Beyond Headline Recovery: Visitor Composition, Length of Stay and Expenditure in Malaysia's Post-Pandemic Inbound Tourism

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DOI: https://doi.org/10.47772/IJRISS.2026.100900601

Received: 26 September 2026; Accepted: 01 October 2026; Published: 17 October 2026

ABSTRACT

Headline international visitor arrivals can conceal important differences in the composition and expenditure profile of tourism recovery. This study examines Malaysia's post-pandemic inbound tourism by distinguishing total visitors, overnight tourists, same-day excursionists, average length of stay (ALOS), and nominal inbound tourism expenditure. Official secondary data from Tourism Malaysia and the Department of Statistics Malaysia are used for national benchmark recovery over 2019-2025, monthly 2019-versus-2025 comparisons for six major source markets, and nationality-specific visitor receipts for 2023-2024. The analysis is descriptive and accounting-based: recovery is defined relative to the 2019 benchmark, total visitor change is decomposed into tourist and excursionist components, and average expenditure measures are derived from published expenditure and visitor totals. The results show that Malaysia's total visitor volume in 2025 was 20.4% above 2019, while overnight tourists were only 2.0% above the benchmark, excursionists were 74.2% higher, and ALOS remained 25.7% below its pre-pandemic level. Tourists represented 63.1% of visitors in 2025 but generated 95.6% of inbound tourism expenditure; using published totals, average expenditure was approximately RM4,480 per overnight tourist compared with about RM355 per excursionist. At source-market level, Singapore and Thailand exceeded their 2019 total visitor counts despite overnight tourist arrivals remaining below the benchmark. Visitor volume and receipts were also not proportional across source markets in 2024. The findings show that recovery is metric-dependent: aggregate mobility can exceed its pre-pandemic benchmark before overnight demand and trip duration are restored, while changes in visitor composition can materially alter the expenditure interpretation of that recovery. Tourism performance monitoring should therefore report visitor type, length of stay, and expenditure alongside headline arrivals.

Keywords: tourism recovery, excursionists, overnight tourists, visitor composition, length of stay

INTRODUCTION

International tourism recovery after COVID-19 is often communicated through a headline comparison with a pre-pandemic arrival benchmark. That comparison is intuitive, but it can conceal changes in what is being counted. The pandemic disrupted mobility, destination behaviour, transport systems, and the conditions under which destinations reopened (Gössling, Scott, & Hall, 2021; Hampton, Jeyacheya, & Nair, 2023; Liu et al., 2024b). Recent post-pandemic research consequently treats recovery as uneven across markets and potentially involving reconfiguration rather than a mechanical return to previous patterns (Hampton et al., 2023; Liu et al., 2024a, 2024b).

Malaysia is a useful case because its official inbound statistics explicitly distinguish tourists, who stay at least one night, from same-day visitors or excursionists. Tourism Malaysia's current terminology classifies a visitor as a tourist when the trip includes an overnight stay and as an excursionist when it does not (Tourism Malaysia, 2026). As a result, a rise in total international visitors can occur through growth in overnight

tourism, same-day mobility, or both. Those components have different implications for accommodation demand, length of stay, and expenditure.

The measurement issue is already visible in Malaysia's national recovery. Total foreign visitors increased from 35.05 million in 2019 to 37.96 million in 2024, exceeding the pre-pandemic benchmark, while overnight tourist arrivals were still lower at 25.02 million compared with 26.10 million in 2019. By 2025, total visitors had reached 42.20 million and overnight tourists had moved only slightly above the 2019 count. At the same time, excursionists increased sharply and the average length of stay remained below its pre-pandemic level (Department of Statistics Malaysia [DOSM], 2026; Tourism Malaysia, 2026).

The source-market evidence makes the aggregation problem even clearer. Singapore, Malaysia's largest source market, recorded 21.08 million visitors in 2025 compared with 17.03 million in 2019, yet overnight tourists declined from 10.16 million to 9.34 million. The difference was more than offset by growth in same-day excursionists. A statement that the Singapore market had recovered is therefore correct if 'recovery' refers to total visitors, but not if it refers to overnight tourism. The indicator selected changes the conclusion.

This paper addresses that measurement problem rather than attempting to identify the causal determinants of tourism demand. Its contribution is empirical and measurement-oriented. It operationalises tourist/excursionist disaggregation across four linked layers: national benchmark recovery, source-market decomposition, within-year monthly consistency, and a supplementary expenditure interpretation. The analytical value therefore lies not in the accounting identity that visitors equal tourists plus excursionists, but in showing when aggregation changes the empirical conclusion about recovery and how large that difference becomes in the dominant source markets. The study places total visitors, tourist/excursionist composition, ALOS, and nominal inbound expenditure in the same analytical frame; decomposes net visitor growth into overnight-tourist and excursionist components; and links visitor type to national average expenditure while comparing source-market visitor shares with receipt shares. The objective is not to argue that one visitor category is preferable, but to show that different indicators answer different policy and economic questions.

Two research questions guide the benchmark-recovery analysis:

RQ1. How does Malaysia's recovery relative to 2019 differ across total visitors, overnight tourists, excursionists, average length of stay, and nominal inbound tourism expenditure?

RQ2. How did the composition of recovery differ across Malaysia's six largest inbound source markets, and to what extent were net visitor gains accounted for by tourists versus excursionists?

