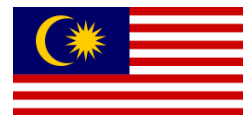


# Consumer Demand Project 2019 Malaysia Market Fact Sheet



## Current Malaysia Visitation and Expenditure in Australia<sup>1</sup>

Malaysians spent \$970.6m in Australia in the year ending September 2019, a decline of 8.0 per cent compared to the previous year. During the same period, visitation decreased by 3.7 per cent to 344,000 and visitors stayed 7.3m nights, down 17.5 per cent.



**\$970.6m** spend  
-8.0% year-on-year



**344,000** visitors  
-3.7% year-on-year



**7.3m** nights  
-17.5% year-on-year

## Factors of importance when choosing holiday destination

Safety and security is the most important factor for Malaysians selecting holiday destinations. Compared to other markets, they place more importance on value for money and friendly, family-friendly destinations.

### Top five importance factors

% ranking each factor in their top five most important



**A safe and secure destination** **62%**  
(54%)



**A destination that offers value for money** **49%**  
(39%)



**World-class natural beauty and wildlife** **46%**  
(49%)



**Friendly and open citizens, local hospitality** **37%**  
(32%)



**A family friendly destination** **36%**  
(26%)

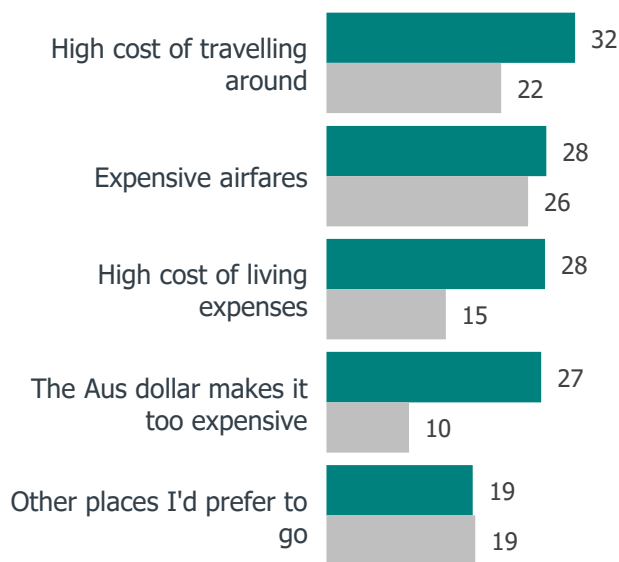
% Malaysian travellers (%) 11 Market total<sup>2</sup>

## Barriers to visiting Australia

Cost is a key barrier for Malaysian travellers. Compared to the 11 market total, Malaysians are more than twice as likely to cite the Australian dollar as a barrier to visitation. The high cost of travelling around, airfares and living expenses are also barriers.

### Top five barriers to visiting Australia

% of those not intending to visit Australia



■ Malaysian travellers ■ 11 Market total<sup>2</sup>

## Research Background

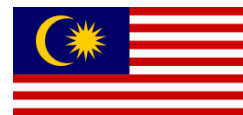
The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

# Consumer Demand Project 2019 Malaysia Market Fact Sheet



## Current Malaysia Visitation and Expenditure in Queensland<sup>1</sup>

Visitors from Malaysia to Queensland increased 2.6 per cent in the year ending September 2019, to 50,000 with visitors staying 636,000 nights down by 36.5 per cent. During the same period, Malaysian visitor spend declined by 21.6 per cent to \$88.0m.



**\$88.0m** spend  
-21.6% year-on-year



**50,000** visitors  
+2.6% year-on-year



**636,000** nights  
-36.5% year-on-year

## Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked second amongst Malaysian travellers for consideration and first for experience awareness and intention but is the fourth most visited state.

### Queensland's competitive rankings<sup>3</sup>

ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) <sup>4</sup>	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

■ 2018 rank ■ 2019 rank

**How to read this:**  
Malaysian travellers rank Queensland 2nd out of Australian states and territories for consideration

## Australia's competitive rankings - Malaysian market

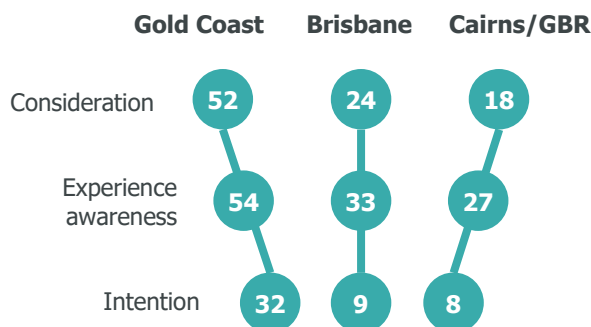
ranking against other international destinations



