

This fact sheet provides a summary of the latest tourism data for Malaysian visitors to Victoria. Information includes: visitor numbers, purpose of visit, expenditure, visitor forecasts, regional visitation and dispersal, demographics, visitor behaviour, airline used, travel style, information sources and booking methods.

I OVERVIEW OF MALAYSIAN VISITORS TO AUSTRALIA

I.1 Trends

Total Visitation from Malaysia to Australia, 2000-2010

Year Ending							Av Annual	Av Annual	% Change	
	December	2000	2006	2007	2008	2009	2010	% Change		
								2000-2010	2006-2010	
Visitors (000s)		136	135	143	154	192	213	4.6%	12.1%	10.7%
Visitor Nights (000s)		3,558	5,045	5,276	5,967	6,776	6,957	6.9%	8.4%	2.7%
Average Length of Stay		26.2	37.4	36.8	38.8	35.2	32.7			

Malaysia generated 213,000 visitors to Australia in the year ending December 2010. The number of visitors from Malaysia coming to Australia has increased 10.7% year-on-year and at a rate of 4.6% per annum over the period 2000-2010. Malaysian visitors to Australia are also spending more nights in the country. In 2010, they spent 7.0 million nights in Australia, an increase of 2.7% over 2009. Visitor nights have grown at a rate of 6.9% per annum between 2000 and 2010. The average length of stay in Australia by Malaysian visitors was 32.7 nights in 2010.

I.2 Main Purpose of Trip

Visitation (000s) from Malaysia to Australia by Purpose of Trip, 2000-2010

Year Ending							Av Annual	Av Annual	% Change	
	December	2000	2006	2007	2008	2009	2010	% Change		
								2000-2010	2006-2010	09-10
Holiday		80	65	66	73	94	107	3.0%	13.6%	13.9%
Visiting friends & relatives		25	27	31	32	45	49	6.8%	15.8%	7.6%
Business		14	17	19	19	18	20	3.7%	4.1%	15.1%
Education		11	19	20	21	27	26	8.8%	8.7%	-3.5%
Other (incl Employment)		5	7	8	8	8	10	7.2%	8.8%	28.8%

107,000 visitors came to Australia from Malaysia in 2010 for holiday purposes, an increase of 13.9% from the previous year. 49,000 Malaysian visitors came to Australia to visit friends and relatives (VFR), an increase of 7.6% from the previous year. Additionally, the VFR segment has experienced strong longer term growth over the period 2000-2010, increasing by an average of 6.8% per annum.

The business travel sector experienced an increase in 2010 to over 20,000 visitors, an increase of 15.1% from the previous year. However, the education segment has experienced a short term decline with a decrease of 3.5% from the previous year to 26,000 visitors in 2010. This segment has however grown at an average annual rate of 8.8% since 2006.

International Market Profile

Malaysia

Year Ending December 2010

1.3 States/Territories Visited

Malaysian Overnight Visitation (000s) to Australia by State/Territory, 2000-2010

Year Ending							Av Annual	Av Annual	% Change
	December	2000	2006	2007	2008	2009	2010	% Change	
									2000-2010
Australia	136	135	143	154	192	213	4.6%	12.1%	10.7%
New South Wales	48	40	41	39	43	43	-1.2%	1.4%	-0.1%
Victoria	38	47	48	53	73	91	9.1%	17.6%	24.5%
Queensland	37	29	29	41	41	45	2.0%	11.4%	11.2%
South Australia	7	9	10	8	10	13	6.6%	8.7%	28.3%
Western Australia	41	33	40	40	59	56	3.2%	14.5%	-4.3%

There were 91,000 Malaysian overnight visitors to Victoria in 2010, a 24.5% increase from the previous year. Malaysian overnight visitation to Victoria has increased by 9.1% per annum since 2000, outperforming all other states and territories including key competitors New South Wales (-1.2% p.a.) and Queensland (+2.0% p.a.).

Malaysian Visitor Nights (000s) in Australia by State/Territory, 2000-2010

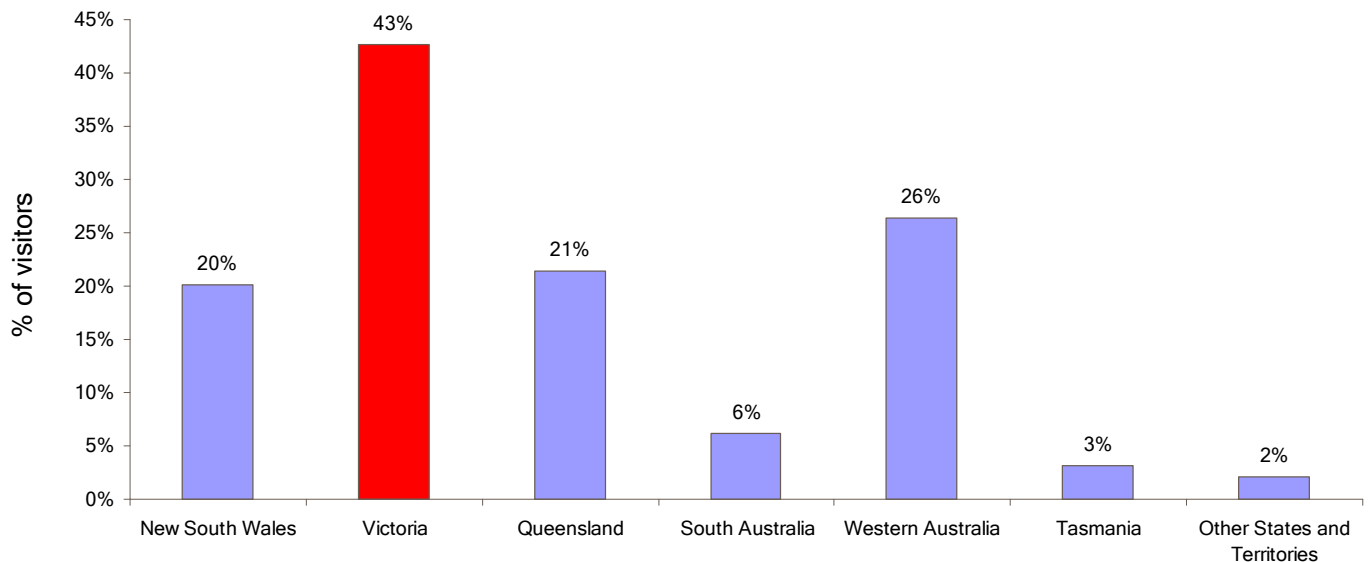
Year Ending							Av Annual	Av Annual	% Change
	December	2000	2006	2007	2008	2009	2010	% Change	
									2000-2010
Australia	3,558	5,045	5,276	5,967	6,776	6,957	6.9%	8.4%	2.7%
New South Wales	1,201	1,015	1,089	943	830	911	-2.7%	-2.7%	9.7%
Victoria	893	1,698	1,328	2,038	2,498	2,661	11.5%	11.9%	6.5%
Queensland	-	-	627	750	580	708	-	-	22.1%
South Australia	-	581	592	-	-	579	-	-0.1%	-
Western Australia	577	835	1,299	1,398	1,827	1,634	11.0%	18.3%	-10.6%
Other States & Territories	-	523	-	-	588	-	-	-	-

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, the number of visitor nights spent in Victoria by Malaysian visitors increased by 6.5% from the previous year to 2.7 million visitor nights. Malaysian visitor nights in Victoria have grown at an annual average rate of 11.5% between 2000 and 2010.

