

Travel and Tourism in Malaysia to 2017



**Government Initiatives, Growing Number of LCCs and
Competitive Prices will Continue to Drive Tourism**

Report Code: TT0086MR
Publication Date: May 2013

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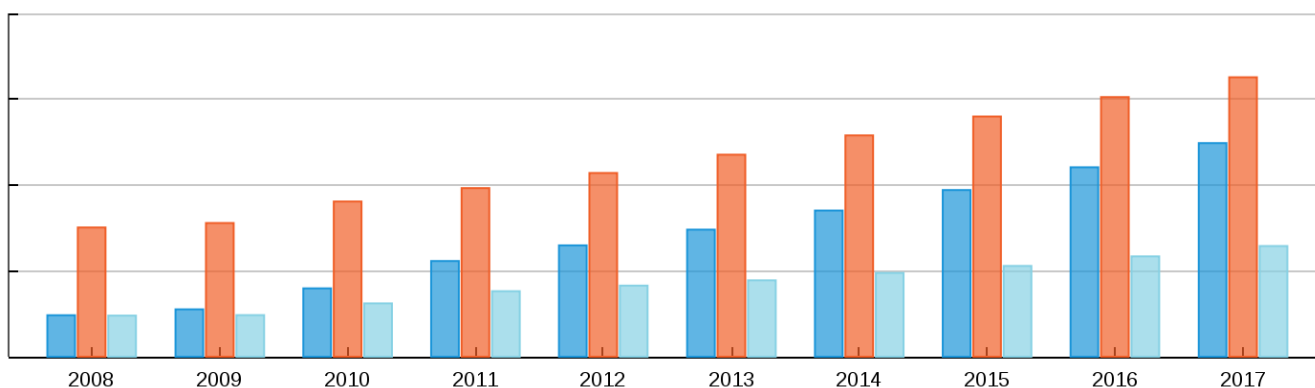
1 EXECUTIVE SUMMARY

Malaysia enjoys a strong position in global tourism and was ranked the ninth most visited country in the world by the United Nations World Tourism Organization (UNWTO) in 2011. The growth in Malaysian tourism was driven by government initiatives which aim to promote tourism in the country and increase investments in tourism infrastructure development. Malaysia's tourism sector has been important in driving the country's economic and social development since the late 1990s and has emerged as the second-largest foreign exchange earner after manufacturing for the country. According to the World Travel and Tourism Council (WTTC), the direct contribution of the sector to the country's GDP stood at XX.XX% in 2012, and is forecast to increase to XX.XX% by 2017.

- Domestic tourist volume increased from XX.XX million trips in 2008 to XX.XX million trips in 2012, at a CAGR of XX.XX%.
- Inbound arrivals increased from XX.XX million in 2008 to XX.XX million in 2012, rising at a CAGR of XX.XX %. Over the forecast period, inbound tourist arrivals are expected to reach XX.XX million by 2017, expanding at a CAGR of XX.XX %.
- Outbound tourism rose from XX.XX million in 2008 to XX.XX million in 2012, at a CAGR of XX.XX % during the review period. Outbound tourism is expected to increase at a CAGR of XX.XX % over the forecast period.
- The number of seats available on airlines increased from XX.XX million in 2008 to XX.XX million in 2012, rising at a CAGR of XX.XX % during the review period.
- The number of hotel establishments increased from XXXX in 2008 to XXXX in 2012, after expanding at a CAGR of XX.XX % during the review period. Total revenues increased at a CAGR of XX.XX % during the review period.

