



# PRESENTATION TO THE MALAYSIAN FRENCH BUSINESS COMMUNITY

17 FEBRUARY 2023

ALMATY | AUCKLAND | FRANKFURT | LOS ANGELES | LONDON | ISTANBUL  
MOSCOW | PARIS | SYDNEY | THE HAGUE | VANCOUVER | DUBLIN

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# ORGANIZATION STRUCTURE

ALMATY | AUCKLAND | FRANKFURT | LOS ANGELES | LONDON | ISTANBUL  
MOSCOW | PARIS | SYDNEY | THE HAGUE | VANCOUVER | DUBLIN





# MINISTRY OF TOURISM, ARTS & CULTURE (MOTAC)

## DEPARTMENTS & AGENCIES



**MALAYSIA TOURISM  
PROMOTION BOARD**



**DEPARTMENT OF NATIONAL  
HERITAGE**



**NATIONAL DEPARTMENT FOR  
CULTURE AND ARTS**



**ISTANA BUDAYA**



**NATIONAL ACADEMY OF ARTS,  
CULTURE & HERITAGE**



**KRAFTANGAN  
MALAYSIA**  
**MALAYSIAN HANDICRAFT  
DEVELOPMENT CORPORATION**



**بالی سنی لویس زمقارا**  
**Balai Seni Lukis Negara**  
National Art Gallery Malaysia  
**NATIONAL VISUAL ART  
DEVELOPMENT BOARD**



**ISLAMIC TOURISM  
CENTRE**



**MALAYSIA CONVENTION  
& EXHIBITION BUREAU**



**HOTEL SERI MALAYSIA**



# TOURISM MALAYSIA FUNCTION



## T- PROMOTION

- ▶ Advertising
- ▶ International Promotions
  - ASEAN
  - Asia & Africa
  - Americas, Europe & Oceania
- ▶ Domestic Promotion
- ▶ Communication
- ▶ Info Dissemination



## T- PLANNING & DEVELOPMENT

- ▶ Strategic Planning
- ▶ Package Development
- ▶ Domestic
- ▶ Production
- ▶ Communication & Publicity
- ▶ Information Technology

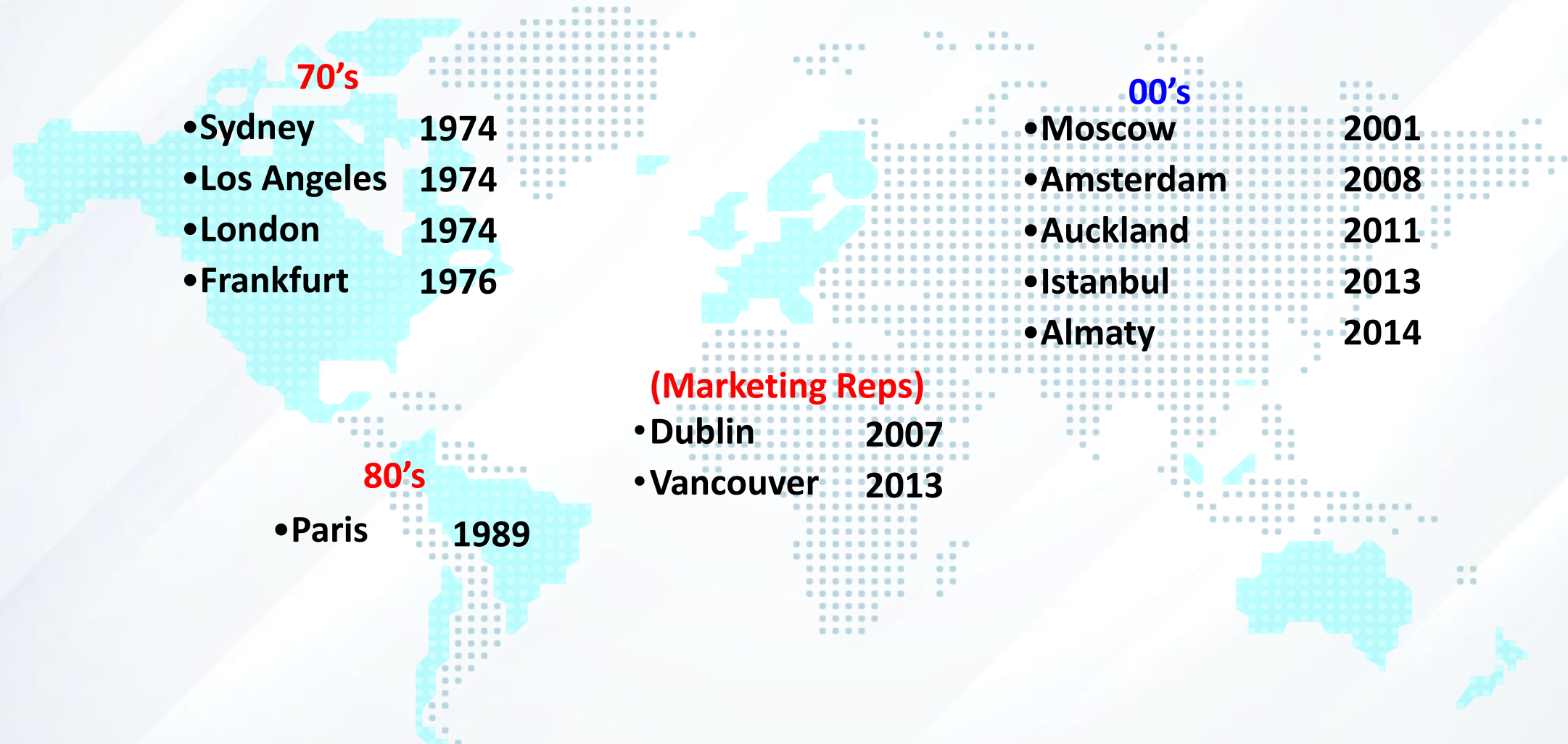


## MANAGEMENT & OPERATION

- ▶ Finance
- ▶ Administration
- ▶ Human Resource
  - ▶ Corporate Management
  - ▶ Legal
  - ▶ Internal Audit
  - ▶ Integrity

# INTERNATIONAL PROMOTION DIVISION (AMERICAS/EUROPE/OCEANIA)

OVERSEAS OPERATION (10 OFFICES & 2 MARKETING REPRESENTATIVES)



# INTERNATIONAL PROMOTION DIVISION (AMERICAS/EUROPE/OCEANIA)

## AREA OF COVERAGE

| AMERICAS       |                                                                                                                                                                   |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| TM LOS ANGELES | AMERICA CONTINENT                                                                                                                                                 |
| TM VANCOUVER   | CANADA                                                                                                                                                            |
| EUROPE         |                                                                                                                                                                   |
| TM ISTANBUL    | TURKIYE, BULGARIA, ROMANIA, MOLDOVA, AZERBAIJAN, GEORGIA, UKRAINE, SERBIA, CROATIA, BOSNIA & HERZEGOVINA                                                          |
| TM LONDON      | UNITED KINGDOM, (ENGLAND, SCOTLAND, WALES, & NORTHERN IRELAND)                                                                                                    |
| TM DUBLIN      | IRELAND                                                                                                                                                           |
| TM PARIS       | FRANCE, GREECE, ALBANIA, MACEDONIA, MONTENEGRO, SLOVENIA, MOROCCO, ALGERIA, TUNISIA,<br><b>MARKETING REPS (TM MILAN)</b> - SPAIN, PORTUGAL, ITALY, MALTA, ANDORRA |
| TM MOSCOW      | RUSSIA, BELARUS & ARMENIA                                                                                                                                         |





# INTERNATIONAL PROMOTION DIVISION (AMERICAS/EUROPE/OCEANIA)

## AREA OF COVERAGE



| EUROPE       |                                                                                                                                                                 |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| TM ALMATY    | KAZAKSHTAN, UZBEKISTAN, TURKMENISTAN, TAJIKISTAN, KYRGYZSTAN                                                                                                    |
| TM FRANKFURT | GERMANY, SWITZERLAND, AUSTRIA, POLAND, HUNGARY, CZECH REPUBLIC, SLOVAKIA                                                                                        |
| TM THE HAGUE | BELGIUM, NETHERLANDS, LUXEMBOURG<br><b>MARKETING REPS (TM NORDIC)</b> - BALTIC (LITHUANIA, ESTONIA, LATVIA), NORDIC (FINLAND, ICELAND, NORWAY, SWEDEN, DENMARK) |
| OCEANIA      |                                                                                                                                                                 |
| TM SYDNEY    | AUSTRALIA, PAPUA NEW GUINEA, CHRISTMAS ISLAND                                                                                                                   |
| TM AUCKLAND  | NEW ZEALAND, (NORTH & SOUTH ISLAND), NEW CALEDONIA, FIJI & TONGA                                                                                                |





# MARKET PERFORMANCE 2022

ALMATY | AUCKLAND | FRANKFURT | LOS ANGELES | LONDON | ISTANBUL  
MOSCOW | PARIS | SYDNEY | THE HAGUE | VANCOUVER | DUBLIN



# TARGET 2022



**9.2M**  
TOURIST ARRIVALS



**26.8B**  
RECEIPTS (MYR)

| Market       | Target Arrivals  |
|--------------|------------------|
| ASEAN        | 7,430,000        |
| EAST ASIA    | 395,000          |
| SOUTH ASIA   | 464,000          |
| WEST ASIA    | 67,000           |
| EUROPE       | 366,000          |
| OCEANIA      | 140,000          |
| AMERICAS     | 136,000          |
| others       | 205,000          |
| <b>TOTAL</b> | <b>9,200,000</b> |