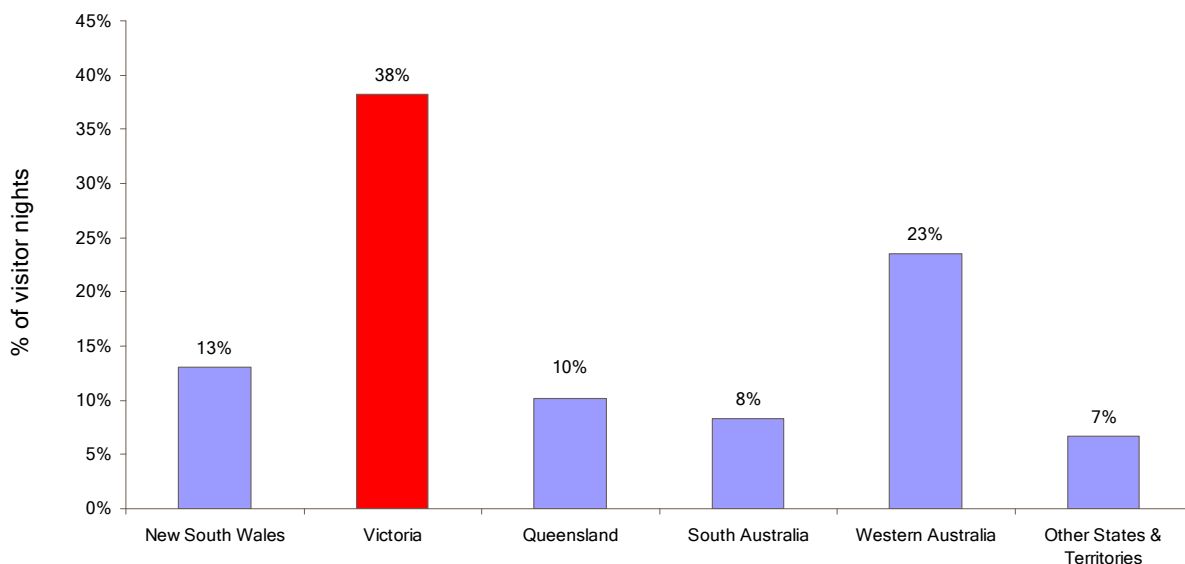
1.4 Market Share by State

Malaysian Visitors¹ to Australia, Year ending December 2010 – by State



43% of Malaysian visitors to Australia in 2010 stayed overnight in Victoria, the highest of all states and territories.

Malaysian Visitor Nights to Australia, Year ending December 2010 – Market Share by State



Victoria's market share of Malaysian visitor nights in 2010 was 38%, the highest market share of all states and territories.

¹ NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

I.5 Main Purpose of Visit – Visitors to Victoria

Malaysian Visitation (000s) to Victoria by Main Purpose of Visit, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
Holiday	20	22	21	20	34	44	7.9%	19.1%	26.6%
Visiting friends & relatives	9	10	12	14	19	23	9.4%	23.5%	19.3%
Total Leisure	30	31	33	34	53	66	8.4%	20.5%	24.0%
Business	-	-	6	7	-	8	-	-	-
Education	-	9	7	10	12	13	-	10.8%	9.8%
Other (incl Employment)	-	-	-	-	-	-	-	-	-

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, there were 66,000 Malaysian overnight leisure visitors to Victoria, a 24.0% increase over the previous year and 20.5% average annual increase from 2006 to 2010. Increases in both overnight holiday and VFR visitors were experienced year-on-year (up 26.6% and 19.3% respectively). Victoria also experienced a year-on-year increase in overnight education (+9.8%) visitors from Malaysia.

I.6 Regional Dispersal² – Visitor Nights (000s), 2000 - 2010

Malaysia	2000	2006	2007	2008	2009	2010	Ave. Annual	Ave. Annual	% change
							Change (%)	Change (%)	
							2000-2010	2006-2010	2009-2010
Regional Australia - Visitor Nights (000s)	-	513	-	-	607	650	-	6.1%	7.0%
% of total nights in Aust	-	10.2%	-	-	9.0%	9.3%	-	-	-

NB: where there is a '-', figures are unreliable and are unable to be published.

Malaysian visitors spent 650,000 nights in regional Australia in 2010, an increase of 7.0% from the previous year, and a 6.1% increase per annum from 2006 to 2010.

I.7 Melbourne and Victorian Regions Visited

Malaysian Visitation (000s) to Victoria, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change	% change	
							2000-2010	2006-2010	2009-2010
Melbourne	73	96	92	97	122	160	8.1%	13.6%	31.7%
Great Ocean Road	-	-	5	6	6	9	-	-	37.1%
Regional Victoria	7	11	11	13	15	18	9.9%	13.3%	18.5%

NB: Where there is a '-', figures are unreliable and are unable to be published; Regions not listed are suppressed due to all figures being below publishable threshold.

There were 160,000 Malaysian overnight visitors to Melbourne in the two years ending December 2010, a 31.7% increase over the previous period. Malaysian overnight visitation to Melbourne has grown at an annual average rate of 8.1% over the longer term, 2000 to 2010. In the period, there were 18,000 Malaysian overnight visitors to regional Victoria and an estimated 9,000 overnight visitors to the Great Ocean Road region.

² "Regional" is defined as non capital city nights for each state with the exception of the Gold Coast. For example, Regional Queensland excludes nights spent in both Brisbane and the Gold Coast.

Malaysian Visitor Nights (000s) in Melbourne, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual % change	Av Annual % change	% change
	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	2009-2010
Melbourne	1,803	3,309	2,807	3,163	4,221	4,789	10.3%	9.7%	13.4%

The number of visitor nights spent in Melbourne by Malaysian visitors increased by 13.4% from the previous period to reach 4.8 million visitor nights in the period two years ending December 2010.

