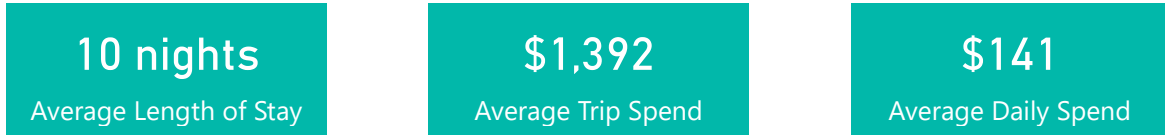


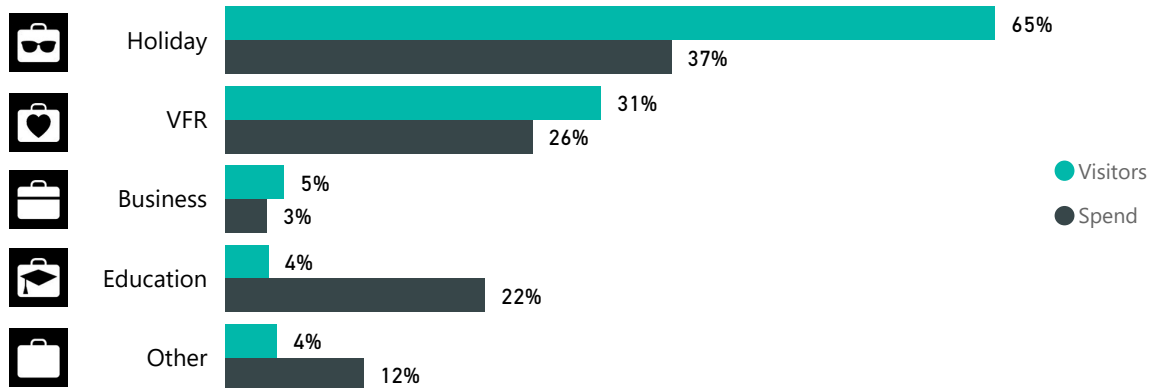
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MARKET OVERVIEW

