

# Market Snapshot

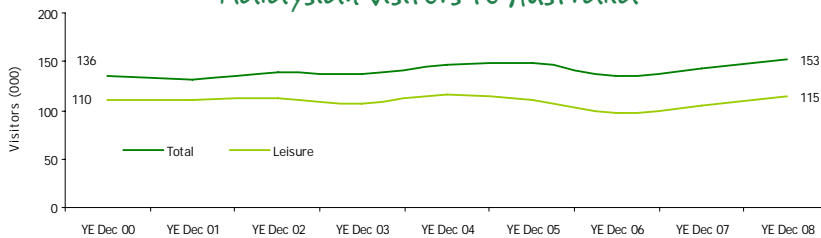
Year ended December 2008

## Malaysia

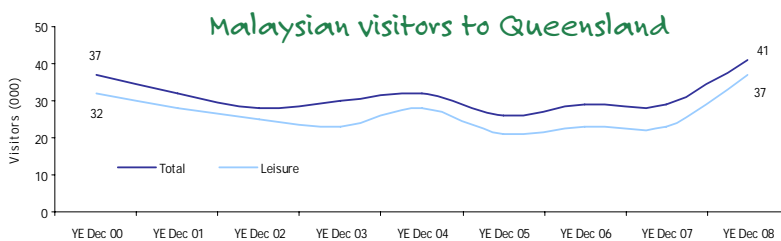


	Australia	Change Dec 07 to Dec 08	Share of international visitors	Queensland	Change Dec 07 to Dec 08	Share of visitors to Qld
<b>Total visitors</b>	153,000	8% ▲	3%	41,000	41% ▲	2%
Total ALOS <sup>1</sup> (nights)	39.0	1.7 ▲		18.3	-3.1 ▼	
<b>Leisure<sup>2</sup> visitors</b>	115,000	11% ▲	3%	37,000	n/p	2%
Leisure ALOS	14.7	-0.9 ▼		7.1	-3.0 ▼	
<b>Expenditure (\$m)<sup>3</sup></b>	685	13% ▲	4% (Share of expenditure)	89	19% ▲	2% (Share of expenditure)

### Malaysian visitors to Australia



### Malaysian visitors to Queensland



The Malaysian market to Australia has remained relatively stable over the past eight years.

First time visitors to Australia accounted for 31% of the Malaysian market, this market increased by 23% over the year to December 2008.

Repeat visitors increased also (up 3%) over the same period.

47% of Malaysian visitors travel alone (lower than the average total international market of 55%).

Family groups travelling together accounted for 19% of the Malaysian market. This was higher than the total international market (9%).

### Malaysian visitors to Queensland

First time visitors (to Australia) accounted for 42% of the Malaysian market to Queensland. The larger repeat visitor market increased by 27% over the year to December 2008.

The Gold Coast was the State's most visited region for Malaysian visitors. 75% of Malaysian visitors to Queensland visited the Gold Coast, with very little dispersal to other regions other than Brisbane (44% of visitors stopped there). This was influenced by Air AsiaX route to the Gold Coast from Kuala Lumpur that began in November 2007.

Malaysians spent \$89 million in Queensland in the year to December 2008. This was an increase of 19% on the same period last year.

Malaysian spend per visitor in Queensland was \$2,171, higher than the total international average spend (\$1,975).

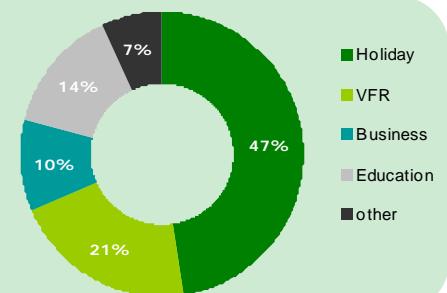
### Main purpose of visitation to Australia

The holiday market accounted for just under half of all Malaysian visitors to Australia. This market increased by 10% over the year to December 2008.

Malaysian holiday visitor nights also increased (up 4%) over the year to December 2008. Their average length of stay was 12.3 nights.

The visiting friends or relatives (VFR) and business markets both increased over the year to December 2008 (up 5% and 6% respectively). VFR visitor nights increased by 10% however business visitor nights saw a decline of 7% over the same period.

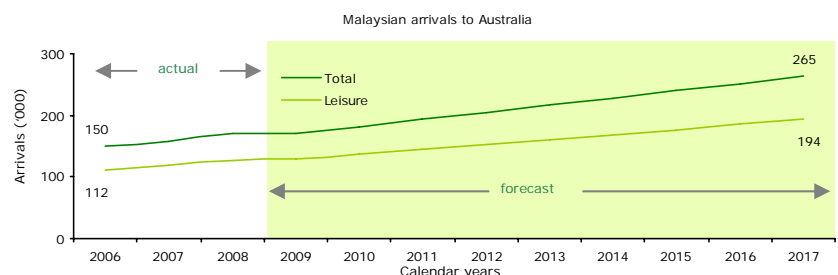
Education visitors increased by 7% and visitor nights increased by 18% over the year to December 2008. This market's average length of stay was 175.8 nights and this influenced the overall Malaysian visitor length of stay.



### Malaysian arrivals forecast<sup>4</sup>

There is a growing and affluent middle class segment in Malaysia where travel is an integral part of their life. There is also a growing retiree market. The depreciation of the Australian dollar will make it easier to attract these markets to Australia.

Arrivals to Australia from Malaysia are forecast to increase by an average of 5% each year from 2012 to reach 265,000 arrivals in 2017.



1. Average length of stay  
 2. Leisure is holiday and visiting friends or relatives (VFR) combined  
 3. Expenditure data is sourced from Tourism Research Australia and is inclusive of package expenditure  
 4. Tourism Forecasting Committee 2008 Issue 2

Note All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2008