1.8 Visitor Expenditure

Expenditure by Malaysian Visitors	Total Expenditure					Expenditure Share			Expenditure Per Night			Expenditure Per Visitor		
	Nominal (\$ million)					%			\$			\$		
	Year Ending December	2000	2009	2010	Av Ann % Change 00-10	% Change 09-10	2000	2009	2010	2000	2009	2010	2000	2009
New South Wales	np	68	115	np	69.1%	np	1.1%	1.8%	np	82	126	np	1,585	2,685
Victoria	np	333	315	np	-5.4%	np	8.9%	8.0%	np	133	118	np	4,562	3,467
Queensland	np	75	77	np	2.7%	np	1.9%	2.0%	np	129	109	np	1,833	1,693
South Australia	np	59	52	np	-11.9%	np	9.0%	7.1%	np	132	90	np	5,749	3,950
Western Australia	np	189	207	np	9.5%	np	10.7%	10.7%	np	103	127	np	3,210	3,675
Tasmania	np	np	np	np	np	np	np	np	np	np	np	np	np	np
Northern Territory	np	np	np	np	np	np	np	np	np	np	np	np	np	np
Australian Capital Territory	np	np	np	np	np	np	np	np	np	np	np	np	np	np
Australia	384	773	814	7.8%	5.3%	3.5%	4.5%	4.6%	108	114	117	2,830	4,018	3,822

np: denotes figures not published by TRA.

NB: Visitor expenditure includes expenditure on packages attributable to destination.

Source: Tourism Research Australia expenditure allocation method applied to 2000-2010 International Visitor Survey data.

Since 2000, expenditure by Malaysian visitors in Australia has increased at an annual average rate of 7.8% to reach \$814 million in 2010. Malaysian overnight visitor expenditure in Victoria reached \$315 million in 2010 with a year-on-year decrease of 5.4%, representing an 8.0% share of total international expenditure in Victoria.

1.9 Visitors to Victoria Forecast

Malaysia Forecasts	2010	ACTUAL 2010	FORECAST										Ave Annual Growth Rate (2009 - 2020)
	Vic Mkt Share		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Visitor Numbers (000s)	43%	91	81	85	88	92	95	98	101	105	108	111	3.9%
Visitor Nights (000s)	38%	2,661	2,652	2,879	3,105	3,334	3,588	3,856	4,141	4,448	4,777	5,127	6.8%

Note 1: Based on visitors aged 15 years or over.

Note 2: Victorian estimates based on market share of visitor nights (IVS, year ending December 2010) and assumes market share remains constant.

Note 3: Slight variations in calculations are due to rounding.

Sources: Tourism Forecasting Committee, November 2010 Issue 2 and *International Visitor Survey*, year ending December 2010, Tourism Research Australia

Average annual growth for arrivals to Australia from Malaysia is forecast at 3.9% over the period 2009-2020. Victoria is estimated to receive 111,000 overnight visitors from Malaysia by 2020. Although the Malaysian economy tightened in 2009, there was growth in direct aviation capacity which has contributed to growth in arrivals to Australia. A reduction in airfares on the Malaysia-Australia route and the expansion of services by low cost airlines has opened up the market in 2009/2010. Additionally, growth in capacity is expected to continue and support good growth in arrivals over the medium term.

Source: Tourism Forecasting Committee Forecast 2010 Issue 1, June 2010.

For more detailed information on tourism forecasting, market performance and economic commentary, please refer to the source at:

<http://www.ret.gov.au/tourism/tra/traforecasts/publications/Pages/default.aspx>

2 OVERVIEW OF MALAYSIAN LEISURE VISITORS TO VICTORIA

The main focus of this analysis will be on overnight leisure travellers from Malaysia to Victoria. Leisure travellers are those who travelled to Australia for holiday purposes or to visit friends and relatives (VFR).

Malaysian Visitation to Victoria for Leisure, 2000-2010

Year Ending							Av Annual	Av Annual	
							% Change	% Change	% Change
December	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	09-10
Visitors (000s)	30	31	33	34	53	66	8.4%	20.5%	24.0%
% Market Share	28%	34%	34%	33%	38%	42%			

66,000 Malaysian leisure visitors stayed overnight in Victoria in 2010 for leisure purposes, an increase of 24.0% from the previous year. This represents 42% of Malaysian leisure visitors to Australia who stayed overnight in Victoria. Victoria has experienced an average annual increase of 8.4% from this market over the period 2000-2010.

Malaysian 'Experience Seekers' – Proportion by State/ Territory, 2007-2010

Tourism Australia defines the Experience Seekers as "looking for unique, involving and personal experiences from their holidays. Experience Seekers are long haul travellers who are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations. Experience Seekers can be found among all age groups, income levels and geographic locations."

Malaysia Experience Seekers - Proportion by State/Territory, 2007-2010

Year ending					
	December	2007	2008	2009	2010
Total		30%	39%	39%	39%
New South Wales		38%	38%	35%	40%
Victoria		26%	43%	39%	39%
Queensland		29%	35%	42%	40%
South Australia		27%	51%	39%	44%
Western Australia		34%	39%	39%	35%
Tasmania		32%	57%	33%	56%
Northern Territory		22%	23%	80%	66%
Australian Capital Territory		65%	43%	64%	50%

Of Malaysian overnight leisure visitors to Victoria, 39% can be defined as part of the Tourism Australia defined segment "Experience Seekers" in 2010. This is similar to the proportion of Malaysian leisure travellers to Australia generally (39%), and also for key competitors New South Wales (40%) and Queensland (40%). Over time, this proportion has increased 13 percentage points, from 26% of overnight leisure visitors to Victoria in 2007.

For more detailed information on the Experience Seekers segment, please refer to:

<http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>

2.1 Places Visited in Regional Victoria and Melbourne Attractions

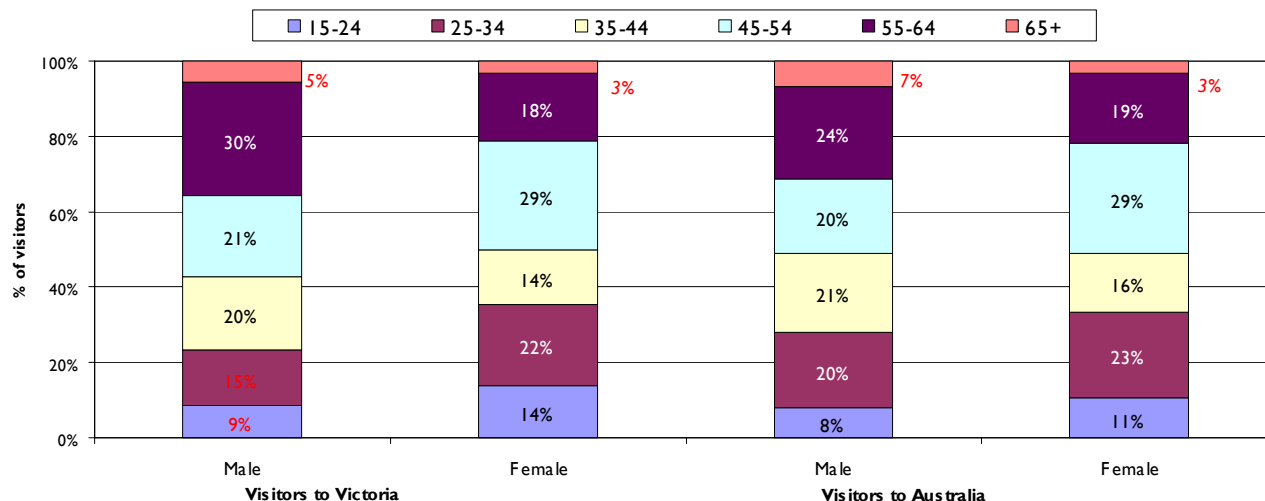
Selected Places Visited - Overnight Visit or Daytrip (% of all Leisure Overnight Visitors to Victoria)	Malaysian Visitors	All International Visitors	Selected Places Visited - Melbourne Attractions (% of Leisure Overnight Visitors to Victoria)	Malaysian Visitors	All International Visitors
Phillip Island, penguin parade	18%	20%	Crown Casino/entertainment complex	46%	33%
Ballarat, Sovereign Hill	12%	12%	Federation Square	51%	50%
Dandenongs, Puffing Billy, Healesville Sanctuary	22%	14%	Queen Victoria Market	72%	51%
Great Ocean Road or Twelve Apostles	27%	34%	Southbank/Southgate	35%	31%
Mornington Peninsula	9%	9%	Melbourne Museum (Royal Exhibition Building)	20%	23%
Daylesford, Hepburn Springs, Macedon	-	2%	Docklands/Telstra Dome	42%	28%
Yarra Valley	16%	12%	National Gallery of Victoria (NGV)	14%	17%
Bendigo	-	5%	Melbourne Cricket Ground (MCG)	-	11%

