miranda (2021) mengkaji tentang musim, harga bilik mengikut hari dalam seminggu, tempoh tempahan dan cuti antarabangsa serta tempatan. Beberapa kajian juga telah meneliti hubungan antara kadar bilik dan jarak dari hotel ke tarikan berdekatan. Sebagai contoh, Lee dan Jang (2011) mengkaji kesan jarak ke lapangan terbang dan daerah pusat perniagaan terhadap kadar bilik hotel di beberapa bandar di Amerika Syarikat. Alegre et al. (2013) menganalisis bagaimana atribut lokasi khususnya yang melibatkan tiga elemen semula jadi (Laut, Matahari & Pasir) mempengaruhi harga bilik di Kepulauan Balearic.

HPMs digunakan bukan sahaja untuk menentukan harga bilik hotel tetapi juga untuk menetapkan kadar harian untuk sewaan percutian. Santos et al. (2021) memperluas kajian mengenai atribut hotel yang mempengaruhi kadar bilik kepada rumah untuk tujuan pelancongan (44.65%), hotel (45.32%) dan apartmen pelancong (10.03%). Selain itu, Voltes-Dorta dan Sánchez-Medina (2020) meneroka pemacu harga Airbnb di Bristol memfokuskan kepada jenis hartanah atau bilik, musim dan lokasi. Lazimnya, regresi OLS digunakan untuk mengkaji hubungan antara kadar bilik dengan pemboleh ubah bebas. Namun begitu, sesetengah penyelidik menggunakan regresi kuantil untuk mengkaji faktor penentu utama strategi penetapan harga bilik hotel dengan regresi OLS digunakan untuk tujuan perbandingan (Sing & Awang, 2021, Masiero et al. 2015 & Hung, Shang Wang, 2010). Regresi kuantil membolehkan anggaran fungsi kuantil bersyarat, di mana setiap fungsi menggambarkan tingkah laku titik tertentu dalam taburan bersyarat, sekali gus memberikan gambaran menyeluruh bagi keseluruhan taburan bersyarat (Koenker & Bassett, 1978).

3.0 Metodologi

3.1 Data

Analisis yang dicadangkan adalah berdasarkan data yang dikumpul daripada Booking.com, sebuah platform tempahan hotel global yang merangkumi Malaysia. Data dikumpul melalui pengikisan web setiap hujung minggu bermula dari 1 Januari 2023 hingga 31 Disember 2023. Perisian Octoparse digunakan untuk mengautomatiskan proses pengikisan dan mengekstrak data ke dalam pangkalan data khusus. Sebanyak 415,925 mata data telah dikumpulkan. Untuk analisis ini, atribut penginapan berikut telah diekstrak daripada Booking.com: tarikh tempahan, harga bilik, penarafan, jumlah ulasan, jenis penginapan, kolam renang, bar, spa, pusat kecergasan, jarak penginapan ke tarikan berdekatan dan jarak penginapan ke restoran. Data kemudian dibersihkan dan disusun untuk analisis menggunakan IBM SPSS dan R Studio. Semasa pra-pemprosesan, entri yang berulang telah dibuang dan nilai yang hilang ditangani menggunakan kaedah imputasi yang sesuai.

Set data telah dikategorikan kepada dua (2) kategori mengikut bulan terbaik untuk melawat Malaysia, iaitu musim puncak (Januari – Februari, Jun – Ogos, Disember) dan luar musim (Mac – Mei, September – November). Sementara itu, cuti umum dan cuti sekolah di kenal pasti berdasarkan kalendar cuti rasmi di Malaysia. Dalam analisis ini, harga bilik telah dipilih sebagai pemboleh ubah bersandar manakala pemboleh ubah bebas lain dimasukkan dalam penilaian analisis (**Jadual 1**).

Jadual 1: Deskripsi mengenai pemboleh ubah bebas

Pemboleh ubah bebas	Deskripsi
Penarafan	1 – 10
Ulasan	Jumlah ulasan
Musim	Musim puncak=1, Musim luar=0
Cuti umum	Ya=1, Tidak=0
Cuti Sekolah	Ya=1, Tidak=0
Kolam	Ya=1, Tidak=0
Bar	Ya=1, Tidak=0
Spa	Ya=1, Tidak=0
Pusat kecergasan	Ya=1, Tidak=0
JarakBerdekatan	Jarak penginapan ke tempat tarikan pelancongan terdekat (km)
JarakRestoran	Jarak penginapan ke restoran terdekat (km)

3.2 Model Harga Hedonik

Untuk menentukan atribut yang mempengaruhi harga bilik di Malaysia, model regresi harga hedonik OLS digunakan. Spesifikasi asas OLS boleh dinyatakan seperti berikut:

$$P_i = \beta_0 + \sum_{j=1}^k \beta_j X_j + \varepsilon$$

di mana P_i adalah harga bilik; i merujuk kepada bilangan bilik ($i = 1, 2, \dots, n$); β_0 adalah pemalar; X_j adalah atribut bilik; β_j adalah pekali yang berkaitan; j adalah bilangan pemboleh ubah tapak dan situasi ($j = 1, 2, \dots, k$); dan ε adalah terma ralat rawak.

Menurut Soler dan Gemar (2018), model separa logaritma (separa log) diutamakan untuk penjelasan yang lebih jelas. Analisis ini menggunakan model separa log kerana ia memenuhi andaian untuk regresi linear berganda termasuk kenormalan, lineariti dan homoskedastisiti. Teknik *Variance Inflation Factor* (VIF) digunakan untuk memeriksa multikolineariti dengan nilai VIF berada di bawah 2, yang menunjukkan tiada isu multikolineariti. Dalam model separa log, pemboleh ubah bebas berada dalam bentuk linear manakala pemboleh ubah bersandar adalah dalam bentuk logaritma. Aturan ini membolehkan pekali regresi mewakili pekali separa elastik bagi ciri-ciri tersebut (Du et al., 2020). Model separa log yang digunakan dalam kajian ini adalah seperti berikut:

$$\ln P_i = \beta_0 + \sum_{j=1}^k \beta_j X_j + \varepsilon$$

$$\ln P_i = \beta_0 + \beta_1 X_{i1} + \beta_2 X_{i2} + \beta_3 X_{i3} + \dots + \beta_k X_{ik} + \varepsilon, \quad i = 1, 2, \dots, n$$

$$\begin{aligned} \ln \text{Harga} = & \beta_0 + \beta_1 \text{Penarafan} + \beta_2 \text{Ulasan} + \beta_3 \text{Musim} + \beta_4 \text{CutiUmum} + \beta_5 \text{CutiSekolah} \\ & + \beta_6 \text{Kolam} + \beta_7 \text{Bar} + \beta_8 \text{Spa} + \beta_9 \text{PusatKecergasan} \\ & + \beta_{10} \text{JarakBerdekatan} + \beta_{11} \text{JarakRestoran} + \varepsilon \end{aligned}$$

Model lain yang digunakan dalam analisis ini ialah regresi kuantil di mana model ini menghasilkan nilai pekali yang berlainan bagi setiap pemboleh ubah tidak bersandar pada tahap (kuantil) bagi pemboleh ubah bersandar (Farmer dan Lipscomb, 2010). Sing dan Awang (2021) menyatakan bahawa adalah mungkin untuk mewakili mana-mana titik taburan yang telah ditetapkan kerana mana-mana kuantil boleh digunakan. Model ini juga menyediakan pilihan untuk menggunakan median atau mana-mana kuantil lain selain daripada menggunakan min untuk

mengukur kecenderungan memusat. Model regresi kuantil umum ditakrifkan seperti berikut:

$$P_i = X_i' b^{(s)} + \varepsilon_i^{(s)}, \quad i = 1, 2, \dots, n; 0 < s < 1$$

di mana P_i adalah harga bilik; X_i menandakan vektor ($k \times 1$) pemboleh ubah bebas (**Jadual 1**); $b^{(s)}$ adalah vektor parameter yang tidak diketahui untuk dianggarkan yang berkaitan dengan kuantil s^{th} dan $\varepsilon_i^{(s)}$ adalah terma ralat. Kuantil s^{th} bersyarat bagi P_i diberikan X_i dinyatakan sebagai:

$$Q^{(s)}(P_i|X_i) = X_i' b^{(s)}$$

Anggaran regresi kuantil bagi $b^{(s)}$ diselesaikan seperti berikut:

$$\hat{b}^{(s)} = \underset{b^{(s)}}{\operatorname{argmin}} \sum_i \rho |P_i - X_i' b^{(s)}|$$

di mana ρ adalah fungsi semakan yang ditakrifkan sebagai:

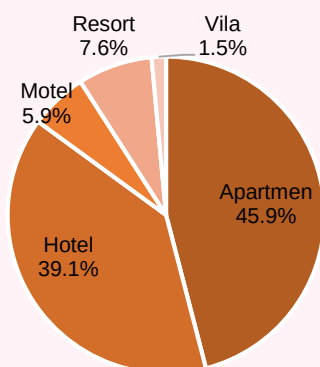
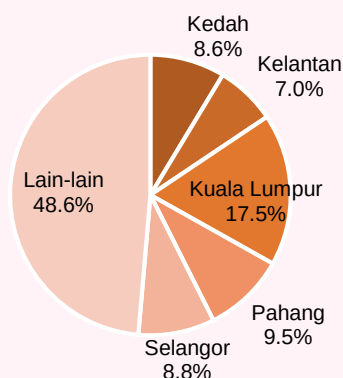
$$\rho(\varepsilon_i^{(s)}) = \begin{cases} s\varepsilon_i^{(s)}, & \varepsilon_i^{(s)} \geq 0 \\ (s-1)\varepsilon_i^{(s)}, & \varepsilon_i^{(s)} < 0 \end{cases}$$

Dalam analisis ini, empat kuantil digunakan iaitu 0.25, 0.50, 0.75 dan 0.90.

4.0 Hasil dan Perbincangan

4.1 Statistik deskriptif

Analisis terhadap set data menunjukkan purata harga bilik penginapan adalah RM263.68, dengan julat harga bermula dari RM20.00 hingga RM9,125.00. Purata penarafan bagi indeks kepuasan adalah 8.00 (skala dari 1 - 10), mencerminkan pengalaman yang baik semasa menginap. Secara purata, penginapan menerima 1,056.73 ulasan daripada tetamu selepas penginapan mereka. Daripada 415,925 data yang dikumpulkan, 30,726 telah dibersihkan dan dikategorikan. Data tersebut dikategorikan kepada lima jenis penginapan iaitu apartmen (45.9%), hotel (39.1%), motel (5.9%), resort (7.6%) dan vila (1.5%) seperti di **Rajah 1**. Kuala Lumpur mencatatkan bilangan penginapan tertinggi iaitu 17.5 peratus diikuti oleh Pahang (9.5%), Selangor (8.8%), Kedah (8.6%) dan Kelantan (7.0%) seperti di **Rajah 2**. Purata jarak dari penginapan ke restoran dan tarikan berdekatan masing-masing adalah 0.66 km dan 2.02 km. Atribut tambahan yang diekstrak ialah kewujudan bar, spa, pusat kecergasan dan kolam renang. Analisis memaparkan kebanyakan penginapan menawarkan kemudahan ini pada kadar yang sederhana iaitu kolam renang (43.8%), pusat kecergasan (33.7%), bar (18.9%) dan spa (10.1%). Ini menunjukkan bahawa majoriti penginapan pelancong di Malaysia masih kekurangan kemudahan asas ini.

