

SUMMARY OF FINDINGS

Overview

Tourism Satellite Account provides information on tourism statistics in Malaysia for the period of 2000 to 2010. It presents data on expenditure for inbound, domestic, outbound & internal tourism, production accounts and employment in the tourism industries.

Table I : Total Tourism Expenditure, 2000-2010

Tourism Expenditure								
Year	Inbound		Domestic		Outbound		Total	
	RM (Million)	Annual change (%)	RM (Million)	Annual change (%)	RM (Million)	Annual change (%)	RM (Million)	Annual change (%)
2000	18,756.7	..	10,784.3	..	4,873.8	..	34,414.8	..
2001	25,831.9	37.7	14,852.5	37.7	6,561.6	34.6	47,246.0	37.3
2002	26,981.2	4.4	15,513.2	4.4	6,381.7	-2.7	48,876.1	3.5
2003	22,112.6	-18.0	16,585.3	6.9	6,417.1	0.6	45,115.0	-7.7
2004	30,710.0	38.9	17,656.8	6.5	5,932.1	-7.6	54,298.9	20.4
2005	33,092.4	7.8	19,026.8	7.8	8,039.6	35.5	60,158.8	10.8
2006	37,572.9	13.5	21,603.0	13.5	9,117.5	13.4	68,293.4	13.5
2007	47,423.7	26.2	27,265.6	26.2	10,851.9	19.0	85,541.2	25.3
2008	50,171.8	5.8	17,870.9	-34.5	12,574.4	15.9	80,617.1	-5.8
2009	55,000.8	9.6	21,133.5	18.3	12,073.5	-4.0	88,207.8	9.4
2010	58,347.5	6.1	27,575.8	30.5	14,287.4	18.3	100,210.7	13.6

Total Tourism Expenditure (Table I)

Total tourism expenditure consists of inbound tourism expenditure, domestic tourism expenditure and outbound tourism expenditure. It increased from RM88.2 billion in 2009 to RM100.2 billion in 2010 due to the increases in inbound, domestic and outbound tourism expenditure.

Inbound Tourism Expenditure (Table I)

Inbound tourism expenditure showed a consistent positive growth for the period of 2004 to 2010. The total receipts increased to RM58.3 billion in 2010 from RM55.0 billion in 2009. Albeit the increase of the total receipts, the annual percentage change abated from 9.6 per cent in 2009 to 6.1 per cent in 2010. Meanwhile, the number of inbound visitors to Malaysia in 2010 accounted for 32.7 million, an increase from 31.5 million in 2009. Most of them are from ASEAN countries especially from Singapore and Indonesia.

Domestic Tourism**Expenditure**

(Table I)

Domestic tourism expenditure expanded from RM21.1 billion in 2009 to RM27.6 billion in 2010. In terms of growth, it recorded 30.5 per cent in 2010, registered a double-digit growth since 2006 despite a negative growth in 2008.

Outbound Tourism**Expenditure**

(Table I)

Outbound tourism expenditure which reflected outflows of tourism expenditure increased by 18.3 per cent in 2010 compared with a negative growth of 4.0 per cent recorded in 2009. Outbound tourism expenditure for 2010 registered the highest receipts of RM14.3 billion since year 2000.

Table II : Internal Tourism Consumption and Inbound Tourism as a Percentage to Total Exports

Year	Inbound tourism expenditure		Domestic tourism expenditure		Internal tourism consumption		Total exports RM (Million)	Inbound tourism over total exports (%)
	RM (Million)	Annual change (%)	RM (Million)	Annual change (%)	RM (Million)	Annual change (%)		
2000	18,756.7	..	10,784.3	..	29,541.0	..	427,003	4.4
2001	25,831.9	37.7	14,852.5	37.7	40,684.4	37.7	389,256	6.6
2002	26,981.2	4.4	15,513.2	4.4	42,494.4	4.4	415,040	6.5
2003	22,112.6	-18.0	16,585.3	6.9	38,697.9	-8.9	447,846	4.9
2004	30,710.0	38.9	17,656.8	6.5	48,366.8	25.0	546,925	5.6
2005	33,092.4	7.8	19,026.8	7.8	52,119.2	7.8	613,694	5.4
2006	37,572.9	13.5	21,603.0	13.5	59,175.9	13.5	669,505	5.6
2007	47,423.7	26.2	27,265.6	26.2	74,689.3	26.2	706,382	6.7
2008	50,171.8	5.8	17,870.9	-34.5	68,042.7	-8.9	766,096	6.5
2009	55,000.8	9.6	21,133.5	18.3	76,134.3	11.9	655,336	8.4
2010	58,347.5	6.1	27,575.8	30.5	85,923.3	12.9	745,311	7.8