# INTERNATIONAL PROMOTION DIVISION (AMERICAS/EUROPE/OCEANIA)

## 2022 MARKET PERFORMANCE





**(APRIL - DECEMBER 2022)**

| <b>SUMMARY</b> |                                   |              |            |             |             |               |             |            |            |            |              |
|----------------|-----------------------------------|--------------|------------|-------------|-------------|---------------|-------------|------------|------------|------------|--------------|
| <b>NO.</b>     | <b>PROGRAMMES/<br/>ACTIVITIES</b> | <b>2022</b>  |            |             |             |               |             |            |            |            |              |
|                |                                   | <b>APRIL</b> | <b>MAY</b> | <b>JUNE</b> | <b>JULY</b> | <b>AUGUST</b> | <b>SEPT</b> | <b>OCT</b> | <b>NOV</b> | <b>DEC</b> | <b>TOTAL</b> |
| <b>A.</b>      | <b>PROMOTION</b>                  |              |            |             |             |               |             |            |            |            |              |
|                | <b>AERO</b>                       | 35           | 33         | 47          | 48          | 28            | 65          | 60         | 78         | 45         | 439          |
|                | <b>ASAF</b>                       | 16           | 23         | 16          | 17          | 20            | 22          | 16         | 21         | 22         | 173          |
|                | <b>ASEAN</b>                      | 5            | 8          | 13          | 8           | 11            | 8           | 14         | 8          | 10         | 85           |
|                | <b>SUB-TOTAL</b>                  | 56           | 64         | 76          | 73          | 59            | 95          | 90         | 107        | 77         | 697          |
| <b>B.</b>      | <b>PUBLIC RELATIONS (PR)</b>      |              |            |             |             |               |             |            |            |            |              |
|                | <b>AERO</b>                       | 32           | 10         | 13          | 14          | 20            | 13          | 16         | 27         | 15         | 160          |
|                | <b>ASAF</b>                       | 9            | 11         | 14          | 17          | 19            | 9           | 5          | 6          | 8          | 98           |
|                | <b>ASEAN</b>                      | 3            | 8          | 13          | 8           | 9             | 10          | 6          | 5          | 18         | 80           |
|                | <b>SUB-TOTAL</b>                  | 44           | 29         | 40          | 39          | 48            | 32          | 27         | 38         | 41         | 338          |
| <b>C.</b>      | <b>PUBLICITY</b>                  |              |            |             |             |               |             |            |            |            |              |
|                | <b>AERO</b>                       | 13           | 12         | 15          | 11          | 19            | 22          | 26         | 23         | 23         | 164          |
|                | <b>ASAF</b>                       | 12           | 28         | 23          | 22          | 25            | 23          | 58         | 57         | 24         | 272          |
|                | <b>ASEAN</b>                      | -            | 1          | 7           | 33          | 6             | 6           | 4          | 1          | 7          | 65           |
|                | <b>SUB-TOTAL</b>                  | 25           | 41         | 45          | 66          | 50            | 51          | 88         | 81         | 54         | 501          |
| <b>D.</b>      | <b>OTHERS</b>                     |              |            |             |             |               |             |            |            |            |              |
|                | <b>AERO</b>                       | 7            | 3          | 28          | 34          | 40            | 43          | 33         | 53         | 35         | 276          |
|                | <b>ASAF</b>                       | 14           | 7          | 22          | 21          | 17            | 30          | 29         | 35         | 28         | 203          |
|                | <b>ASEAN</b>                      | -            | 8          | 32          | 45          | 11            | 21          | 10         | 13         | 35         | 175          |
|                | <b>SUB-TOTAL</b>                  | 21           | 18         | 82          | 100         | 68            | 94          | 72         | 101        | 98         | 654          |
|                | <b>TOTAL</b>                      | 146          | 152        | 243         | 278         | 225           | 272         | 277        | 327        | 270        | 2,190        |

# INTERNATIONAL PROMOTION DIVISION (AMERICAS/EUROPE/OCEANIA)

## TOURIST ARRIVALS [2019 – 2022]

| REGION          | 2019                | 2020               | 2021               | 2022    | 2022<br>(TARGET) | 2022<br>ACTUAL/TARGET<br>(%) | 2022/2021<br>CHANGE (%) | 2022/2019<br>CHANGE (%) |
|-----------------|---------------------|--------------------|--------------------|---------|------------------|------------------------------|-------------------------|-------------------------|
| AMERICAS        | 406,722             | 76,713             | 2,888              | 155,126 | 136,000          | 114.06                       | 5,371.3                 | -61.86                  |
| EUROPE          | 1,181,304           | 260,423            | 8,482              | 456,181 | 366,000          | 124.63                       | 5,378.2                 | -61.38                  |
| OCEANIA         | 425,497             | 82,601             | 1,570              | 174,098 | 140,000          | 124.35                       | 11,089.04               | -59.08                  |
| CENTRAL<br>ASIA | 35,931              | 11,172             | 301                | 9,366   | 6,000            | 156.1                        | 3,111.6                 | -73.93                  |
| TOTAL           | 2,049,454<br>(+3.8) | 430,909<br>(-78.9) | 16,241<br>(-96.23) | 794,771 | 648,000          | 122.64                       | 4,893.6                 | -61.23                  |