Of the regional Victorian places visited (note: for an overnight visit or daytrip) 27% of Malaysian overnight leisure visitors to Victoria spent time in the Great Ocean Road region and/or the Twelve Apostles. This region is very popular generally with 34% of all international overnight leisure visitors to Victoria travelling there.

Of the Melbourne attractions visited 72% of Malaysian overnight leisure visitors to Victoria spent time at the Queen Victoria Markets. This was also the highest result for all the listed Melbourne Attractions for international overnight leisure visitors to Victoria generally (51% of overnight leisure visitors to Victoria).

2.2 Demographic Profiling

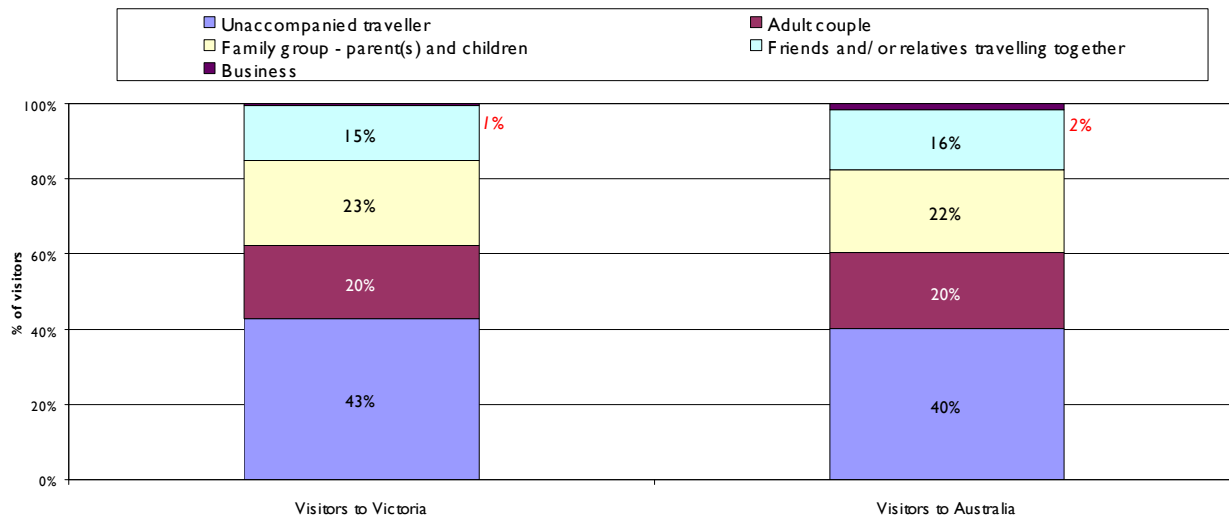
Age Group & Gender (% of overnight leisure visitors from Malaysia)



In 2010, 56% of overnight leisure visitors from Malaysia to Victoria were female and 44% were male. Across the age groups the proportion of visitors is skewed towards the mid to older groups with the biggest proportion for males in the 55-64 age group (30%), while the largest proportion of females were 44-54 (29%).

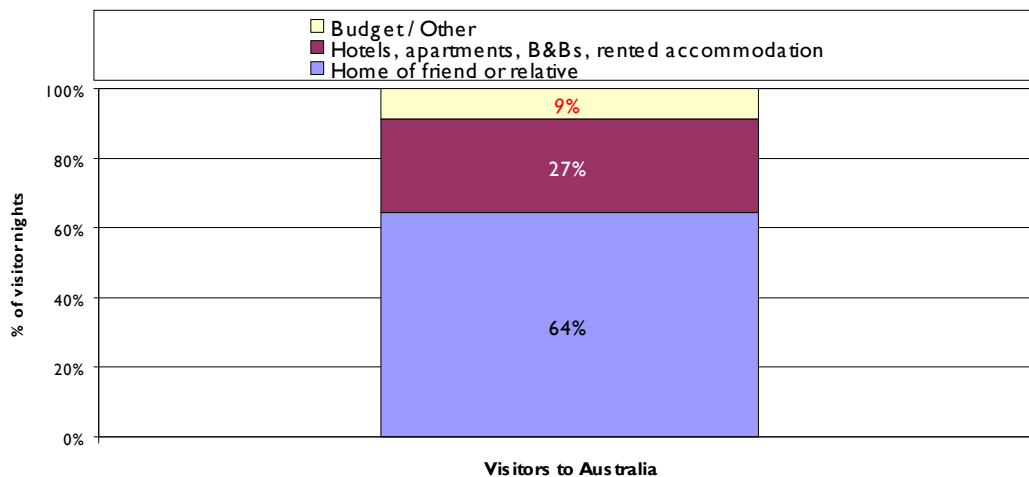
2.3 Detailed Visitor Behaviour

Travel Party Description (% of overnight leisure visitors from Malaysia)