A supplementary economic diagnostic uses 2023-2024 nationality-level data to assess whether source-market visitor growth moved proportionately with visitor receipts and derived aggregate receipts per visitor. Because this series does not provide a pre-pandemic source-market receipt benchmark, the diagnostic is not treated as a third recovery research question.

LITERATURE REVIEW AND ANALYTICAL FRAMING

Recovery, resilience, and the problem of a single headline indicator

The COVID-19 shock generated an unusually large break in global tourism. Recent research emphasises that recovery has been heterogeneous across markets and that tourism-demand relationships can vary over time during and after the pandemic (Gössling et al., 2021; Hampton et al., 2023; Liu et al., 2024a, 2024b). Together, these studies support treating recovery as a process of adjustment that may not reproduce the pre-crisis configuration.

A key implication is that 'recovery' must be defined with respect to the indicator and benchmark being used. The present study focuses on the inference problem created by aggregation. The issue is not merely whether arrivals increased after reopening, but whether a total visitor count produces the same recovery conclusion as overnight tourists, duration, or expenditure. In this paper, recovery is therefore used in a benchmark

sense: an indicator is said to have recovered when it reaches or exceeds its 2019 level. This does not imply that the indicator has returned to the counterfactual path that might have occurred in the absence of the pandemic.

Recent empirical work supports the expectation of heterogeneous recovery. Liu et al. (2024a) show that tourism recovery can differ substantially across source markets, while Liu et al. (2024b) demonstrate time variation in tourism-demand relationships during and after the pandemic. In Malaysia, Hampton, Jeyacheya, and Nair (2023) document post-COVID restructuring in tourism and show why a return in activity does not necessarily reproduce the pre-crisis system. More recently, Galiano, Martín-Álvarez, and Mata (2025) use monthly source-market data and counterfactual time-series modelling to show asymmetric post-pandemic recovery across Spain's origin markets. These studies motivate closer attention to the composition of observed recovery.

Existing studies therefore establish that recovery can be heterogeneous across source markets, that same-day and overnight travel are behaviourally distinct, and that duration and expenditure matter for tourism outcomes. Recent source-market-specific recovery research has strengthened the case for looking beneath national totals, but it has focused primarily on tourist-arrival trajectories rather than on whether headline visitor recovery is being generated by overnight tourists or same-day excursionists and what that composition implies for expenditure. For Malaysia, this matters because a national visitor total can cross a pre-pandemic benchmark even when overnight demand in major markets has not. The present study addresses this narrower gap by integrating visitor-type composition, duration, and expenditure within one benchmark-recovery accounting framework.

Overnight Tourists, Same-Day Visitors, and Length of Stay

International tourism statistics distinguish tourists from same-day visitors because duration is a defining characteristic of the trip. Tourism Malaysia's current terminology classifies a visitor as a tourist when the trip includes an overnight stay and as an excursionist when it does not (Tourism Malaysia, 2026). The distinction is also economically relevant. Scotti et al. (2024), using mobile-network data, show that overnight stays and same-day visits display different behavioural and spatial correlates. In border destinations and geographically proximate source markets, the same visitor total can therefore combine same-day movement with lower overnight demand.

Length of stay adds another dimension. A destination may receive more tourists but fewer visitor-nights if trips become shorter. Banos-Pino et al. (2023) find that the pandemic changed both length of stay and daily expenditure, while Gedecho et al. (2023) show that expenditure and length of stay are jointly shaped by trip and traveller characteristics. Tourism Malaysia reports ALOS as the published national average duration-of-stay indicator for inbound tourists (Tourism Malaysia, 2025, 2026). ALOS is used here as reported and is not reconstructed from the source-market visitor series.

Visitor Volume, Expenditure, and the Accounting Framework

Visitor numbers and visitor expenditure are related but not interchangeable measures. Expenditure research distinguishes the extensive margin of how many visitors arrive from the intensity of spending associated with those visits (Alfarhan et al., 2024). A high-volume source market may therefore contribute a smaller share of receipts than of visitors, while a smaller market may generate relatively high expenditure per visitor.

The analytical framework used in this study is deliberately simple. Total visitors (V) are the sum of overnight tourists (T) and excursionists (E): $V = T + E$. Consequently, the change in total visitors between 2019 and 2025 can be written as Change in V = Change in T + Change in E. This identity makes it possible to establish whether a headline increase in visitors is accounted for by overnight tourism, same-day mobility, or a combination of both. For expenditure, total inbound expenditure is separated conceptually into tourist and excursionist expenditure, and average expenditure per visitor type is derived as published expenditure

divided by the corresponding visitor count. These calculations are descriptive accounting measures; they do not identify causal effects.

Malaysia's Tourism Satellite Account is especially useful because it reports inbound tourism expenditure separately for tourists and excursionists. In the latest published series, tourists generated 96.1% of inbound expenditure in 2024 and 95.6% in 2025, compared with 3.9% and 4.4% for excursionists, respectively (DOSM, 2026). The asymmetry provides a direct reason for monitoring visitor composition alongside total arrivals.

METHODOLOGY

Research Design and Data Sources

The study uses a descriptive longitudinal design based entirely on official aggregate secondary data. It is accounting-based rather than causal. The objective is to determine whether alternative official indicators produce different conclusions about the timing and composition of Malaysia's post-pandemic inbound tourism recovery. Because the analysis uses published aggregate series for the selected markets and is descriptive rather than inferential, no sampling-based significance tests or hypothesis tests are applied.

