

# Market Snapshot

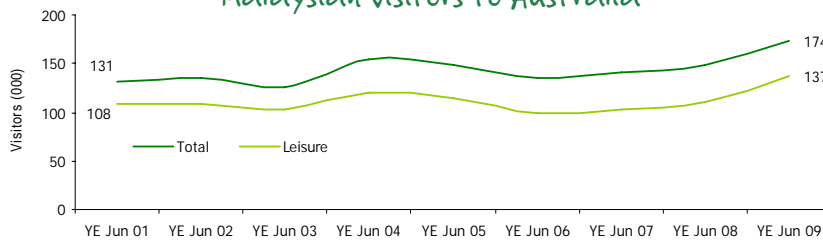
Year ended June 2009

## Malaysia



	Australia	Change Jun 08 to Jun 09	Share of international visitors	Queensland	Change Jun 08 to Jun 09	Share of visitors to Qld
<b>Total visitors</b>	174,000	18% ▲	3%	41,000	11% ▲	2%
Total ALOS <sup>1</sup> (nights)	37.5	-0.9 ▼		12.0	-12.0 ▼	
<b>Leisure<sup>2</sup> visitors</b>	137,000	25% ▲	3%	36,000	13% ▲	2%
Leisure ALOS	15.0	0.3 ▲		6.9	-1.7 ▼	
<b>Expenditure (\$m)<sup>3</sup></b>	712	5% ▲	4% (Share of expenditure)	61	-43% ▼	2% (Share of expenditure)

### Malaysian visitors to Australia



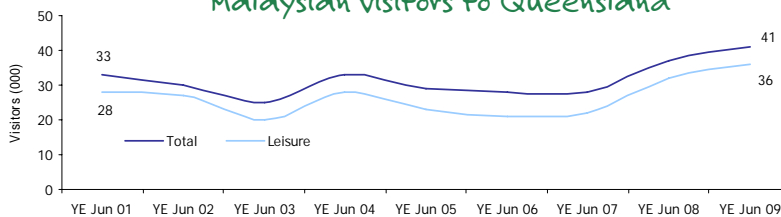
### Malaysian visitors to Australia

The Malaysian market to Australia has remained relatively stable since the year ended June 2004. However, in the year ended June 2009 there was an increase in visitors from Malaysia coinciding with the growth in air capacity.

A small proportion of visitors from Malaysia were repeat visitors (75%), compared with the average international visitor to Australia (60%) in the year to June 2009.

Half of all visitors from Malaysia travelled unaccompanied, while 19% travelled as an adult couple and 18% were part of a family group.

### Malaysian visitors to Queensland



### Malaysian visitors to Queensland

The number of Malaysian visitors to Queensland has been increasing since the year ended June 2007 to 41,000 visitors in the year ended June 2009.

The Gold Coast and Brisbane (71% and 47% respectively) were the regions most commonly frequented by Malaysians. Further, both regions saw an increase in Malaysian visitors over the last 12 months (up 21% and 12% respectively). The increase in visitors to the Gold Coast was driven by AirAsia X direct flights.

Malaysians spent \$61 million on their trip to Queensland in the year to June 2009. This was a decline of 43% over the year.

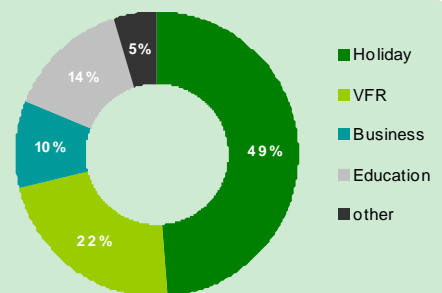
Malaysian spend per visitor in Queensland was \$1,499, lower than the total international average spend (\$1,986).

### Main purpose of visitation to Australia

The holiday and visiting friends or relatives (VFR) markets both increased over the year to June 2009 (up 21% and 19%, respectively). This contributed to the increase in total visitors from Malaysia.

However the business visitor market declined by 10%, and business visitor nights also declined over the same period (down 17%).

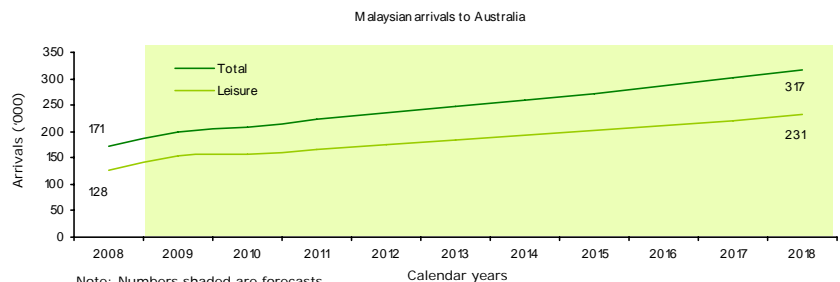
Education visitors increased by 20% and visitor nights increased by 14% over the year to June 2009. This market's average length of stay was 166.8 nights influencing the overall Malaysian visitor length of stay.



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

Malaysian arrivals to Australia are forecast to increase by an average of 6% each year from 2008 to reach 317,000 arrivals in 2018.

The boom in short haul low cost airline seats from Malaysia has increased the average travel propensities and reduced Australia's market share of total outbound traffic.



Note: Numbers shaded are forecasts.

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 2009 Issue 1

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended June 2009