Figure 1: Malaysia – Tourism Expenditure (US\$ Million), 2008–2017

■ Domestic Tourist Expenditure
 ■ Inbound Tourist Expenditure
 ■ Outbound Tourist Expenditure

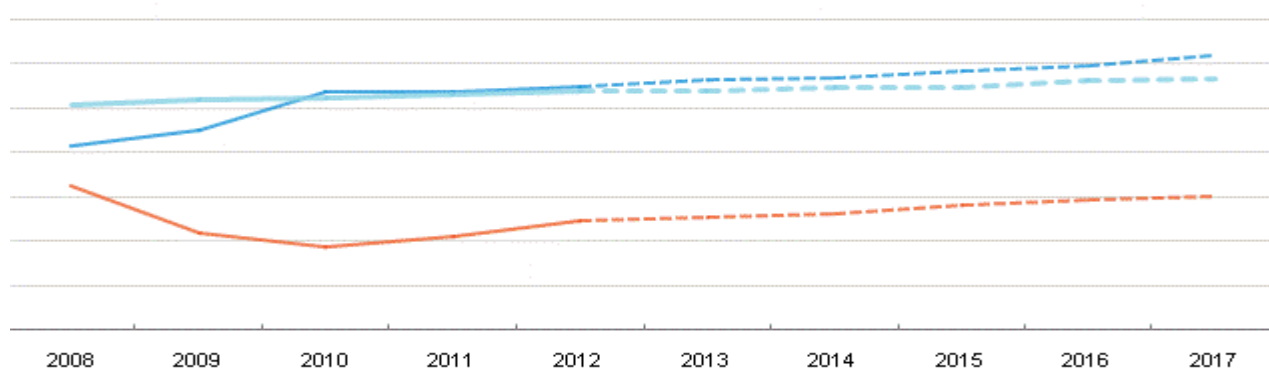


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Figure 2: Malaysia – Key Ratios (%), 2008–2017

— Airline - Load Factor
 — Hotel - Room Occupancy Rate
 — Car Rental - Utilization Rate



Source: Timetric analysis

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13 APPENDIX

13.1 What is this Report About?

This report is the result of extensive research on the travel and tourism sector in Malaysia, covering its dynamics and competitive landscape. It provides insights on the market size and forecast for the travel and tourism sector. The report also includes analysis and insight on relevant airports, tourism destinations and tourist boards. This report also provides an overview of the leading companies in the travel and tourism sector, along with details of strategic initiatives undertaken by them.

13.2 Definitions

For the purposes of this report, the following timeframes apply:

- Review period: 2008–2012
- Forecast period: 2013–2017
- Base year for forecasting: 2012

All data is collected in local currency. To avoid distortions due to currency fluctuations, all conversions into US dollars, of current, historical and forecast data alike, are made with a yearly average exchange rate. All values in tables, with the exception of compound annual growth rate (CAGR) are displayed to one decimal place. Growth rates may, therefore, appear inconsistent with absolute values due to this rounding method.

The key market categories featured in the report are defined below:

Table 1: Timetric Travel and Tourism Sector Definitions

Term	Definition
Tourism demand factors	Factors which influence time and money spent on tourism. Typical factors include the amount of holiday leave available to the average employee in the country and mean household income.
Annual employee holiday entitlement	The number of days the average resident of a country will accrue annually through entitled holidays, including annual leave and public holidays. Public holidays are statutory holidays to which a country's residents are entitled.
Domestic trip	A trip taken to a destination within the traveler's country of residence.
International trip	A trip taken to a destination outside the traveler's country of residence.
Trips taken by season	The number of trips undertaken by the residents of a country (both domestic and international), segmented into four quarters: January–March, April–June, July–September and October–December.
Number of trips by residents	The number of trips undertaken by the residents of a country, segmented by domestic and international trips.
Average length of trip	The average number of nights spent by the residents of a country, segmented by domestic and international trips.
Tourism flow factors	Factors which influence the flow of tourists from one location to another.
Number of overnight stays	The total number of nights spent by the residents of a country on all tourism trips during a given year.
International arrivals	The number of foreign nationals entering a country. For example, a person from Canada who visits France would be an international arrival to France.
Leisure trips	Trips for holidaying, recreation, or visits to friends and relatives.