Three official data blocks are used. First, Tourism Malaysia's Malaysia Tourism Key Performance Indicators 2025 provides national and source-market visitor, tourist, and excursionist counts, together with national ALOS and monthly source-market series. The national 2019-2025 benchmark analysis and the 2019-versus-2025 source-market and monthly consistency comparisons are drawn from this series. For ALOS, the published 2020 value refers only to the first quarter and the 2021 value is unavailable; neither is used as a comparable full-year ALOS recovery observation. Second, DOSM's Tourism Satellite Account 2025, published in 2026, provides the latest consolidated 2019-2025 series for national inbound tourism expenditure and exact tourist/excursionist expenditure totals. Third, Tourism Malaysia's Malaysia Tourism Statistics in Brief 2024 provides nationality-specific visitor receipts and visitor volume for 2023 and 2024. Where annual values overlap across publications, the latest consolidated official vintage is retained; monthly source-market observations are taken only from the KPI 2025 series, while nationality-specific receipts are taken only from Statistics in Brief 2024 and are analysed separately rather than reconciled to the DOSM TSA aggregate.

The source-market analysis covers Singapore, Indonesia, China, Thailand, Brunei, and India. These were selected mechanically as the six largest source markets by total visitor arrivals in 2025 and together accounted for 35.66 million visitors, or 84.5% of Malaysia's foreign visitors. The same six markets were also the six largest visitor source markets in the 2019 benchmark year and accounted for approximately 82.6% of visitors then, reducing concern that the analytical sample is defined only by post-pandemic performance. Selection was therefore based on market size rather than recovery performance or expenditure outcomes, and the group is intended to represent the dominant source-market structure rather than a statistically representative sample of all origin markets.

Table 1: Data sources and analytical role

Data block	Coverage used	Variables	Analytical role
Tourism Malaysia KPI 2025	National: 2019-2025; source markets: 2019 and 2025 plus monthly 2025	Visitors; tourists; excursionists; ALOS; monthly source-market arrivals	National benchmark recovery; source-market composition, decomposition, and within-year consistency
DOSM Tourism Satellite Account	2019-2025	Inbound tourism expenditure; exact tourist/excursionist	Nominal expenditure recovery and approximate visitor-type expenditure

2025		expenditure totals	averages
Tourism Malaysia Statistics in Brief 2024	2023-2024 by nationality	Visitor volume; visitor receipts	Source-market volume-receipt correspondence and aggregate receipts per visitor

Sources: Department of Statistics Malaysia; Tourism Malaysia. The latest official series is used where it revises or consolidates earlier totals. All three source publications were accessed on 5 October 2026.

Measures and Interpretation

Statistical definitions are applied consistently throughout the study. A total visitor (V) is either an overnight tourist (T), whose trip includes at least one overnight stay, or a same-day excursionist (E), whose trip does not include an overnight stay; hence V = T + E and, between two periods, change in V = change in T + change in E. Throughout the manuscript, 'visitors' refers to the total V, 'tourists' to overnight visitors T, and 'excursionists' to same-day visitors E. These categories follow Tourism Malaysia's published terminology.

The primary benchmark is 2019, the last full pre-pandemic year. For an indicator z, benchmark recovery is calculated as 100 x z(t) / z(2019). A value of 100 indicates parity with 2019. Percentage differences from 2019 are reported in the text because they are easier to interpret. Importantly, benchmark recovery is not a counterfactual estimate of where tourism would have been without COVID-19.

At source-market level, the recovery gap is defined as total-visitor recovery minus overnight-tourist recovery, measured in percentage points. Visitor composition is represented by the tourist share of total visitors. Net visitor growth between 2019 and 2025 is decomposed arithmetically into the change in tourists plus the change in excursionists. Monthly consistency is assessed by counting the number of months in 2025 in which each market equalled or exceeded the corresponding month of 2019. This is interpreted as a within-year consistency check, not as a formal robustness test, structural-break test, or evidence of multi-year persistence. The monthly count is intentionally binary and summarises directional consistency rather than the magnitude of monthly recovery gaps.

The national expenditure comparison uses exact tourist and excursionist expenditure totals reported in DOSM Tourism Satellite Account 2025 together with the corresponding official tourist and excursionist arrival counts reproduced in the same publication from Tourism Malaysia. For calendar year t, average expenditure per tourist is calculated as Tourist expenditure(t) / Tourist arrivals(t), while average expenditure per excursionist is calculated as Excursionist expenditure(t) / Excursionist arrivals(t). In each ratio, the expenditure numerator and arrival denominator refer to the same visitor category and the same calendar year. These ratios are descriptive aggregate accounting measures, not microdata estimates of individual spending. Because both the national expenditure series and the nationality-specific visitor-receipt series are nominal and are not adjusted for inflation, the paper does not interpret increases as real purchasing-power gains. The nationality-specific Tourism Malaysia receipt series is analysed separately and is not merged with the DOSM TSA total because the two official products have different published aggregates and analytical purposes.