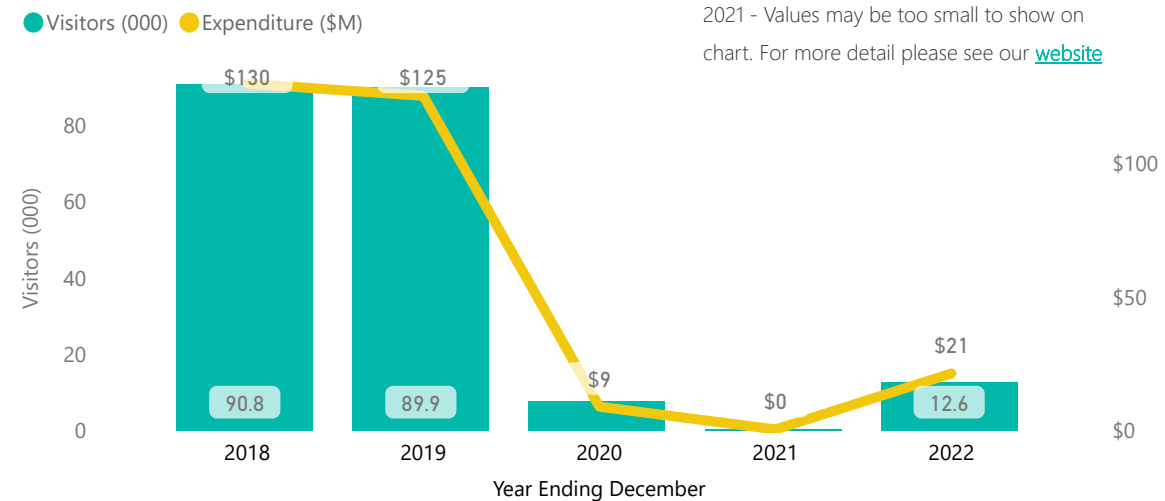
Leisure Visitation to WA¹



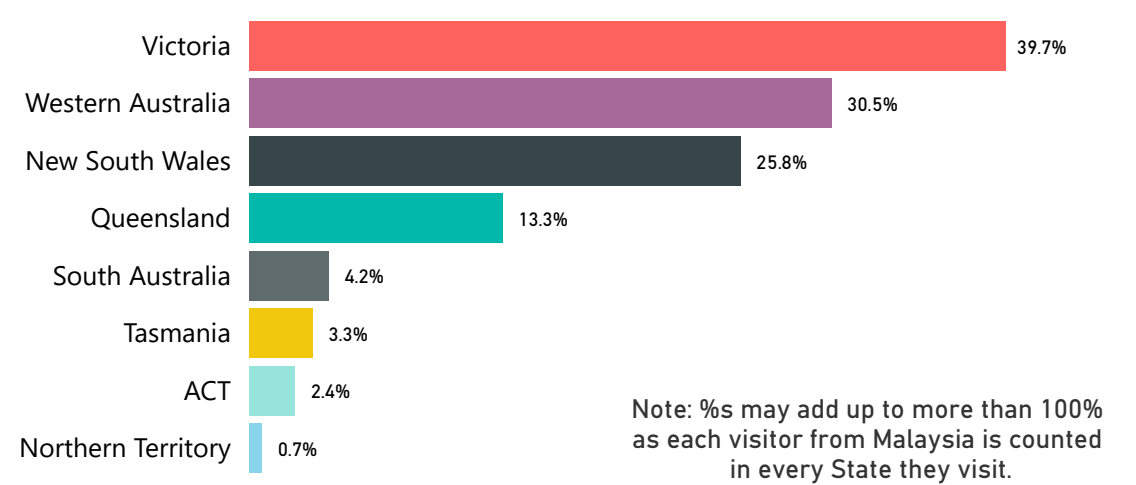
International Visitors and Spend by Purpose (WA)¹



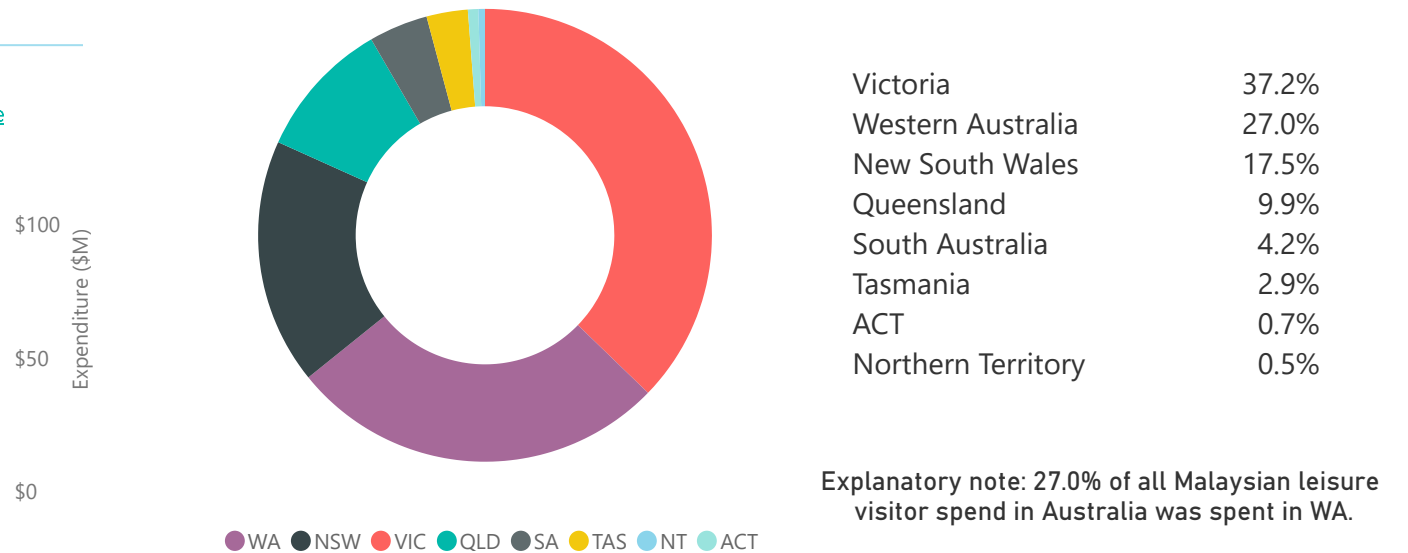
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



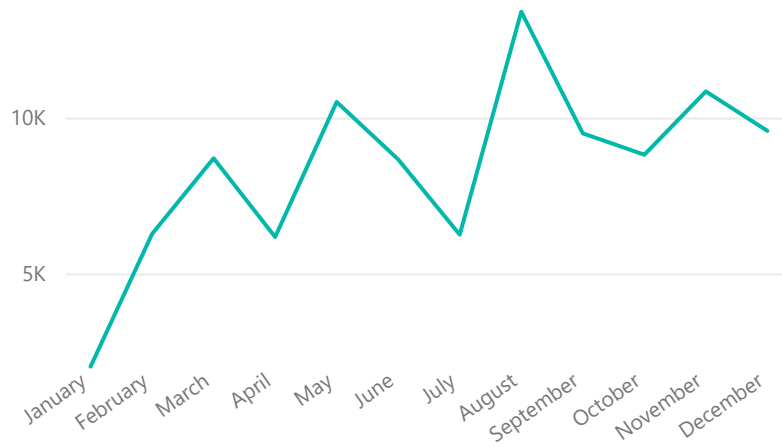
Market Share of International Leisure Visitor Spend in Australia¹