Rajah 1: Pengagihan jenis penginapan**Rajah 2: Peratusan penginapan mengikut negeri**

4.2 Hasil empirikal

Hasil regresi diringkaskan dalam **Jadual 2**. Jadual tersebut menunjukkan anggaran pekali setiap pemboleh ubah bebas oleh OLS dan tahap regresi kuantil pada presentil ke 25, 50, 75 dan 90. Keputusan daripada kedua-dua kaedah dipaparkan untuk tujuan perbandingan. Semua pemboleh ubah OLS mempunyai pengaruh yang signifikan terhadap harga penginapan kecuali jarak dari restoran terdekat (JarakRestoran). Dalam analisis regresi kuantil, anggaran pekali pemboleh ubah bebas berbeza-beza merentasi pelbagai persentil bagi taburan kadar bilik penginapan. Kedua-dua analisis OLS dan regresi kuantil mendedahkan bahawa penarafan atas talian memberi kesan positif terhadap harga bilik. Penemuan ini selaras dengan kajian terdahulu seperti Latinopoulus (2018) yang menunjukkan bahawa penarafan pelanggan memberi kesan positif terhadap harga dan Soler et al. (2019) menemui kesan yang sama pada penarafan di TripAdvisor. Selain itu, hasil kajian menunjukkan bahawa bilangan ulasan pelanggan atas talian memberi impak positif yang signifikan terhadap kadar bilik dalam kedua-dua model.

Jadual 2: Hasil empirikal untuk penentu harga bilik

Pemboleh ubah	OLS	Regresi Kuantil			
		25	50	75	90
Malar	2.670*(.000)	2.625*(.000)	2.590*(.000)	2.549*(.000)	2.750*(.000)
Penarafan atas talian	0.278*(.000)	0.245*(.000)	0.282*(.000)	0.324*(.000)	0.337*(.000)
Ulasan	0.000*(.000)	0.000*(.000)	0.000*(.000)	0.000*(.000)	0.000*(.000)
Musim	0.026*(.000)	0.012*(.008)	0.010*(.049)	0.037*(.000)	0.048*(.000)
Cuti umum	0.025*(.002)	0.013*(.040)	0.011(.124)	0.023*(.043)	0.052*(.000)
Cuti sekolah	0.073*(.000)	0.044*(.000)	0.080*(.000)	0.111*(.000)	0.146*(.000)
Kolam	0.487*(.000)	0.474*(.000)	0.509*(.000)	0.508*(.000)	0.491*(.000)
Bar	0.279*(.000)	0.229*(.000)	0.256*(.000)	0.272*(.000)	0.384*(.000)
Spa	0.230*(.000)	0.161*(.000)	0.226*(.000)	0.300*(.000)	0.378*(.000)
Pusat kecergasan	0.217*(.000)	0.272*(.000)	0.225*(.000)	0.161*(.000)	0.082*(.000)
JarakBerdekatan	-0.003*(.000)	-0.005*(.000)	-0.003*(.000)	-0.004*(.000)	-0.000*(.000)
JarakRestoran	0.001(.118)	0.000(.930)	0.004*(.000)	0.008*(.000)	0.004*(.000)

*Signifikan pada paras signifikan 5%

Berkenaan dengan kemudahan hotel, ketersediaan atribut terpilih seperti kolam renang, bar, spa dan pusat kecergasan memberi kesan yang signifikan terhadap penetapan harga bilik dalam kedua-dua analisis OLS dan regresi kuantil. Dalam keputusan OLS, musim, cuti umum dan cuti sekolah mempengaruhi kadar bilik. Keputusan regresi kuantil juga menunjukkan bahawa musim dan cuti sekolah memberi kesan signifikan terhadap kadar bilik di semua kuantil. Namun begitu, walaupun cuti umum memberi kesan signifikan terhadap harga bilik pada persentil ke 25, 75 dan 90, ia tidak memberi kesan pada persentil 50. Ini menunjukkan bahawa cuti umum memberi pengaruh positif terhadap bilik berharga rendah dan tinggi tetapi tidak pada bilik berharga sederhana.

Pekali yang dianggarkan untuk jarak dari tempat pelancongan berdekatan (*JarakBerdekatan*) adalah signifikan secara negatif dalam kedua-dua model regresi. Bagi setiap tambahan kilometer jarak hotel dari tempat-tempat pelancongan berdekatan, logaritma semula jadi harga bilik berkurang sebanyak 0.003. Ini bermaksud penurunan sedikit harga bilik, kira-kira RM1.00 bagi peningkatan jarak satu kilometer. Hubungan negatif ini menunjukkan bahawa jarak dekat dengan tempat-tempat pelancongan adalah atribut yang bernilai dengan jarak yang lebih dekat kebiasaannya menyebabkan harga yang lebih tinggi. Sebaliknya, *JarakRestoran* tidak mempengaruhi secara signifikan dalam penetapan harga bilik dalam regresi OLS. Walau bagaimanapun, dalam analisis regresi kuantil, *JarakRestoran* adalah signifikan pada persentil ke 50, 75 dan 90. Ini menunjukkan bahawa bilik berharga rendah kurang dikaitkan dengan jarak ke restoran, mungkin kerana bilik yang lebih murah sering berkelompok di pusat bandar berhampiran dengan restoran atau gerai tepi jalan.

5.0 Kesimpulan

Dalam beberapa tahun kebelakangan ini, sektor pelancongan telah menunjukkan daya tahan yang luar biasa, mengharungi cabaran seperti turun naik ekonomi, ketidakstabilan politik dan pandemik COVID-19. Faktor-faktor utama seperti kategori hotel, musim, kemudahan dan jarak dengan tarikan pelancong akan terus mempengaruhi pemulihan industri ke tahap pra-pandemik. Memahami penentu harga ini adalah penting untuk membuat keputusan strategik dan memupuk persaingan sihat di kalangan penyedia hospitaliti yang memacu inovasi dalam perkhidmatan, kemudahan, dan pengalaman pelanggan.

Artikel ini mengkaji faktor-faktor yang mempengaruhi penetapan harga penginapan pelancong di Malaysia menggunakan data daripada Booking.com, termasuk pelbagai atribut penginapan dan kadar bilik. Kajian ini menggunakan kedua-dua model regresi OLS dan regresi kuantil. Penemuan menunjukkan bahawa walaupun terdapat persamaan antara hasil regresi OLS dan regresi kuantil, terdapat juga perbezaan yang ketara. Regresi OLS mengenal pasti semua pemboleh ubah utama sebagai signifikan dalam mempengaruhi kadar bilik, kecuali jarak ke restoran berdekatan. Kebanyakan pekali memberi kesan positif terhadap harga bilik kecuali jarak ke tempat pelancongan, yang mempunyai hubungan negatif. Sebaliknya, keputusan regresi kuantil menunjukkan bahawa beberapa faktor tidak mempengaruhi kadar bilik secara signifikan merentas kuantil yang berbeza. Sebagai contoh, cuti umum tidak memberi kesan yang signifikan terhadap bilik harga sederhana dan hotel bajet rendah tidak menunjukkan hubungan yang jelas dengan jarak ke restoran terdekat.

Kajian ini mempunyai batasan termasuk kekurangan data mengenai pemboleh ubah yang berkaitan dengan perbelanjaan pelancong dan ciri-ciri sosioekonomi. Penyelidikan masa depan boleh menumpukan pada atribut yang memberi kesan paling signifikan pada harga bilik di pelbagai pasaran dan segmen pelanggan. Selain itu, penerokaan bagaimana trend yang sedang berkembang seperti kerja jarak jauh dan penginapan jangka panjang mempengaruhi permintaan untuk kategori hotel yang berbeza dan model penetapan harga akan menjadi amat bernilai. Meneroka peranan data raya dalam membentuk penetapan harga hotel dan trend pelancongan adalah penting. Memanfaatkan data raya, termasuk penggunaan kecerdasan buatan dan analitik lanjutan akan memberikan pemahaman yang lebih mendalam tentang dinamika harga dan membantu pengusaha hotel mengoptimumkan strategi mereka. Memahami faktor-faktor yang sedang berkembang ini akan menjadi penting bagi industri pelancongan untuk menavigasi landskap pasca-pandemik dan kekal berdaya saing dalam pasaran yang dipacu oleh data.

Penafian

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

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LEVERAGING BIG DATA TO DETERMINE KEY FACTORS AFFECTING ROOM PRICES IN MALAYSIA'S TOURISM INDUSTRY

Nurul Aini Abdul Wahab¹, Nur Hafizan Che Nah¹ dan Nurul Nadiah Abd Ghani¹

¹National Accounts Statistics Division, Department of Statistics, Malaysia

Abstract

The tourism sector is one of the main drivers of global economic growth, job creation and cultural exchange. In Malaysia, the accommodation industry has struggled due to the COVID-19 pandemic, resulting in a decline in the number of hotels and rising competition from short-term rental accommodations (STRA) which offering significant discounts. To understand these dynamics situation, this study uses big data from Booking.com collected on weekly basis throughout 2023, to analyse factors affecting hotel room prices in Malaysia. This study applies Ordinary Least Squares (OLS) hedonic price regression and quantile regression model to assess how attributes like hotel rating, location, amenities, and proximity to tourist attractions influence room rates. While both models showed similarities, they also reveal differences particularly in how certain factors affect prices at various quantiles. For example, OLS shows most factors significantly impact room prices except for the distance to restaurants, whereas quantile regression highlights variability in factors depending on room price distribution. The study emphasises the value of big data in understanding pricing trends and optimising hospitality strategies.

Keywords

Web scrapping; Hedonic; Price determinants; Hotel room; Quantile regression

1.0 Introduction

The tourism sector has emerged as a pivotal sector to the global economy, driving significant economic growth and socio-cultural exchange. It is essential for the overall economic health of a country or region due to its contributions, such as foreign exchange earnings, job creation, infrastructure development and promoting cultural exchange as well as international connectivity. Within the broader tourism sector, the accommodation industry stands out as a fundamental component, providing essential services that facilitate travel and accommodation for millions of tourists worldwide.

Malaysia, renowned for its cultural diversity and natural beauty, has emerged as a prominent player in the global hospitality sector (Knight Frank, 2023). However, the COVID-19 pandemic severely impacted the tourism industry, significantly affecting travel agencies, tour operators and hotels. According to the Tourism Malaysia's statistics, the number of hotels in Malaysia decreased by 6.1 per cent, from 5,382 in 2019 before the pandemic to 5,052 in 2022. The emergence of private-owned apartments or short-term rental accommodations (STRA) as alternative tourist accommodations has also affected the traditional hotel industry paradigm (Raafat & Weller, 2019). For groups or families, renting an entire apartment or house can be cost-effective compared to booking multiple hotel rooms. Features like kitchens, living rooms and laundry facilities also enhance the appeal of STRA.