Internal Tourism**Consumption**

(Table II)

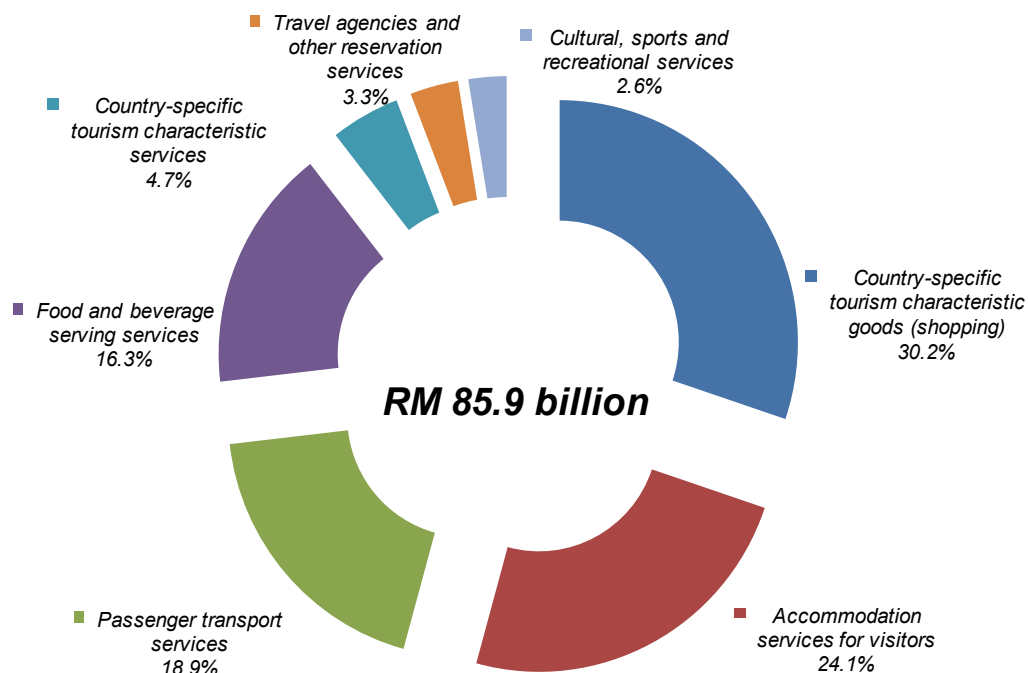
Internal tourism consumption is the combination of both inbound and domestic tourism expenditure. It increased from a negative growth of 8.9 per cent in 2008 to a positive 11.9 per cent in 2009 and subsequently, 12.9 per cent in 2010.

Inbound Tourism**Expenditure to Total Exports**

(Table II)

Inbound tourism expenditure accounted 7.8 per cent of total exports (merchandise and services) for 2010. It decreased by 0.6 percentage point from 2009. Within the period of eleven years, inbound tourism expenditure share to total exports was the highest in 2009, at 8.4 per cent.

Chart 1 : Percentage Share of Internal Tourism Consumption by Component, 2010



Share of Internal Tourism Consumption
(Chart 1)

Internal tourism consumption measures the total demand of foreign and domestic visitors. It recorded RM85.9 billion in 2010. Internal visitors consumed most on shopping and accommodation which was 30.2 per cent and 24.1 per cent respectively of the total internal tourism consumption. In addition, these visitors spent 18.9 per cent on passenger transport services and 16.3 per cent on food & beverage serving services.

Internal tourism consumption as a percentage to Gross Domestic Product
(Table I, II and IV)

Internal tourism consumption for 2010 was 11.2 per cent of Gross Domestic Product (GDP). As a percentage to GDP, inbound recorded 7.6 per cent, domestic 3.6 per cent and outbound 1.9 per cent in 2010 while it posted a share of 8.1 per cent, 3.1 per cent and 1.8 per cent respectively in 2009.

Table III : National and International Tourism Expenditure

Year	National tourism expenditure		International tourism expenditure	
	RM (Million)	Annual change (%)	RM (Million)	Annual change (%)
2000	15,658.1	..	23,630.5	..
2001	21,414.1	36.8	32,393.5	37.1
2002	21,894.9	2.2	33,362.9	3.0
2003	23,002.4	5.1	28,529.7	-14.5
2004	23,588.9	2.5	36,642.1	28.4
2005	27,066.4	14.7	41,132.0	12.3
2006	30,720.5	13.5	46,690.4	13.5
2007	38,117.5	24.1	58,275.6	24.8
2008	30,445.3	-20.1	62,746.2	7.7
2009	33,207.0	9.1	67,074.3	6.9
2010	41,863.2	26.1	72,634.9	8.3

National Tourism Expenditure

(Table I and III)

National tourism expenditure is the amalgamation of domestic and outbound tourism expenditure. In 2010, national tourism expenditure showed that Malaysian residents spent RM41.9 billion, an increase of 26.1 per cent from the 9.1 per cent growth recorded in the previous year.

