

MALAYSIA | MARKET PROFILE 2018-19

MARKET OVERVIEW

MALAYSIA LEISURE VISITATION TO WA¹

- **88,800** leisure visitors to WA
- WA's **2nd largest** international market by leisure visitors
- **\$119.4 million** spent by leisure visitors in WA*
- Average daily spend: **\$140**
- Average length of stay: **10 nights**

VISITORS AND SPEND IN WA BY PURPOSE¹

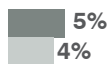
Holiday



Visiting Friends and Relatives



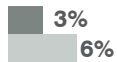
Business



Education



Other



MALAYSIA LEISURE VISITATION TO AUSTRALIA¹

- **299,500** leisure visitors to Australia
- Australia's **7th largest** international market by leisure visitors

SEASONALITY - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA²

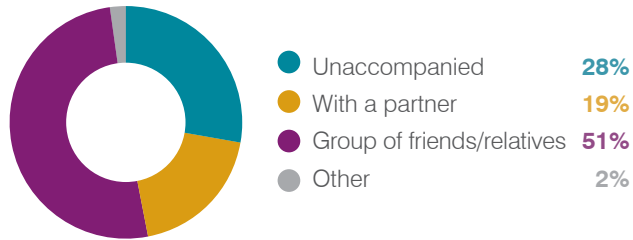
Arrivals typically fluctuate throughout the year.



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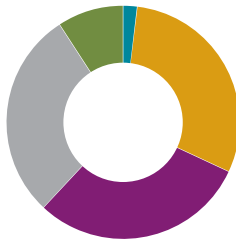
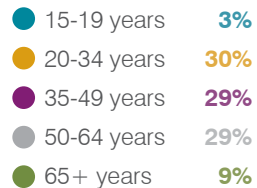
TRIP PROFILE

TRAVEL PARTY⁴



LEISURE VISITORS BY AGE⁴

WA

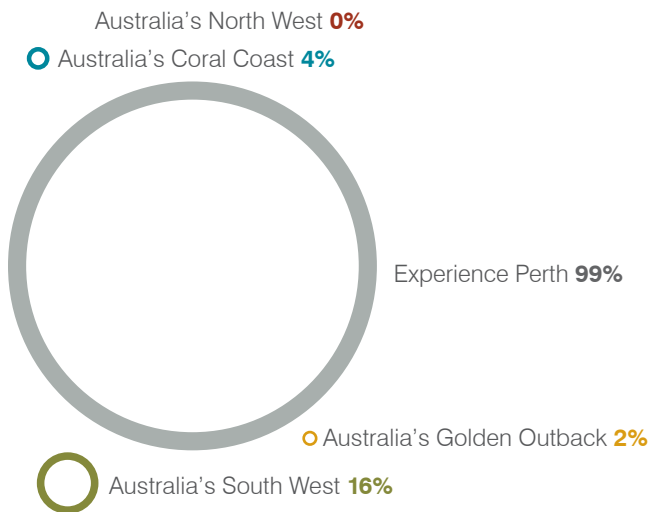


Australia



REGIONAL DISPERSAL⁴

An average of one in five **19%** of Malaysian leisure visitors to WA spend **at least one night in Regional WA**.



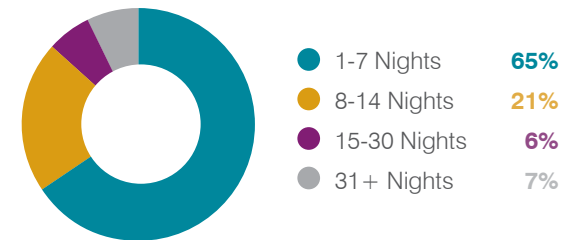
REPEAT VISITORS⁴

70% of Malaysian leisure visitors to WA are on a **return visit** to Australia.

OTHER STATES VISITED⁴

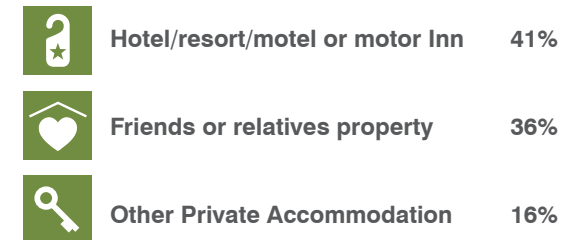
95% of Malaysian leisure visitors to WA **only visit WA** on their trip.

LENGTH OF STAY – LEISURE VISITORS TO WA⁴



TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA⁴

Proportion staying in this accommodation type (%)



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MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

High Value Travellers (HVTs) are a new target audience for Tourism Western Australia.

DEFINITION OF A HIGH VALUE TRAVELLER



Travel Long Haul



Considering or intending to visit Australia.



Motivated by nature and wildlife, aquatic and coastal, and food and wine experiences



Represent "high value": above average trip expenditure, and a higher likelihood to stay longer and disperse further

WHAT MALAYSIAN HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY³



World class nature & wildlife



A safe and secure destination



A destination that offers value for money



Good food, wine, local cuisine and produce



A family friendly destination

HVTs BARRIERS TO VISITING AUSTRALIA³

The **cost** of an Australian holiday (including the visa) is the top barrier for this market. Competition from **other destinations** (notably Japan) and **lack of urgency** for visiting Australia ("I'd like to go, just not right now") are also key barriers. This underscores the importance of promoting Australia's **coastal, nature and wildlife offerings**, a major drawcard for this market, in gaining market share. It will also be important to promote **affordable and accessible experiences** to this market.