According to CBRE Hotels (2020), STRA often offer discounts of around 5.0 per cent, which can rise up to 20.0 to 30.0 per cent in urban areas. Consequently, hotels frequently adjust their prices to compete with these discounts. Therefore, competitive pricing is essential for the hotel industry's recovery especially after the COVID-19 pandemic. Effective pricing strategies could attract a range of guests from budget to luxury travellers. It is crucial to achieved high occupancy rates which are essential for revenue and operations during the recovery phase (Pohland & Kesgin, 2018). Key factors affecting the hotel room pricing include the hotel's star rating, location, amenities, room types, and external elements like market demand, seasonality, local events and nearby competition.

The tourism sector has undergone significant transformation due to technological advancements with big data becoming a crucial tool for insight and decision-making. Big data in tourism includes information from online travel agencies, social media, review sites, and other digital channels where tourists can share their experiences. This paper uses Octoparse software to collect weekly data on hotel room prices from Booking.com throughout 2023, showcasing how big data is applied in the industry. This method gathers extensive information on pricing trends across various accommodations including hotels and STRA. By analysing this data, the study identifies key factors affecting room prices in Malaysia offering valuable insights for hoteliers to optimise their pricing strategies and for policymakers to develop data-driven tourism policies that enhance the sector's competitiveness and sustainability.

2.0 Literature Review

Hotel revenues are essential for the survival and growth of hotel establishments. It is not only covers the operational expenses but also facilitate development and innovation within the industry. Adequate revenues are crucial for covering day-to-day expenses like staff salaries, utility bills, rent and maintenance costs. Revenues enable hotels to invest in upgrades and inventions that will enhance guest experience. This could include renovations, new amenities, technological advancements or sustainable practices which are vital for to remain competitive in the market and meeting evolving consumer demands. Room revenue usually constitutes the bulk of a hotel's income, accounting for around 70.0 per cent of total revenue (Lavi, 2023). As such, determining the optimal room rates is a significant decision for hotel management to increase their revenue. Hotels frequently adjust their room rates based on various factors such as demand fluctuations, occupancy rates, seasonal trends and competitive pricing strategies applied by other hotels in the market.

Lozano, Pereira and Miranda (2021) emphasised hotel room prices in any destination are influenced by a wide range of variables. Soler and Gemar (2018) suggested that the pricing of hotel room can be influenced differently by various attributes related to a hotel's location and situation. Factors such as the hotel's location, physical characteristics and environmental surroundings play a significant role in shaping pricing strategies. Site attributes pertain to the physical or structural aspects of the hotel, such as its size, class, age, and service quality (Zhang et al., 2011a). On the other hand, situation attributes refer to the environmental characteristics surrounding the hotel, such as proximity to airports, transportation stations and tourist attractions. This suggests that

pricing decisions are not solely determined by one or two factors but are rather shaped by a combination of elements. Hedonic Pricing Models (HPMs), as mentioned by Zhang et al. (2011a), are utilised to identify the determinants of hotel room prices. HPMs employ OLS regression to analyse how room prices are influenced by multiple site and situation factors. This approach assumes that room prices can be modeled as a linear function of these various factors.

A lot of studies have associated room prices with hotel attributes. Basically, hotel attributes that affect room rates include location, facilities and amenities, service quality, star rating, atmosphere, etc (Thrane, 2007). According to Stojchevska, Naumoski and Mitreski (2018), hotel facilities specifically focus on amenities like the presence of a TV, terrace, balcony, bathtub or parking. On the other hand, Santos et al (2021) found that variables related to amenities such as WiFi and air conditioning, were the most frequently observed, while amenities like a gym or spa were the least common. In addition, Chen and Rothschild (2010) analysed a range of hotel attributes affecting the room rates such as bathroom with bathtub and shower, buffet breakfast, LED TV, business center, bar/café, Internet access, shuttle buses, conference facilities, swimming pool, fitness center, free parking and room service.

Schamel (2012) and Lozano, Pereira & Miranda (2021) studied the relationship between room rates and online rating that showed a positive effect between them. The online rating can come from various sources such as TripAdvisor, HotelTravel.com, Trivago.com, etc. However, Schamel (2012) notes that ratings from Booking.com have an advantage in terms of reliability as the platform only allows real guests to submit reviews after their stay. While most of the literature focuses on how online reviews impact the consumer decision-making, there are also studies that examine how these quality signals influence hotel room rates. Zhang, Ye and Law (2011b) are among the researchers who have explored this aspect. These studies collectively suggest that higher online ratings and reviews tend to correlate with higher room rates.

Kim, Lee and Roehl (2016) emphasized the importance of considering events and seasonality when determining pricing. Santos et al (2021) researched on room prices in Seville on various periods; high season (weekday and weekend), low season (weekday and weekend), Holy Week (as a special event) and April Fair (as an important event). Lozano, Pereira & Miranda (2021) studied on seasonality, room prices at the day of the week, booking horizon and international and national holidays. Some research has also examined the relationship between room rates and proximity to nearby attractions. For example, Lee and Jang (2011) studied the effects of proximity to airports and the central business district on hotel room rates in various United States cities. Alegre et al. (2013) analysed how location attributes particularly involving three natural elements (Sea, Sun, & Sand) influence room prices in the Balearic Islands.

HPMs are used not only for determining hotel room pricing but also for setting daily rates for holiday rentals. Santos et al (2021) extended their research on hotel attributes affecting room rates on houses for tourism purposes (44.65%), hotel (45.32%) and tourist apartments (10.03%). In addition, Voltes-Dorta and Sánchez-Medina (2020) explored the drivers of Airbnb prices in Bristol focusing on property or room type, season and location. Commonly, the OLS regression was practiced to examine the relationship of room rates with independent variables. Nevertheless, some researchers applied quantile regression to study the major determinants of hotel room pricing

strategies with OLS regression used for comparative purposes (Sing & Awang, 2021, Masiero et al. 2015 & Hung, Shang Wang, 2010). Quantile regression enables the estimation of conditional quantile functions, where each function depicting the behavior of a specific point within the conditional distribution, thus providing a comprehensive representation of the entire conditional distribution (Koenker & Bassett, 1978).

3.0 Methodology

3.1 Data

The proposed analysis is based on data collected from Booking.com, a global hotel booking platform that includes Malaysia. Data was gathered through web scraping every weekend from 1st January 2023 until 31st December 2023. The Octoparse software utilised to automated the scraping then extracting the data into a dedicated database. A total of 415,925 data points were collected. For the analysis, the following accommodation attributes were extracted from Booking.com: booking date, room prices, rating, number of reviews, type of accommodation, pool, bar, spa, fitness centre, distance to nearby attractions and distance to restaurants. The data was then cleaned and organised for analysis using IBM SPSS and R Studio. During pre-processing, duplicate entries were removed and missing values were handled using appropriate imputation methods.

The dataset was categorised into two (2) categories according to the best month to visit Malaysia, that is peak season (January – February, June – August, December) and off season (March – May, September – November). Meanwhile public and school holiday were identified based on the official holiday calendar in Malaysia. In the analysis, room price was selected as the dependent variable while other independent variables were included in the evaluation of the analysis (**Table 1**).

Table 1: Descriptions of independent variables

Independent variable	Descriptions
Rating	1 – 10
Reviews	Number of reviews
Season	Peak season=1, Off season=0
Public holiday	Yes=1, No=0
School holiday	Yes=1, No=0
Pool	Yes=1, No=0
Bar	Yes=1, No=0
Spa	Yes=1, No=0
Fitness centre	Yes=1, No=0
DisNearby	Distance of accommodation to the nearest tourist spot (km)
DisRestaurant	Distance of accommodation to the nearest restaurant (km)

3.2 Hedonic Pricing Model

In order to determine the attributes that influence the room price in Malaysia, an OLS hedonic price regression model is applied. The basic OLS formula can be expressed as follow:

$$P_i = \beta_0 + \sum_{j=1}^k \beta_j X_j + \varepsilon$$

where P_i is the room price; i refers the number of room ($i = 1, 2, \dots, n$); β_0 is the constant; X_j is the room attributes; β_j is the associated coefficient; j is the number of site and situation variables ($j = 1, 2, \dots, k$); and ε is a random error term.

According to Soler and Gemar (2018), a semi-logarithmic (semi-log) model is preferred for a clearer explanation. This analysis employed a semi-log model because it satisfies the assumptions of multiple linear regression including normality, linearity, and homoscedasticity. The Variance Inflation Factor (VIF) technique was used to check for multicollinearity with all VIF values being below 2, indicating no multicollinearity issues. In the semi-log model, the independent variables are in a linear form while the dependent variable is in a logarithmic form. This setup allows the regression coefficient to represent the semi-elasticity coefficient of the characteristics (Du & Chung, 2020). The semi-log model used in this study is as follows:

$$\ln P_i = \beta_0 + \sum_{j=1}^k \beta_j X_j + \varepsilon$$

$$\ln P_i = \beta_0 + \beta_1 X_{i1} + \beta_2 X_{i2} + \beta_3 X_{i3} + \dots + \beta_k X_{ik} + \varepsilon, \quad i = 1, 2, \dots, n$$

$$\begin{aligned} \ln Price = & \beta_0 + \beta_1 Rating + \beta_2 Reviews + \beta_3 Seasonality + \beta_4 PublicHoliday + \beta_5 SchoolHoliday \\ & + \beta_6 Pool + \beta_7 Bar + \beta_8 Spa + \beta_9 FitnessCentre \\ & + \beta_{10} DisNearby + \beta_{11} DisRestaurant + \varepsilon \end{aligned}$$

Another model used in this analysis is quantile regression where this model produces a different coefficient value for every independent variable at different levels (quantile) of the dependent variable (Farmer and Lipscomb, 2010). Sing and Awang (2021) stated that it is possible to represent any predetermined point of the distribution since any quantile can be used. This model also provides the option to use the median or any other quantile instead of using the mean to measure central tendency. The general quantile regression model is defined as follows:

$$P_i = X_i' b^{(s)} + \varepsilon_i^{(s)}, \quad i = 1, 2, \dots, n; 0 < s < 1$$

where P_i is room price; X_i denotes a $(k \times 1)$ vector of independent variables (**Table 1**); $b^{(s)}$ are unknown vector of parameters to be estimated associated with s^{th} quantile and $\varepsilon_i^{(s)}$ is an error term. The s^{th} conditional quantile of P_i given X_i expressed as:

$$Q^{(s)}(P_i | X_i) = X_i' b^{(s)}$$

The quantile regression estimates of $b^{(s)}$ is solved as:

$$\hat{b}^{(s)} = \underset{b^{(s)}}{\operatorname{argmin}} \sum_i \rho |P_i - X_i' b^{(s)}|$$

where ρ is the check function define as:

$$\rho(\varepsilon_i^{(s)}) = \begin{cases} s\varepsilon_i^{(s)}, & \varepsilon_i^{(s)} \geq 0 \\ (s-1)\varepsilon_i^{(s)}, & \varepsilon_i^{(s)} < 0 \end{cases}$$

In this analysis, four quantiles are employed which is 0.25, 0.50, 0.75 and 0.90.