Business trips	Trips involving business as the primary purpose. It includes trips for meetings, incentives, conventions and exhibitions (MICE) purposes, events and conferences.
Other trips	Trips for purposes other than leisure or business, such as education, sports or pilgrimage.
International departures	The total number of citizens leaving their home country and arriving in other countries. This will be higher than the total number of citizens leaving their home country, as a traveler might travel to more than one country.
Domestic tourist expenditure	Expenditure on tourism commodities during trips within national borders by citizens of the country. This spending is categorized into accommodation, sightseeing and entertainment, food service, retail transportation, travel intermediation and others, which include travel insurance and equipment rental.
Accommodation	The total direct spending on accommodation by inbound, domestic and outbound tourists within a single economy.
Sightseeing and entertainment	The total direct spending on sightseeing and entertainment by inbound, domestic and outbound tourists within a single economy
Foodservice	The total direct spending on food and beverages from foodservice outlets by inbound, domestic and outbound tourists within a single economy.
Retail	The total direct spending in retail outlets by inbound, domestic and outbound tourists within a single economy.
Transportation	The total direct spending on transportation by inbound, domestic and outbound tourists within a single economy.
Travel intermediation	The total direct spending via travel intermediaries by inbound, domestic and outbound tourists within a single economy.
Other categories	The total direct spending within all other categories by inbound, domestic and outbound tourists within a single economy.
Inbound tourist expenditure	Expenditure on travel and tourism commodities by international visitors within a country. This spending is categorized into accommodation, sightseeing and entertainment, food service, retail, transportation, travel intermediation and others, which include travel insurance and equipment rental.
Outbound tourist expenditure	The total expenditure by the residents of a country for the purpose of, and during, international tourism trips, irrespective of whether these transactions involve domestic or international providers. This spending is categorized by various categories such as accommodation, sightseeing and entertainment, food service, retail, transportation, travel intermediation and others which include travel insurance and equipment rental.
Tourism balance of payments	The difference between the expenditure of a country's inbound and outbound tourists with international tourism commodities providers.
Direct tourism output	The total direct spending by inbound, domestic and outbound tourists within a single economy, segmented by categories such as accommodation or sightseeing and entertainment. Direct tourism output represents all output consumed directly by visitors.
Indirect tourism output	Indirect tourism output includes all output used as inputs in the process of producing direct tourism output. Examples include toiletries for hotel guests and local entertainment for hotels.
Indirect tourism employment	Includes all jobs where workers are engaged in the production of indirect tourism-related output, for example, output which is used as an input in the process of producing direct tourism output. For example, people employed for local entertainment in hotels generate an indirect output which will be used as an input for the accommodation industry, a direct tourism output.
Direct tourism employment	Includes all jobs where workers are engaged in the production of direct tourism output.
Total tourism output	The sum of the value of goods and services purchased by tourists and output which is used as an input in the process of producing these goods