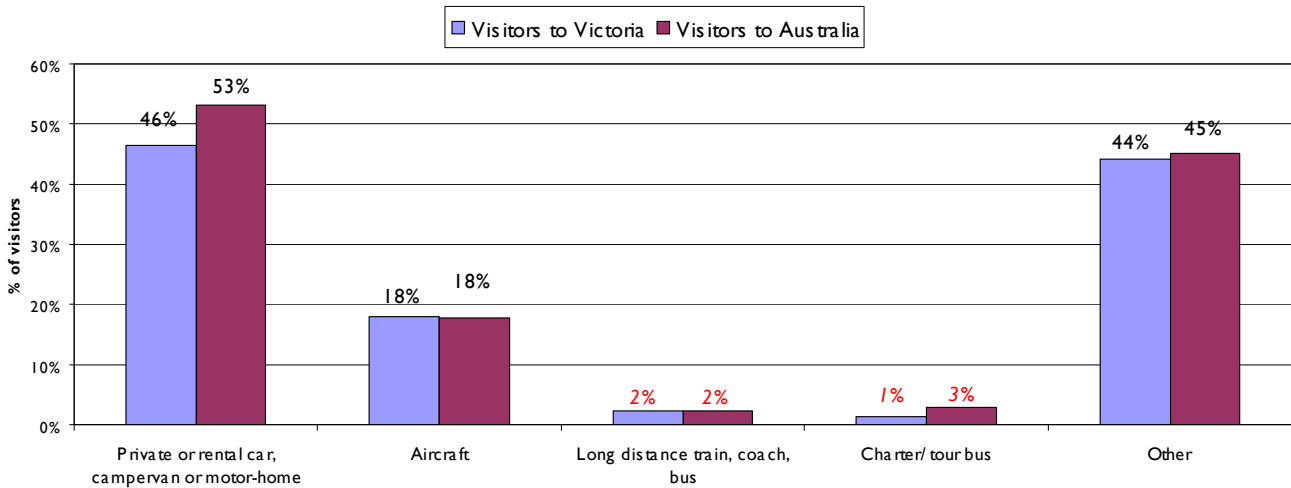
Of overnight leisure travellers to Victoria from Malaysia in 2010, the highest proportion were unaccompanied travellers (43%), followed by family group travel (with parents and children) (23%), those travelling as a couple (20%) and with friends and relatives (15%). This split across the travel parties was very similar for Malaysian leisure visitors to Australia generally.

Accommodation (% of visitor nights spent by Malaysian leisure visitors)



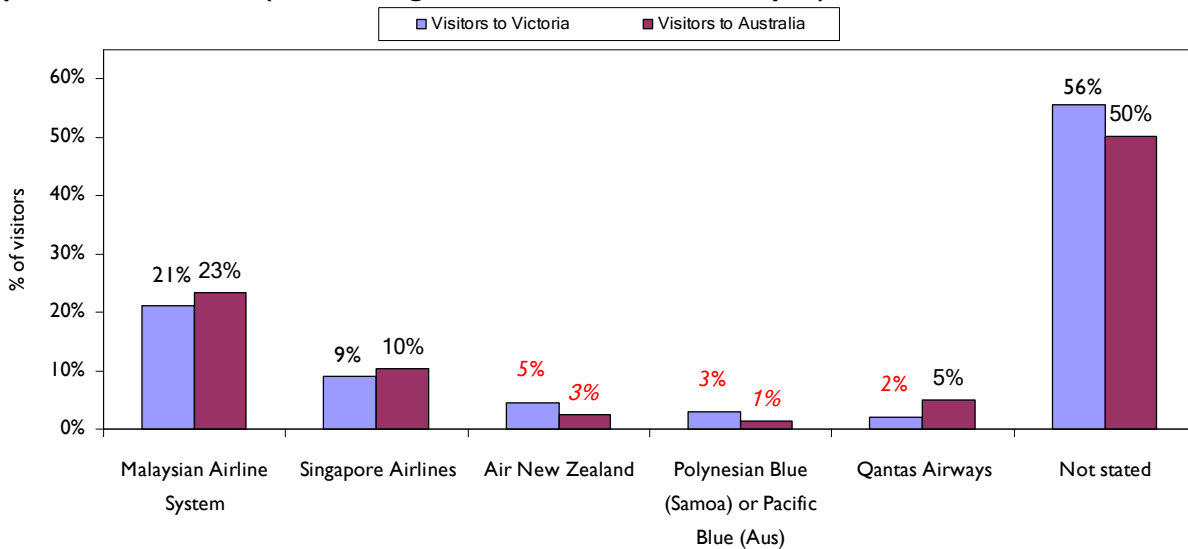
In 2010, 64% of nights spent by leisure visitors to Australia from Malaysia were spent with friends or relatives, and 27% of nights were spent at hotels, apartments, B&Bs or rented accommodation.

Transportation used (% of overnight leisure visitors from Malaysia)



Of the 66,000 Malaysian leisure visitors who stayed overnight in Victoria in 2010, 46% used a private or rental car, campervan or motor-home on their trip while 44% used other forms of transport such as public transport or a ship/boat/ferry. In comparison, 53% of Malaysian leisure visitors to Australia used a private or rental car, campervan or motor-home and 45% used other forms of transport.

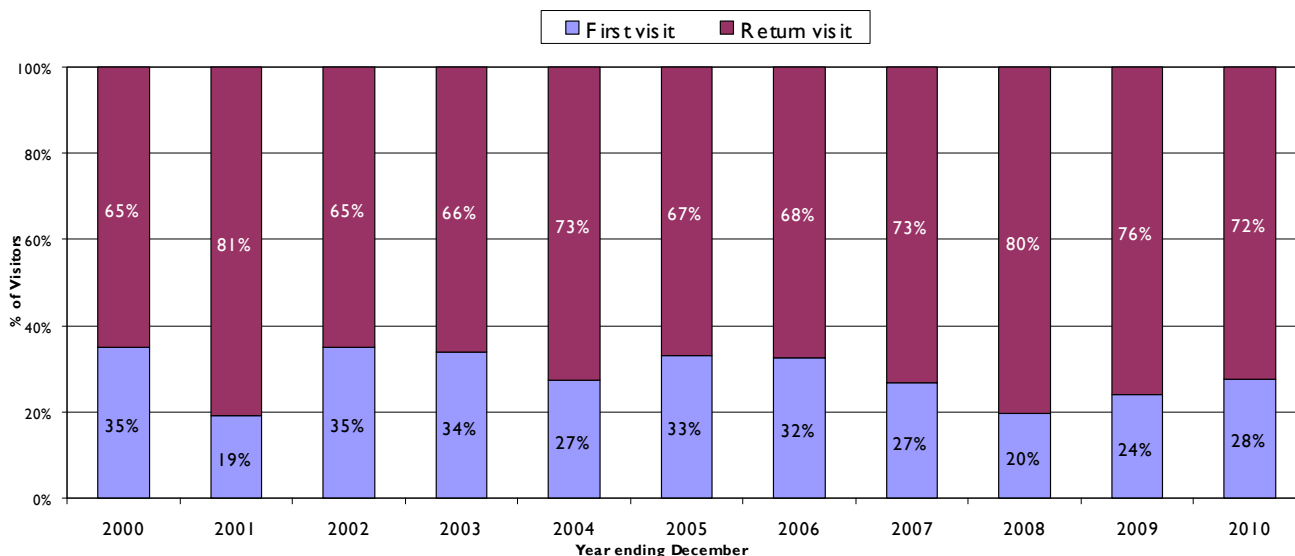
Departure Airline used (% of overnight leisure visitors from Malaysia)



Of overnight leisure visitors to Victoria from Malaysia in 2010, the most popular airline used was Malaysian Airlines (21%) and Singapore Airlines (9%) when departing Australia following their holiday. This was similar for all leisure visitors from Malaysia to Australia generally. However, the majority of overnight leisure travellers did not state the airline that they used to depart (56% for visitors to Victoria and 50% for visitors to Australia).