## TOURIST ARRIVALS TO MALAYSIA 2022

| REGION / COUNTRY<br>OF NATIONALITY | 2022 |      |      |       |       |       |       |       |       |       |       |       | 2022             | 2019    | 22/19  | 2022  |
|------------------------------------|------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------------------|---------|--------|-------|
|                                    |      |      |      |       |       |       |       |       |       |       |       |       |                  |         | CHANGE | SHARE |
|                                    | JAN  | FEB  | MAR  | APR   | MAY   | JUN   | JUL   | AUG   | SEP   | OCT   | NOV   | DEC   | JANUARY-DECEMBER |         | (%)    | (%)   |
| AMERICAS                           | 876  | 685  | 1006 | 6427  | 10322 | 14588 | 18234 | 17247 | 17267 | 21803 | 21961 | 24710 | 155126           | 406722  | -61.86 | 1.54  |
| CARIBBEAN                          | 10   | 11   | 15   | 80    | 118   | 111   | 188   | 227   | 171   | 309   | 196   | 248   | 1684             | 3281    | -48.67 | 0.02  |
| CENTRAL AMERICA                    | 22   | 7    | 15   | 160   | 225   | 258   | 391   | 414   | 563   | 808   | 614   | 526   | 4003             | 11376   | -64.81 | 0.04  |
| MEXICO                             | 14   | 6    | 11   | 127   | 178   | 200   | 331   | 331   | 458   | 663   | 502   | 434   | 3255             | 8949    | -63.63 | 0.03  |
| NICARAGUA                          | 0    | 0    | 0    | 1     | 4     | 2     | 6     | 4     | 6     | 8     | 9     | 3     | 43               | 114     | -62.28 | 0.00  |
| PANAMA                             | 0    | 0    | 1    | 5     | 5     | 4     | 8     | 10    | 19    | 21    | 16    | 9     | 98               | 437     | -77.57 | 0.00  |
| OTHERS                             | 8    | 1    | 3    | 27    | 38    | 52    | 46    | 69    | 80    | 116   | 87    | 80    | 607              | 1876    | -67.64 | 0.01  |
| NORTHERN AMERICA                   | 777  | 627  | 902  | 5671  | 9197  | 13398 | 16513 | 15323 | 15206 | 19052 | 19664 | 22467 | 138797           | 357497  | -61.18 | 1.38  |
| CANADA                             | 134  | 115  | 203  | 1362  | 1919  | 2298  | 2982  | 3441  | 3496  | 4611  | 4865  | 5230  | 30656            | 87568   | -64.99 | 0.30  |
| UNITED STATES                      | 643  | 512  | 699  | 4309  | 7278  | 11100 | 13531 | 11882 | 11710 | 14441 | 14799 | 17237 | 108141           | 269928  | -59.94 | 1.07  |
| OTHERS                             | 0    | 0    | 0    | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0                | 1       | 0.00   | 0.00  |
| SOUTHERN AMERICA                   | 67   | 40   | 74   | 516   | 782   | 821   | 1142  | 1283  | 1327  | 1634  | 1487  | 1469  | 10642            | 34568   | -69.21 | 0.11  |
| BRAZIL                             | 45   | 26   | 41   | 299   | 393   | 389   | 567   | 653   | 658   | 683   | 688   | 716   | 5158             | 14220   | -63.73 | 0.05  |
| ARGENTINA                          | 8    | 9    | 11   | 68    | 133   | 149   | 203   | 168   | 220   | 288   | 285   | 262   | 1804             | 7750    | -76.72 | 0.02  |
| VENEZUELA                          | 5    | 0    | 6    | 15    | 25    | 35    | 18    | 43    | 34    | 52    | 45    | 51    | 329              | 1395    | -76.42 | 0.00  |
| PARAGUAY                           | 0    | 0    | 0    | 4     | 3     | 2     | 9     | 9     | 11    | 12    | 6     | 12    | 68               | 175     | -61.14 | 0.00  |
| OTHERS                             | 9    | 5    | 16   | 130   | 228   | 246   | 345   | 410   | 404   | 599   | 463   | 428   | 3283             | 11028   | -70.23 | 0.03  |
| OCEANIA                            | 644  | 502  | 731  | 7095  | 9187  | 13218 | 18518 | 16454 | 21046 | 23688 | 23994 | 39021 | 174098           | 425497  | -59.08 | 1.73  |
| AUSTRALIA                          | 558  | 433  | 625  | 6275  | 7987  | 11612 | 16030 | 14169 | 18463 | 20565 | 21092 | 34456 | 152265           | 368271  | -58.65 | 1.51  |
| NEW ZEALAND                        | 74   | 61   | 81   | 671   | 916   | 1287  | 1952  | 1850  | 2182  | 2604  | 2511  | 4049  | 18238            | 50140   | -63.63 | 0.18  |
| OTHERS                             | 12   | 8    | 25   | 149   | 284   | 319   | 536   | 435   | 401   | 519   | 391   | 516   | 3595             | 7086    | -49.27 | 0.04  |
| EUROPE                             | 2487 | 2064 | 3145 | 19944 | 27630 | 32274 | 57271 | 66806 | 50061 | 63742 | 60637 | 70120 | 456181           | 1181304 | -61.38 | 4.53  |
| EASTERN EUROPE                     | 203  | 176  | 321  | 1770  | 2553  | 2990  | 4209  | 5266  | 5910  | 8961  | 12528 | 15971 | 60858            | 169097  | -64.01 | 0.60  |
| RUSSIA                             | 53   | 51   | 150  | 709   | 1110  | 1150  | 1599  | 2031  | 2628  | 4834  | 7563  | 11125 | 33003            | 79984   | -58.74 | 0.33  |
| CZECH. REP                         | 13   | 18   | 30   | 143   | 130   | 268   | 444   | 394   | 360   | 431   | 609   | 511   | 3351             | 12235   | -72.61 | 0.03  |
| POLAND                             | 34   | 31   | 42   | 278   | 403   | 536   | 838   | 1160  | 1096  | 1276  | 1732  | 1046  | 8472             | 27033   | -68.66 | 0.08  |
| AZERBAIJAN                         | 4    | 3    | 12   | 14    | 30    | 37    | 37    | 86    | 51    | 69    | 68    | 96    | 507              | 1323    | -61.68 | 0.01  |
| UKRAINE                            | 45   | 35   | 26   | 180   | 257   | 316   | 382   | 456   | 497   | 607   | 753   | 827   | 4381             | 16019   | -72.65 | 0.04  |
| OTHERS                             | 54   | 38   | 61   | 446   | 623   | 683   | 909   | 1139  | 1278  | 1744  | 1803  | 2366  | 11144            | 32503   | -65.71 | 0.11  |
| NORTHERN EUROPE                    | 1055 | 873  | 1246 | 8736  | 11120 | 13453 | 21546 | 21619 | 18148 | 24563 | 21760 | 24387 | 168506           | 447042  | -62.31 | 1.67  |
| DENMARK                            | 65   | 46   | 61   | 427   | 501   | 623   | 1315  | 810   | 908   | 1005  | 1010  | 946   | 7717             | 22314   | -65.42 | 0.08  |
| FINLAND                            | 35   | 14   | 33   | 237   | 294   | 307   | 328   | 247   | 361   | 618   | 798   | 819   | 4091             | 13557   | -69.82 | 0.04  |
| NORWAY                             | 22   | 17   | 45   | 322   | 298   | 492   | 863   | 459   | 449   | 674   | 624   | 695   | 4960             | 14585   | -65.99 | 0.05  |
| SWEDEN                             | 37   | 49   | 65   | 461   | 490   | 621   | 870   | 622   | 862   | 1084  | 1269  | 1653  | 8083             | 29592   | -72.69 | 0.08  |
| IRELAND                            | 45   | 43   | 50   | 409   | 556   | 813   | 1086  | 964   | 1013  | 1581  | 1079  | 1100  | 8739             | 19696   | -55.63 | 0.09  |
| UNITED KINGDOM                     | 850  | 702  | 991  | 6868  | 8949  | 10569 | 17058 | 18498 | 14530 | 19564 | 16947 | 19141 | 134667           | 346485  | -61.13 | 1.34  |
| OTHERS                             | 1    | 2    | 1    | 12    | 32    | 28    | 26    | 19    | 25    | 37    | 33    | 33    | 249              | 813     | -69.37 | 0.00  |

Source : Immigration Department of Malaysia



## TOURIST ARRIVALS TO MALAYSIA 2022

| REGION / COUNTRY<br>OF NATIONALITY | 2022       |            |            |             |             |             |             |              |             |             |             |             | 2022             | 2019          | 22/19<br>CHANGE | 2022<br>SHARE |
|------------------------------------|------------|------------|------------|-------------|-------------|-------------|-------------|--------------|-------------|-------------|-------------|-------------|------------------|---------------|-----------------|---------------|
|                                    | JAN        | FEB        | MAR        | APR         | MAY         | JUN         | JUL         | AUG          | SEP         | OCT         | NOV         | DEC         | JANUARY-DECEMBER |               | (%)             | (%)           |
| <b>SOUTHERN EUROPE</b>             | 461        | 325        | 593        | 2119        | 3150        | 3785        | 7445        | 12760        | 6469        | 8243        | 6963        | 6296        | 58609            | 149314        | -60.75          | 0.58          |
| ITALY                              | 210        | 123        | 155        | 688         | 1019        | 1158        | 2161        | 5182         | 1961        | 2341        | 1916        | 1952        | 18866            | 54710         | -65.52          | 0.19          |
| SPAIN                              | 132        | 87         | 65         | 487         | 767         | 1178        | 3151        | 5104         | 2502        | 3117        | 2252        | 1632        | 20474            | 43616         | -53.06          | 0.20          |
| PORTUGAL                           | 15         | 26         | 21         | 236         | 294         | 410         | 515         | 764          | 441         | 625         | 606         | 540         | 4493             | 12185         | -63.13          | 0.04          |
| TURKIYE                            | 57         | 33         | 249        | 378         | 595         | 555         | 772         | 791          | 749         | 1089        | 946         | 955         | 7169             | 15290         | -53.11          | 0.07          |
| OTHERS                             | 47         | 56         | 103        | 330         | 475         | 484         | 846         | 919          | 816         | 1071        | 1243        | 1217        | 7607             | 23513         | -67.65          | 0.08          |
| <b>WESTERN EUROPE</b>              | 768        | 690        | 985        | 7319        | 10807       | 12046       | 24071       | 27161        | 19534       | 21975       | 19386       | 23466       | 168208           | 415851        | -59.55          | 1.67          |
| BELGIUM                            | 22         | 25         | 48         | 273         | 442         | 568         | 1352        | 1104         | 1041        | 1037        | 833         | 798         | 7543             | 22082         | -65.84          | 0.07          |
| LUXEMBOURG                         | 0          | 3          | 1          | 12          | 13          | 16          | 45          | 59           | 39          | 36          | 36          | 49          | 309              | 830           | -62.77          | 0.00          |
| NETHERLANDS                        | 163        | 151        | 171        | 1376        | 1856        | 2173        | 5544        | 4896         | 3678        | 3885        | 3687        | 3490        | 31070            | 82110         | -62.16          | 0.31          |
| AUSTRIA                            | 41         | 24         | 55         | 273         | 351         | 377         | 788         | 807          | 689         | 686         | 842         | 946         | 5879             | 13146         | -55.28          | 0.06          |
| <b>FRANCE</b>                      | <b>233</b> | <b>208</b> | <b>327</b> | <b>2565</b> | <b>3894</b> | <b>3944</b> | <b>8088</b> | <b>10980</b> | <b>6097</b> | <b>7442</b> | <b>5365</b> | <b>5944</b> | <b>55087</b>     | <b>141661</b> | <b>-61.11</b>   | <b>0.55</b>   |
| GERMANY                            | 247        | 231        | 312        | 2321        | 3618        | 4237        | 6584        | 7989         | 6904        | 7381        | 7192        | 10764       | 57780            | 130221        | -55.63          | 0.57          |
| SWITZERLAND                        | 62         | 46         | 71         | 498         | 625         | 723         | 1667        | 1324         | 1082        | 1501        | 1423        | 1464        | 10486            | 25659         | -59.13          | 0.10          |
| <b>*CENTRAL ASIA</b>               | <b>87</b>  | <b>67</b>  | <b>46</b>  | <b>337</b>  | <b>492</b>  | <b>620</b>  | <b>997</b>  | <b>1196</b>  | <b>1111</b> | <b>1025</b> | <b>1408</b> | <b>1980</b> | <b>9366</b>      | <b>35931</b>  | <b>-73.93</b>   | <b>0.09</b>   |
| KAZAKSTAN                          | 35         | 40         | 16         | 136         | 163         | 191         | 265         | 307          | 334         | 435         | 410         | 504         | 2836             | 18138         | -84.36          | 0.03          |
| UZBEKISTAN                         | 24         | 16         | 11         | 78          | 123         | 206         | 474         | 640          | 530         | 375         | 769         | 1196        | 4442             | 12031         | -63.08          | 0.04          |
| OTHERS                             | 28         | 11         | 19         | 123         | 206         | 223         | 258         | 249          | 247         | 215         | 229         | 280         | 2088             | 5762          | -63.76          | 0.02          |