4.0 Results and Discussion

4.1 Descriptive statistics

Analysis of the dataset showed the average room price for accommodations was RM263.68 with prices ranging starting from RM20.00 to RM9,125.00. The mean rating for indexes of satisfaction was 8.00 (on a scale of 1 – 10), reflecting favourable experiences during the stay. On average, accommodations received 1,056.73 reviews from guests following their stays. Out of 415,925 collected data points, 30,726 were cleaned and categorised. These data were categorised into five types of accommodation which is apartments (45.9%), hotels (39.1%), motels (5.9%), resorts (7.6%) and villas (1.5%) as in **Figure 1**. Kuala Lumpur recorded the highest number of accommodations which was 17.5 per cent followed by Pahang (9.5%), Selangor (8.8%), Kedah (8.6%) and Kelantan (7.0%) as in **Figure 2**. The average distances from accommodations to restaurants and nearby attractions were 0.66 km and 2.02 km respectively. Additional attributes extracted included the presence of a bar, spa, fitness centre and pool. The analysis showed that most accommodations offer these amenities at moderate rates which is pool (43.8%), fitness centre (33.7%), bar (18.9%) and spa (10.1%). This indicates that the majority of tourist accommodations in Malaysia still lack these standard amenities.

Figure 1: The distribution of types of accommodation

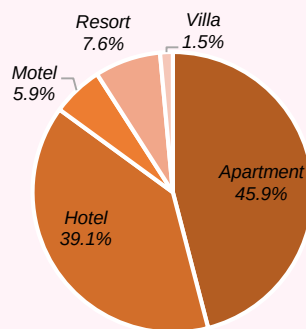
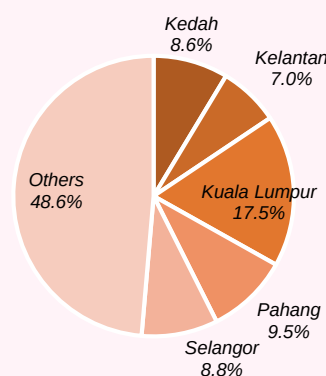


Figure 2: The percentage of accommodations by states



4.2 Empirical results

The results of the regression are summarised in **Table 2**. The table show the estimated coefficients of each independent variables by OLS and quantile regression level at 25th, 50th, 75th and 90th. The results from both methods are presented for comparative purposes. All OLS variables have a significant influence on accommodation price except distance from nearby restaurant (DisRestaurant). In the quantile regression analysis, the estimated coefficients for the independent variables vary across different percentiles of the accommodation room rate distribution. Both OLS and quantile regression analyses reveal that online ratings positively affect room prices. This finding is consistent with previous studies such as Latinopoulus (2018) which demonstrated that customer ratings positively impact prices and Soler et al. (2019) which found a similar effect on TripAdvisor ratings. Additionally, the results indicate that the number of online customer reviews have positive significant impacts room rates in both models.

Table 2: Empirical results for room price determinants

Variable	OLS	Quantile Regression			
		25th	50th	75th	90th
Constant	2.670*(.000)	2.625*(.000)	2.590*(.000)	2.549*(.000)	2.750*(.000)
Online rating	0.278*(.000)	0.245*(.000)	0.282*(.000)	0.324*(.000)	0.337*(.000)
Reviews	0.000*(.000)	0.000*(.000)	0.000*(.000)	0.000*(.000)	0.000*(.000)
Season	0.026*(.000)	0.012*(.008)	0.010*(.049)	0.037*(.000)	0.048*(.000)
Public Holiday	0.025*(.002)	0.013*(.040)	0.011(.124)	0.023*(.043)	0.052*(.000)
School Holiday	0.073*(.000)	0.044*(.000)	0.080*(.000)	0.111*(.000)	0.146*(.000)
Pool	0.487*(.000)	0.474*(.000)	0.509*(.000)	0.508*(.000)	0.491*(.000)
Bar	0.279*(.000)	0.229*(.000)	0.256*(.000)	0.272*(.000)	0.384*(.000)
Spa	0.230*(.000)	0.161*(.000)	0.226*(.000)	0.300*(.000)	0.378*(.000)
Fitness centre	0.217*(.000)	0.272*(.000)	0.225*(.000)	0.161*(.000)	0.082*(.000)
DisNearby	-0.003*(.000)	-0.005*(.000)	-0.003*(.000)	-0.004*(.000)	-0.000*(.000)
DisRestaurant	0.001(.118)	0.000(.930)	0.004*(.000)	0.008*(.000)	0.004*(.000)

*Significant at 5% significance level

Regarding hotel amenities, the availability of selected attributes such as pool, bar, spa and fitness centre are significantly affecting room pricing in both OLS and quantile regression analyses. In the OLS results, seasonality, public holidays and school holidays influence room rates. The quantile regression results also show that season and school holidays significantly impact room rates across all quantiles. However, while public holidays significantly affect room prices at the 25th, 75th and 90th percentiles, they have no impact at the 50th percentile. This suggests that public holidays positively influence both low and high-priced rooms but not middle-priced rooms.

The estimated coefficients for distance from nearby tourist spots (DisNearby) are significantly negative in both regressions. For each additional kilometre a hotel is from nearby tourist spots, the natural logarithm of the room price decreases by 0.003. This implies a slight decrease in room price, approximately RM1.00 per kilometre increase in distance. This negative relationship indicates that proximity to tourist spots is a valuable attribute with closer proximity generally leading to higher prices. In contrast, DisRestaurant does not significantly influence room pricing in the OLS regression. However, in the quantile regression analysis, DisRestaurant is significant at the 50th, 75th and 90th percentiles. This suggests that low-priced rooms are less associated with distance to restaurants, possibly because cheaper rooms are often clustered in city centres close to restaurants or roadside stalls.

5.0 Conclusion

In recent years, the tourism sector has shown impressive resilience, adapting to challenges like economic fluctuations, political instability and the COVID-19 pandemic. Key factors such as hotel category, season, amenities and proximity to attractions will continue to influence the industry's recovery to pre-pandemic levels. Understanding these pricing determinants is crucial for strategic decision-making and fostering healthy competition among hospitality providers which drives innovation in service, amenities, and customer experiences.

This article examines the factors affecting tourist accommodation pricing in Malaysia using data from Booking.com, including various accommodation attributes and room rates. The study

applied both OLS and quantile regression models. The findings show that while there are similarities between the results of OLS and quantile regression, there are also notable differences. OLS regression identified all key variables as significant in influencing room rates, except for the distance to nearby restaurants. Most coefficients positively affect room prices with the exception of the distance to tourist spots, which has a negative association. In contrast, the quantile regression results show that some factors do not significantly affect room rates across different quantiles. For example, public holidays do not significantly impact middle-priced rooms and low-budget hotels show no clear relationship with the distance to the nearest restaurant.

This study has limitations including lack of data on variables related to tourist spending and socioeconomic characteristics. Future research could focus on attributes that most significantly impact room prices across various markets and customer segments. Additionally, exploring how emerging trends like remote work and extended stays influence demand for different hotel categories and pricing models would be valuable. Exploring the role of big data in shaping hotel pricing and tourism trends is crucial. Leveraging big data, including the use of artificial intelligence and advanced analytics will provide deeper insights into pricing dynamics and help hoteliers optimise their strategies. Understanding these evolving factors will be essential for tourism industry to navigate the post-pandemic landscape and remain competitive in a data-driven market.

Disclaimer

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

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JADUAL STATISTIK
STATISTICAL TABLES



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

Produk Products	2019	2020	2021	2022	2023
	RM Juta RM Million				
Perkhidmatan penginapan Accommodation services	22,007.3	3,144.0	64.8	5,234.1	14,369.0
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	12,019.2	2,011.2	78.6	5,603.0	10,574.6
Perkhidmatan pengangkutan penumpang Passenger transport services	16,023.7	2,413.0	178.0	7,160.7	16,290.8
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	4,047.1	582.5	0.5	740.7	3,295.1
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	2,526.7	395.1	9.8	1,755.8	2,845.8
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	467.2	24.0	0.1	325.9	748.9
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	29,924.4	4,717.9	44.4	11,288.4	25,387.6
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	2,405.3	406.0	94.8	1,703.1	2,314.8
Jumlah Total	89,421.0	13,693.7	470.9	33,811.7	75,826.5
Perubahan peratusan tahunan (%) Annual percentage change (%)	2.0	-84.7	-96.6	7079.7	124.3
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penginapan Accommodation services	24.6	23.0	13.8	15.5	18.9
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	13.4	14.7	16.7	16.6	13.9
Perkhidmatan pengangkutan penumpang Passenger transport services	17.9	17.6	37.8	21.2	21.5
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	4.5	4.3	0.1	2.2	4.3
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	2.8	2.9	2.1	5.2	3.8
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	0.5	0.2	-	1.0	1.0
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	33.5	34.5	9.4	33.4	33.5
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	2.7	3.0	20.1	5.0	3.1
Jumlah Total	100.0	100.0	100.0	100.0	100.0

Perbelanjaan pelancongan inbound bagi pelancong mengikut produk
Inbound tourism expenditure of tourist by products

Produk Products	2019	2020	2021	2022	2023
	RM Juta RM Million				
Perkhidmatan penginapan <i>Accommodation services</i>	22,007.3	3,144.0	64.8	5,234.1	14,369.0
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	11,517.1	1,907.2	49.7	5,338.2	10,069.0
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	15,456.2	2,297.3	168.4	6,834.3	15,616.7
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	3,878.0	552.4	0.4	705.7	3,137.6
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	2,421.2	374.7	7.8	1,672.8	2,709.7
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	447.7	22.8	-	310.5	713.1
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic goods</i>	28,674.2	4,473.9	10.8	10,755.0	24,173.6
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	2,304.8	385.0	87.8	1,622.7	2,204.1
Jumlah <i>Total</i>	86,706.5	13,157.3	389.8	32,473.3	72,992.8
Perubahan peratusan tahunan (%) <i>Annual percentage change (%)</i>	2.1	-84.8	-97.0	8229.9	124.8
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penginapan <i>Accommodation services</i>	25.4	23.9	16.6	16.1	19.7
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	13.3	14.5	12.8	16.4	13.8
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	17.8	17.5	43.2	21.0	21.4
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	4.5	4.2	0.1	2.2	4.3
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	2.8	2.8	2.0	5.2	3.7
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	0.5	0.2	-	1.0	1.0
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic goods</i>	33.1	34.0	2.8	33.1	33.1
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	2.7	2.9	22.5	5.0	3.0
Jumlah <i>Total</i>	100.0	100.0	100.0	100.0	100.0