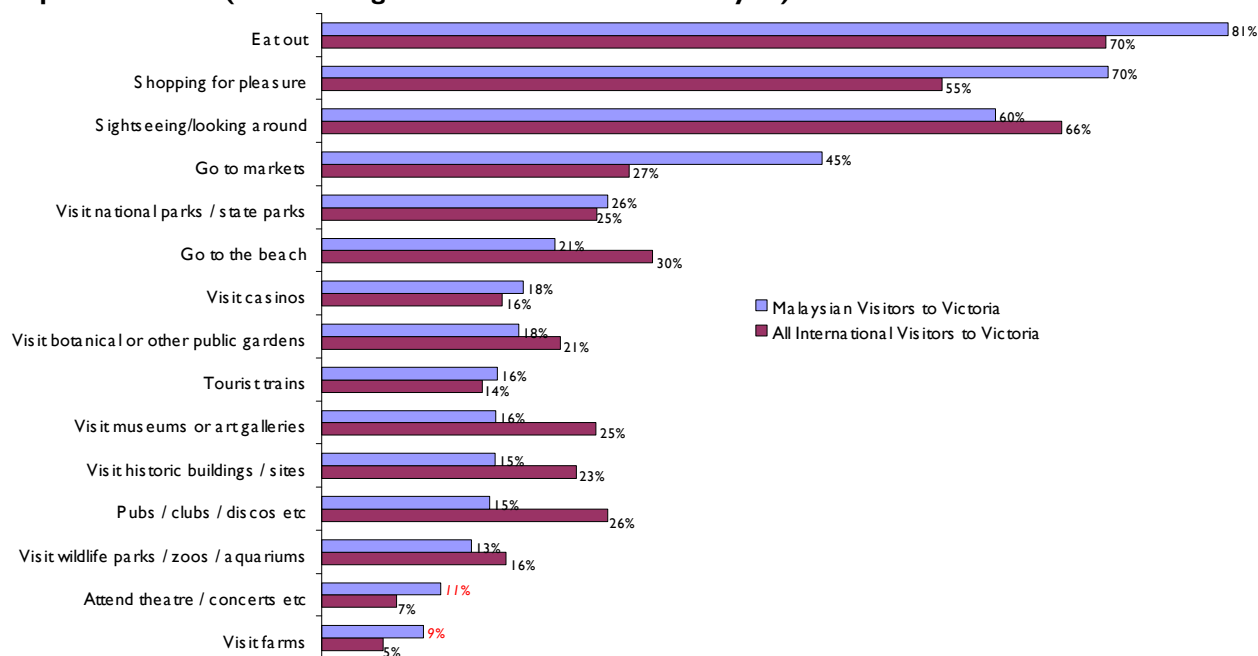


Repeat Visitation to Victoria (% of overnight leisure visitors from Malaysia)



Malaysia is a mature market with over 70% of visitors coming on a return visit. In 2010, the proportion of overnight leisure visitors from Malaysia to Victoria who were visiting for the first time was 28%, a decrease of 7 percentage points in the last ten years, but a small short term increase of 4 percentage points from last year. Repeat visitation to Victoria was 72% in 2010, similar to the proportion to Australia (71%).

Top 15 Activities (% of overnight leisure visitors from Malaysia)



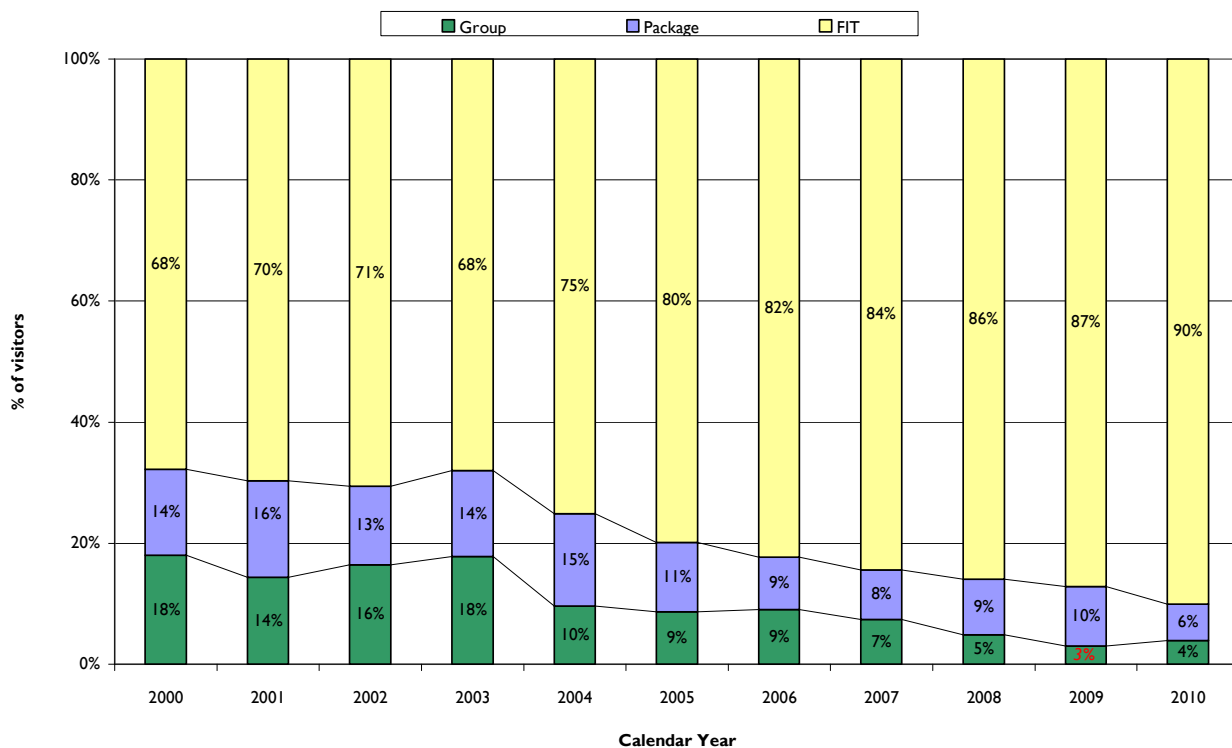
Note: Malaysian visitor activities are based on three years to December 2010.

