TOURISM MALAYSIA

MALAYSIAN OUTBOUND AND DOMESTIC TRAVEL BEHAVIOR

TOURISM MALAYSIA®

2024

CONTENT:

HIGHLIGHTS

- **35%** of the respondents have **travelled outside Malaysia** for an overnight holiday trip in 2023.

- The main countries visited by Malaysians in 2023 were Thailand, Indonesia, Singapore, Japan, China, S.Korea, S.Arabia (pilgrimage), Vietnam and the U.K.

- *Holiday* **(91%)** was the main reason for Malaysians' outbound travelling.

- Main sources of information for holiday decisions were *personal and social reference* (60.2%) and *OTA* (27.9%) and *Hotel & Airlines Websites* (8.6%).

- Majority of the Malaysians booked directly with *hotels and airlines* followed by *OTA* for their outbound travel.

- Malaysians mostly were influenced by *budget consideration* (28.3%), *discount received* (25.3%), *social media* (13.4%) *and word of mouth* (12.7%) when making decisions on their recent outbound holiday trips.

- **69%** of Malaysians have planned to take **vacations abroad** in 2024 with an **average of 1.3 destinations.**

- Southern Thailand, Indonesia, Vietnam, Japan, Singapore, S.Korea and Turkiye topped the list of holiday destinations in 2024 for Malaysians.

- *Destination appeals (41.9%), within budget (25.3%) and activities & experiences in the destination (24.9%) are the top 3 factors influencing the future outbound holiday trips.*

- **74%** are aware of the **"Cuti-Cuti Malaysia" (CCM) campaign**.

- **86%** of the respondents felt that *social media* **are the most effective medium to promote the CCM campaign** followed by *Discount and offers* (65%) and through *TV and radio advertisements* (34%).

- **55%** of the respondents were **influenced by the CCM campaign** to holiday domestically in 2023.

- Domestic destinations visited because of CCM campaign were led by Langkawi, Penang, Sabah, Redang, KL and Melaka.

- Most Malaysians enjoyed the *natural attractions* (40.6%), *local cuisines* (29.1%), *accommodation quality & amenities* (20.5%) and *cultural & heritage sites* (19.1%) during their CCM holidays.

- **66%** plan to take **holiday domestically** in 2024 with an **average of 1.1 destinations.**

- Main domestic destinations planned for 2024 are Langkawi, Penang, Sabah, Redang, KL, Melaka, Terengganu and Tioman.

- On average, Malaysians will make **2.4 domestic holiday trips** in 2024.

- **47%** proposed *revamping the CCM campaign by including new elements*. Whilst 31% felt that TM should *continue the CCM campaign as it is and o*nly 9.8% proposed the *CCM to be replaced with a completely new campaign.*

- *Not budgeted* (38%), *local destinations are expensive* (15%), *going for overseas holiday* (14%), *local destinations are not attractive* (13%) and *have visited all major destinations in Malaysia* (12%) are the **main reasons for not holidaying in Malaysia**.

METHODOLOGY

MALAYSIAN OUTBOUND AND DOMESTIC TRAVEL BEHAVIOR

Methodology

Limitation of the Study

TM has developed an online survey for 18 years and above Malaysians to analyse their outbound & domestic travel behaviour patterns, reasons for choosing a destination and their views on the effectiveness of the CCM campaign.

The survey was conducted during Feb-March 2024 using self-administered questionnaires.

1,359 Malaysians have completed the online survey

Limited to those who have access to the online questionnaires (QR) which are being distributed through TM website & social media, WhatsApp groups and at the main airports and Tambak Johor.

Analysis by state of residence are not conducted due to the insignificant numbers from certain states.

The study's findings can be interpreted as a broad indications for Malaysians travel behavior.

