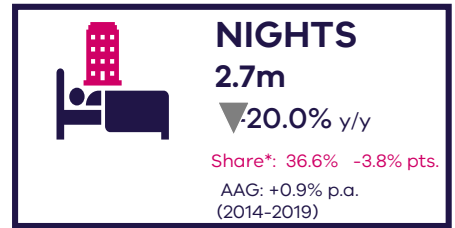
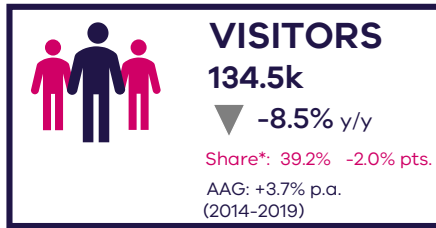
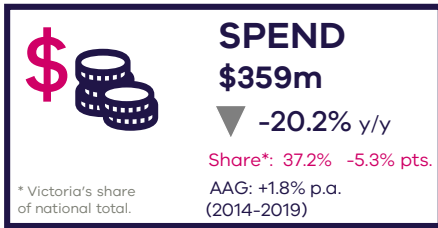


International Tourism Summary: Malaysia

Year ending December 2019

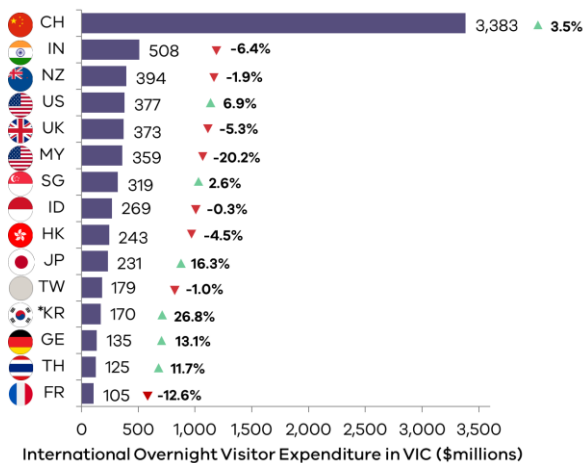


134,500 Malaysian visitors spent 2.7 million nights and \$359 million on trips to Victoria in the year ending December 2019.

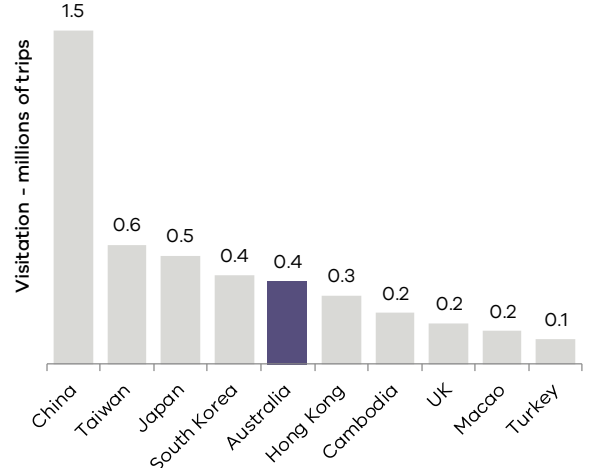


Context: In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

International Overnight Expenditure in Victoria (\$m)



Top 10 Out-of-Region Destinations for Malaysian Travellers



Australia was ranked #5 for visitation against other out-of-region destinations for Malaysian travellers in the year ending December 2019 (the same as 2018).

*USA including Hawaii Source: Tourism Economics, YE2019

Malaysian visitors spent \$359 million on trips to Victoria in the year ending December 2019, a year-on-year decline of 20.2 per cent. This represents 4.1 per cent of all international overnight visitor spend in Victoria. Malaysia is ranked Victoria's 6th largest international market in terms of expenditure.

* In the year ending December 2019, all Korean visitors to Australia were from South Korea.