	and services.
Total tourism employment	All employees engaged in generating tourism output within a country, both directly and indirectly.
Total tourism employment as a percentage of total employment	The percentage of people employed in the tourism industry, both directly and indirectly, of the total employed population.
Average salary by category	Average remuneration per year for employees working within tourism-related categories.
Total national tourism expenditure	The total spending by residents on both domestic and outbound trips within categories such as accommodation and transportation.
Average national tourism spend per day of trip – domestic	The average daily expenditure of a country's residents during domestic trips.
Average national tourism spend per day of trip – International	The average daily expenditure of a country's residents during international trips.
Percentage of total resident income spent on tourism	The percentage of total annual income that a country's residents spend on travel and tourism activities.
Average expenditure per international tourist	The average expenditure on travel and tourism activities by an international tourist within a country. This spending is categorized by accommodation, entertainment and sightseeing, food service, retail transportation, travel intermediation and others which include travel insurance and equipment rental.
Average expenditure per domestic trip	The average expenditure on domestic travel and tourism activities by residents of a country, segmented by categories such as accommodation and foodservice.
Average overseas tourism expenditure	The average expenditure on travel and tourism activities by outbound tourists of a country, segmented by categories such as accommodation and food service.
Domestic, outbound and inbound tourist expenditure on transportation	Expenditure on all modes of transport within a country by domestic, outbound and inbound tourists.
Direct tourism output on transportation	The total direct spending on transportation by inbound, outbound and domestic tourists within a single economy. Direct tourism output represents all output consumed directly by visitors.
Indirect tourism output on transportation	Indirect tourism output on transportation includes all output used as inputs in the process of producing direct tourism output on transportation.
Indirect tourism employment on transportation	Includes all jobs where workers are engaged in the production of indirect tourism-related output, for example, output which is used as an input in the process of producing direct tourism output.
Direct tourism employment on transportation	Includes all jobs where workers are engaged in the production of direct tourism output in the transportation category of a country.
Total tourism output on transportation	The sum of the value of goods and services (directly or indirectly related to transportation) purchased by tourists and output which is used as an input in the process of producing these goods and services.
Total tourism employment	All employees engaged in generating tourism output within a country, both directly and indirectly.
Total national tourism expenditure on transportation	The total spending by residents on transportation in domestic trips.
Average expenditure per international tourist on transportation	The average expenditure on transportation by an international tourist within a country.
Average expenditure per domestic trip on transportation	The average expenditure by residents of a country on transportation during domestic trips.
Passenger airlines	An airline whose primary business is the transport of passengers.
Low-cost airlines	Airlines that generally offer lower fares by eliminating many traditional services. To recover the revenue lost in reduced ticket prices, the airlines may charge for additional facilities such as priority boarding, seat allocation, food and baggage.
Full-service airlines	Full-service airlines generally have higher fares, operate long-distance routes and offer a complete range of in-flight services.

Charter airlines	An airline which is hired by a group or single customer for leisure or business purposes, or as an air ambulance, and flies outside normal schedules. Airlines classified as non-scheduled by civil aviation organizations fall into this category.
Number of seats available	The number of seats available for purchase on all the airlines operating in a country, for example, both national and foreign carriers operating on domestic and international routes.
Number of seats sold	The number of seats sold to revenue passengers by all the airlines operating in a country in a year.
Hotels	Establishments that provide paid lodging and full guest services, typically with a continuous staff presence. In the case of motels, this includes off-street parking facilities but not necessarily meal services.
Budget hotels	Includes hotels that are considered to be budget accommodation, or have a one or two-star rating, providing accommodation on a short-term basis at relatively low prices.
Midscale hotels	Includes hotels with a three star rating. These hotels provide more facilities and comfort than budget hotels, and their services are charged at higher prices.
Luxury hotels	Includes hotels with a four and five-star rating or higher. Luxury hotels provide comfortable accommodation, with a combination of facilities and style, typically at higher prices than standard hotels.
Number of rooms	The total number of rooms available in all hotel accommodation establishments in a country in a year.
Room occupancy rate	The percentage of available rooms sold during a given period.
Revenue per available room	A measure of financial performance in the hospitality industry. It is the ratio of total room revenue to total rooms available. Average room rates and occupancy can also be used to calculate revenue per available room.
Total room revenue	The room rent that a guest pays for the occupied room.
Total non-room revenue	Revenue earned by hotels other than the room rent. It includes revenue from food and beverages, telecommunications, health and leisure operations, and car rentals.
Number of guests	Guest numbers in all hotel accommodation establishments in a country in a year.
Business guests	The annual number of guests arriving in hotel accommodation establishments for business purposes.
Leisure guests	The annual number of guests arriving in hotel accommodation establishments for leisure purposes.
Car rental	Car rental is the hiring of a motor vehicle from one party to another.
Business rentals	Annual revenue generated through car rentals under negotiated contractual agreements between businesses and a rental company,
Leisure rentals	Annual revenue generated through car rentals directly to customers.
Airport rentals by leisure customers	Annual car rental revenue generated through direct customer rentals to and from an airport.
Airport rentals by business customers	Revenue generated through car rentals by business customers from an airport under negotiated contractual agreements between the employers and the rental company.
Non-airport rentals	Annual car rental revenue generated through direct customer rentals at locations other than airports.
Non-airport rentals by business customers	Revenue generated through car rentals by business customers at locations other than airports under negotiated contractual agreements between the employers and the rental company.
Insurance replacement	The revenue generated by car rental firms through customers hiring vehicles through insurance and leasing companies, repair shops or dealerships with which car rental companies have a contractual relationship.
Fleet size	The number of vehicles available for rent in one year.