RESULTS

National Recovery Was Asynchronous Across Indicators

Malaysia's inbound tourism recovery followed different trajectories depending on the indicator selected. By 2023, total visitors had recovered to 82.6% of the 2019 benchmark and overnight tourists to 77.2%, whereas excursionists were already at 98.6%. Nominal inbound expenditure stood at 84.8% of its 2019 level, while ALOS was only 60.8% of the benchmark.

The divergence widened in 2024. Total visitors reached 108.3% of the 2019 level, meaning the headline

visitor count had moved above the pre-pandemic benchmark. Overnight tourists, however, remained at 95.8%. Excursionists reached 144.7%, nominal inbound expenditure 119.8%, and ALOS only 68.9%. Thus, the first year in which the total visitor count exceeded 2019 was not a year in which overnight tourism or duration had fully returned to the benchmark.

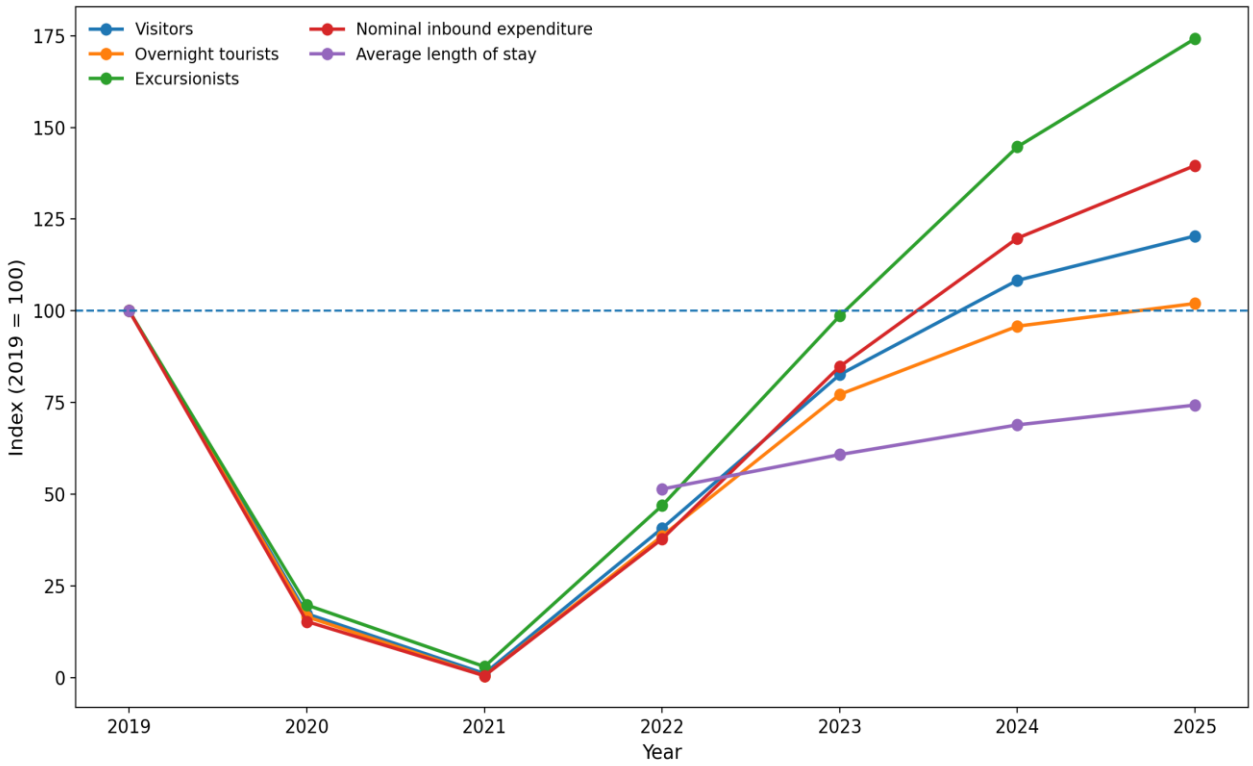
By 2025, overnight tourists finally moved slightly above 2019, reaching 102.0% of the benchmark. Yet the composition remained different: total visitors were 20.4% above 2019, excursionists were 74.2% higher, and ALOS remained 25.7% lower. The tourist share of total visitors fell from 74.5% in 2019 to 63.1% in 2025. Nominal inbound tourism expenditure reached approximately RM124.8 billion, 39.6% above 2019 (DOSM, 2026).

Table 2: National recovery relative to 2019

Year	Visitors	Tourists	Excursionists	Nominal expenditure	ALOS index	ALOS (nights)
2019	100.0	100.0	100.0	100.0	100.0	7.4
2020	17.4	16.6	19.8	15.3	n.a.	4.1*
2021	1.1	0.5	3.0	0.5	n.a.	n.a.
2022	40.7	38.6	46.9	37.8	51.4	3.8
2023	82.6	77.2	98.6	84.8	60.8	4.5
2024	108.3	95.8	144.7	119.8	68.9	5.1
2025	120.4	102.0	174.2	139.6	74.3	5.5

Note: 2019 = 100 for the recovery columns. ALOS = average length of stay. *The published 2020 ALOS value (4.1 nights) refers to the first quarter only and is not used in the annual ALOS recovery index or Figure 1; 2021 ALOS is not available. Sources: Tourism Malaysia (2026) for visitor counts and ALOS; DOSM Tourism Satellite Account publications for nominal inbound expenditure.