Source : Immigration Department of Malaysia

## TOURIST RECEIPTS (JAN – DEC 2022)



**TOURIST  
ARRIVALS**

**10,070,964**



**TOURIST RECEIPTS  
(RM MILL)**

**28,228.3**



**PERCAPITA  
(RM)**

**2,802.9**



**AVERAGE  
LENGTH OF STAY**

**3.8 NIGHTS**

## TOURIST RECEIPTS (JAN – DEC 2019)



**Tourist  
Arrivals**

**26,100,784  
(+1.0%)**



**Total  
Expenditure**

**RM86,143.5 mil.  
(+2.4%)**



**Average  
Stay**

**7.4 nights  
(+0.9 nights)**

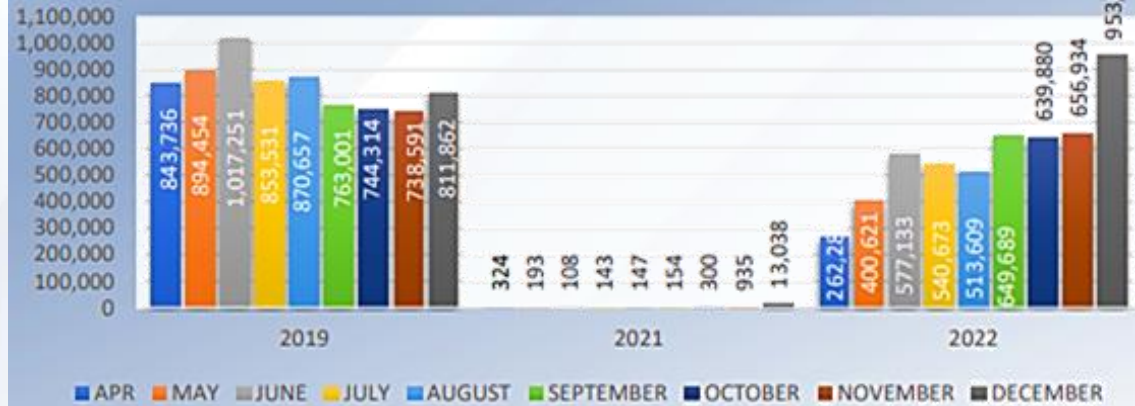


**Per Capita  
Expenditure**

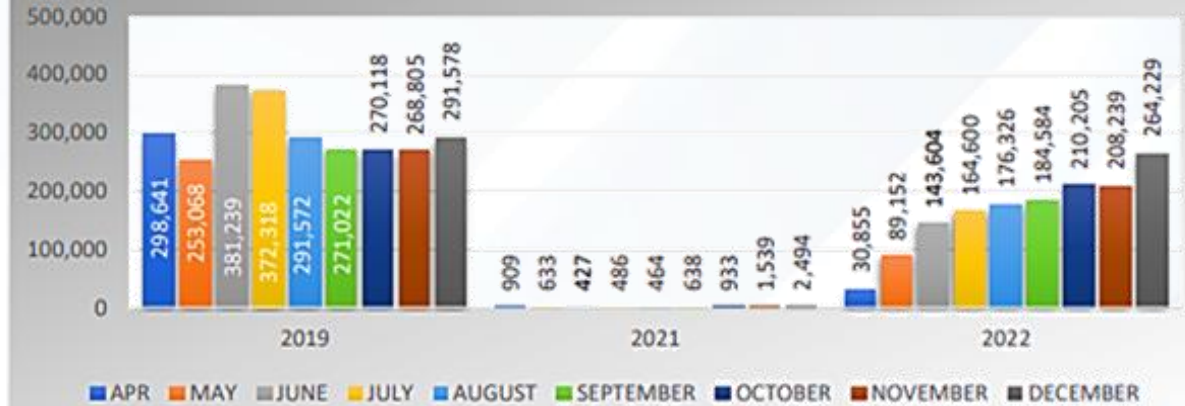
**RM 3,300.4  
(+1.3%)**

# TOURIST ARRIVALS 2019 - 2022

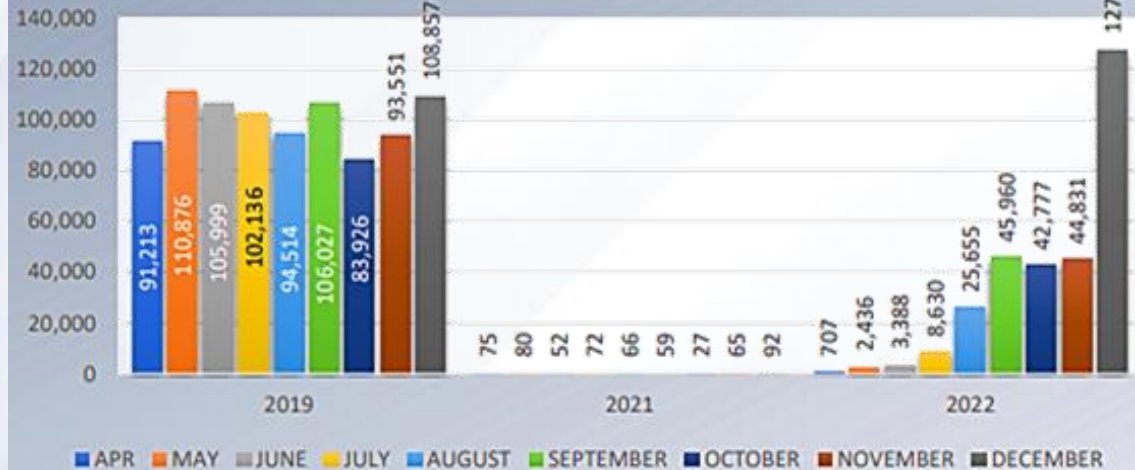
## 1. SINGAPORE



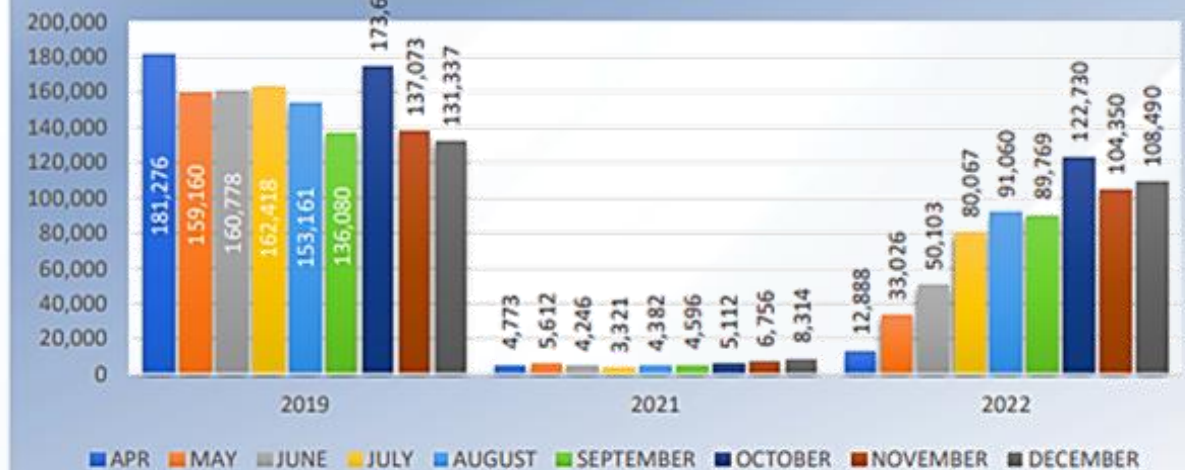
## 2. INDONESIA



## BRUNEI



## 3. THAILAND





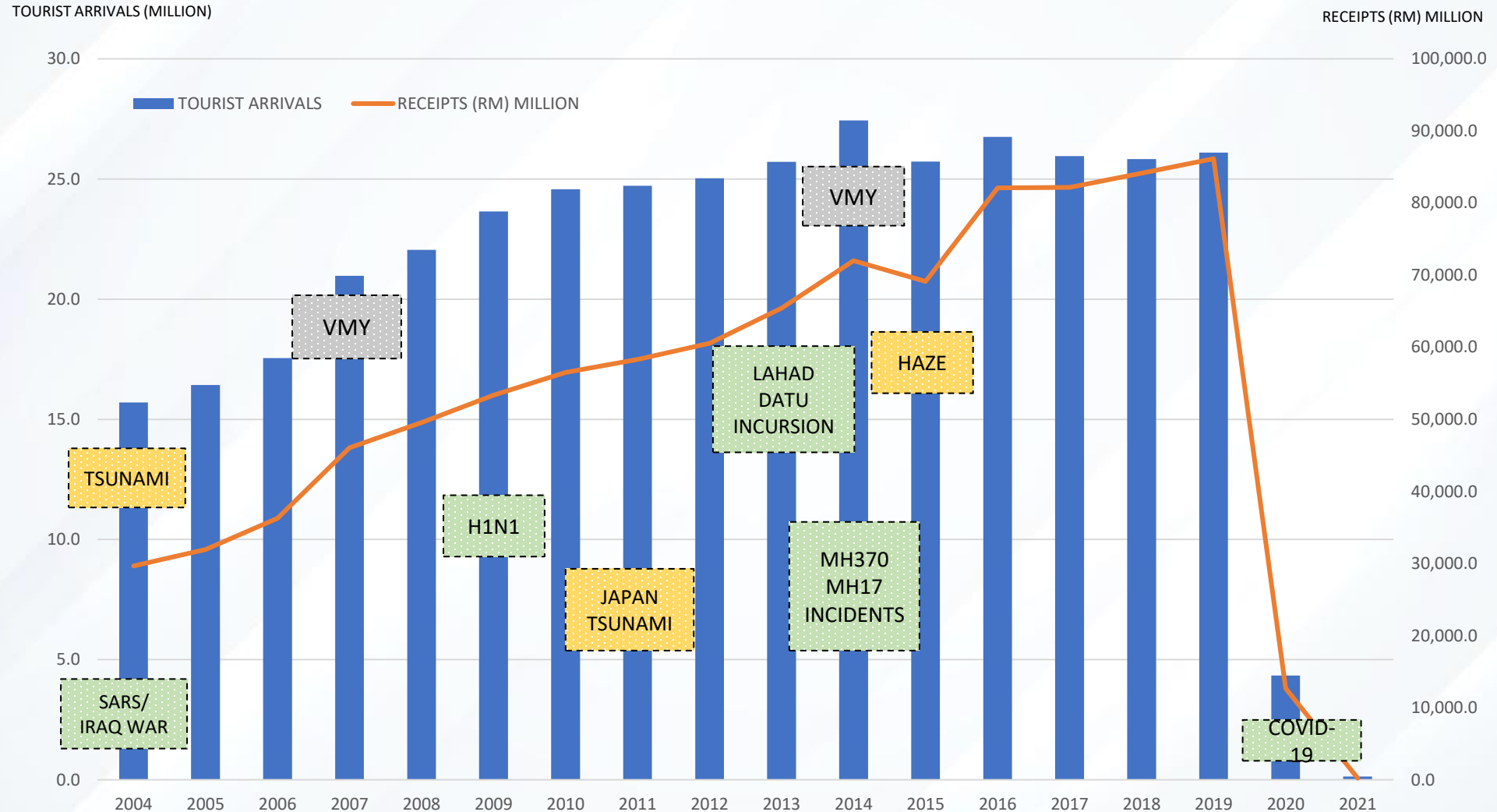
# TOURIST ARRIVALS & RECEIPTS TO MALAYSIA 2004-2021