Number of rental occasions	The number of times rental cars are rented out.
Rental days	The total number of days all cars in the fleet are rented. It is calculated by multiplying the total fleet size by the average number of days per year during which a car is rented.
Average rental length	The average duration of a car rental.
Utilization rate	The ratio of the number of rental days to total number of days for which cars could be actually rented during the year.
Average revenue per day	The ratio of car rental revenue to the total number of rental days in a year.
Travel intermediaries	Part of a business that assists in selling travel products and services to customers. The products may include airline tickets, car rentals, hotels, railway tickets and package holidays that may combine several products.
Accommodation only	Total revenue generated by intermediaries exclusively through accommodation bookings.
Travel only	Total revenue generated by intermediaries exclusively through travel bookings.
Car rental only	Total revenue generated by intermediaries exclusively through car rental bookings.
Tourism packages	A combination of tourism products or services, such as accommodation, travel bookings and car rental bundled together by a tour operator.
Experiential travel	Travel packages offering a holistic experience for travelers who want to go beyond the beaten tourist paths and learn about cultural and social aspects of a country or a place.
Other products	Revenue generated by travel intermediaries from travel products and services that are not classified above.
Travel agents	Businesses that sell travel-related products and services to both leisure and business customers on behalf of suppliers such as tour operators. These may include package holidays, sightseeing tours, airline tickets, hotel accommodation, cruise bookings, car rentals, rail travel and travel insurance. Some travel agents also serve as sales agents for international travel companies.
Tour operators	Tour operators typically combine two or more travel services, such as transport, sightseeing, accommodation, food and entertainment, and sell them either directly to customers or through travel agents as a single product, called a package tour, for one price.
Other providers	Any part of the value chain between the direct supplier and traveler (customer), which is not classified as a travel agent or a tour operator.
Online	Revenue generated by travel intermediaries by selling travel-related products or services over the internet.
In-store	Revenue generated by travel intermediaries by selling related products or services to a customer over the counter.
Source: Timetric analysis	

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13.3 Methodology

Timetric's dedicated research and analysis teams consist of experienced professionals with an industry background in marketing, market research, consulting and advanced statistical expertise.

Timetric adheres to the Codes of Practice of the Market Research Society (www.mrs.org.uk) and the Society of Competitive Intelligence Professionals (www.scip.org).

All Timetric databases are continuously updated and revised.

All travel and tourism reports are created by following a comprehensive, four-stage methodology. This includes market study, research, analysis and quality control.

1) Market Study

A. Standardization

Definitions are specified using recognized industry classifications. The same definition is used for every country. Annual average currency exchange rates are used for the latest completed year. These are then applied across both the historical and forecast data to remove exchange rate fluctuations.

B. Internal Audit

Review of in-house databases to gather existing data:

- Historic market databases and reports
- Company database

C. Trend monitoring

- Review of the latest travel and tourism companies and industry trends

2) Research

A. Sources

- Collection of the latest market-specific data from a wide variety of industry sources:
 - Government statistics
 - Industry associations
 - Company filings
 - International organizations
 - Travel and tourism agencies

B. Expert opinion

- Collation of opinion taken from leading travel and tourism industry experts
- Analysis of third-party opinion and forecasts:
 - Broker reports
 - Media
 - Official government sources

C. Data consolidation and verification

- Consolidation of data and opinion to create historical datasets
- Creation of models to benchmark data across categories and geographies

3) Analysis

A. Market forecasts

- Feeding forecast data into market models:
 - Macroeconomic indicators
 - Industry-specific drivers
- Analysis of travel and tourism industry database to identify trends:
 - Latest travel and tourism trends
 - Key drivers of the travel and tourism industry