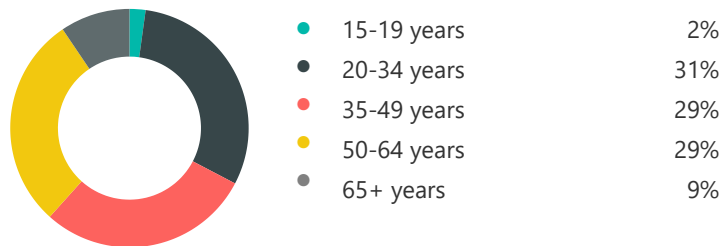
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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

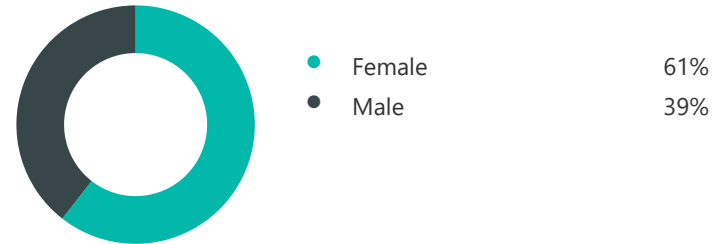
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



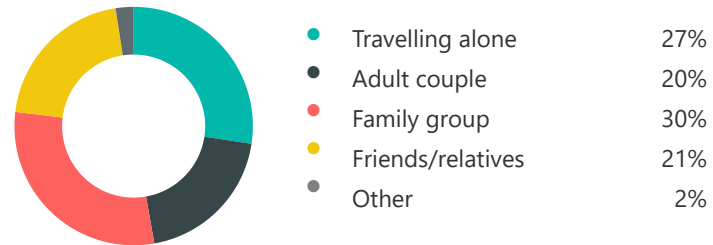
Age³



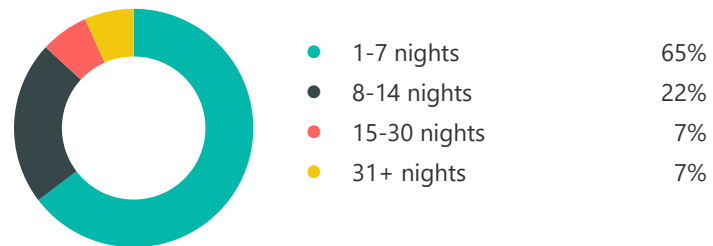
Gender³



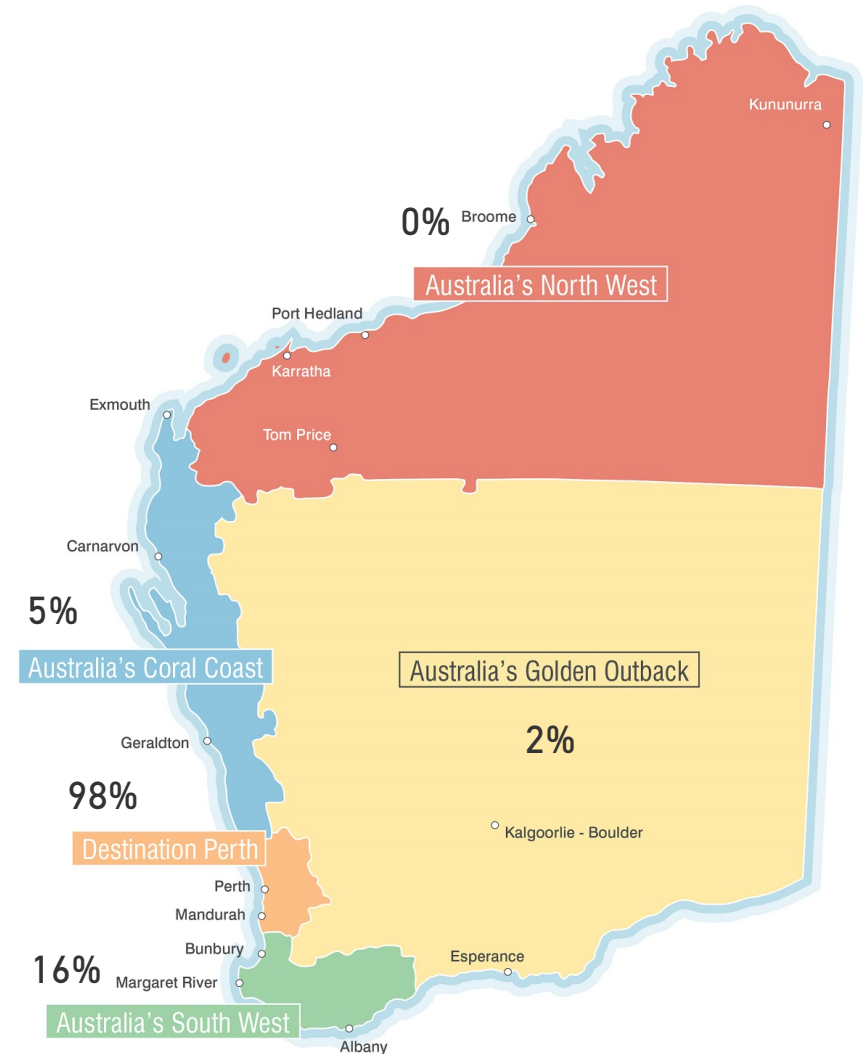
Travel Party³



Length of Trip³



Regional Dispersal³



Note: Due to the small number of international visitors to WA, trip details post 2019 cannot be provided at this time.

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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

Top 5 Activities for Leisure Visitors to WA³

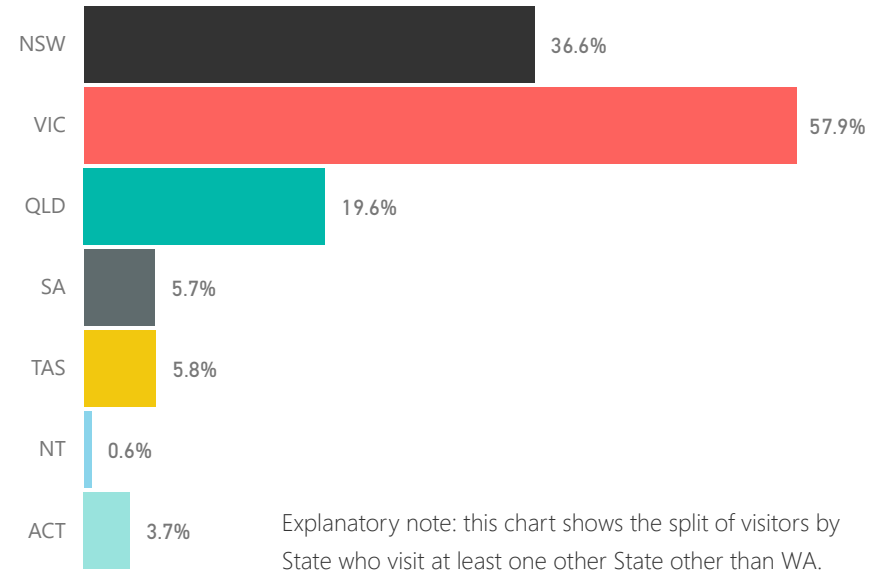
1	Eat out / dine at a restaurant and/or cafe	93%
2	Go shopping for pleasure	89%
3	Go to markets	62%
4	Sightseeing/looking around	78%