Malaysia has recorded 4,332,722 tourist arrivals in 2020, a decline of -83.4%. In terms of tourists expenditure, Malaysia received RM 12.7 billion in tourism receipts, which is also a decline of -85.3% compared to the same period in 2019.

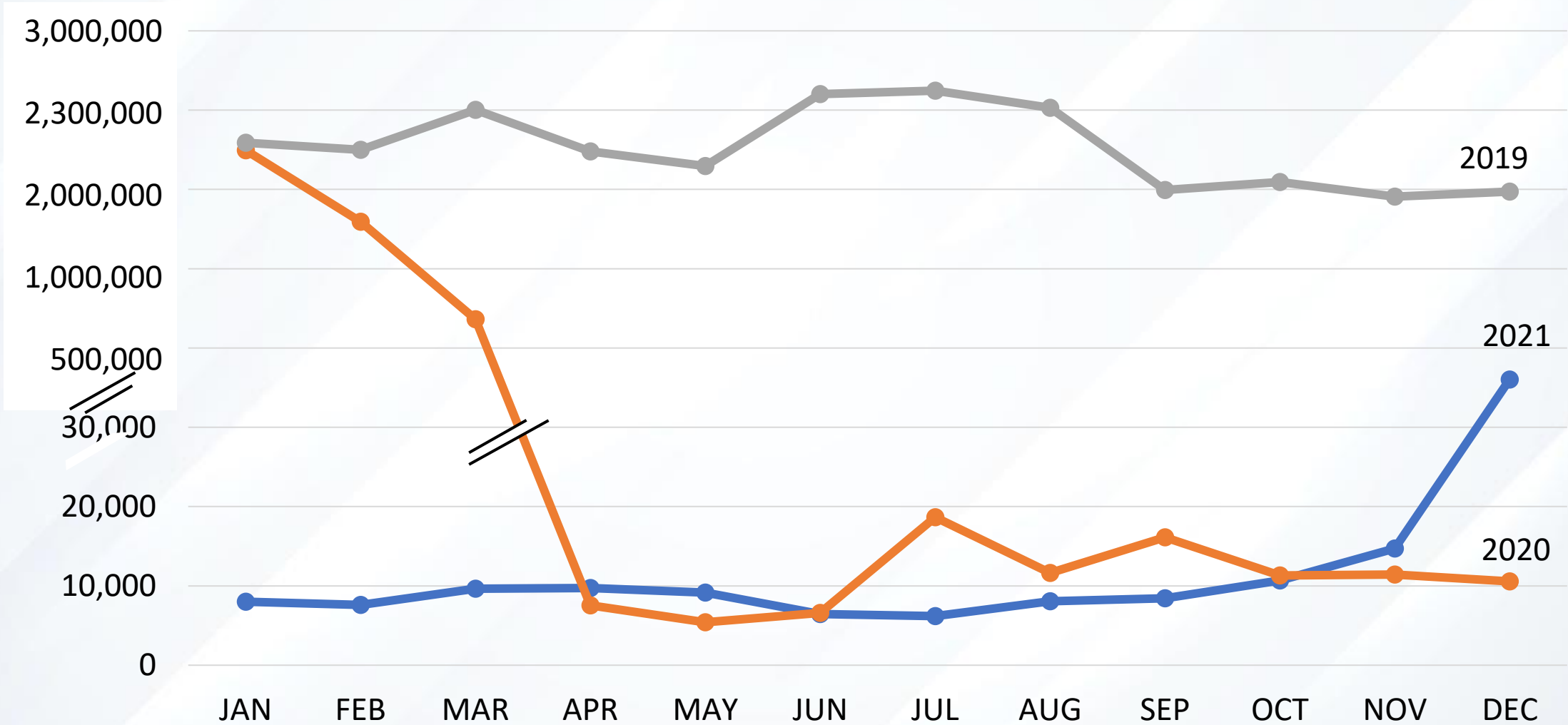
|      | TOURIST ARRIVALS | RECEIPTS (RM) MILLION |
|------|------------------|-----------------------|
| 2004 | 15,703,406       | 29,651.4              |
| 2005 | 16,431,055       | 31,954.1              |
| 2006 | 17,546,863       | 36,271.7              |
| 2007 | 20,972,822       | 46,070.0              |
| 2008 | 22,052,488       | 49,561.2              |
| 2009 | 23,646,191       | 53,367.7              |
| 2010 | 24,577,196       | 56,492.5              |
| 2011 | 24,714,324       | 58,315.9              |
| 2012 | 25,032,708       | 60,556.7              |
| 2013 | 25,715,460       | 65,443.3              |
| 2014 | 27,437,315       | 71,998.8              |
| 2015 | 25,721,251       | 69,119.6              |
| 2016 | 26,757,392       | 82,098.2              |
| 2017 | 25,948,459       | 82,165.0              |
| 2018 | 25,832,354       | 84,135.2              |
| 2019 | 26,100,784       | 86,143.5              |
| 2020 | 4,332,722        | 12,688.2              |
| 2021 | 134,728          | 238.7                 |

Source: Strategic Planning, Tourism Malaysia with the cooperation of Immigration Department, Malaysia

# TOURIST ARRIVALS & RECEIPTS TO MALAYSIA 2004-2021



# TOURIST ARRIVALS TO MALAYSIA 2019-2021





# MARKET ACCESSIBILITY

ALMATY | AUCKLAND | FRANKFURT | LOS ANGELES | LONDON | ISTANBUL  
MOSCOW | PARIS | SYDNEY | THE HAGUE | VANCOUVER | DUBLIN

# SCHEDULE FLIGHT SUMMARY

(DECEMBER 2022)



| REGION       | MALAYSIA |            |          |            |          |            |          |            | CHANGES<br>(2022/2021) |            | CHANGES<br>(2022/2019) |            |
|--------------|----------|------------|----------|------------|----------|------------|----------|------------|------------------------|------------|------------------------|------------|
|              | 2022     |            | 2021     |            | 2020     |            | 2019     |            | %                      | %          | %                      | %          |
|              | Ops/Week | Seats/Week | Ops/Week | Seats/Week | Ops/Week | Seats/Week | Ops/Week | Seats/Week | Ops/week               | Seats/Week | Ops/week               | Seats/Week |
| EUROPE       | 28       | 8,676      | 14       | 4,301      | 9        | 2,586      | 35       | 11,031     | 107.14                 | 113.71     | -20.0                  | -21.3      |
| AMERICAS     | -        | -          | -        | -          | -        | -          | 7        | 2,639      | -                      | -          | -                      | -          |
| OCEANIA      | 93       | 25,665     | 15       | 4,798      | 24       | 7,204      | 131      | 36,430     | 526.66                 | 434.91     | -29.0                  | -29.55     |
| CENTRAL ASIA | 2        | 516        | -        | -          | -        | -          | 5        | 1,014      | -                      | -          | -60.0                  | -49.1      |
| TOTAL        | 123      | 34,857     | 29       | 9,099      | 33       | 9,790      | 178      | 51,114     | 324.13                 | 283.08     | -30.89                 | -31.80     |