B. Report writing

- Analysis of market data
- Discussion of company and industry trends and issues
- Review of financial deals and travel and tourism trends

4) Quality Control

A. Templates

- Detailed process manuals
- Standardized report templates and accompanying style guides
- Complex forecasting tool used to ensure forecast methodologies are consistently applied
- Quality control checklists

B. Quality control process

- Peer review
- Senior-level QC
- Random spot checks on data integrity
- Benchmark checks across databases
- Market data cross-checked for consistency with accumulated data from:
 - Company filings
 - Government sources

13.4 Contact Us

If you have any queries about this report, or would like any further information, please contact info@timetric.com.

13.5 About Timetric

Timetric is a leading provider of online data, analysis and advisory services on key financial and industry sectors. Timetric provides integrated information services covering risk assessments, forecasts, industry analysis, market intelligence, news and comment.

Timetric helps over 1,500 financial services institutions and their partner companies around the world benefit from better, timelier decisions and improve their competitive edge. This is done by providing:

High quality data including proprietary, specialised industry data, survey-based research, social media monitoring, macroeconomic data and forecasts

Expert analysis from experienced economists and analysts, who use robust proprietary models, indices and forecasts

Powerful proprietary visualisation and workflow technologies developed over years of extensive investment

Timetric has office locations in London, New York, San Francisco, Hyderabad, Seoul, Singapore and Sydney, in which it employs 500 people including 150 analysts and economists and 200 professional researchers.

13.6 Our Services

Intelligence Centers

Timetric's industry Intelligence Centers are premium web-based services that provide access to interactive tools, comprehensive research and expert analysis in key sectors. They provide invaluable decision support presented in an easily digestible format and grounded in deep research.

Timetric offers Intelligence Centers covering the following industries:

- Banking
- Insurance
- Wealth
- Construction
- Travel & Tourism

Briefing Services

Timetric offers a range of briefing services, which offer cutting-edge thought leadership and expert commentary on and for the financial services industries. Driven by influential and respected editorial teams with years of experience in their respective fields, these services deliver need-to-know insight and analysis to decision makers across the financial services value chain.

Timetric offers briefing services covering the following financial sectors:

- Accountancy
- Asset Finance
- Banking
- Cards & Payments
- Insurance

Consultancy

Timetric specializes in the development and delivery of innovative research solutions that are designed to provide competitive advantage and profitability to our clients.

Timetric's dedicated industry analysts and economists provide expert advice and actionable recommendations underpinned by Timetric's market and country knowledge, experience and proprietary databases, panels and research infrastructure.

For projects requiring quantitative data, Timetric undertakes special research projects using its in-house panels and survey technology providing ready access to an extensive source of specialist business executives and consumers.

Core capabilities include:

Economic Research and Consulting

Timetric's highly experienced economists provide a number of bespoke research services covering subjects ranging from macroeconomic forecasting to sector outlooks, business presentations and workshops.

Industry Analysis and Consulting

Whether you're looking for information and analysis, independent expert opinion and advice, facilitated decision or strategic support, Timetric will leverage our extensive body of proprietary data and analysis and provide expertise-based consulting to deliver the solution that best suits your requirements.

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Timetric connects with thousands of potential customers every single day. Using sophisticated, interactive and highly engaging graphical surveys Timetric helps to speed up and reduce the cost of your research, whilst ensuring that respondents are highly motivated to deliver the insight you need.

Qualitative Research

Timetric's Qualitative Research service helps you understand the emotional and cultural behaviours of your target audience. Timetric provides unique access through our market-leading publications and information services to decision makers specifically brought together to discuss the topics that are important to you.

Technology Solutions

Timetric has built a unique technological platform to collect mine and visualise data and employs some of the world's leading experts on data collection and visualisation. Through technology and software consulting services, Timetric can provide you with the solutions to gather and visualise the data you already have or want to collect.

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