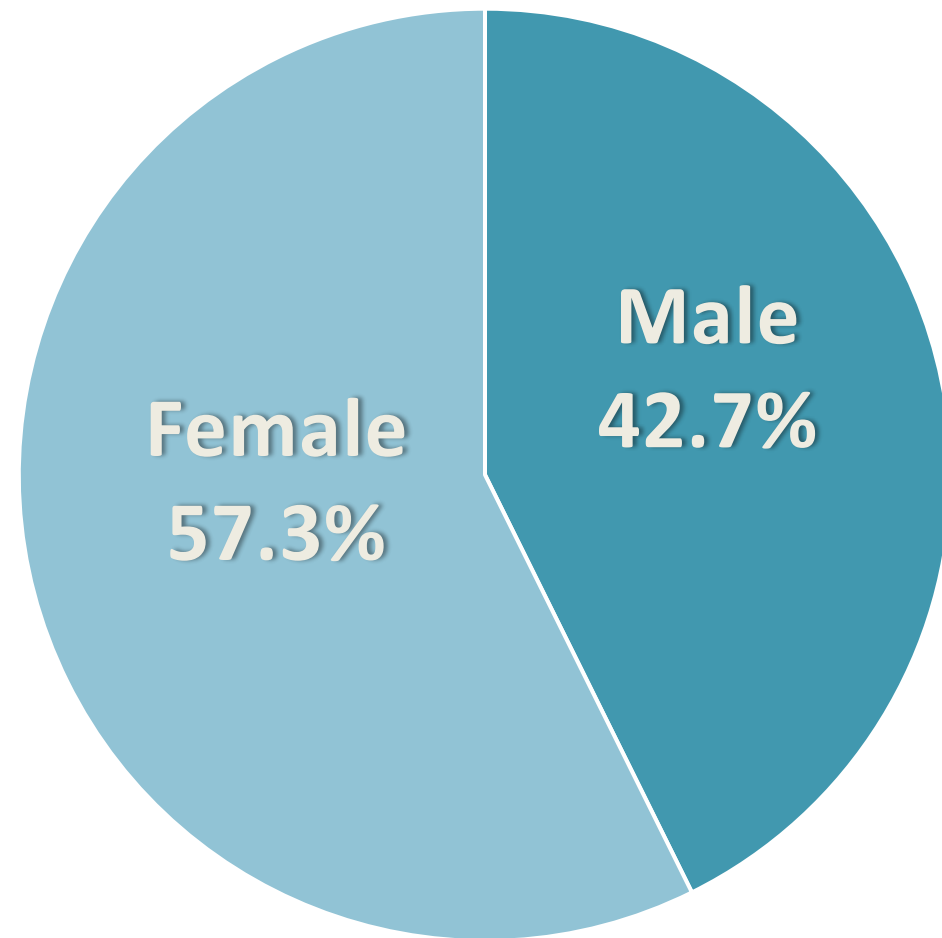# DEMOGRAPHIC PROFILES

MALAYSIAN OUTBOUND AND DOMESTIC TRAVEL BEHAVIOR

TOURISM MALAYSIA®

1.Gender (%)