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

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

Produk Products	2019	2020	2021	2022	2023
	RM Juta RM Million				
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	502.1	104.0	28.8	264.8	505.7
Perkhidmatan pengangkutan penumpang Passenger transport services	567.5	115.7	9.6	326.4	674.0
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	169.1	30.1	0.1	35.0	157.6
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	105.6	20.4	2.0	83.0	136.1
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	19.5	1.2	-	15.4	35.8
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	1,250.2	244.0	33.6	533.4	1,214.0
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	100.5	21.0	7.0	80.5	110.7
Jumlah Total	2,714.5	536.5	81.1	1,338.4	2,833.8
Perubahan peratusan tahunan (%) Annual percentage change (%)	-1.4	-80.2	-84.9	1550.4	111.7
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	18.5	19.4	35.6	19.8	17.8
Perkhidmatan pengangkutan penumpang Passenger transport services	20.9	21.6	11.8	24.4	23.8
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	6.2	5.6	0.1	2.6	5.6
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	3.9	3.8	2.4	6.2	4.8
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	0.7	0.2	0.1	1.2	1.3
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	46.1	45.5	41.4	39.9	42.8
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	3.7	3.9	8.6	6.0	3.9
Jumlah Total	100.0	100.0	100.0	100.0	100.0

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

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

Perbelanjaan pelancongan domestik bagi pelawat mengikut produk
Domestic tourism expenditure of visitors by products

Produk Products	2019	2020	2021	2022	2023
	RM Juta RM Million				
Perkhidmatan penginapan Accommodation services	8,625.7	2,087.9	1,087.4	5,956.5	10,653.5
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	14,702.4	7,497.4	2,783.2	9,725.2	13,802.8
Perkhidmatan pengangkutan penumpang Passenger transport services	6,384.5	2,506.3	888.9	4,816.7	5,691.1
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	1,603.5	94.6	21.1	774.5	1,050.2
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	1,695.3	569.1	457.0	2,022.4	2,269.5
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	15,498.5	3,627.2	2,038.8	8,839.7	11,226.7
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	39,033.4	21,267.4	9,263.9	24,939.2	30,842.7
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	5,094.9	984.9	910.8	2,142.9	3,139.9
Jumlah Total	92,638.2	38,634.6	17,451.0	59,217.0	78,676.4
Perubahan peratusan tahunan (%) Annual percentage change (%)	12.0	-58.3	-54.8	239.3	32.9
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penginapan Accommodation services	9.3	5.4	6.2	10.1	13.5
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	15.9	19.4	15.9	16.4	17.5
Perkhidmatan pengangkutan penumpang Passenger transport services	6.9	6.5	5.1	8.1	7.2
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	1.7	0.2	0.1	1.3	1.3
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	1.8	1.5	2.6	3.4	2.9
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	16.7	9.4	11.7	14.9	14.3
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	42.1	55.0	53.1	42.1	39.2
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	5.5	2.5	5.2	3.6	4.0
Jumlah Total	100.0	100.0	100.0	100.0	100.0

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

Perbelanjaan pelancongan domestik bagi pelawat mengikut produk
Domestic tourism expenditure of visitors by products

Produk Products	2019	2020	2021	2022	2023
	RM Juta RM Million				
Perkhidmatan penginapan <i>Accommodation services</i>	8,625.7	2,087.9	1,087.4	5,956.5	10,653.5
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	9,756.1	4,969.6	1,153.8	6,186.5	8,734.7
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	5,617.4	2,110.9	693.4	4,205.5	4,837.5
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	1,596.5	93.7	20.6	773.2	1,048.3
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	757.8	232.8	199.8	1,318.1	1,336.2
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	10,533.5	2,109.9	889.3	5,078.8	6,891.0
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic goods</i>	18,803.1	9,526.1	2,176.9	10,310.1	12,159.9
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	2,896.3	743.3	694.1	1,159.7	1,874.6
Jumlah <i>Total</i>	58,586.5	21,874.2	6,915.3	34,988.5	47,535.7
Perubahan peratusan tahunan (%) <i>Annual percentage change (%)</i>	13.6	-62.7	-68.4	406.0	35.9
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penginapan <i>Accommodation services</i>	14.7	9.5	15.7	17.0	22.4
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	16.7	22.7	16.7	17.7	18.4
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	9.6	9.7	10.0	12.0	10.2
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	2.7	0.4	0.3	2.2	2.2
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	1.3	1.1	2.9	3.8	2.8
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	18.0	9.6	12.9	14.5	14.5
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic goods</i>	32.1	43.5	31.5	29.5	25.6
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	4.9	3.4	10.0	3.3	3.9
Jumlah <i>Total</i>	100.0	100.0	100.0	100.0	100.0

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

Perbelanjaan pelancongan domestik bagi pelawat harian mengikut produk
Domestic tourism expenditure of excursionist by products

Produk Products	2019	2020	2021	2022	2023
	RM Juta RM Million				
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	4,946.4	2,527.7	1,629.4	3,538.6	5,068.1
Perkhidmatan pengangkutan penumpang Passenger transport services	767.1	395.3	195.5	611.2	853.5
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	7.0	0.8	0.5	1.3	1.9
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	937.5	336.3	257.2	704.3	933.2
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	4,964.9	1,517.3	1,149.4	3,760.8	4,335.7
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	20,230.2	11,741.3	7,087.0	14,629.1	18,682.8
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	2,198.6	241.6	216.7	983.1	1,265.3
Jumlah Total	34,051.7	16,760.5	10,535.7	24,228.5	31,140.7
Perubahan peratusan tahunan (%) Annual percentage change (%)	9.2	-50.8	-37.1	130.0	28.5
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	14.5	15.1	15.5	14.6	16.3
Perkhidmatan pengangkutan penumpang Passenger transport services	2.3	2.4	1.9	2.5	2.7
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	-	-	-	-	-
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	2.8	2.0	2.4	2.9	3.0
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	14.6	9.1	10.9	15.5	13.9
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	59.4	70.1	67.3	60.4	60.0
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	6.5	1.4	2.1	4.1	4.1
Jumlah Total	100.0	100.0	100.0	100.0	100.0

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

Produk Products	2019	2020	2021	2022	2023
	RM Juta RM Million				
Perkhidmatan penginapan Accommodation services	10,080.0	3,747.6	3,133.1	4,800.7	8,742.8
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	5,824.0	2,213.4	2,107.6	3,763.9	6,307.6
Perkhidmatan pengangkutan penumpang Passenger transport services	14,224.0	5,927.5	2,822.7	6,986.9	9,661.0
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	1,568.0	575.8	104.9	788.8	1,437.2
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	1,568.0	592.3	94.4	473.3	798.4
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	10,886.4	3,675.3	1,887.4	5,161.3	12,056.3
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	649.6	487.3	335.5	563.5	918.2
Jumlah Total	44,800.1	17,219.2	10,485.6	22,538.4	39,921.6
Perubahan peratusan tahunan (%) Annual percentage change (%)	8.9	-61.6	-39.1	114.9	77.1
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penginapan Accommodation services	22.5	21.8	29.9	21.3	21.9
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	13.0	12.9	20.1	16.7	15.8
Perkhidmatan pengangkutan penumpang Passenger transport services	31.8	34.4	26.9	31.0	24.2
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	3.5	3.3	1.0	3.5	3.6
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	3.5	3.4	0.9	2.1	2.0
Barang khusus bercirikan pelancongan negara Country-specific tourism characteristic goods	24.3	21.3	18.0	22.9	30.2
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	1.5	2.8	3.2	2.5	2.3
Jumlah Total	100.0	100.0	100.0	100.0	100.0

Produk Products	2019	2020	2021	2022	2023
	RM Juta RM Million				
Perkhidmatan penginapan <i>Accommodation services</i>	30,633.0	5,231.9	1,152.2	11,190.6	25,022.5
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	26,721.7	9,508.6	2,861.7	15,328.1	24,377.4
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	22,408.3	4,919.3	1,066.9	11,977.4	21,981.8
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	5,650.6	677.1	21.6	1,515.2	4,345.4
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	4,222.0	964.2	466.8	3,778.2	5,115.3
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	15,965.7	3,651.2	2,038.9	9,165.6	11,975.6
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic goods</i>	68,957.8	25,985.2	9,308.3	36,227.6	56,230.3
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	7,500.2	1,390.9	1,005.5	3,846.0	5,454.7
Jumlah <i>Total</i>	182,059.1	52,328.4	17,921.9	93,028.7	154,503.0
Perubahan peratusan tahunan (%) <i>Annual percentage change (%)</i>	6.8	-71.3	-65.8	419.1	66.1
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penginapan <i>Accommodation services</i>	16.8	10.0	6.4	12.0	16.2
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	14.7	18.2	16.0	16.5	15.8
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	12.3	9.4	6.0	12.9	14.2
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	3.1	1.3	0.1	1.6	2.8
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	2.3	1.8	2.6	4.1	3.3
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	8.8	7.0	11.4	9.9	7.8
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic goods</i>	37.9	49.7	51.9	38.9	36.4
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	4.1	2.7	5.6	4.1	3.5
Jumlah <i>Total</i>	100.0	100.0	100.0	100.0	100.0

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

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

Akaun pengeluaran industri pelancongan pada harga semasa
Production accounts of tourism industry at current prices

Industri <i>Industry</i>	2019	2020	2021	2022 ^e	2023 ^p
	RM Juta <i>RM Million</i>				
Perkhidmatan penginapan <i>Accommodation services</i>	26,406.8	12,137.9	9,712.6	15,133.1	17,967.1
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	43,166.7	35,571.2	33,845.9	42,622.4	45,827.3
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	9,379.5	4,863.0	3,682.1	6,329.1	8,483.3
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	4,226.9	1,641.5	1,092.9	3,101.9	3,909.5
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	11,307.1	6,307.6	4,215.3	8,199.4	9,488.5
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	4,725.9	4,181.6	4,361.6	6,299.8	7,092.7
Perdagangan runcit <i>Retail trade</i>	111,121.6	106,560.0	111,617.8	136,747.3	147,943.6
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	29,695.0	29,036.5	30,013.2	31,695.5	35,063.6
Jumlah Nilai Ditambah Kasar Industri Pelancongan <i>Total Gross Value Added of Tourism Industries</i>	240,029.5	200,299.2	198,541.4	250,128.5	275,775.6
Nilai Ditambah Kasar Pelancongan Langsung <i>Tourism Direct Gross Value Added</i>	102,233.3	28,314.8	11,656.6	47,968.8	81,170.5
Keluaran Dalam Negeri Kasar Pelancongan Langsung <i>Tourism Direct Gross Domestic Product</i>	102,272.3	28,350.8	11,660.1	47,982.5	81,191.9
Keluaran Dalam Negeri Kasar <i>Gross Domestic Product</i>	1,512,737.8	1,418,490.9	1,548,700.8	1,793,903.1	1,822,904.4
	Perubahan Peratusan Tahunan (%) <i>Annual percentage change (%)</i>				
Nilai Ditambah Kasar Industri Pelancongan <i>Gross Value Added of Tourism Industries</i>	8.9	-16.6	-0.9	26.0	10.3
Keluaran Dalam Negeri Kasar Pelancongan Langsung <i>Tourism Direct Gross Domestic Product</i>	8.1	-72.3	-58.9	311.5	69.2
Keluaran Dalam Negeri Kasar <i>Gross Domestic Product</i>	4.5	-6.2	9.2	15.8	1.6
	Peratus sumbangan (%) <i>Percentage share (%)</i>				
Nilai Ditambah Kasar Industri Pelancongan kepada KDNK <i>Gross Value Added of Tourism Industries to GDP</i>	15.9	14.1	12.8	13.9	15.1
Nilai Ditambah Kasar Pelancongan Langsung kepada keseluruhan Nilai Ditambah Kasar <i>Tourism Direct Gross Value Added to overall Gross Value Added</i>	6.8	2.0	0.8	2.7	4.5
KDNK Pelancongan Langsung kepada KDNK <i>Tourism Direct Gross Domestic Product to GDP</i>	6.8	2.0	0.8	2.7	4.5