AUSTRALIA



\$965m Spend
▼ -8.8%
343k Visitors
▼ -3.9%
7.4m Nights
▼ -11.8%

NEW SOUTH WALES



\$202m Spend
▲ 12.7%
91k Visitors
▲ 2.0%
1.8m Nights
▲ 15.5%

QUEENSLAND



\$84m Spend
▼ -27.7%
46k Visitors
▼ -10.3%
554k Nights
▼ -45.4%

The rate of decline of Malaysian expenditure on trips to Victoria (-20.2% year-on-year) was greater than the national average (-8.8%) and compares to the changes in growth for New South Wales (+12.7%) and Queensland (-27.7%).

MELBOURNE



\$341m Spend
▼ -21.1%
130k Visitors
▼ -9.0%
2.5m Nights
▼ -23.1%

REGIONAL VICTORIA



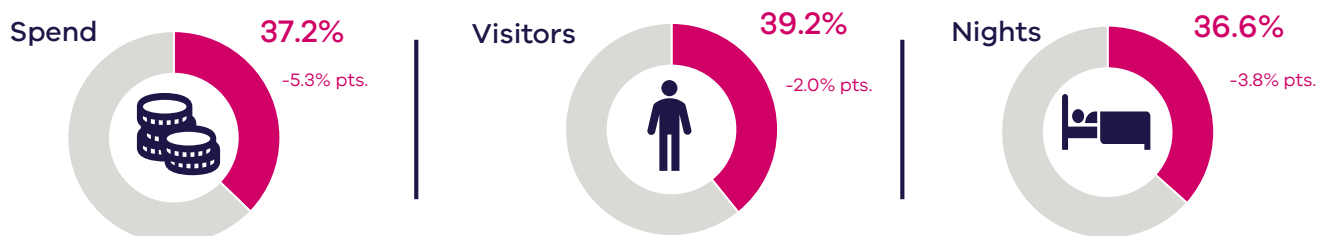
np Spend
26k Visitors
▲ 6.6%
np Nights

In the year ending December 2019:

- 130,000 Malaysian visitors spent 2.5 million nights and \$341 million on trips to Melbourne
- 26,000 Malaysian visitors stayed in regional Victoria.

Malaysian Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of Malaysian spend, visitors and nights



Malaysian Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from Malaysia Year Ending December	Total Expenditure (\$ million)					Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$		
	2014	2018	2019	Av Ann 14-19	% Change 18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	135	179	202	8.4% p.a.	12.7%	16.4%	16.9%	20.9%	97	115	112	1,684	2,000	2,209
Victoria	327	450	359	1.8% p.a.	-20.2%	39.7%	42.5%	37.2%	126	133	132	2,918	3,058	2,668
Queensland	82	116	84	0.3% p.a.	-27.7%	10.0%	10.9%	8.7%	95	114	151	1,742	2,245	1,809
Australia	824	1,058	965	3.2% p.a.	-8.8%				119	126	130	2,823	2,965	2,814

Total VIC International Expenditure	4,903	8,467	8,826	12.5% p.a.	4.2%
Malaysia's Share of VIC International Expenditure	6.7%	5.3%	4.1%		

AAG = Average Annual Growth

NB : Visitor expenditure includes expenditure on packages attributable to destination. Estimates may differ from those published by Tourism Australia

Source: Regional Expenditure Model, International Visitor Survey, December 2014-2019, Tourism Research Australia, Canberra.

Victoria received 37.2 per cent of Malaysian overnight visitors' expenditure in Australia in the year ending December 2019, well ahead of Queensland (8.7%) and New South Wales (20.9%). Malaysian visitors' expenditure per night in Victoria (\$132) was higher than the national average (\$130) and New South Wales (\$112), but lower than in Queensland (\$151). Victoria received a higher total spend per visitor (\$2,668) compared with Queensland (\$1,809) and New South Wales (\$2,209).