Figure 1: National multidimensional tourism recovery, 2019-2025 (2019 = 100)



Source: Authors' calculations from Tourism Malaysia (2026) and DOSM Tourism Satellite Account publications. ALOS is not plotted for 2020 (Q1 only) or 2021 (not available).

Visitor type and Average Expenditure

The expenditure split shows why the compositional shift matters economically. In the latest TSA series, 2024 inbound tourism expenditure was RM107.1 billion, of which tourists accounted for RM102.93 billion (96.1%) and excursionists RM4.21 billion (3.9%). In 2025, total inbound tourism expenditure was RM124.8 billion, with RM119.31 billion attributable to tourists (95.6%) and RM5.53 billion to excursionists (4.4%) (DOSM, 2026).

Using the exact published category totals and corresponding official visitor counts gives approximate average inbound expenditure of RM4,115 per tourist and RM325 per excursionist in 2024. In 2025, the corresponding values were approximately RM4,483 per tourist and RM355 per excursionist. These are broad accounting averages rather than estimates of individual trip behaviour. In both years, the tourist average exceeded the excursionist average by more than twelve times. The large difference in observed averages shows why equal visitor counts from the two categories are not economically equivalent in expenditure terms.

Table 3: National inbound expenditure and approximate average expenditure by visitor type, 2024 and 2025

Year	Visitor type	Visitors (million)	Inbound expenditure (RM bn)	Expenditure share	Approx. average expenditure / visitor
2024	Tourists	25.02	102.93	96.1%	RM4,115
2024	Excursionists	12.94	4.21	3.9%	RM325
2025	Tourists	26.61	119.31	95.6%	RM4,483
2025	Excursionists	15.58	5.53	4.4%	RM355

Exact category expenditure totals are reported in DOSM Tourism Satellite Account 2025 (RM102.9313 billion and RM4.2132 billion in 2024; RM119.3120 billion and RM5.5303 billion in 2025). Visitor counts are the corresponding official tourist and excursionist arrivals reproduced in the same publication from Tourism Malaysia.

Average expenditure per visitor is calculated as category expenditure divided by the corresponding visitor count and is therefore a descriptive accounting ratio, not a microdata estimate. Source: DOSM (2026).

Source-Market Recovery Differed in Composition

All six major source markets displayed stronger recovery in total visitors than in overnight tourists in 2025. The divergence was most pronounced for Singapore and Thailand. Singapore's total visitors were 23.7% above 2019, but overnight tourists were 8.1% below the benchmark, while excursionists were 70.8% higher. Thailand displayed the same pattern: visitors were 12.5% above 2019, tourists were 8.7% below, and excursionists were 130.1% above.

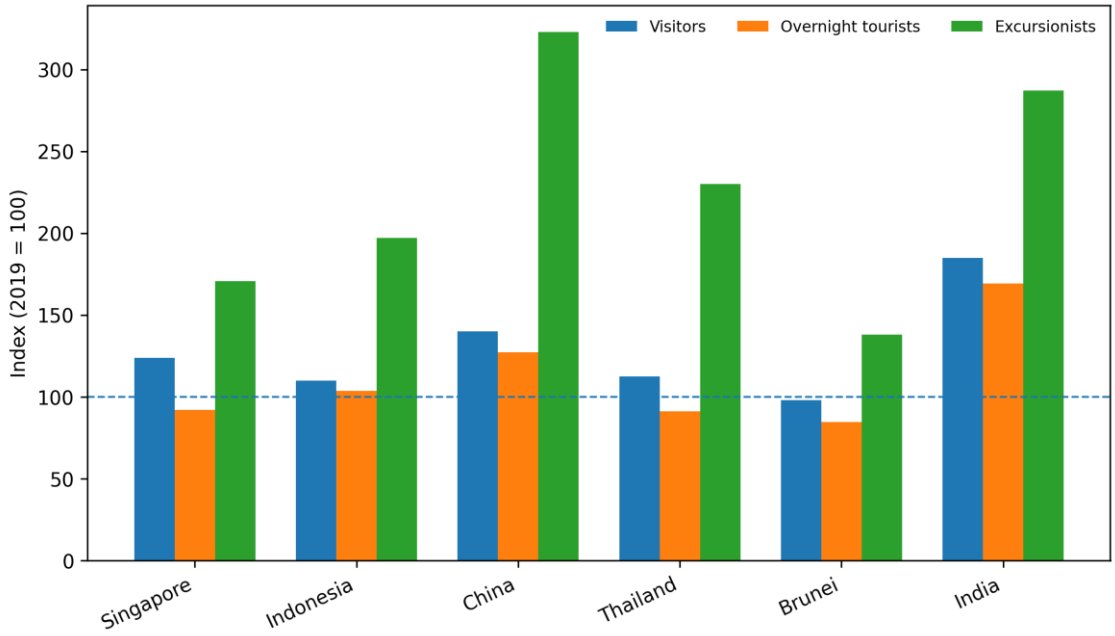
Brunei remained slightly below its 2019 total visitor count, but its internal composition shifted in the same direction: tourists were 15.4% below 2019 while excursionists were 38.1% above. Indonesia, China, and India had recovered in overnight-tourist terms by 2025, but excursionist growth was substantially faster in all three markets. The tourist share of total visitors therefore fell in every market.