International Tourism Expenditure

(Table I and III)

International tourism expenditure is made up of inbound and outbound tourism expenditure. It recorded RM72.6 billion in 2010, an increase of 8.3 per cent from the previous year. Of significance, the international tourism led mainly by inbound tourism recorded a share of 80.3 per cent in 2010.

**Table IV : Gross Value Added of Tourism Industries and Percentage Share to GDP
(at current prices)**

Year	Total output of tourism industries (at basic prices)		Total intermediate consumption (at purchasers' prices)		Total Gross Value Added of Tourism Industries (at basic prices)		Gross Domestic Product (at current prices)		Percentage share of GVATI to GDP
	RM (Billion)	Annual change (%)	RM (Billion)	Annual change (%)	RM (Billion)	Annual change (%)	RM (Billion)	Annual change (%)	
2000	73.2	..	31.9	..	41.3	..	356.4	..	11.6
2001	75.0	2.5	32.7	2.5	42.3	2.5	352.6	-1.1	12.0
2002	77.1	2.9	33.9	3.7	43.2	2.2	383.2	8.7	11.3
2003	79.2	2.7	34.7	2.3	44.5	2.9	418.8	9.3	10.6
2004	87.8	10.9	39.0	12.4	48.8	9.7	474.0	13.2	10.3
2005	100.3	14.2	43.9	12.7	56.4	15.5	522.4	10.2	10.8
2006	110.3	9.9	48.7	11.0	61.5	9.1	574.4	10.0	10.7
2007	129.9	17.8	57.3	17.5	72.7	18.1	642.0	11.8	11.3
2008	148.5	14.3	66.3	15.8	82.2	13.1	742.5	15.6	11.1
2009	151.1	1.7	68.0	2.5	83.1	1.1	679.9	-8.4	12.2
2010	163.0	7.9	73.7	8.4	89.3	7.5	766.0	12.7	11.7

Total Output of Tourism Industries
(Table IV)

Total output of tourism industry is the total output of goods and services produced to be likely consumed by visitors. It increased 7.9 per cent to attain RM163.0 billion in 2010 from RM151.1 billion in 2009.

Total Intermediate Consumption
(Table IV)

Total intermediate consumption reached RM73.7 billion in 2010 from RM68.0 billion in 2009. In terms of growth, it expanded 8.4 per cent in 2010 compared to 2.5 per cent in 2009.

Gross Value Added of Tourism Industries
(Table IV)

Gross Value Added of Tourism Industries (GVATI) is the difference between total output and total intermediate consumption of tourism industry. GVATI recorded RM89.3 billion in 2010 and RM83.1 billion in 2009. It posted a growth of 7.5 per cent in 2010, after recording a marginal growth of 1.1 per cent in 2009.

Gross Value Added of Tourism Industries to GDP
(Table IV)

In 2010, the share of GVATI to GDP recorded 11.7 per cent, a decline from 12.2 per cent in 2009. The share of GVATI to GDP for the past eleven years sustained between 10.3 to 12.2 per cent.