2. Ethnic Group (%)
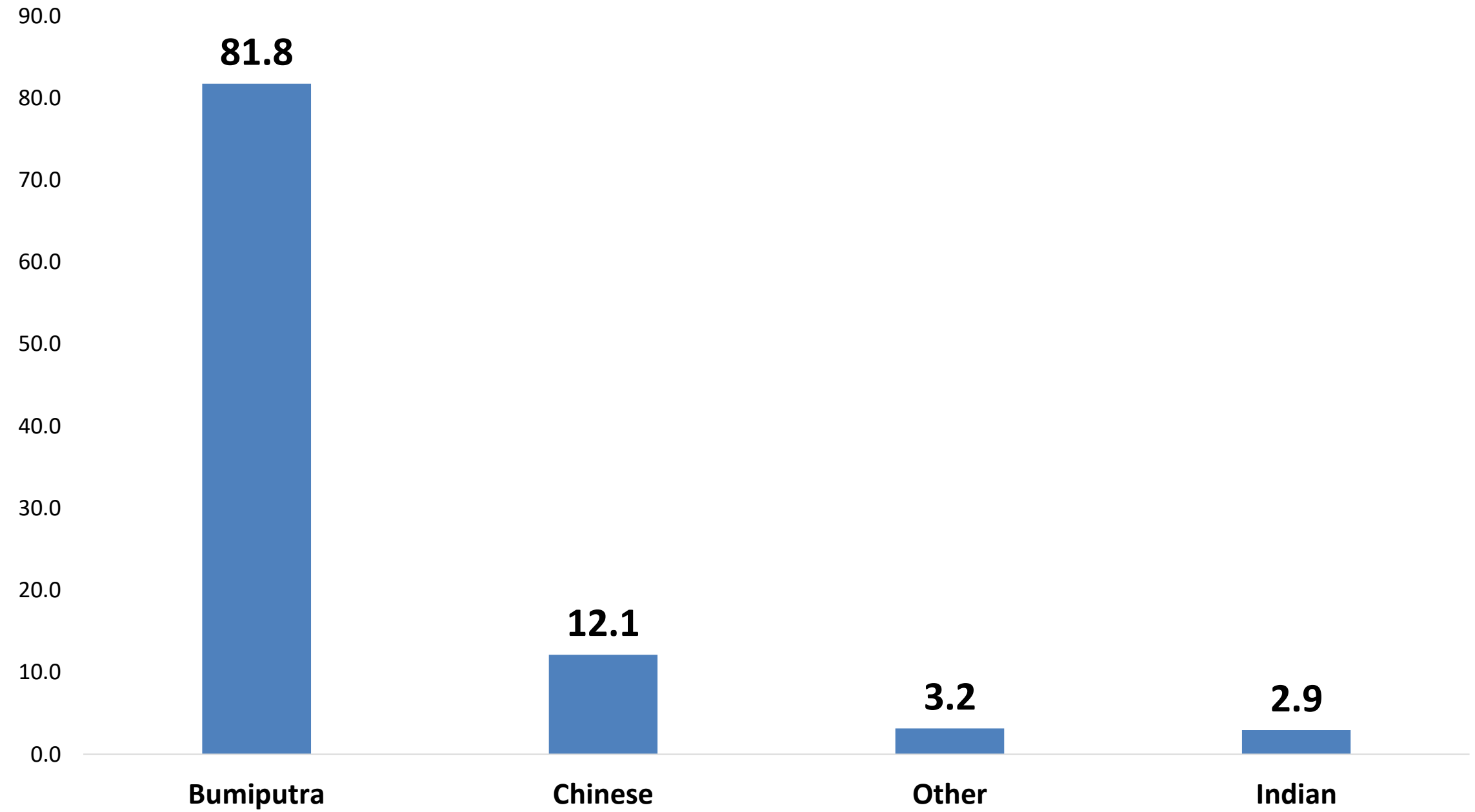