5	Visit national parks / state parks	61%

NOTE: Activity may have taken in place in WA or elsewhere in Australia during the trip.

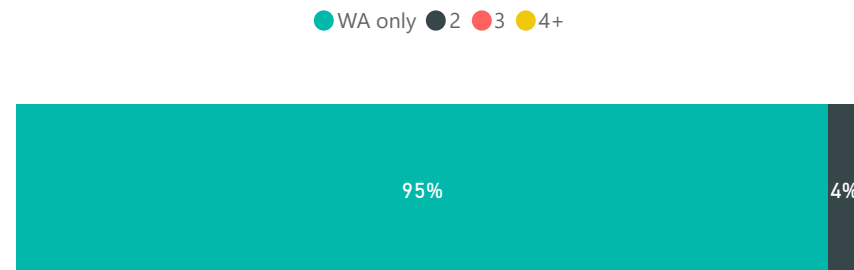
Top 3 Accommodation Choices for Leisure Visitors to WA³

1	Other Private Accommodation	52%
2	Hotel/resort/motel or motor Inn	40%
3	Friends or relatives property	35%

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

93% of Malaysian leisure visitors to WA are free independent travellers. Equally, 96% of Malaysian leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

Repeat Visitors³

69% of Malaysian leisure visitors to WA are on a return visit to Australia

Travel Packages³

7% of Malaysian leisure visitors to WA arrived on a travel package

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MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

Definition of a High Yield Traveller (HYT)



Willing to travel out of their region.