Of the most common activities on their trip as listed above, Malaysian overnight leisure visitors were more likely to do a number of particular activities than the average international visitor to Victoria. Popular activities included, to eating out (81% compared to 70%), shopping for pleasure (70% compared to 55%), visiting markets (45% compared to 27%), visiting national parks/ state parks (26% compared to 25%), going to a casino (18% compared to 16%) and travelling on a tourist train (16% compared to 14%).

3 TRAVEL STYLE

3.1 Group, package & Fully Independent Travel (FIT) travel

Trends in Group, Package and FIT travel among Malaysian leisure visitors to Australia, 2000-2010



The proportion of Malaysian FIT travellers to Australia has grown steadily from 2000 to reach a high of 90% in 2010. While the market matures with FIT travellers, the proportion of both group and package has diminished over time from 18% to 4% for group and 14% to 6% for package.

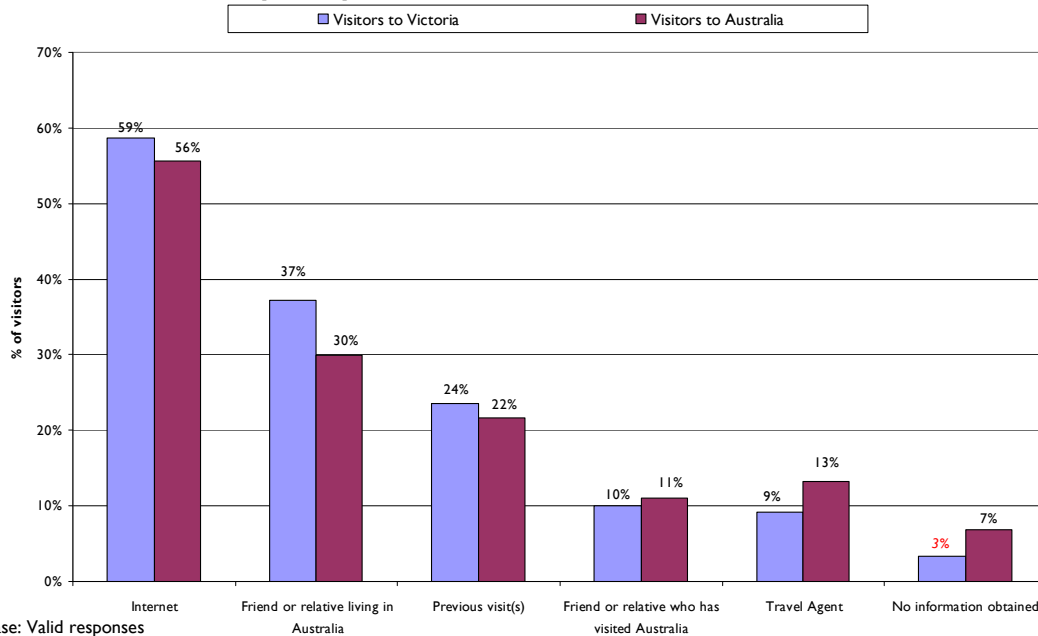
* NOTE: Group, Package and FIT are derived using the following method.

'Group' travellers refer to those who responded yes to question "Did you travel to Australia on a group tour?". 'Package' travellers refer to those who responded yes to question "Did you arrive in Australia on a travel package?" (minus 'Group' travellers). The remaining travellers who were not 'group' or 'package' are referred to as 'FIT' travellers.

4 INFORMATION SOURCES & BOOKING METHODS

4.1 Information Sources

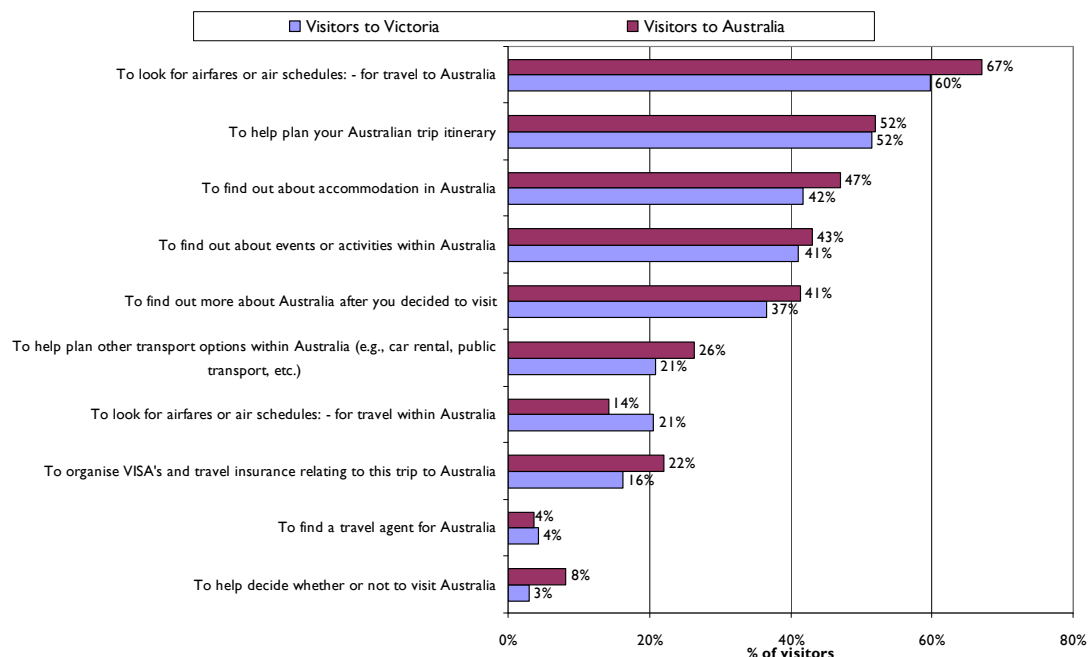
Information Sources by Malaysian Leisure Visitors to Australia and Victoria, 2010



Base: Valid responses

Among Malaysian overnight leisure visitors to Victoria and Australia in 2010, the leading information source used was the internet (59% and 56%), followed by word of mouth from an Australian resident (37% and 30% respectively), and previous visits (24% and 22%).