# FLIGHT ACCESSIBILITY TO MALAYSIA FOR FRENCH MARKET

## MARCH 2023 (INDIRECT)



| No. | Departure Country    | Operating Airlines         | Frequency | Seats   |
|-----|----------------------|----------------------------|-----------|---------|
| 1   | Netherlands          | KLM-Royal Dutch Airlines   | 18        | 5,656   |
| 2   | Turkiye              | Turkish Airlines           | 44        | 14,866  |
| 3   | United Kingdom       | Malaysia Airlines          | 62        | 17,732  |
| 4   | United Arab Emirates | Air Arabia                 | 9         | 1,935   |
|     |                      | Emirates                   | 62        | 29,115  |
|     |                      | Etihad Airways             | 31        | 9,754   |
| 5   | Qatar                | Malaysia Airlines          | 57        | 16,530  |
|     |                      | Qatar Airways              | 45        | 15,579  |
| 6   | Oman                 | Oman Air                   | 38        | 8,704   |
| 7   | Singapore            | AirAsia                    | 687       | 123,660 |
|     |                      | Batik Air Malaysia         | 124       | 20,592  |
|     |                      | Ethiopian Airlines         | 4         | 1,080   |
|     |                      | Firefly                    | 186       | 13,392  |
|     |                      | Jetstar Asia               | 124       | 22,320  |
|     |                      | Malaysia Airlines          | 284       | 45,440  |
|     |                      | Scot                       | 349       | 70,271  |
|     |                      | Singapore Airlines         | 268       | 49,727  |
| 8   | Thailand             | AirAsia                    | 498       | 89,640  |
|     |                      | Batik Air Malaysia         | 93        | 15,120  |
|     |                      | Firefly                    | 18        | 2,880   |
|     |                      | Malaysia Airlines          | 190       | 30,908  |
|     |                      | Qatar Airways              | 14        | 4,270   |
|     |                      | Thai AirAsia               | 273       | 49,140  |
|     |                      | Thai Airways International | 62        | 16,492  |
|     |                      | Thai Smile Airways         | 31        | 5,022   |



# PROMOTIONAL PROGRAMMES 2023

ALMATY | AUCKLAND | FRANKFURT | LOS ANGELES | LONDON | ISTANBUL  
MOSCOW | PARIS | SYDNEY | THE HAGUE | VANCOUVER | DUBLIN



# INTERNATIONAL PROMOTION DIVISION (AMERICAS/EUROPE/OCEANIA)

## 2023 PROMOTIONAL PROGRAMMES

| NO. | PROGRAMMES                                                | PARTNERS                                                                                                          | TM OFFICE       | DATE               | PLACE                            |
|-----|-----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-----------------|--------------------|----------------------------------|
| 1   | <b>VakantieBeurs, The Hague</b>                           | State tourism body, private sectors, industries players                                                           | TM The Hague    | 11-15 Jan          | The Hague, Netherlands           |
| 2   | <b>FITUR International Tourism Fair in Madrid (FITUR)</b> | <b>Private sectors, industries players</b>                                                                        | <b>TM Paris</b> | <b>18 - 22 Jan</b> | <b>Madrid, Spain</b>             |
| 3   | <b>SALES MISSIONS &amp; ROADSHOWS – Nordic Region</b>     | State tourism body, private sectors, industries players, airlines, tourism related agencies, tourism associations | TM The Hague    | 18 - 27 Jan        | Denmark/ Sweden/ Finland/ Norway |
| 4   | <b>MATKA Nordic Travel Fair (MATKA)</b>                   | Private sectors, industries players                                                                               | TM The Hague    | 19 - 22 Jan        | Helsinki, Finland                |
| 5   | <b>Moscow Dive Show, Russia</b>                           | Private sectors, industries players                                                                               | TM Moscow       | 9 - 12 Feb         | Moscow, Russia                   |
| 6   | <b>Borsa Internazionale del Turismo (BIT)</b>             | <b>Private sectors, industries players</b>                                                                        | <b>TM Paris</b> | <b>12 - 14 Feb</b> | <b>Milan, Italy</b>              |

# INTERNATIONAL PROMOTION DIVISION (AMERICAS/EUROPE/OCEANIA)

## 2023 PROMOTIONAL PROGRAMMES

| NO. | PROGRAMMES                                                   | PARTNERS                                                                                                          | TM OFFICE       | DATE             | PLACE                |
|-----|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-----------------|------------------|----------------------|
| 7   | <b>Internationale Tourismus-Börse (ITB)</b>                  | State tourism body, private sectors, industries players, airlines, tourism related agencies, tourism associations | TM Frankfurt    | 7 - 9 March      | Berlin, Germany      |
| 8   | <b>Moscow International Travel &amp; Tourism Expo (MITT)</b> | State tourism body, private sectors, industries players                                                           | TM Moscow       | 16 - 18 March    | Moscow, Russia       |
| 9   | <b>Kazakhstan International Tourism Fair (KITF)</b>          | Private sectors, industries players                                                                               | TM Almaty       | 19 - 21 April    | Almaty, Kazakhstan   |
| 10  | <b>IFTM Top Resa</b>                                         | <b>Private sectors, industries players</b>                                                                        | <b>TM Paris</b> | <b>3 – 5 Oct</b> | <b>Paris, France</b> |
| 11  | <b>World Travel Mart (WTM)</b>                               | State tourism body, private sectors, industries players, airlines, tourism related agencies, tourism associations | TM London       | 6 – 8 Nov        | London, UK           |
| 12  | <b>Tashkent International Tourism Fair (TITF)</b>            | Private sectors, industries players                                                                               | TM Almaty       | 1 – 3 Dec        | Tashkent, Uzbekistan |



# PROMOTIONAL PROGRAMMES 2023-PARIS



| NO. | ITALY PROGRAMMES LOCAL PROMO                                                                                                                 | TRADE/<br>CONSUMER | TYPE     | DATE                    | PLACE        |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------|--------------------|----------|-------------------------|--------------|
| 1   | 3 webinar on Malaysia (TM)                                                                                                                   | Trade              | Digital  | Feb-March-April         | Italy        |
| 2   | 5 webinars with Malaysian states on product updates (Langkawi, Penang, Sabah, Sarawak, Terengganu) – welcomed also others (Pahang, Kelantan) | Trade              | Digital  | Jan-Feb-March-April-May | Italy        |
| 3   | Far East day (TAT, JNT0, SING, PHILIP)                                                                                                       | Trade              | Physical | May                     | Milan, Italy |
| 4   | Renew ADUTEI membership 2023                                                                                                                 | Trade              | Physical | 2023                    | Italy        |

| NO. | SPAIN PROGRAMMES LOCAL PROMO                                            | TRADE/<br>CONSUMER | TYPE     | DATE                                            | PLACE |
|-----|-------------------------------------------------------------------------|--------------------|----------|-------------------------------------------------|-------|
| 1   | Singapore Airlines Spain Joint Promotions (Breakfast meetings/Tactical) | Trade & Consumer   | Physical | 1 <sup>st</sup> Quarter/2 <sup>nd</sup> Quarter | Spain |
| 2.  | Seminar on Malaysia                                                     | Trade              | Digital  | March-April-May/Sept-Oct-Nov                    | Spain |

# PROMOTIONAL PROGRAMMES 2023-PARIS

| NO. | HQ INITIATED PROGRAMMES                                        | TRADE/<br>CONSUMER | EXHIBITION      | DATE           | PLACE                |
|-----|----------------------------------------------------------------|--------------------|-----------------|----------------|----------------------|
| 1   | <b>FITUR International Tourism Fair in Madrid (FITUR) 2023</b> | Trade & Consumer   | Physical        | 18-22 Jan      | Madrid, Spain        |
| 2   | <b>Borsa Internazionale del Turismo (BIT) 2023</b>             | Trade & Consumer   | Physical        | 12 - 14 Feb    | Milan, Italy         |
| 3   | <b>IFTM Top Resa 2023</b>                                      | <b>Trade</b>       | <b>Physical</b> | <b>3-5 Oct</b> | <b>Paris, France</b> |
| 4   | <b>TTG Rimini</b>                                              | Trade              | Physical        | 11-13 Oct      | Rimini, Italy        |

| NO. | FRANCE PROGRAMMES LOCAL PROMO                                                  | TRADE/<br>CONSUMER | TYPE            | DATE                                                     | PLACE                |
|-----|--------------------------------------------------------------------------------|--------------------|-----------------|----------------------------------------------------------|----------------------|
| 1   | <b>Asia Voyages Roadshow</b>                                                   | Trade              | Physical        | 9 March<br>3 May                                         | Grenoble<br>Biarritz |
| 2   | <b>Village International Gastronomie</b>                                       | <b>Consumer</b>    | <b>Physical</b> | <b>1-4 September</b>                                     | <b>Paris</b>         |
| 3   | <b>Malaysia Updates with Trade Industry Partners, Media &amp; Influencer</b>   | <b>Trade</b>       | <b>Physical</b> | <b>May</b>                                               | <b>Paris</b>         |
| 4   | <b>Breakfast Meeting with Singapore Airlines &amp; Singapore Tourism Board</b> | <b>Trade</b>       | <b>Physical</b> | <b>1<sup>st</sup> Quarter<br/>2<sup>nd</sup> Quarter</b> | <b>Paris</b>         |