Malaysian Overnight Visitation (000s) to Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Visitors %
							% change 14/19	% change 18/19	
Australia	292	306	349	353	357	343	3.3% p.a.	-3.9%	
New South Wales	80	81	86	89	89	91	2.7% p.a.	2.0%	27%
Victoria	112	127	142	139	147	134	3.7% p.a.	-8.5%	39%
Queensland	47	44	48	46	51	46	-0.5% p.a.	-10.3%	13%

Malaysian overnight visitors to Victoria declined by 8.5 per cent in the year ending December 2019, behind the national average (-3.9%) and key competitor New South Wales (+2.0%) but ahead of Queensland (-10.3%). Over the longer term (2014 to 2019), Malaysian overnight visitors to Victoria increased at an average annual rate of 3.7 per cent, ahead of the national average (+3.3% p.a.), New South Wales (+2.7% p.a.) and a decline for Queensland (-0.5% p.a.).

Malaysian Visitor Nights (000s) in Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Nights %
							% change 14/19	% change 18/19	
Australia	6,904	7,618	8,467	8,679	8,387	7,400	1.4% p.a.	-11.8%	
New South Wales	1,388	1,550	1,778	1,672	1,553	1,794	5.3% p.a.	15.5%	24%
Victoria	2,590	2,767	3,286	3,165	3,391	2,711	0.9% p.a.	-20.0%	37%
Queensland	866	756	1,052	1,015	1,013	554	-8.6% p.a.	-45.4%	7%

In the year ending December 2019, Malaysian visitor nights to Victoria declined by 20.0 per cent year-on-year, behind a slower decline nationally (-11.8%), yet ahead of the larger decline recorded in Queensland (-45.4%). In contrast, New South Wales recorded double-digit growth in the period (+15.5%). Over the longer term (2014 to 2019), Malaysian visitor nights spent in Victoria increased at an average annual rate of 0.9 per cent, behind the national average (+1.4% p.a.) and New South Wales (+5.3% p.a.), but ahead of Queensland (-8.6% p.a.).

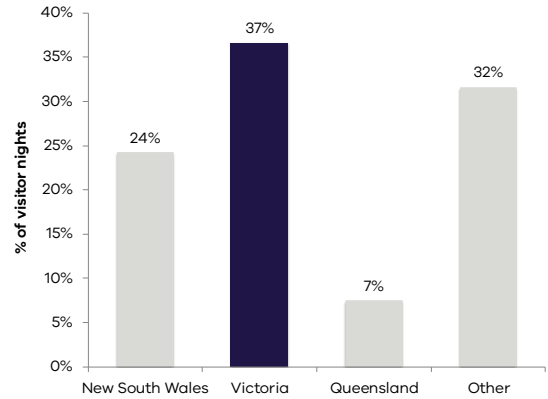
Market Share by Key States¹

Malaysian Overnight Visitors to Australia
Year ending December 2019 – Market Share by Key States



In the year ending December 2019, 39 per cent of Malaysian visitors to Australia stayed overnight in Victoria; ahead of New South Wales (27%) and Queensland (13%).

Malaysian Visitor Nights to Australia
Year ending December 2019 – Market Share by Key States



Victoria's market share of visitor nights spent by Malaysian travellers to Australia in the year ending December 2019 was 37 per cent; ahead of New South Wales (24%) and Queensland (7%).

Main Purpose of Trip (000s) to Australia by Key States Visited and Market Share Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Education	Total
New South Wales	55	18	73	7	6	91
Market Share %	27%	21%	25%	34%	30%	27%
Victoria	82	34	116	7	9	134
Market Share %	40%	41%	40%	32%	49%	39%
Queensland	28	11	39	-	-	46
Market Share %	13%	13%	13%	-	-	13%
Australia	207	83	290	22	19	343

* Total Leisure = Holiday + VFR

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

NB: Figures for 'Employment' and 'Other' visitors are unreliable and are unable to be published

In the year ending December 2019, 40 per cent of Malaysian leisure visitors to Australia stayed overnight in Victoria, including 40 per cent of holiday and 41 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of Malaysian leisure visitors was lower at 25 per cent, as was Queensland's share (13%). During the same period, Victoria's share of the Malaysian education market was 49 per cent and the business visitor market share was 32 per cent.