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

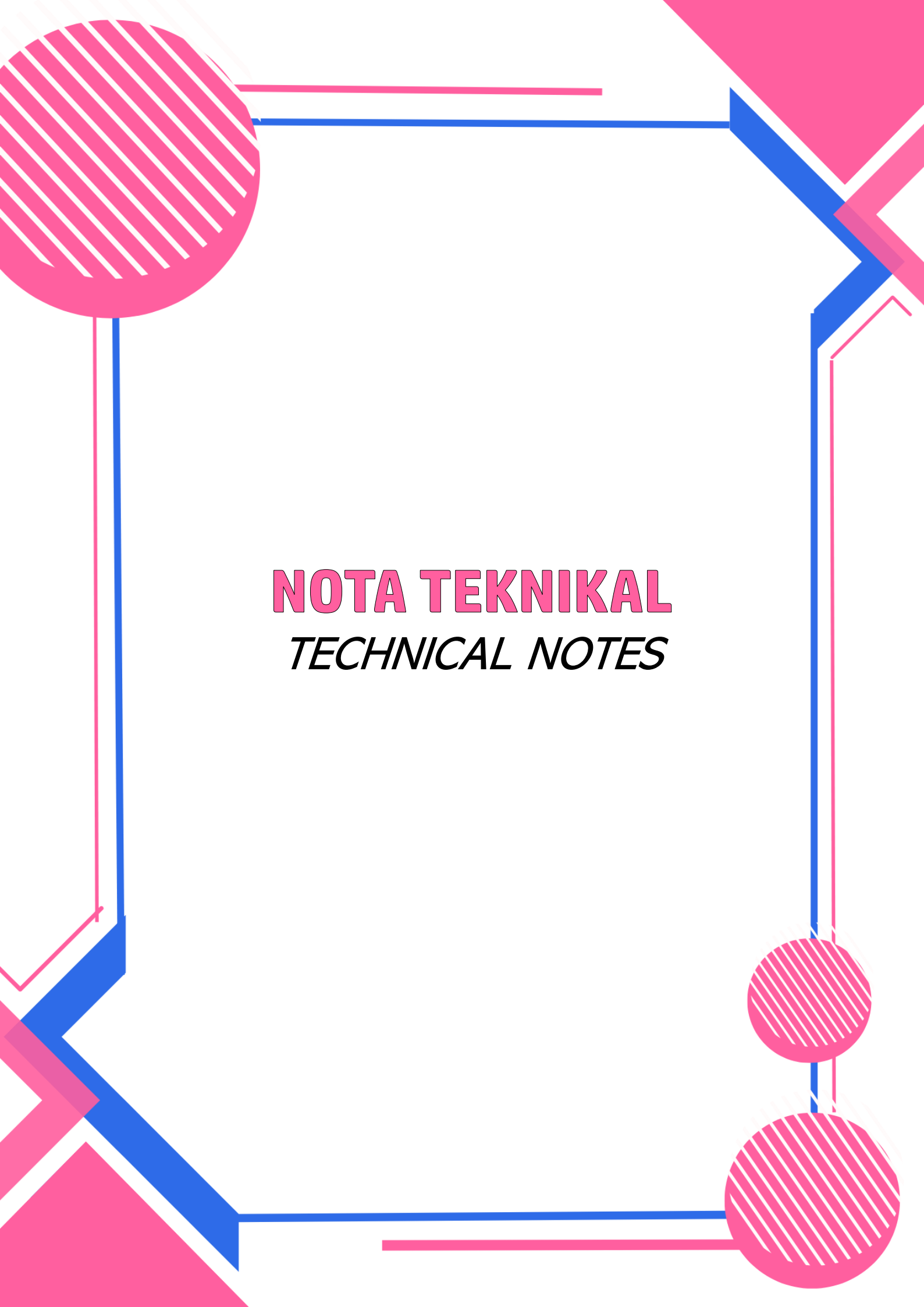
Jumlah penawaran dan penggunaan pelancongan mengikut jenis produk
Total supply and tourism consumption by type of products

Produk Products	2019	2020	2021	2022 ^e	2023 ^p
Penawaran mengikut industri (RM Juta) <i>Supply by industries (RM Million)</i>					
Perkhidmatan penginapan <i>Accommodation services</i>	31,824.3	18,490.3	5,612.1	21,299.7	26,722.3
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	96,026.7	75,318.3	24,541.9	75,623.8	81,353.7
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	42,379.5	31,300.1	27,113.3	31,883.0	40,298.4
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	6,973.1	3,943.1	226.5	3,842.2	6,098.2
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	24,776.6	13,993.9	9,718.9	16,669.7	17,134.0
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	47,612.6	27,042.4	24,292.7	37,056.5	37,649.9
Perdagangan runcit <i>Retail trade</i>	159,423.4	153,134.5	159,968.0	177,467.3	190,873.4
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	55,584.1	53,316.3	47,675.9	52,594.1	64,990.1
Jumlah Total	464,600.4	376,538.9	299,149.2	416,436.4	465,120.0
Penggunaan mengikut produk (RM Juta) <i>Consumption by products (RM Million)</i>					
Perkhidmatan penginapan <i>Accommodation services</i>	30,633.0	5,231.9	1,152.2	11,190.6	25,022.5
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	26,721.7	9,508.6	2,861.7	15,328.1	24,377.4
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	22,408.3	4,919.3	1,066.9	11,977.4	21,981.8
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	5,650.6	677.1	21.6	1,515.2	4,345.4
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	4,222.0	964.2	466.8	3,778.2	5,115.3
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	15,965.7	3,651.2	2,038.9	9,165.6	11,975.6
Barang khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic goods</i>	68,957.8	25,985.2	9,308.3	36,227.6	56,230.3
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	7,500.2	1,390.9	1,005.5	3,846.0	5,454.7
Jumlah Total	182,059.1	52,328.4	17,921.9	93,028.7	154,503.0
Kadar pelancongan <i>Tourism ratio</i>					
Perkhidmatan penginapan <i>Accommodation services</i>	0.963	0.283	0.205	0.525	0.936
Perkhidmatan penyediaan makanan dan minuman <i>Food and beverage serving services</i>	0.278	0.126	0.117	0.203	0.300
Perkhidmatan pengangkutan penumpang <i>Passenger transport services</i>	0.529	0.157	0.039	0.376	0.545
Perkhidmatan agensi pengembaraan dan penempahan lain <i>Travel agencies and other reservation services</i>	0.810	0.172	0.096	0.394	0.713
Perkhidmatan kebudayaan, sukan dan rekreasi <i>Cultural, sports and recreational services</i>	0.170	0.069	0.048	0.227	0.299
Jualan runcit bahan api kenderaan <i>Retail sale of automotive fuel</i>	0.335	0.135	0.084	0.247	0.318
Perdagangan runcit <i>Retail trade</i>	0.433	0.170	0.058	0.204	0.295
Perkhidmatan khusus bercirikan pelancongan negara <i>Country-specific tourism characteristic services</i>	0.135	0.026	0.021	0.073	0.084
Kadar pelancongan Tourism ratio	0.392	0.139	0.060	0.223	0.332

Sumber : Jabatan Perangkaan Malaysia
Lembaga Penggalakan Pelancongan Malaysia

Sources : Department of Statistics, Malaysia
Malaysia Tourism Promotion Board

Industri Industry	2019	2020	2021	2022	2023
	Ribu orang Thousand persons				
Perkhidmatan penginapan Accommodation services	233.8	209.9	202.8	218.7	225.6
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	1,237.7	1,189.1	1,164.4	1,189.5	1,244.5
Perkhidmatan pengangkutan penumpang Passenger transport services	177.3	158.2	154.1	167.9	171.9
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	40.7	31.0	23.6	25.7	27.7
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	81.2	63.2	48.0	50.2	54.6
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	34.7	31.0	29.5	29.7	30.4
Perdagangan runcit Retail trade	1,158.1	1,156.6	1,166.7	1,178.2	1,254.9
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	356.9	342.5	347.9	364.8	372.6
Jumlah Total	3,320.3	3,181.5	3,137.0	3,224.7	3,382.2
Perubahan peratusan tahunan (%) Annual percentage change (%)	2.2	-4.2	-1.4	2.8	4.9
	Peratus sumbangan (%) Percentage share (%)				
Perkhidmatan penginapan Accommodation services	6.6	6.6	6.5	6.8	6.7
Perkhidmatan penyediaan makanan dan minuman Food and beverage serving services	34.7	37.4	37.1	36.9	36.8
Perkhidmatan pengangkutan penumpang Passenger transport services	5.0	5.0	4.9	5.2	5.1
Perkhidmatan agensi pengembaraan dan penempahan lain Travel agencies and other reservation services	1.1	1.0	0.8	0.8	0.8
Perkhidmatan kebudayaan, sukan dan rekreasi Cultural, sports and recreational services	2.3	2.0	1.5	1.6	1.6
Jualan runcit bahan api kenderaan Retail sale of automotive fuel	1.0	1.0	0.9	0.9	0.9
Perdagangan runcit Retail trade	32.5	36.4	37.2	36.5	37.1
Perkhidmatan khusus bercirikan pelancongan negara Country-specific tourism characteristic services	16.8	10.8	11.1	11.3	11.0
Jumlah Total	100.0	100.0	100.0	100.0	100.0

The background features a complex geometric pattern. It includes several thick blue lines forming a rectangular frame with some diagonal extensions. Pink lines also form a similar frame, slightly offset from the blue one. In the corners, there are pink circles with diagonal white stripes. Additionally, there are solid pink shapes: a large circle in the top-left, a triangle in the top-right, and a triangle in the bottom-left. The text is centered within the blue frame.