**How to read this:** Australia comes 2<sup>nd</sup> in the list of destinations Malaysian travellers intend to visit, but ranks 5<sup>th</sup> in terms of actual visitation

## Queensland destinations - Malaysian market

% of travellers considering Australia



**How to read this:** 52% of Malaysian travellers considering visiting Australia have considered visiting the Gold Coast, but only 32% intend to actually visit

1 Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)  
3 INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany  
4 Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

# Consumer Demand Project 2019 Malaysia Market Fact Sheet



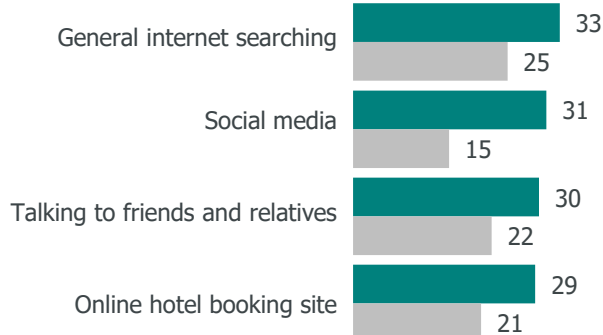
## Sources for travel planning

Compared to the other markets, Indonesian travellers are more likely to use online channels during the travel booking cycle. They are also more likely to source inspiration from internet searching and social media.

Compared to the 11 market total, Malaysian travellers were more likely to book flights, tours and accommodation online, directly through the operator.

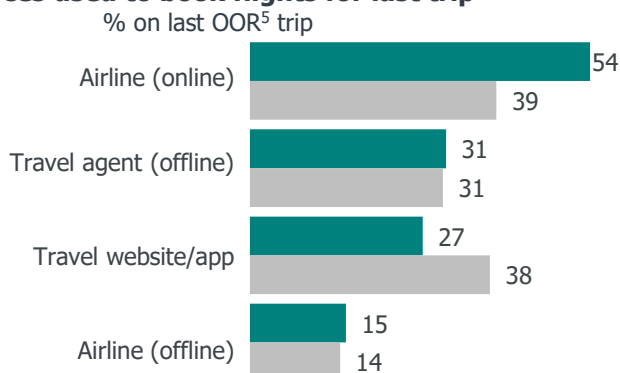
## Sources of inspiration for last trip

% on last OOR<sup>5</sup> trip



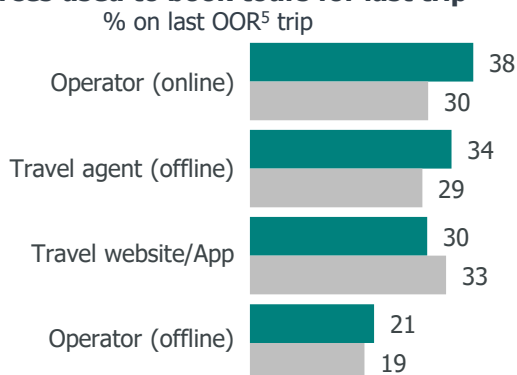
## Sources used to book flights for last trip

% on last OOR<sup>5</sup> trip



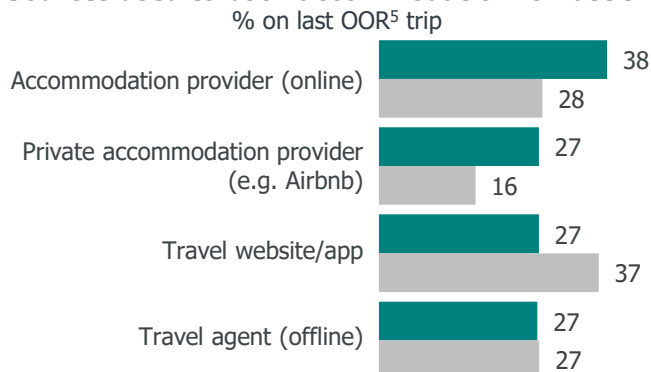
## Sources used to book tours for last trip

% on last OOR<sup>5</sup> trip



## Sources used to book accommodation for last trip

% on last OOR<sup>5</sup> trip



■ Indonesian travellers    ■ 11 Market total<sup>2</sup>



<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

<sup>5</sup> OOR Trip – Out of Region Trip (Indonesian travelling outside Nepal/Sri Lanka/Maldives/South East Asia [excluding Guam]/Middle East)