

2023 INTERNATIONAL MARKET UPDATE

MALAYSIA

MARKET OVERVIEW

Results based on year ending June 2023

- Malaysia is South Australia's tenth largest inbound market and is currently 35% down on pre-Covid visitation levels, and 37% down on expenditure levels.
- Key demand-driving experiences include food and wine, nature and wildlife and the range of distinctive landscapes on Adelaide's doorstep such as the Barossa, Adelaide Hills and Fleurieu Peninsula.
- Malaysians usually visit one or maximum two states on each visit to Australia.
- Malaysians have limited time to travel, preferring to take a series of short trips rather than one long holiday per year.
- 98% of Malaysian visitors to South Australia have been to Australia before.

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2023

VISITORS



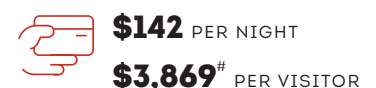
NIGHTS



EXPENDITURE



AVERAGE SPEND



AVERAGE LENGTH OF STAY



INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#10 FOR VISITORS

#8 FOR NIGHTS

#9 FOR EXPENDITURE

*A high average due to education visitors.

AIR ACCESS

MALAYSIA



Key Airlines

Malaysia Airlines (MH) and Batik Air Malaysia (OD) offer a direct service from Kuala Lumpur to Adelaide

Multiple airlines offer connections via other Australian Airports

FAST FACTS & FIGURES

Annual average of 2017-2019 figures

MALAYSIA	HOLIDAY	VFR [^]	BUSINESS	OTHER	TOTAL
Visits (SA)	5	7	1	2	14
Visits (AUS)	208	133	24	44	351
Nights (SA)	44	126	8	207	385
Nights (AUS)	1,747	2,477	226	3,705	8,155
ALOS[^] - Nights (SA)	9	18	8	104	28
ALOS[^] - Nights (AUS)	8	19	9	84	23
Expenditure					\$55M

(\$.000)

[^] ALOS = Average Length Of Stay, VFR = Visiting Friends and Relatives.

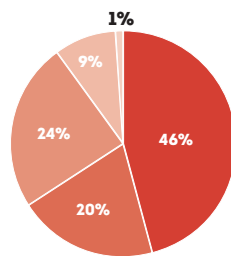
VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



Travel party description (to SA)

- Unaccompanied
- Adult couple
- Family group
- Friends/relatives travelling together
- Business



IMPORTANCE FACTORS

Data from Consumer Demand Project (CDP) report - August 2023



60%

Safety and security
VS. 53% GLOBAL AGGREGATE



44%

Value for money
VS. 37% GLOBAL AGGREGATE



40%

World-class beauty and nature
VS. 40% GLOBAL AGGREGATE



35%

Clean cities
VS. 25% GLOBAL AGGREGATE



33%

Good food and wine
VS. 37% GLOBAL AGGREGATE

GLOBAL AGGREGATE: This is from the Consumer Demand Project research conducted quarterly by Tourism Australia in 12 key international markets for Australia. Global aggregate refers to the average across all these markets.