3. Occupational Sector (%)
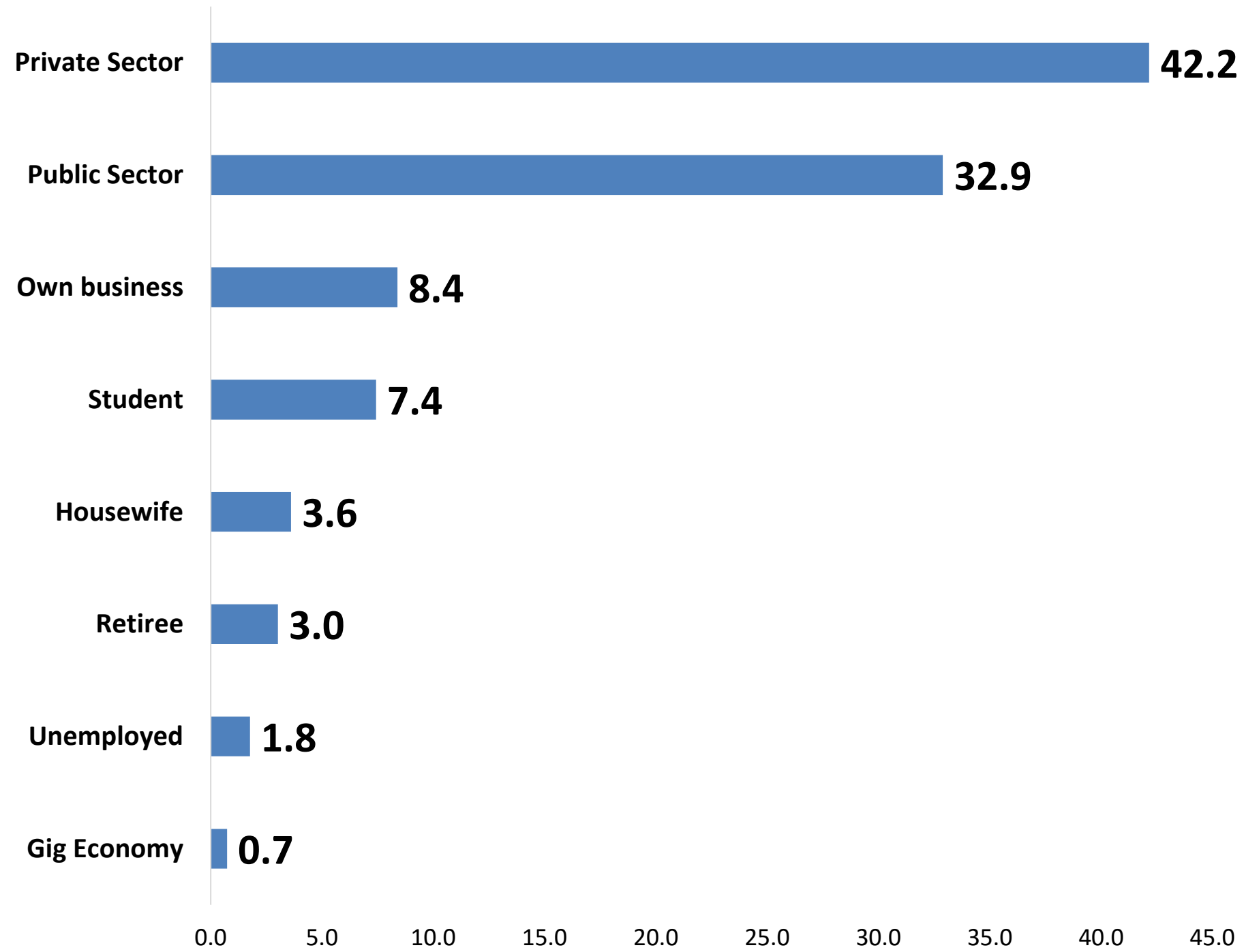