Purpose of Visit to Victoria (and the Destinations Within)

Some international visitors to Victoria visit more than one destination in the state, and for different purposes. For example, a visitor might stay in Melbourne for education reasons, and visit the Great Ocean Road region for a holiday. As such, the percentages of international visitors who visited Victoria for each purpose total more than 100 per cent.

Malaysian Overnight Expenditure and Visitation to Victoria by Destination Purpose of Visit – Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Education	Total
Overnight Expenditure (\$M)	89	84	173	-	163	359
Overnight Visitors (000s)	79	46	117	8	9	134
Visitor Nights (000s)	508	907	1,415	-	1,112	2,711
Average Length of Stay	6.4	19.5	12.1	-	125.6	20.2
Spend per Visitor	1,118	1,815	1,480	-	18,357	2,668
Spend per Night	174	93	122	-	146	132

* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one purpose)

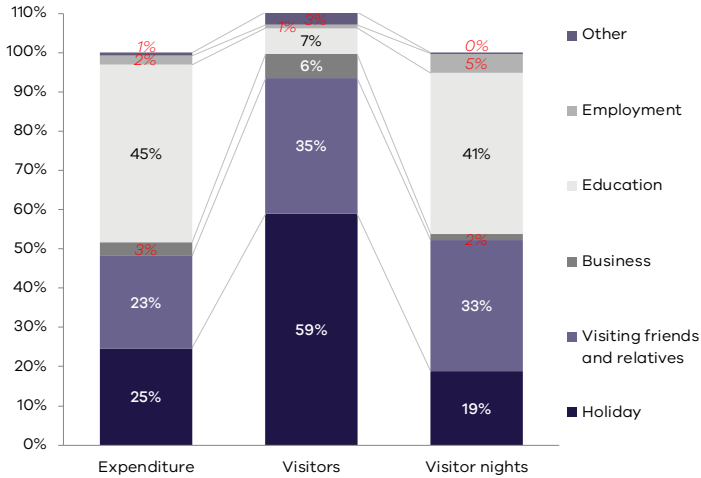
NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Employment' and 'Other' visitors are unreliable and are unable to be published

¹NOTE: 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.

Malaysian Overnight Expenditure, Visitors and Nights to Victoria by Purpose of Visit

Year Ending December 2019



In the year ending December 2019, almost half (48%) of Malaysian visitor expenditure in Victoria was accounted for by leisure visitors, comprising holiday visitor expenditure (25%) and VFR visitor expenditure (23%)*. This was closely followed by spend by Malaysian education visitors (45%).

During the same period, 59 percent of Malaysian visitors travelled to Victoria for holiday purposes and 35 per cent travelled for VFR. A further seven per cent came for education purposes and six per cent came on business.

Forty-one (41%) of all nights spent in Victoria by Malaysian visitors in the year ending December 2019 were accounted for by education visitors, 33 per cent by VFR visitors and 19 per cent by holiday visitors.

Note: Percentages of visitors will not add up to 100% as visitors can travel to multiple destinations in Victoria with different purposes.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

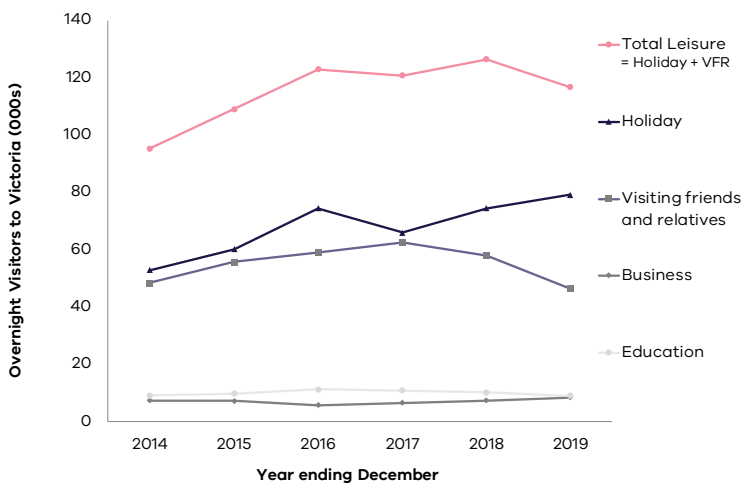
*Figures might not add up due to rounding.