Reasons for using the Internet by Malaysian Leisure Visitors to Australia and Victoria, 2010

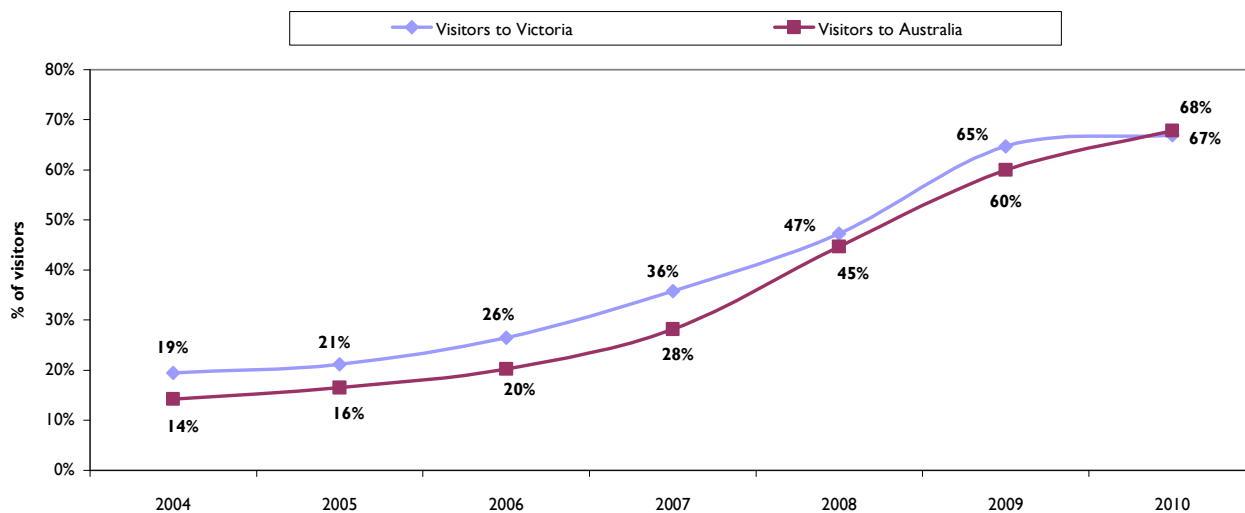


Base: Those who used the Internet as an Information Source.

Of Malaysian overnight leisure visitors to Victoria who used the internet in their holiday planning, 60% used it to look for airfares and schedules for their trip to Australia. Other uses included to help plan an itinerary (52%), looking for accommodation (42%), and to find out about events and activities (41%).

4.2 Internet Booking

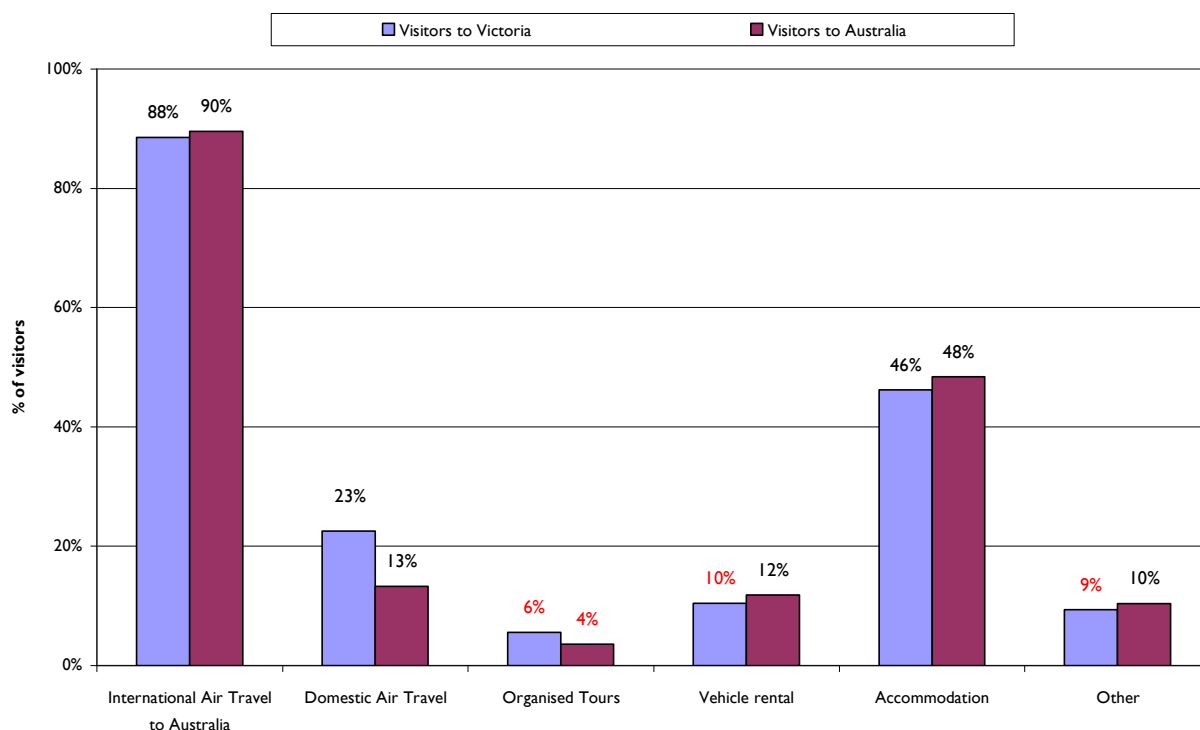
Incidence of Online Booking among Malaysian Overnight Leisure Visitors, 2004-2010



Base: Valid responses

Strong growth in the incidence of online booking among Malaysian overnight leisure visitors to Victoria and Australia is evident, increasing from 14% in 2004 to 68% in 2010 for visitors to Australia, and from 19% to 67% for visitors to Victoria.

Trip Components Booked Online among Malaysian Overnight Leisure Visitors, 2010



Base: Booked online

Among Malaysian overnight leisure visitors booking travel, international air fares (88% for visitors to Victoria and 90% for visitors to Australia from Malaysia) and accommodation (46% and 48%) online were the most frequently purchased components. Overnight leisure visitors to Victoria were more likely to have booked domestic air fares online (23% compared to 13%) than Malaysian leisure visitors to Australia.

4.3 Planning and Booking Horizons

	Visitors to Australia	Visitors to Victoria
Planning Horizon (average weeks)	10.7	11.7
Booking Horizon (average weeks)	9.6	10.6

Among Malaysian overnight leisure visitors to Australia, the average planning horizon was 10.7 weeks, with a slightly longer horizon for overnight leisure visitors to Victoria (11.7 weeks). However, 43% of visitors to Australia indicated a lead time of less than 4 weeks for planning (36% of overnight leisure visitors to Victoria).

For Malaysian leisure visitors to Australia, flight booking occurred an average of 9.6 weeks prior to departure, with overnight leisure visitors to Victoria recording a slightly longer lead time (10.6 weeks). For both visitors to Australia, 21% of flight bookings occurred within 2 weeks of departure (16% of visitors to Victoria).

Sources:

- *International Visitor Survey*, year ending December 2000-2010, Tourism Research Australia
- *International Tourism Expenditure in Australia's regions 2000-2010*, Tourism Research Australia
- Tourism Forecasting Committee Forecast 2010: Issue 1 (June 2010) and Issue 2 (December 2010).
- Tourism Australia Corporate Website: <http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>, February 2010.

Further information: www.tourism.australia.com/Markets.asp
www.tourism.vic.gov.au/facts-and-figures/

Figures that are unreliable and unable to be published are represented by '-'. Percentages in red italics are unreliable and should be used with caution.

Figures might not add up due to rounding.