NOTA TEKNIKAL

TECHNICAL NOTES

1. PENGENALAN

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

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

2. KONSEP DAN DEFINISI

2.1 Pelawat

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

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

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

- i. Pelancong - Jika perjalanannya melibatkan tidur bermalam
- ii. Pelawat harian - Jika perjalanannya mengambil masa kurang daripada 24 jam

2.2 Persekitaran biasa

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

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

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

- a. Mereka yang membuat perjalanan pergi dan balik sekurang-kurangnya 50 kilometer dari kawasan kediaman mereka untuk tujuan pelancongan, berada di luar persekitaran biasa mereka dan memperuntukkan masa sekurang-kurangnya 4 jam di lokasi tersebut; dan
- b. Mereka yang membuat perjalanan pergi dan balik kurang daripada 50 kilometer pula, masa yang digunakan hendaklah minimum 4 jam dan lebih serta menggunakan kemudahan pelancongan seperti kemudahan pengangkutan, penginapan, makanan & minuman dan rekreasi.

3. JENIS-JENIS PELANCONGAN

3.1 Pelancongan *inbound*

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

3.2 Pelancongan domestik

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

3.3 Pelancongan *outbound*

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

3.4 Pelancongan *internal*

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

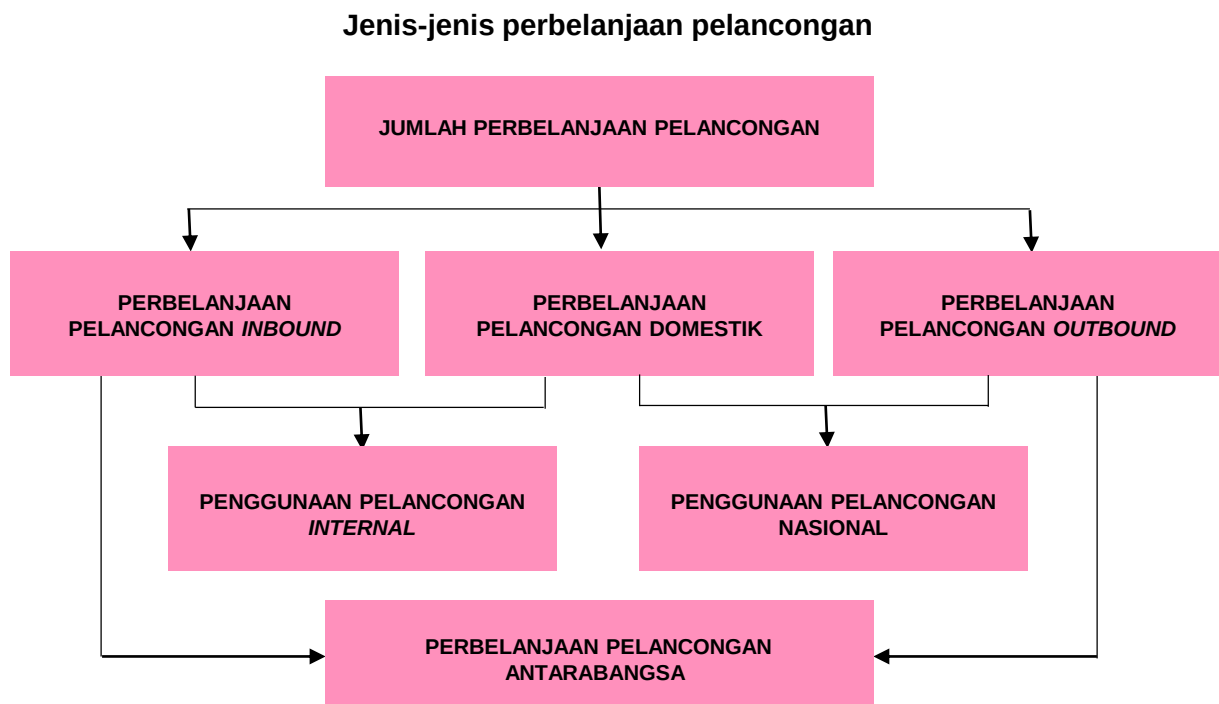
3.5 Pelancongan nasional

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

3.6 Pelancongan antarabangsa

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

Rajah di bawah menunjukkan jenis-jenis perbelanjaan pelancongan:



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 passport, 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 aktiviti membeli-belah (produk bagi permintaan pelancongan) dan juga perdagangan runcit dalam industri pelancongan.

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

7. AKAUN PENGELUARAN

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

8. NILAI DITAMBAH

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

8.1 NDKIP

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

8.2 NDKPL

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

8.3 KDNKPL

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

Jadual menunjukkan perbandingan agregat penawaran:

Perbandingan agregat penawaran

Agregat	Nilai Ditambah Kasar Industri Pelancongan	Nilai Ditambah Kasar Pelancongan Langsung	Keluaran Dalam Negeri Kasar Pelancongan Langsung
NDK (pada harga asas) dijana daripada penawaran kepada pelawat oleh industri pelancongan	Ya	Ya	Ya
NDK (pada harga asas) dijana daripada penawaran kepada bukan pelawat oleh industri pelancongan	Ya	Tidak	Tidak
NDK (pada harga asas) dijana daripada penawaran kepada pelawat oleh industri lain	Tidak	Ya	Ya
NDK (pada harga asas) dijana daripada penawaran kepada bukan pelawat oleh industri lain	Tidak	Tidak	Tidak
Cukai bersih ke atas produk dan import termasuk nilai penggunaan pelancongan <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 ditolak subsidi ke atas produk dan import serta margin perdagangan dan pengangkutan.

METODOLOGI & SUMBER DATA

1. Penyusunan akaun satelit

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

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

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

2. Penyusunan ASP Malaysia

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

3. Indikator pelancongan Malaysia

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

- a. Bilangan pelancong
 - mengikut negara/ negeri;
 - mod pengangkutan; dan
- b. Statistik penginapan

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

4. Jadual utama ASP Malaysia

Berdasarkan manual TSA: RMF 2008, ASP Malaysia mempunyai tujuh (7) 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 Survei Pelancongan Domestik (DTS) yang dijalankan oleh DOSM. Survei ini meliputi individu yang menetap di Malaysia sekurang-kurangnya satu tahun dan lebih. Selain warganegara dan residen tetap, ekspatriat dan bukan warganegara turut diambil kira. Jumlah perbelanjaan pelancongan domestik di Jadual 2 adalah berbeza dengan jumlah perbelanjaan pelancongan domestik yang diterbitkan di laporan Survei Pelancongan Domestik disebabkan oleh perbezaan konsep perbelanjaan bagi perkhidmatan penginapan dan perkhidmatan penyediaan makanan & minuman. Penyusunan ASP tidak mengambil kira perbelanjaan yang tidak dilakukan oleh pelawat seperti penginapan dan makanan & minuman yang disediakan di rumah saudara atau rakan.

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

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

Jadual 4: Penggunaan pelancongan *internal* mengikut produk

Data bagi Jadual 4 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 diperoleh dari Jadual SUT 2015. Bagi tahun-tahun seterusnya, data adalah berdasarkan KDNK Tahunan.

Jadual 6: Jumlah penawaran dan penggunaan mengikut jenis produk

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

Jadual 7: Guna tenaga dalam industri pelancongan

Guna tenaga dalam industri pelancongan disusun berdasarkan sumber data dari Survei Tenaga Buruh (STB), Survei Ekonomi Tahunan, Survei Perkhidmatan Suku Tahunan dan Survei Perdagangan Borong & Runcit Bulanan yang diterbitkan oleh DOSM. Data telah dikemaskini berdasarkan ketersediaan data terperinci dan semakan semula data STB berteraskan Banci Penduduk dan Perumahan 2020.

SIMBOL

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

1. INTRODUCTION

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

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

2. CONCEPTS AND DEFINITIONS

2.1 Visitor

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

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

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

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

2.2 Usual environment

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

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

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

- a. Those who take a trip from their residence for tourism purposes at least 50 kilometers to and return, outside their usual environment and spend a minimum 4 hours at the location; and*
- b. Those who take a trip for a distance less than 50 kilometers to and return, the period should be a minimum of 4 hours and more and using tourism facilities such as transport, accommodation, food & beverage and recreation.*

3. TYPES OF TOURISM

3.1 Inbound tourism

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

3.2 Domestic tourism

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

3.3 Outbound tourism

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

3.4 Internal tourism

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

3.5 National tourism

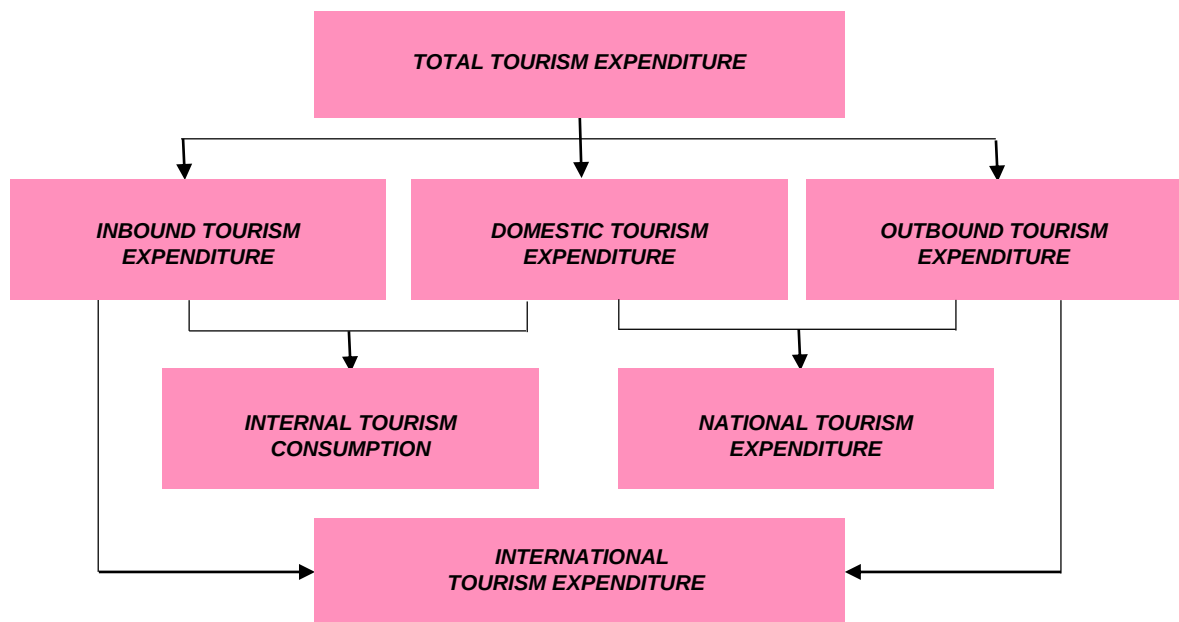
Comprises domestic tourism and outbound tourism, that is the activities of resident visitors within and outside the country of reference (Malaysia) either as part of domestic or outbound trip.