High overall trip expenditure with a minimum of \$200 per person per night

What HYTs are looking for in a holiday destination generally ⁶

- 1 Safety & security
- 2 World class natural beauty
- 3 Value for money
- 4 Clean cities
- 5 Good food & wine

Safety stands out for this market, followed by natural beauty and value for money. Clean cities and food experiences are also important for this market.

HYTs Destination Choice and First Booking Timeframes ⁵

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.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 General internet searching
- 2 Online hotel booking site
- 3 Social media
- 4 Traveller review sites
- 5 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)

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 There are other places I would prefer to travel to/ have planned to travel to
- 2 I am concerned about the dangers of Covid-19
- 3 High cost of living expenses
- 4 High cost of travelling around
- 5 The Australian dollar makes it too expensive to holiday there

Preference for other places is the top barrier, along with high costs - both the initial outlay for the airfare and on-the-ground costs. To overcome these barriers, it will be important to promote quality nature and food experiences to this market that are affordable, accessible and unique.

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APPEALING WA DESTINATIONS AND EXPERIENCES

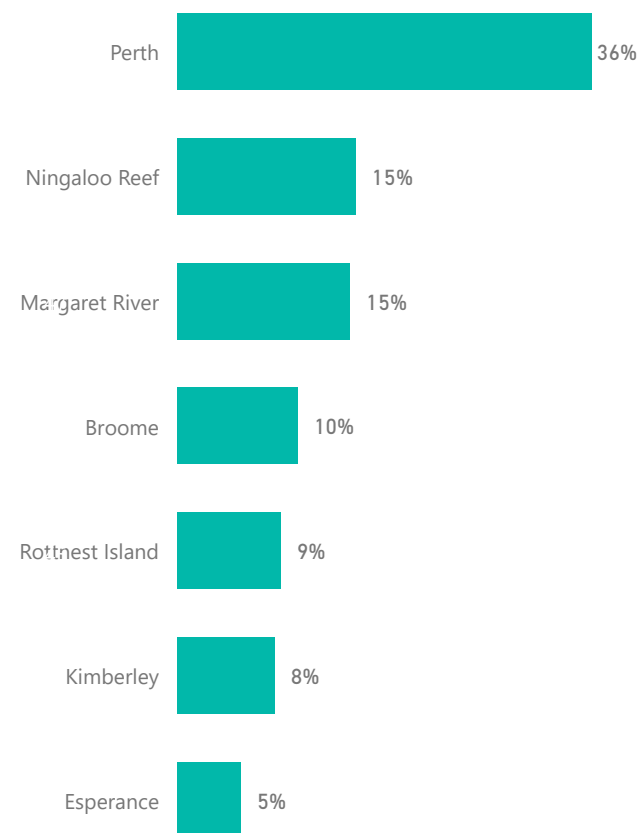
In research undertaken in 2018, Malaysian HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

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 Experiences⁷

- 1 Lunch by the Swan River or Indian ocean**
(Perth & Surrounds)
- 2 Artisan produce & secluded vineyards**
(Perth & Surrounds)
- 3 Viewing the wildflowers**
(Margaret River)
- 4 Snorkelling in the reef**
(Ningaloo Reef)
- 5 Discovering restaurants, bars & cafes**
(Perth & Surrounds)
- 6 Discovering untouched islands & beaches by boat**
(Esperance)
- 7 Picnic lunch & spotting kangaroos**
(Esperance)
- 8 Viewing marine wildlife**
(Rottnest Island)
- 9 Spotting diverse marine wildlife**
(Esperance)
- 10 Boat ride through horizontal waterfalls**
(Kimberley)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

Margaret River

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

Ningaloo Reef

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

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"

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 19
2. Tourism Research Australia – International Visitor Survey, YE Dec 18/19/20/21/22
3. Tourism Research Australia – International Visitor Survey, 3 yr average, YE Dec 17/18/19
4. 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 Dec 19
5. Tourism Australia – Consumer Demand Project 2019.
6. Tourism Australia – Consumer Demand Project 2022.
7. BDA – International High Value Travellers - Western Australia State Report, 2019

Published by Tourism WA, April 2023

For more information, please contact: research@westernaustralia.com