# PROMOTIONAL PROGRAMMES 2023 - PARIS



| NO. | ITALY PROGRAMMES LOCAL PROMO                                                                                                              | TRADE/<br>CONSUMER | TYPE     | DATE                    | PLACE        |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------|--------------------|----------|-------------------------|--------------|
| 1   | 3 Webinar on Malaysia (TM)                                                                                                                | Trade              | Digital  | Feb-March-April         | Italy        |
| 2   | 5 Webinars with Malaysian states on product updates (Lgkwi, Penang, Sabah, Sarawak, Terengganu) – welcomed also others (Pahang, Kelantan) | Trade              | Digital  | Jan-Feb-March-April-May | Italy        |
| 3   | Far East day (TAT, JNTO, SING, PHILIP)                                                                                                    | Trade              | Physical | May                     | Milan, Italy |
| 4   | Renew ADUTEI membership 2023                                                                                                              | Trade              | Physical | 2023                    | Italy        |

| NO. | SPAIN PROGRAMMES LOCAL PROMO                                            | TRADE/<br>CONSUMER | TYPE     | DATE                                            | PLACE |
|-----|-------------------------------------------------------------------------|--------------------|----------|-------------------------------------------------|-------|
| 1   | Singapore Airlines Spain Joint Promotions (Breakfast meetings/Tactical) | Trade & Consumer   | Physical | 1 <sup>st</sup> Quarter/2 <sup>nd</sup> Quarter | Spain |
| 2.  | Seminar on Malaysia                                                     | Trade              | Digital  | March-April-May/Sept-Oct-Nov                    | Spain |



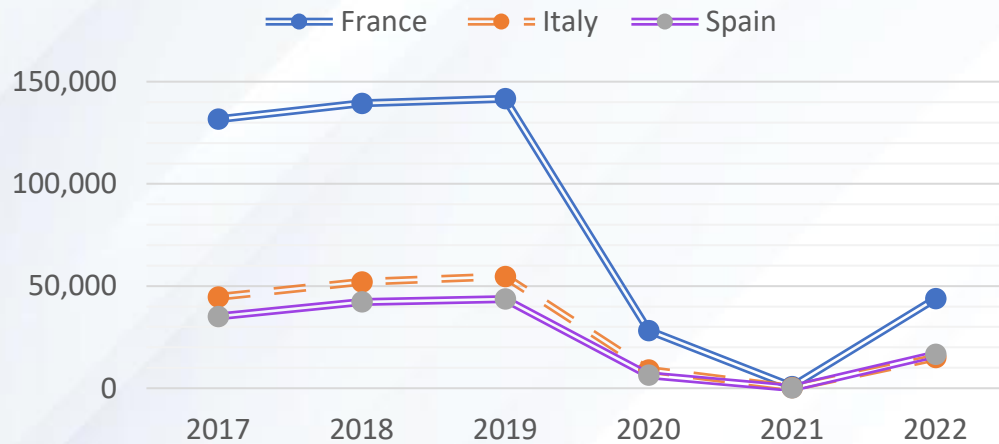
# PROMOTIONAL PROGRAMMES 2023 - PARIS



| NO. | PROGRAMMES (recommended)                                                                                                                 | TRADE/<br>CONSUMER  | TYPE             | DATE                         | PLACE                |
|-----|------------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------------|------------------------------|----------------------|
| 1   | Media Fam Trip with Le Figaro (8 pages Coverage)                                                                                         | Consumer            | Physical         | February/March               | France               |
| 2   | DITEX                                                                                                                                    | Trade &<br>Consumer | Physical         | 30 March-2<br>April          | France               |
| 3.  | Mahana Lyon                                                                                                                              | Consumer            | Physical         | 3-5 March                    | France               |
| 4   | Influencer & Media Fam trip                                                                                                              | Consumer            | Physical         | Jan-Dec                      | France, Italy, Spain |
| 5   | Singapore Airlines & Exo Travel Fam Trip                                                                                                 | Trade               | Physical         | March                        | Spain                |
| 6   | Malaysia, Singapore & Singapore Airlines Fam Trip                                                                                        | Trade               | Physical         | March                        | France               |
| 7   | Partnership & co-marketing with Travel agents network<br>(UVET 1.000 agencies- Gattinoni 1,200 agents, Geo 1.300 agents)                 | Trade               | Physical/digital | April-May                    | Italy                |
| 8   | Fam trip top Tour Operators with Turkish Airlines and<br>Qatar Airways                                                                   | Trade               | Physical         | March &<br>November          | Italy                |
| 9   | Partnership (webinars, social media promotion) with<br>ASTOI (association of Tour operators) and FIAVET<br>(association Travel Agencies) | Trade               | Digital          | February-March-<br>April-May | Italy                |
| 10  | Roadshow TOD (Travel Quotidiano trade newspaper) 5<br>cities                                                                             | Trade               | Physical         | March-April-<br>September    | Italy                |

# MARKET PERFORMANCE

## Arrivals to MALAYSIA 2017-2022



ARRIVALS TO MALAYSIA

|        | 2017    | 2018    | 2019    | 2020   | 2021 | 2022   |
|--------|---------|---------|---------|--------|------|--------|
| FRANCE | 131,668 | 139,408 | 141,661 | 28,237 | 843  | 43,778 |
| ITALY  | 44,638  | 52,055  | 54,710  | 8,971  | 300  | 14,998 |
| SPAIN  | 35,149  | 42,267  | 43,616  | 6,367  | 147  | 16,590 |

## Flight Frequency From Paris To Malaysia 2022

| AIRLINES               | Frequency/<br>week                                    | Capacity/week |
|------------------------|-------------------------------------------------------|---------------|
| TURKISH AIRLINES       | 52<br>(Including Nice, Marseilles, Lyon & Strasbourg) | 13,419        |
| QATAR AIRWAYS          | 21                                                    | 7,434         |
| EMIRATES               | 30<br>(Including Nice & Lyon)                         | 13,445        |
| SINGAPORE AIRLINES     | 10                                                    | 2,960         |
| ETIHAD                 | 6                                                     | 1,386         |
| THAI AIRWAYS           | 7                                                     | 1,876         |
| OMAN AIR               | 3                                                     | 792           |
| AIR FRANCE (VIA PARIS) | 3                                                     | 837           |



# TARGET 2023



**15.6M**  
TOURIST ARRIVALS



**47.6B**  
RECEIPTS (MYR)

| EUROPE & AMERICAS |             |
|-------------------|-------------|
| TM OFFICES        | ESTIMATION  |
| LONDON            | 0.174 mil.  |
| LOS ANGELES       | 0.119 mil.  |
| PARIS             | 0.110 mil.  |
| FRANKFURT         | 0.085 mil.  |
| THE HAGUE         | 0.042 mil.  |
| MOSCOW            | 0.028 mil.  |
| VANCOUVER         | 0.027 mil.  |
| ALMATY            | 0.008 mil.  |
| ISTANBUL          | 0.012 mil.  |
| DUBLIN            | 0.008 mil.  |
| TOTAL             | 0.613 mil.  |
| SHARE             | 3.9% [3.8%] |



| OCEANIA    |             |
|------------|-------------|
| TM OFFICES | ESTIMATION  |
| SYDNEY     | 0.273 mil.  |
| AUCKLAND   | 0.034 mil.  |
| TOTAL      | 0.308 mil.  |
| SHARE      | 2.0% [1.9%] |



# MARKET BRIEF & ISSUES/CHALLENGES PARIS 2023

ALMATY | AUCKLAND | FRANKFURT | LOS ANGELES | LONDON | ISTANBUL  
MOSCOW | PARIS | SYDNEY | THE HAGUE | VANCOUVER | DUBLIN



# MARKET BRIEF



## TRAVEL TRENDS

- Price sensitivity – best value, flexibility
- Search for genuine local experience
- Travellers needs to be guided in his choices and his experiences
- Use of mobile phone for bookings
- Social networks influence next destinations (<45 years old)
- Concerns on climate impact/carbon emission.
- Return of business trips
- Virtual reality and metaverse are becoming a tool to know in advance the destination
- Travel agents still play important role in booking long-haul destination

## MARKET SEGMENTS - DEMOGRAPHIC

- Millennials
- Gen Z
- Family with young kids
- Couples
- Honeymooners
- Business – incentives

## MARKET SEGMENTS - FRANCE GEOGRAPHIC

- Ile De France (Paris Area)
- South – Lyon, Nice Marseilles
- North West – Nantes
- South West - Bordeaux
- East – Strasbourg

## ITALY GEOGRAPHIC

- North Italy (Milan, Turin, Venice)
- Centre of Italy (Florence, Rome)
- South of Italy (Naples, Bari)
- Islands (Sicily, Sardinia)

## HOLIDAY TREND FOCUS ON:

- Green holidays
- Eco – sustainable tourism
- Family Travel
- Solo/Independent travelling
- Authentic local experience
- Experiential and immersive travel
- Food and traditions
- Digital Nomad
- Well Being Stay
- Film Tourism

## Outgoing destinations for France, Italy & Spain in 2023 (forecast) in order of preference:

France, Spain, Germany, Greece, United States of America, Swiss, Austria, Netherlands, United Kingdom, Europe euro area, Central and South America, **Asia**, Africa, Oceania