Malaysian Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	53	60	74	66	74	79	8.4% p.a.	6.3%
Visiting friends and relatives	48	56	59	63	58	46	-0.8% p.a.	-19.9%
Total Leisure	95	109	123	121	126	117	4.1% p.a.	-7.7%
Business	7	7	6	6	7	8	3.1% p.a.	14.9%
Education	9	10	11	11	10	9	-0.4% p.a.	-12.1%

NB: Figures for 'Employment' and 'Other' visitors are unreliable and are unable to be published

Malaysian Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

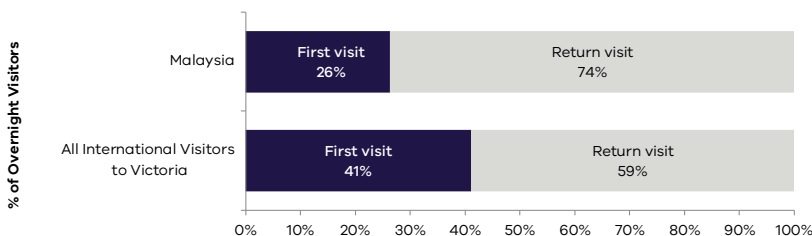


Of all the main purpose segments, the Malaysian holiday market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+8.4% p.a.), while VFR visitors have decreased at an average rate of 0.8 per cent per annum.

Overnight Malaysian business visitors to Victoria have increased at an average annual rate of 3.1 per cent per annum over the period 2014-2019, while education visitors have decreased at an average rate of 0.4 per cent per annum since 2014.

Repeat Visitation to Australia

Repeat Visitation to Australia (% of Malaysian overnight visitors to Victoria vs all international overnight visitors to Victoria)



In the year ending December 2019, 26 per cent of overnight visitors from Malaysia to Victoria were visiting Australia for the first time, compared with 41 per cent of international overnight visitors to Victoria overall.

Melbourne and Regional Victoria Overnight Visitation

Malaysian Overnight Visitation (000s) to Victoria, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	108	123	138	136	143	130	3.7% p.a.	-9.0%
Regional Victoria	16	17	20	20	24	26	10.2% p.a.	6.6%
Victoria	112	127	142	139	147	134	3.7% p.a.	-8.5%

There were 130,000 Malaysian overnight visitors to Melbourne in the year ending December 2019, a 9.0 per cent decline over the previous year. Malaysian visitors to Melbourne have grown at an average annual rate of 3.7 per cent over the period 2014 to 2019.

In the year ending December 2019, there were 26,000 Malaysian overnight visitors to regional Victoria, a 6.6 per cent increase year-on-year. Over the longer term (2014-19), Malaysian overnight visitors to regional Victoria have grown at an average annual rate of 10.2 per cent per annum.

Malaysian Visitor Nights (000s) to Victoria, 2 years² (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	4,678	4,821	5,471	5,944	6,223	5,671	3.9% p.a.	-8.9%
Regional Victoria	441	536	583	507	333	431	-0.4% p.a.	29.6%
Victoria	5,118	5,357	6,053	6,451	6,556	6,103	3.6% p.a.	-6.9%