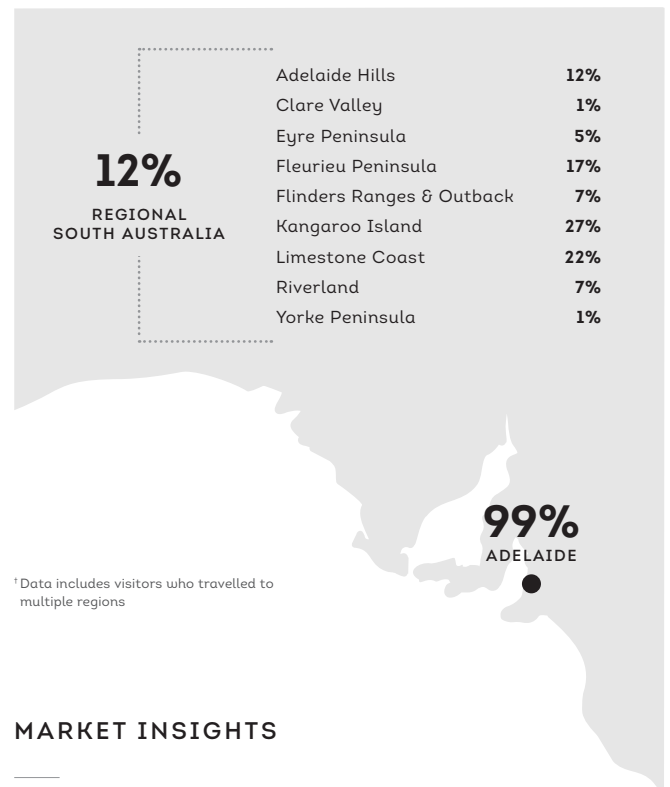
TARGET MARKET PROFILE



Professionals who travel as a couple or with family/friends, well-travelled, seeking unique and bespoke experiences most having been to Australia previously.

VISITOR DISPERSAL[†]

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



MARKET INSIGHTS

- Malaysian travellers are price-conscious, digitally sophisticated and very comfortable actively searching for deals and better perceived value for money.
- South Australia generally attracts couples and families residing in the Klang Valley (Kuala Lumpur), Penang and Johor Bahru.
- Working with trade partners remains important in the market to ensure that trade have the knowledge required to sell South Australia confidently.
- The SATC continues to build on strong relationships with key trade partners, media, and airlines to reach consumers directly to ensure that destination awareness continues to be raised for South Australia.
- The Australian visa application for Malaysians is more stringent in comparison to others such as Singapore. This plays an important part in their decision-making process when selecting a holiday destination.
- Australia has a high appeal for incentive groups in Malaysia with 86% likelihood of planning an incentive trip to Australia in the next 12-24 months.
- Halal meals (alcohol and pork-free) and prayer facilities are essential considerations for the Muslim travellers which is a sector of growing importance from Malaysia. It is important to be aware of cultural and religious sensitivities when promoting your experience to this market.

INFORMATION SOURCES

Annual average of 2017-2019 figures – current year samples not yet sizeable enough



48%

Internet



45%

Friend/relative in Australia or visited



34%

Other



12%

Previous visit(s)



7%

Travel agent



5%

Did not get any information



2%

Travel book or guide

TOP 3 BARRIERS TO VISITING AUSTRALIA

Data from Consumer Demand Project (CDP) report – August 2023



High cost of travelling around



High cost of living expenses



Expensive airfares

CONTRACTING & BROCHURE TIMES

The key contracting period runs from April to June with validity from 1 October to 30 September

MALAYSIA CHECKLIST

Consider the following points when targeting travellers from Malaysia:

- ✓ **Be easy to book online** by ensuring you have a seamless booking platform and informative, up to date website.
- ✓ **Connect with major OTAs in-market** to ensure that your product/experiences are showcased to their audiences.
- ✓ **Build relationships with trade partners** by attending various trade events, ensure that you keep them across any changes to your product and be responsive to their enquiries and questions.
- ✓ **Showcase the immersive experiences** you offer highlighting the unique and authentic aspects of your offering with rich imagery and video assets.

KEY TRADE PARTNERS

Key Agents

- Apple Vacation
- Corporate Information Travel (CIT)
- Forever Travel (Penang)
- Sedunia Travel
- Holiday Tours
- Airlink Travel

Inbound Representative Company in Australia

Business is highly competitive and travel agents do not contact a single inbound operator, rather request quotations for each tour and confirm the booking with the inbound tour operator that provides the cheapest quotation for that particular tour.

Active inbound companies include:

- Xceptional Tours Australia
- Holiday Services Down Under
- H2Oz
- Valentino

TOP ONLINE TRAVEL AGENTS

Trip.com

agoda

traveloka

TOP TRAVEL RESOURCES

agoda

Booking.com

airasia

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Source: International Visitor Survey Dec 17, Dec 18, Dec 19 and June 23 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 23. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2017 to Dec 2019. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).

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