Table 4: Source-market recovery and composition, 2025 versus 2019

Market	Visitors	Overnight tourists	Excursionists	Recovery gap (pp)	Tourist share (%)
Singapore	+23.7%	-8.1%	+70.8%	31.8	59.7 -> 44.3
Indonesia	+9.9%	+3.6%	+97.1%	6.2	93.3 -> 88.0
China	+40.0%	+27.3%	+222.8%	12.7	93.5 -> 85.1
Thailand	+12.5%	-8.7%	+130.1%	21.2	84.8 -> 68.8
Brunei	-2.0%	-15.4%	+38.1%	13.4	75.0 -> 64.8
India	+84.8%	+69.3%	+187.0%	15.5	86.8 -> 79.5

Source: Authors' calculations from Tourism Malaysia, Malaysia Tourism Key Performance Indicators 2025. Recovery gap = visitor recovery minus overnight-tourist recovery.

Figure 2: Source-market recovery in 2025 relative to 2019



Source: Authors' calculations from Tourism Malaysia (2026).

The arithmetic decomposition shows how the headline gains were produced. Singapore added 4.04 million visitors between 2019 and 2025 even though overnight tourists declined by 0.82 million. The net increase was more than fully accounted for by approximately 4.86 million additional excursionists. Thailand added 0.28 million visitors despite a decline of 0.16 million overnight tourists because excursionists increased by approximately 0.44 million. In both markets, a positive change in total visitors therefore coexisted with a negative change in overnight tourism.

Monthly Consistency of the Visitor-Tourist Divergence

The annual comparisons are supported by the within-year monthly pattern in 2025. Singapore exceeded the corresponding 2019 visitor count in all 12 months, but its overnight-tourist count reached or exceeded the same-month benchmark in only four months. Thailand exceeded its 2019 visitor level in nine months but its

tourist level in only two. Brunei showed six visitor months and two tourist months at or above 2019. Indonesia recorded 10 visitor months and seven tourist months, China 12 and 10, and India 12 and 12. Excursionist counts exceeded the corresponding 2019 month in all 12 months for every market.

Table 5: Months in 2025 at or above the corresponding month of 2019

Market	Visitors	Overnight tourists	Excursionists
Singapore	12	4	12
Indonesia	10	7	12
China	12	10	12
Thailand	9	2	12
Brunei	6	2	12
India	12	12	12

Source: Authors' monthly comparison using Tourism Malaysia (2026). This table is a within-year consistency check rather than a formal statistical robustness or persistence test.

Supplementary source-market volume-receipt correspondence, 2023-2024

As a supplementary economic diagnostic rather than a benchmark-recovery test, the 2023-2024 nationality-level data show that visitor growth and receipt growth did not move mechanically together. Tourism Malaysia's visitor-receipt series increased from RM74.29 billion in 2023 to RM106.78 billion in 2024, a rise of 43.7%, while visitor arrivals increased by 31.1%. Across the six markets, however, both the level and change in aggregate receipts per visitor varied. This ratio is a market-level accounting measure and reflects the market's mix of tourists and excursionists as well as their spending.

Singapore accounted for 49.7% of Malaysia's foreign visitors in 2024 but 26.2% of visitor receipts. Its visitor arrivals increased by 27.2%, receipts by 29.5%, and derived aggregate receipts per visitor by 1.8%, to about RM1,482. China displayed the opposite volume-receipt balance: it accounted for 9.8% of visitors but 19.5% of receipts, with aggregate receipts per visitor of about RM5,600. Indonesia also contributed a larger share of receipts than visitors.

Thailand provides the clearest short-run divergence. Visitor arrivals fell by 1.4% between 2023 and 2024, yet receipts increased by 23.3%, raising aggregate receipts per visitor by about 25.1%, from RM1,408 to RM1,761. These patterns do not identify why spending differed across markets, and the nationality-level data do not permit tourist and excursionist expenditure to be separated within each market. The ratios therefore should not be interpreted as market-specific tourist spending propensities. They show instead that source-market volume and receipts answer different performance questions.