3.6 International tourism

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

Types of tourism expenditure illustrated below:

Types of tourism expenditure



4. TOURISM EXPENDITURE

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

4.1 Inbound tourism expenditure

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

4.2 Domestic tourism expenditure

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

4.3 Outbound tourism expenditure

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

4.4 Internal tourism consumption

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

4.5 National tourism expenditure

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

4.6 International tourism expenditure

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

4.7 Total tourism expenditure

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

5. TOURISM INDUSTRY

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

6. TOURISM PRODUCTS

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

6.1 Consumption products

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

a. Internationally comparable tourism characteristic products

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

b. Country-specific tourism characteristic products

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

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

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

7. PRODUCTION ACCOUNTS

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

8. VALUE ADDED

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

8.1 GVATI

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

8.2 TDGVA

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

8.3 TDGDP

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

Table shows the comparison of supply aggregates:

Comparison of supply aggregates

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

METHODOLOGY & DATA SOURCES

1. Establishment of satellite account

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

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

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

2. Establishment of Malaysia's TSA

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

3. Malaysia tourism indicators

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

a. No. of tourist arrivals

- by country/ state;*
- mode of transports; and*

b. Accommodation statistics

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

4. Main tables Malaysia's TSA

Based on the manual of TSA: RMF 2008, Malaysia's TSA comprises of seven (7) main tables which will be described as follows:

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

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

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

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

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

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

Table 4: Internal tourism consumption by products

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

Table 5: Production accounts of tourism industry

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

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

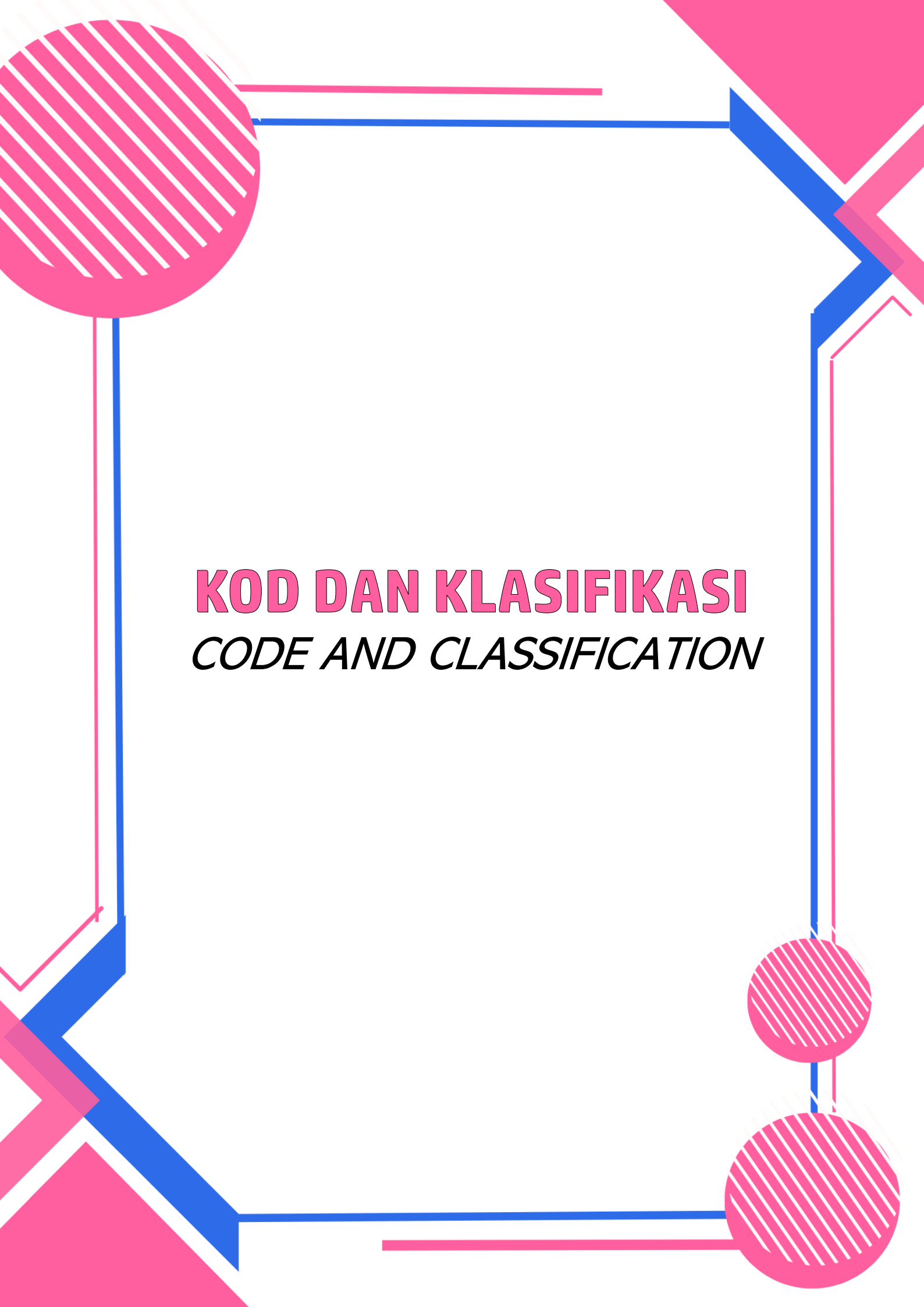
Table 6 is derived from production accounts of tourism industry & other industries in Table 5 and internal tourism consumption in Table 4.

Table 7: Employment in the tourism industry

Employment in the tourism industry is compiled based on data sources from the Labour Force Survey (LFS), Annual Economic Survey, Quarterly Services Survey and Monthly Wholesale & Retail Trade Survey published by DOSM. The data has been updated based on the availability of detailed data and revision of the LFS in line with 2020 Population and Housing Census.

SYMBOLS

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

The background features a complex geometric pattern. It includes several thick blue lines that form a rectangular frame around the central text, with some lines extending outwards. There are also thinner pink lines that intersect with the blue ones. In the corners, there are large pink shapes: a circle with diagonal stripes in the top-left, and two overlapping circles with diagonal stripes in the bottom-right. The overall aesthetic is modern and graphic.

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

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

Keterangan bagi ISIC Rev. 4		ISIC Rev. 4	MSIC 2008
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
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, 63290	55101, 55102, 55103, 55104, 55105, 55106, 55107, 55108, 55109, 55200, 55900
1.2	Aktiviti hartanah	72111, 72122, 72123, 72130, 72221, 72222, 72223, 72230, 72211, 72213	68101, 68102, 68103, 68201
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, 66011	49221, 49211, 49212, 49224, 49225, 49229
3.3	Pengangkutan penumpang air	64121, 64122, 64129, 64133, 64231, 64232, 64239	50111, 50112, 50113, 50211, 50212
3.4	Pengangkutan penumpang udara	64134, 64241, 64242, 64243, 64250, 64244	51101, 51102, 51103
3.5	Penyewaan dan pemajakan kenderaan darat, air dan udara serta peralatan rekreasi tanpa operator	73111, 73112, 73240, 73113, 73115	77101, 77102, 77211, 77212, 77213, 77219, 77302, 77303, 77304
4. Perkhidmatan agensi pengembaraan dan tempahan lain			
4.1	Aktiviti agensi pengembaraan	85511, 85512, 85513, 85514, 85519, 85521, 85523, 85524	79110
4.2	Aktiviti operator pelancongan	85540	79120
4.3	Khidmat penempahan dan aktiviti berkaitan dan peralatan untuk rekreasi	85539, 85550, 85562	79900

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

Keterangan bagi CPC Ver. 2		CPC Ver. 2	MCPA 2009 (5 Digit)
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. Barang khusus bercirikan pelancongan negara (membeli-belah)			
8.1	Perdagangan jual runcit kecuali kenderaan bermotor dan motorsikal	621, 622, 624	47
9. Perkhidmatan khusus bercirikan pelancongan negara			
9.1	Kewangan	71134, 71139, 71592	64922, 66124, 66125
9.2	Insurans/ takaful	71322, 71331, 71332, 71333, 71334, 71335, 71337, 71339	65121, 65122
9.3	Pendidikan	92310, 92320, 92330, 92410, 92420, 92510, 92520, 92911, 92912, 92919, 92920	85212, 85222, 85302, 85411, 85412, 85419, 85421, 85429, 85499, 85500
9.4	Kesihatan	93111, 93112, 93113, 93119, 93121, 93122, 93123, 93193, 93195, 93197, 93199	86101, 86201, 86202, 86203, 86902, 86903, 86904, 86905, 86909
9.5	Mesyuarat, insentif, konvensyen, pameran (MICE)	85531, 85961, 85962	82301, 82302
9.6	Aktiviti sauna, mandian stim, salon mengurus	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

Description of ISIC Rev.4		ISIC Rev. 4	MSIC 2008
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
4. Travel agencies and other reservation services			
4.1	Tourism agencies activities	7911	79110
4.2	Tour operator activities	7912	79120
4.3	Other reservation service and related activities	7990	79900
5. Cultural services			
5.1	Motion picture projection activities	5914	59140
5.2	Creative, arts and entertainment activities	9000	90001, 90002, 90003, 90007, 90009
5.3	Museums activities and operation of historical sites and buildings	9102	91021, 91022
5.4	Botanical and zoological gardens and nature reserves activities	9103	91031, 91032
6. Sports and recreational services			
6.1	Renting and leasing of recreational and sports goods	7721	77211, 77212, 77213, 77219
6.2	Gambling and betting activities	9200	92000
6.3	Operation of sports facilities for indoor or outdoor sports events	9311	93111, 93112, 93113, 93114, 93115, 93116, 93117, 93118, 93119
6.4	Activities of sports clubs	9312	93120
6.5	Other sports activities	9319	93191, 93192, 93193, 93199
6.6	Activities of amusement parks and theme parks	9321	93210
6.7	Other amusement and recreation activities n.e.c.	9329	93291, 93292, 93293, 93294, 93295, 93296, 93297, 93299
7. Retail sale of automotive fuel			
7.1	Retail sale of automotive fuel in specialized	4730	47300
8. Retail trade			
8.1	Retail trade, except of motor vehicles and motorcycles	47	All except for 47300 4791 and 47991

<i>Description of ISIC Rev.4</i>		<i>ISIC Rev. 4</i>	<i>MSIC 2008</i>
9. Country-specific tourism characteristic services			
9.1	<i>Other credit granting</i>	6492	64922
9.2	<i>General insurance</i>	6512	65121, 65122
9.3	<i>Security and commodity contracts brokerage</i>	6612	66124, 66125
9.4	<i>General secondary education</i>	8521	85212
9.5	<i>Technical and vocational secondary education</i>	8522	85222
9.6	<i>Higher education</i>	8530	85302
9.7	<i>Sports and recreation education</i>	8541	85411, 85412, 85419
9.8	<i>Cultural education</i>	8542	85421, 85429
9.9	<i>Other education n.e.c.</i>	8549	85499
9.10	<i>Educational support services</i>	8550	85500
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. Country-specific tourism characteristic goods (shopping)			
8.1	Retail trade, except of motor vehicles and motorcycles	621, 622, 624	47
9. Country-specific tourism characteristic services			
9.1	Finance	71134, 71139, 71592	64922, 66124, 66125

Description CPC Ver. 2		CPC Ver. 2	MCPA 2009 (5 Digits)
9.2	<i>Insurance/ takaful</i>	71322, 71331, 71332, 71333, 71334, 71335, 71337, 71339	65121, 65122
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



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