Table V : Total Supply and Demand by Types of Products

Products	Domestic tourism demand		Inbound tourism demand	Total internal tourism demand	Total supply	Tourism ratio
	Business and government demand	Household demand				
RM (Million)						
2008						
Accommodation services for visitors	861.6	1,778.7	15,463.1	18,103.4	19,058.1	0.95
Food and beverage serving services	151.0	3,240.2	8,929.4	12,320.6	31,491.8	0.39
Passenger transport services	482.3	6,234.7	7,718.7	14,435.7	41,695.9	0.35
Travel agencies and other reservation services	126.8	122.4	2,068.4	2,317.6	8,103.0	0.29
Cultural, sports and recreational services	4.1	191.8	1,513.4	1,709.3	6,564.1	0.26
Country-specific tourism characteristic goods	9.2	3,626.4	13,520.3	17,155.9	28,924.5	0.59
Country-specific tourism characteristic services	17.9	1,023.8	958.5	2,000.2	12,704.4	0.16
Total tourism demand	1,652.9	16,218.0	50,171.8	68,042.7	148,541.8	0.46
2009						
Accommodation services for visitors	792.2	1,874.4	16,573.8	19,240.4	20,334.2	0.95
Food and beverage serving services	97.2	3,021.6	9,702.9	12,821.7	33,723.3	0.38
Passenger transport services	307.0	6,424.0	7,861.9	14,592.9	38,421.9	0.38
Travel agencies and other reservation services	95.5	186.6	2,371.8	2,653.9	7,900.9	0.34
Cultural, sports and recreational services	5.5	252.7	1,664.7	1,922.9	6,907.1	0.28
Country-specific tourism characteristic goods	18.8	6,139.8	15,773.5	21,932.1	29,965.8	0.73
Country-specific tourism characteristic services	32.0	1,886.2	1,052.2	2,970.4	13,820.5	0.21
Total tourism demand	1,348.2	19,785.3	55,000.8	76,134.3	151,073.6	0.50
2010						
Accommodation services for visitors	781.0	2,555.4	17,343.2	20,679.6	21,361.4	0.97
Food and beverage serving services	78.7	3,742.3	10,177.1	13,998.1	36,519.7	0.38
Passenger transport services	450.1	7,755.3	8,047.1	16,252.5	40,408.8	0.40
Travel agencies and other reservation services	86.2	183.3	2,544.3	2,813.8	8,860.3	0.32
Cultural, sports and recreational services	1.9	381.3	1,834.3	2,217.5	7,318.3	0.30
Country-specific tourism characteristic goods	6.4	8,944.5	16,981.5	25,932.4	33,480.4	0.77
Country-specific tourism characteristic services	135.6	2,473.8	1,420.0	4,029.4	15,096.5	0.27
Total tourism demand	1,539.9	26,035.9	58,347.5	85,923.3	163,045.3	0.53

Trend of Visitors Spending
(Table V)

The trend of spending between inbound and domestic tourism is observed from Table V. Throughout the years, the pattern of spending of inbound visitors was on accommodation, country-specific characteristic goods which is shopping and followed by food & beverage serving services. In 2010, the trend of domestic visitors spending was mostly on shopping, passenger transport services and food & beverage serving services.

Tourism Ratio
(Table V)

The tourism ratio indicates the proportion of the value of products purchased by visitors as compared to the supply. In 2010, the tourism ratio for accommodation was 0.97 increased from 0.95 in the previous year and it was the highest ratio among the tourism characteristic products. This means that 97.0 per cent of all accommodation services were consumed by the visitors in 2010.

Shopping registered the second highest tourism ratio of 0.77 in 2010 compared to 0.73 in 2009. Tourism ratio of passenger transport services was 0.40 and sustained its importance as the third highest tourism characteristic products. This indicates that in 2010 their demand for passenger transport services reached 40.0 per cent out of total supplied.

Meanwhile, food and beverage serving services remained the tourism ratio of 0.38 since 2009, while travel agencies and other reservation services decreased by 2.0 per cent compared with 2009.

Table VI : Employment in the Related Tourism Industries

Year	Employment in the related tourism industries		Total employment	Share of employment in the related tourism industries to total employment (%)
	Number ('000)	Annual change (%)	Number ('000)	
2000	1,531.1	..	9,269.2	16.5
2001	1,323.4	-13.6	9,357.0	14.1
2002	1,402.1	5.9	9,542.6	14.7
2003	1,472.8	5.0	9,869.7	14.9
2004	1,503.2	2.1	9,979.5	15.1
2005	1,511.5	0.6	10,045.4	15.0
2006	1,554.6	2.9	10,275.4	15.1
2007	1,568.8	0.9	10,538.1	14.9
2008	1,677.6	6.9	10,659.6	15.7
2009	1,759.5	4.9	10,897.3	16.1
2010	1,770.8	0.6	11,129.4	15.9

Employment in the Related Tourism Industries

(Table IV and VI)

Tourism related industry employed about 1.8 million persons in 2010, registering a marginal growth of 0.6 per cent from 4.9 per cent in 2009. Although the output of tourism industries has increased by 7.9 per cent in 2010, the employment in the related tourism industries only grew at 0.6 per cent. However, it corresponds with the growth of total employment in Malaysia at 2.1 per cent in 2010.

In 2010, the share of employment in the related tourism industry was 15.9 per cent as compared with 16.1 per cent in the previous year.

Comparison between employment in the related tourism industries and GVATI

(Table IV & VI and Chart 2)

Comparing the employment and GVATI, it is observed that food & beverage serving industry employed the most at 37.8 per cent, while it recorded a GVATI of 21.5 per cent. This was followed by retail which employed 23.7 per cent and its GVATI was 17.5 per cent. The share of employment in other tourism industries such as spa and education was 13.5 per cent whereas its GVATI was 10.5 per cent.

In 2010, tourism industry generated 15.9 per cent of total employment as compared to the value added generated by tourism of 11.7 per cent to GDP.

Chart 2: Percentage Share of Employment in the Related Tourism Industries and GVATI, 2010