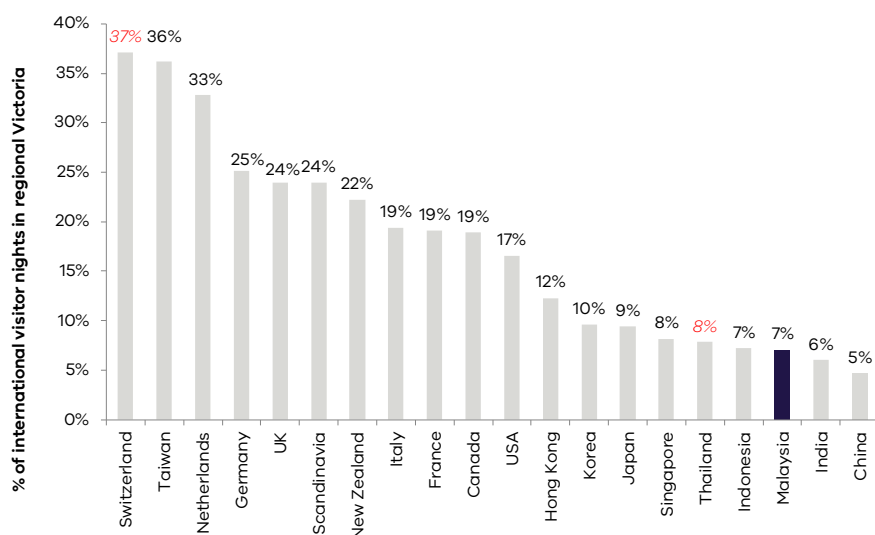
Malaysian visitors spent 5.7 million nights in Melbourne in the two years ending December 2019, a decline of 8.9 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum*), visitor nights spent in Melbourne increased at an average annual rate of 3.9 per cent.

In the two years ending December 2019, Malaysian visitors spent 431,000 nights in regional Victoria, representing an increase of 29.6 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum*), visitor nights spent in regional Victoria decreased at an average rate of 0.4 per cent.

* where 2014 includes years ending December 2013 and 2014 and 2019 includes years ending December 2018 and 2019.

Regional Dispersal

Regional Dispersal of Top 20 International Overnight Markets to Victoria – 2 Years Ending December 2019



Of the 6.1 million nights spent in Victoria by Malaysian visitors in the two years ending December 2019, only seven per cent (431,000) of them were spent in regional Victoria.

Malaysian visitors to Victoria have the 3rd lowest rate of overnight dispersal of all the state's top 20 international markets.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

² Two years of data are used to increase reliability of the figures.

Places Visited in Regional Victoria and Melbourne Attractions

Places Visited in Regional Victoria – Year Ending December 2019

Selected Places Visited - Overnight Visit or Daytrip (% of all Overnight Visitors to Victoria)	Malaysia Visitors	All International Visitors
Ballarat, Sovereign Hill	6%	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	10%	9%
Great Ocean Road/Twelve Apostles	35%	33%
Healesville Sanctuary	-	2%
Mornington Peninsula	11%	8%
Phillip Island/Penguin Parade	20%	17%
Puffing Billy and Dandenong Ranges	12%	10%
Victorian Snowfields	-	2%
Wilson's Promontory	-	3%
Yarra Valley	14%	12%

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

In the year ending December 2019, 35 per cent of Malaysian overnight visitors to Victoria spent time (daytrip or overnight) in the Great Ocean Road/Twelve Apostles region. This region is very popular generally, with 33 per cent of all international overnight visitors to Victoria travelling there.

Twenty per cent (20%) of Malaysian overnight visitors to Victoria went to the Phillip Island/Penguin Parade area (compared with 17 per cent of international overnight visitors to Victoria overall) and 14 per cent visited the Yarra Valley (compared with 12 per cent of international visitors overall).

Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	Malaysia Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	-	4%
Brunswick Street	12%	10%
Chadstone Shopping Centre	22%	15%
Chapel Street	13%	9%
Crown Casino/entertainment complex	28%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	23%	19%
Federation Square	36%	38%
Melbourne CBD Shopping Precinct	70%	63%
Melbourne Cricket Ground (MCG)	-	6%
Melbourne Museum (Royal Exhibition Building)	15%	16%
Melbourne Zoo	7%	8%
National Gallery of Victoria (NGV)	17%	17%
Queen Victoria Market	65%	44%
Shrine of Remembrance	15%	12%
Southbank/Southgate	34%	26%
St Kilda	36%	28%

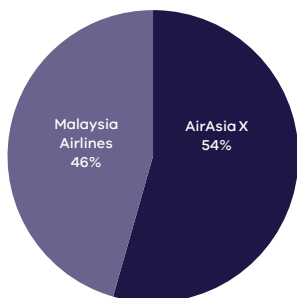
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most visited Melbourne attractions by Malaysian overnight visitors to Victoria were the CBD shopping precinct (70 per cent compared with 63 per cent of international visitors overall) and the Queen Victoria Market (65 per cent of compared with 44 per cent of international visitors overall).

Other attractions that Malaysian visitors were more likely to visit compared to international visitors overall included St Kilda (36 per cent of Malaysian overnight visitors to Victoria, compared with 28 per cent of international visitors overall), Southbank/Southgate (34 per cent compared with 26 per cent of international overnight visitors overall), Crown Casino/entertainment complex (28 per cent compared with 19 per cent of international overnight visitors overall), Chadstone Shopping Centre (22 per cent compared with 15 per cent of international overnight visitors overall) and Chapel Street (13 per cent compared with 9 per cent of international overnight visitors overall).

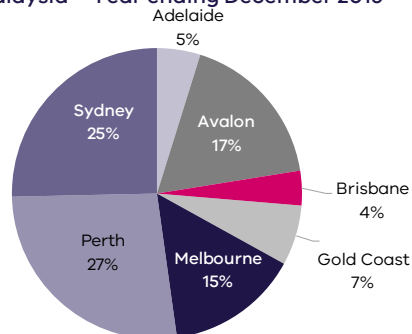
Aviation³

Airline Market Share – Direct Seats into Melbourne from Malaysia – Year ending December 2019



In the year ending December 2019, AirAsia X contributed 54 per cent of the 505,700 available seats on direct flights from Malaysia to Melbourne, with Malaysia Airlines contributing the remaining seats (46%).

Direct Flight Market Share – Direct Seats into Australian Airports from Malaysia – Year ending December 2019



In the year ending December 2019, Melbourne received 32 per cent of the 1.6 million available seats on direct flights from Malaysia to Australia, with 17 per cent arriving at Avalon Airport and 15 per cent at Melbourne Airport. Perth received the second largest share (27%) of available seats on direct flights from Malaysia to Australia, followed closely by Sydney (25%).

³ Note: Aviation capacity is measured by "available seats", which includes international visitors and Australian residents returning home.

Sources:

- International Visitor Survey (IVS), years ending December 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Tourism Australia Consumer Demand Project, Tourism Economics, April 2020
- International Airlines Operated Flights and Seats, year ending December 2019, Department of Infrastructure and Regional Development (BITRE)
- Visitor Arrivals and Departures, year ending December 2019, Tourism Research Australia

Base for IVS and Expenditure data: Only those trips where International visitors aged 15 years or over who have stayed in Australia for less than 12 months are in scope. Expenditure includes package expenditure.

Figures that are unreliable and unable to be published are represented by '-'. Figures might not add up due to rounding.

To view the full suite of 15 International Tourism Summaries (Victoria's top 15 international markets in terms of expenditure, visitors and nights), see <https://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on IVS and Expenditure data sources used please refer to our Guide to Tourism Data Sources and Definitions document found here: <https://www.business.vic.gov.au/tourism-industry-resources/research/teve-research>

For further information on Tourism Australia's Consumer Demand Project, see <http://www.tourism.australia.com/en/markets-and-research/reports/consumer-research.html>

Further information on international visitor statistics: <https://www.tra.gov.au/international>;
<http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

Factsheet produced by the TEVE Research Unit, May 2020.

Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for the use of this information.