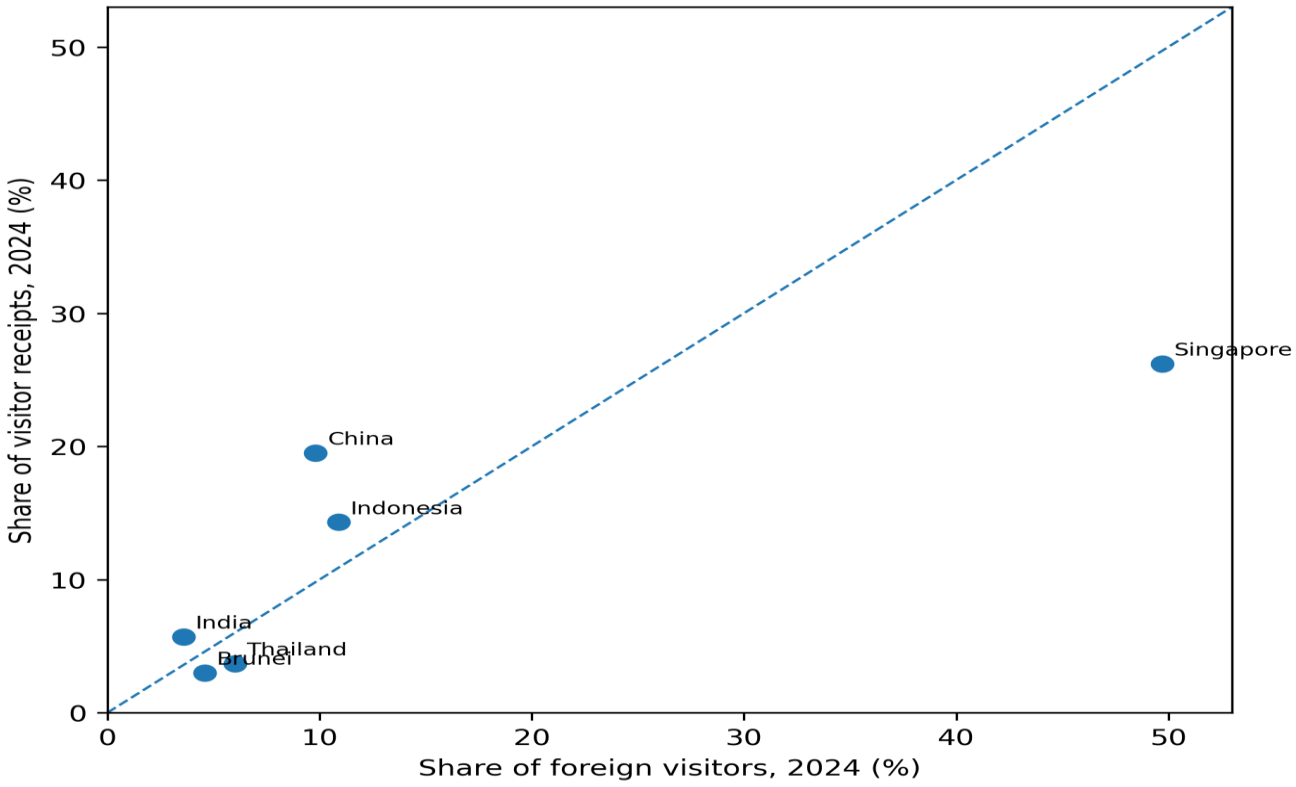
Table 6: Source-market visitor volume and receipts, 2024 and change from 2023

Market	Visitor share 2024	Receipt share 2024	Aggregate receipts / visitor	Visitor growth	Receipt growth	Receipts / visitor growth
Singapore	49.7%	26.2%	RM1,482	+27.2%	+29.5%	+1.8%

Indonesia	10.9%	14.3%	RM3,697	+19.1%	+29.0%	+8.3%
China	9.8%	19.5%	RM5,600	+130.9%	+135.0%	+1.7%
Thailand	6.0%	3.7%	RM1,761	-1.4%	+23.3%	+25.1%
Brunei	4.6%	3.0%	RM1,868	+55.2%	+54.1%	-0.7%
India	3.6%	5.7%	RM4,476	+76.6%	+79.3%	+1.5%

Source: Tourism Malaysia, Malaysia Tourism Statistics in Brief 2024. Aggregate receipts per visitor are derived from published visitor receipts divided by visitor arrivals and therefore reflect each market's tourist/excursionist composition as well as spending.

Figure 3: Visitor share and visitor-receipt share by source market, 2024



Note: The dashed line indicates equal shares of visitor volume and receipts. Source: Authors' calculations from Tourism Malaysia (2025).

DISCUSSION

Recovery Depends on What is Counted

The central result is not simply that Malaysia's tourism sector recovered after COVID-19. It is that the timing and apparent strength of recovery depend materially on the indicator selected. Total visitor volume exceeded the 2019 benchmark in 2024, one year before overnight tourist arrivals did so. Even in 2025, when tourist numbers had moved slightly above 2019, ALOS remained well below its pre-pandemic level and same-day visitors represented a much larger share of total inbound mobility. A headline visitor count therefore captures cross-border mobility, but it does not by itself establish restoration of overnight demand or duration.

This distinction sharpens the broader tourism-recovery literature. Prior studies show that recovery is heterogeneous across markets and that post-shock relationships can change over time (Liu et al., 2024a, 2024b). The Malaysian evidence adds an aggregation problem: even within the same country and year, one can reach different recovery conclusions depending on whether the metric is total visitors, overnight tourists, ALOS, or nominal expenditure. The paper therefore treats multidimensional recovery as a measurement discipline rather than as a claim that one indicator is intrinsically superior.

Same-Day Mobility Was Central to the Headline Increase

The rise in same-day mobility is not a marginal feature of the Malaysian recovery. Excursionists increased faster than overnight tourists nationally and in all six major source markets. For Singapore and Thailand, the importance of excursionists is especially clear because total visitors were above 2019 even though overnight tourist arrivals remained below the benchmark. The monthly consistency results show that the divergence was observed across most of 2025 rather than being generated by a few isolated months.

The pattern is consistent with the importance of same-day cross-border mobility in neighbouring markets, but the present design cannot establish the causes of the shift. Changes in land-border policy, transport capacity, exchange rates, trip purpose, shopping incentives, and travel costs may all matter. The contribution here is narrower: the arithmetic decomposition shows which visitor type accounted for the observed increase. A causal explanation would require a different design and additional explanatory variables.