# MARKET PROFILE (2019)

| ARRIVALS AND RECEIPTS            |          |          |            |
|----------------------------------|----------|----------|------------|
| INDICATOR                        | 2018     | 2019     | DIFFERENCE |
| TOURIST ARRIVALS:                | 139,408  | 141,661  | 1.6        |
| TOURIST RECEIPT [RM MILLION]:    | 603.9    | 629.8    | 4.3        |
| AVERAGE PER CAPITA [RM]:         | 4,331.6  | 4,445.9  | 2.6        |
| AVERAGE PER DIEM [RM]:           | 486.7    | 466.7    | (4.1)      |
|                                  |          |          | DIFFERENCE |
| AVERAGE LENGTH OF STAY [NIGHTS]: | 8.9      | 9.5      | 0.6        |
| EXPENDITURE COMPONENTS           |          |          |            |
| INDICATOR                        | 2018 (%) | 2019 (%) | DIFFERENCE |
| SHOPPING                         | 33.0     | 24.6     | (8.3)      |
| ACCOMMODATION                    | 30.6     | 22.6     | (8.0)      |
| FOOD & BEVERAGE                  | 14.0     | 18.9     | 4.9        |
| LOCAL TRANSPORT                  | 8.8      | 11.5     | 2.7        |
| DEMOGRAPHIC PROFILE              |          |          |            |
| INDICATOR                        | 2018 (%) | 2019 (%) | DIFFERENCE |
| GENDER:                          |          |          |            |
| MALE                             | 55.5     | 52.9     | (2.7)      |
| MARITAL STATUS:                  |          |          |            |
| SINGLE                           | 43.7     | 54.9     | 11.2       |
| OCCUPATIONAL GROUP:              |          |          |            |
| PROFESSIONAL/ TECHNICAL          | 37.3     | 33.5     | (3.8)      |
| MANAGEMENT/ ADMINISTRATION       | 17.2     | 24.4     | 7.2        |
| MANUAL WORKER                    | 3.8      | 10.1     | 6.3        |
| AGE GROUP:                       |          |          |            |
| 35-44                            | 47.7     | 53.4     | 5.7        |
| 45-54                            | 25.7     | 20.9     | (4.8)      |
| 25-34                            | 15.1     | 13.5     | (1.6)      |



# MARKET PROFILE (2019)

| TRAVELLING PATTERN                                          |          |          |            |
|-------------------------------------------------------------|----------|----------|------------|
| INDICATOR                                                   | 2018 (%) | 2019 (%) | DIFFERENCE |
| <b>MAIN PURPOSE OF VISIT:</b>                               |          |          |            |
| HOLIDAY                                                     | 83.6     | 84.9     | 1.3        |
| VFR                                                         | 3.3      | 2.4      | (0.9)      |
| BUSINESS                                                    | 1.4      | 2.2      | 0.8        |
| <b>TRAVEL ARRANGEMENT:</b>                                  |          |          |            |
| INDEPENDENT                                                 | 95.1     | 98.8     | 3.7        |
| <b>FREQUENCY OF VISIT:</b>                                  |          |          |            |
| FIRST TIME                                                  | 72.0     | 66.3     | (5.7)      |
| <b>TRAVELLING COMPANION:</b>                                |          |          |            |
| SPOUSE                                                      | 33.4     | 37.1     | 3.7        |
| FRIENDS                                                     | 31.7     | 33.2     | 1.5        |
| FAMILY/RELATIVES                                            | 23.3     | 22.6     | (0.7)      |
| <b>MAJOR ACTIVITIES ENGAGED:</b>                            |          |          |            |
| SIGHTSEEING IN THE CITIES                                   | 96.9     | 94.2     | (2.7)      |
| SHOPPING                                                    | 85.7     | 76.0     | (9.7)      |
| VISITING ISLAND & BEACHES                                   | 91.6     | 43.9     | (47.7)     |
| VISITING HISTORICAL SITE                                    | 33.7     | 42.6     | 8.9        |
| <b>LEAD TIME TO DECIDE TRIP:</b>                            |          |          |            |
| > 2 MONTHS TO 3 MONTHS                                      | 22.4     | 25.8     | 3.4        |
| > 1 MONTH TO 2 MONTHS                                       | 16.8     | 17.9     | 1.1        |
| > 3 MONTHS TO 4 MONTHS                                      | 11.1     | 15.1     | 4.0        |
| <b>INFORMATION OBTAINED BEFORE COMING TO MALAYSIA:</b>      |          |          |            |
| INTERNET                                                    | 80.8     | 70.6     | (10.2)     |
| FRIENDS/RELATIVE VISITED MALAYSIA                           | 86.5     | 66.0     | (20.5)     |
| OWN EXPERIENCE                                              | 50.8     | 32.2     | (18.5)     |
| AIRLINES                                                    | 13.3     | 22.8     | 9.5        |
| <b>STATES VISITED IN MALAYSIA:</b>                          |          |          |            |
| KUALA LUMPUR                                                | *73.4    | 95.2     | ** N/C     |
| SELANGOR                                                    | *73.4    | 56.8     | ** N/C     |
| PENANG                                                      | 4.4      | 42.5     | 38.1       |
| <b>ITEMS PURCHASED:</b>                                     |          |          |            |
| FOODSTUFF                                                   | 76.9     | 91.1     | 14.2       |
| HANDICRAFT/SOUVENIR                                         | 84.4     | 70.9     | (13.5)     |
| APPAREL/ CLOTHES                                            | 49.0     | 54.6     | 5.6        |
| CHOCOLATES                                                  | 23.3     | 21.9     | (1.4)      |
| <b>MAIN FACTORS IN CHOOSING MALAYSIA:</b>                   |          |          |            |
| TO VISIT MALAYSIA TOURIST ATTRACTION                        | 55.2     | 54.0     | (1.2)      |
| VALUE FOR MONEY                                             | 81.9     | 53.7     | (28.2)     |
| LIKE TO KNOW MORE ABOUT MALAYSIA                            | 41.6     | 52.4     | 10.8       |
| <b>MAIN FEATURES TO PROMOTE MALAYSIA:</b>                   |          |          |            |
| FAMILY FUN & FRIENDLY                                       | 19.8     | 18.1     | (1.7)      |
| MULTI RACIAL COUNTRY                                        | 18.2     | 18.0     | (0.2)      |
| ISLAND & BEACHES                                            | 13.4     | 15.5     | 2.1        |
| VIBRANT & MODERN CITIES                                     | 13.6     | 9.1      | (4.5)      |
| <b>RECOMMENDATION OF MALAYSIA AS A HOLIDAY DESTINATION:</b> |          |          |            |
| YES                                                         | 99.5     | 99.7     | 0.2        |

# ISSUES/CHALLENGES

| ISSUES/CHALLENGES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | RECOMMENDATIONS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"> <li>1) Limitation on direct flights from Europe;</li> <li>2) New competitors (Domestic, local municipalities, European countries, Regions, ) attracting potential share of market to Malaysia</li> <li>3) Lack of foreign language speaking guides. Rate in Malaysia is expensive compared to other countries;</li> <li>4) Aggressive campaign/promotions by other NTO's ie Thailand, Indonesia, Philippines, Japan, Maldives, Seychelles.</li> <li>5) Travel Advisory in place for the East Coast of Sabah</li> <li>6) Lack off Offline, OOH advertising in the market area especially in the 2<sup>nd</sup> and 3<sup>rd</sup> Tiers City.</li> <li>7) Increased cost of travelling (fuel, higher cost of services) affect also cost of packages to Malaysia (average Euro 3/3,500 Euro) and cost of living has increased cutting the expenditure power for travelling</li> <li>8) Lack of innovative packages to suit the current demand</li> </ol> | <ol style="list-style-type: none"> <li>1) Active Collaboration with Airlines; Etihad, Qatar, Turkish Airlines, MH, Oman Air etc</li> <li>2) Create more awareness on Malaysia, OOH, electronics, or prints through JP and JITDP funding</li> <li>3) Facilitates foreign students to work during peak periods in Malaysia as a tourist guide</li> <li>4) Get back the selling strength of stakeholders</li> <li>5) Fam Trip for Media and Agents and try to remove/soften.</li> <li>6) Malaysia as a Filming Destinations</li> <li>7) Communicate appropriately value-for-money destination, ex: Malaysia seems expensive but you get a real life experience all in one holiday</li> <li>8) Promote special/attractive packages to Malaysia</li> </ol> |

# ISSUES/CHALLENGES



| ISSUES/CHALLENGES                                                                                                                                                                                                                                                                                                                          | RECOMMENDATIONS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>9) Mature segment of travellers</li><li>10) Lack of quality images/video to promote the destination</li><li>11) Lack of communication from Malaysia DMC with overseas office, explaining new products</li><li>12) Poor availability of 3-4 star resorts on Islands (particular East Coast)</li></ul> | <ul style="list-style-type: none"><li>9) Communicate to young generation through influencers</li><li>10) Create appropriate material and share with all the TM Offices for promotional use</li><li>11) Encourage local DMC to do more webinars/product update to TM overseas and trade</li><li>12) Incentive local resorts to upgrade services and facilities to European standard 3-4 star accommodation</li><li>13) Appropriate communication (PR Agency for French and Spanish markets)</li></ul> |



# WISHLIST

ALMATY | AUCKLAND | FRANKFURT | LOS ANGELES | LONDON | ISTANBUL  
MOSCOW | PARIS | SYDNEY | THE HAGUE | VANCOUVER | DUBLIN

# WISHLIST



- 1) HOTEL (ACCOR GROUP)
- 2) DIRECT FLIGHT WITH AIRLINES
- 3) TOUR OPERATOR
- 4) SPEAKING GUIDE (FRENCH)
- 5) INVESTMENT/PROPERTY
- 6) MM2H
- 7) MEDIA FAM TRIP
- 8) CULTURE EXCHANGE/STUDENT
- 9) HOMESTAY EXPERIENCE
- 10) FRANCE TO SINGAPORE TO MALAYSIA
- 11) MICE
- 12) JOINT PROMO (JP)



# THANK YOU

**"Tourism Preserves, Conserves & Protects  
Culture, Heritage & Mother Nature"**