Top 3 Barriers to visiting Australia



High cost of travelling around



The Aus dollar makes it too expensive



Planned a holiday to another destination

HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES⁵

Based on last out of region holiday

Based on their last holiday, Malaysian HVTs tend to decide on their holiday destination and make their **first booking** around **3-6 months** before their trip.

HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING³

Inspiration



General internet searching



Online hotel booking site



Social media



Traveller review sites



Talking to F&R

Booking



Flights
Airline (online)
Travel agent (offline)
Travel website/app



Activities
Operator (online)
Travel website/App
Travel agent (offline)



Accommodation
Accomm. Provider (online)
Travel website/app
Travel agent (offline)

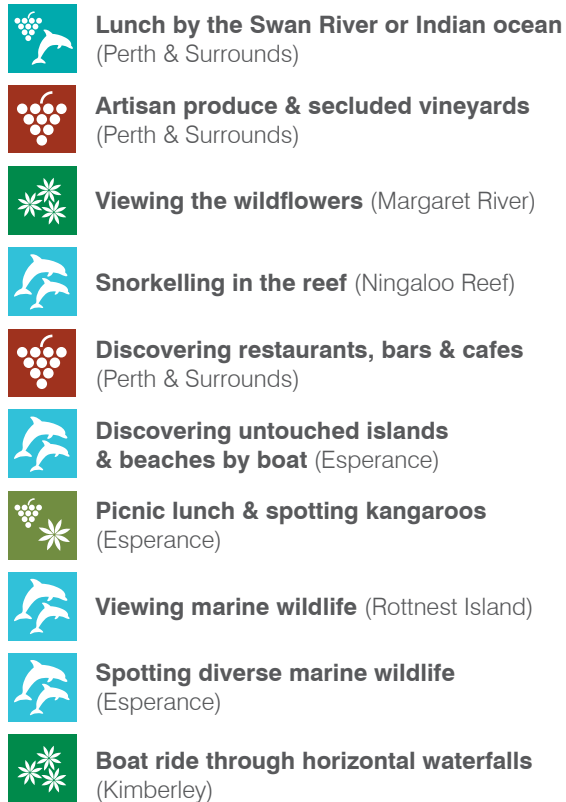
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APPEALING WA DESTINATIONS AND EXPERIENCES

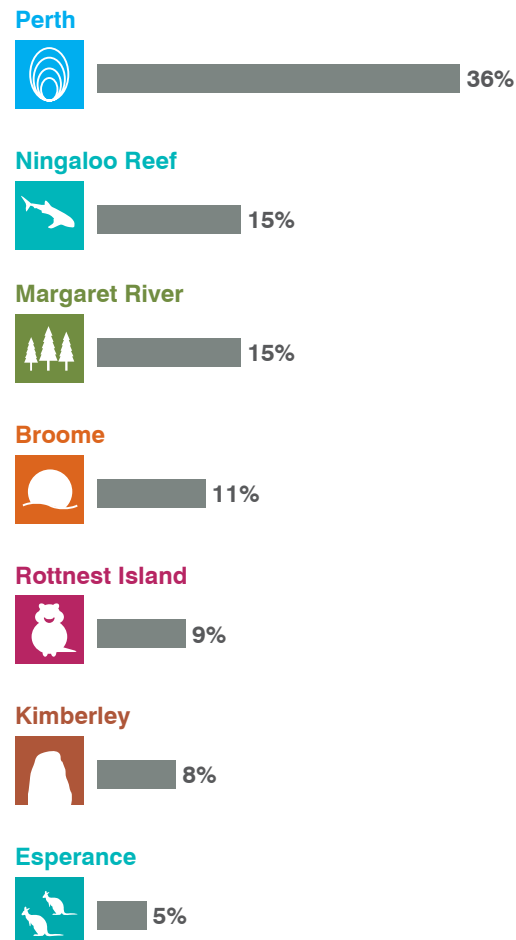
In research undertaken in 2018, **Malaysian HVTs** were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that **Perth** is by far the most preferred destination. **Food and wine** experiences in Perth generate strong appeal, whilst **nature and aquatic experiences** also feature.

MOST APPEALING EXPERIENCES⁵



MOST APPEALING DESTINATION⁵



WHY THESE DESTINATIONS AND EXPERIENCES APPEAL⁵

Perth & Surrounds

"I like Perth's city life, from small bars in the urban villages to the historic port"

"Like the idea of exploring Perth and enjoying great food and shopping. See dolphins up close is also not to be missed"

Ningaloo Reef

"Amazing place for marine nature activities like swimming with a whale shark & spotting humpback whales."

Margaret River

"Nature surroundings and the opportunity to try great local produced food"

Notes

* Expenditure excludes pre-paid package spend.

'Leisure' comprises both holiday visitors and those visiting friends and relatives (VFR).

References

1. Tourism Research Australia – International Visitor Survey, YE Jun 19
2. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Jun 19
3. Tourism Australia – Consumer Demand Project 2019 Malaysia Report
4. Tourism Research Australia – International Visitor Survey, 3 year average (YE Jun 2017/18/19)
5. BDA – International High Value Travellers - Western Australia State Report, 2019

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