Composition Matters Because Average Expenditure Differs by Visitor Type

The national expenditure split makes the compositional argument economically meaningful. Tourists represented 63.1% of visitors in 2025 but generated 95.6% of inbound expenditure. The approximate accounting average of RM4,483 per tourist compared with RM355 per excursionist should not be read as a structural parameter or individual behavioural estimate. It does, however, demonstrate that equal changes in the two visitor categories are not equivalent from an expenditure perspective.

This finding also explains why total visitor growth cannot be treated as a sufficient proxy for tourism receipts. At source-market level, Singapore generated far more visitor volume than its receipt share, while China and India generated receipt shares above their visitor shares. Thailand's 2023-2024 increase in receipts despite slightly lower visitor volume provides a further example. Because the source-market ratios combine tourists and excursionists, cross-market differences in aggregate receipts per visitor partly reflect visitor-type composition and should not be interpreted as pure spending propensities. The broader pattern remains consistent with expenditure research showing that tourism outcomes depend on both the extensive margin of visitor numbers and the intensive margin of spending (Alfarhan et al., 2024; Gedecho et al., 2023).

Implications for Tourism Performance Monitoring

For destination monitoring, the results support a compact multidimensional dashboard rather than reliance on a single headline arrival number. At minimum, total visitors should be reported alongside overnight tourists, excursionists, ALOS, and expenditure. These indicators answer different questions: total visitors measure mobility; overnight tourists are more directly connected to accommodation demand; ALOS captures duration; and expenditure captures nominal monetary contribution. For border-intensive source markets in particular, total visitor targets and overnight-tourism targets should be reported separately: exceeding a headline visitor target should not be interpreted as equivalent restoration of overnight demand.

The same logic applies to source-market assessment. Markets should not be interpreted solely by arrival rank because their roles differ. Some markets contribute scale and cross-border mobility, while others contribute a larger share of receipts relative to visitor volume. The appropriate metric therefore depends on the objective being evaluated. This is a measurement implication, not a normative ranking of visitor types or source markets.

CONCLUSION

This study re-examines Malaysia's post-pandemic inbound tourism recovery by disaggregating total visitors into overnight tourists and same-day excursionists and by adding duration and expenditure to the same analytical frame. The evidence shows that Malaysia's recovery was asynchronous across these dimensions. Total visitor volume exceeded the 2019 benchmark in 2024, while overnight tourists did not move slightly above that benchmark until 2025. By 2025, visitors were 20.4% above 2019 and excursionists 74.2% above, whereas tourists were only 2.0% above and ALOS remained 25.7% lower.

The source-market analysis shows that the national pattern was not uniform but that the direction of compositional change was widespread. Singapore and Thailand had clearly exceeded their 2019 total visitor counts while overnight tourists remained below the benchmark. In every major source market, excursionist recovery was stronger than tourist recovery. Monthly comparisons show that the visitor-tourist divergence was observed across much of 2025 rather than being driven only by a small number of exceptional months.

The expenditure evidence provides the final qualification. Tourists generated 95.6% of inbound expenditure in 2025 despite representing 63.1% of visitors, and the approximate national average expenditure per tourist was more than twelve times the corresponding excursionist average. Source-market visitor shares and receipt shares also differed substantially. The appropriate conclusion is therefore not that Malaysia either 'has' or 'has not' recovered in a single absolute sense. Rather, Malaysia recovered strongly in aggregate mobility and nominal expenditure, while visitor composition and trip duration remained different from the 2019 benchmark. The metric selected determines which dimension of recovery is being described. These descriptive comparisons identify differences in measured recovery but do not establish the causal drivers of those differences.

LIMITATIONS AND FUTURE RESEARCH

The study has six main limitations. First, it is descriptive and accounting-based; it does not identify the causal determinants of the compositional shift. Second, the 2019 benchmark measures return relative to a pre-pandemic level but does not estimate the counterfactual trajectory that might have occurred without COVID-19. Third, the supplementary nationality-specific visitor-receipt series is available here only for 2023-2024, preventing a direct source-market expenditure comparison with 2019. Fourth, both the national inbound expenditure series and the nationality-specific visitor-receipt series are nominal and not price-adjusted; observed increases may therefore partly reflect inflation or other price changes and should not be interpreted as real purchasing-power recovery. Fifth, the visitor-type expenditure averages are aggregate accounting ratios constructed from official category totals and aligned arrival counts within the latest TSA framework; they are not individual-level spending estimates. Sixth, ALOS is available as a national published indicator rather than a consistently comparable source-market series in the data used.

Future research can build directly on these limitations. Monthly source-market data could be combined with exchange rates, source-country income, transport connectivity, border-policy changes, and visa conditions in dynamic or panel models. Structural-break and interrupted-time-series methods could test whether the post-pandemic shift in visitor composition is persistent, while price-adjusted expenditure and source-market ALOS would permit stronger analysis of real expenditure intensity and visitor-nights.

Ethical Considerations

The study used only publicly available aggregate secondary statistics and involved no human participants, animals, or identifiable individual-level data; no human-subject or animal data were collected.

Data Availability

All data used in the study are publicly available in the Department of Statistics Malaysia Tourism Satellite Account publications and Tourism Malaysia statistical publications cited in the manuscript. All recovery

indices, decomposition results, approximate visitor-type expenditure averages, and aggregate receipts-per-visitor measures are derived from those published aggregates.

Conflict of Interest

The authors declare no conflict of interest.

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