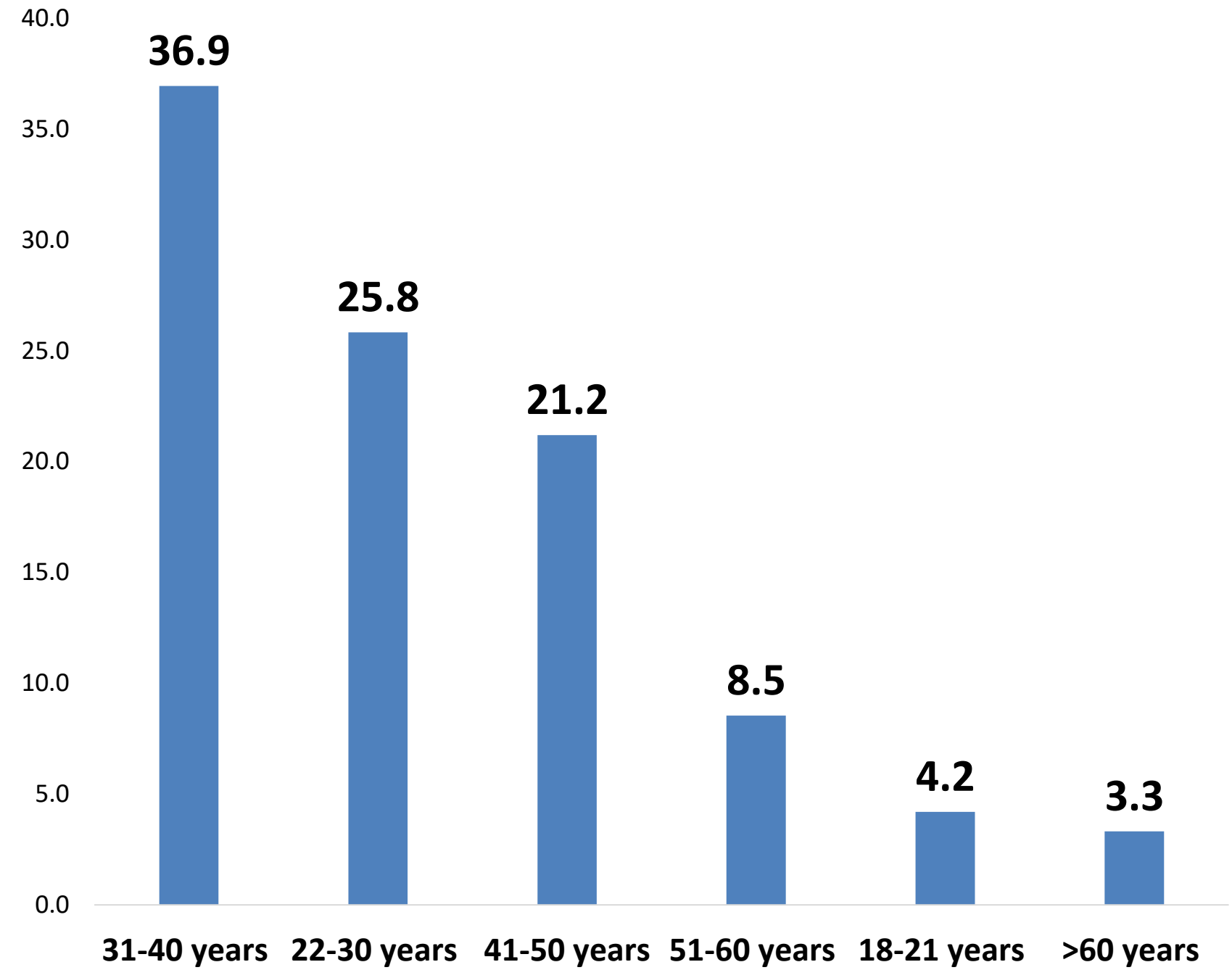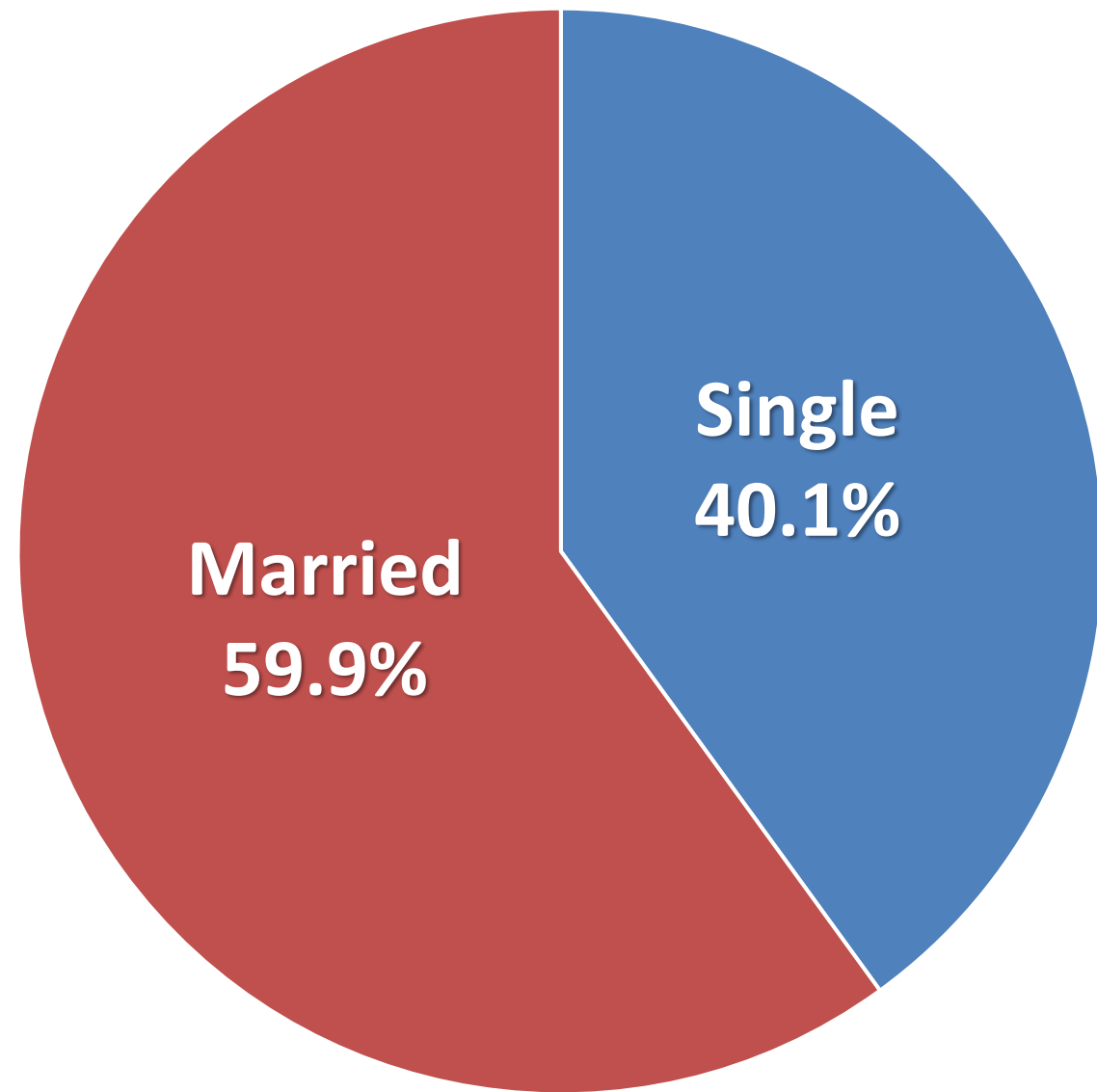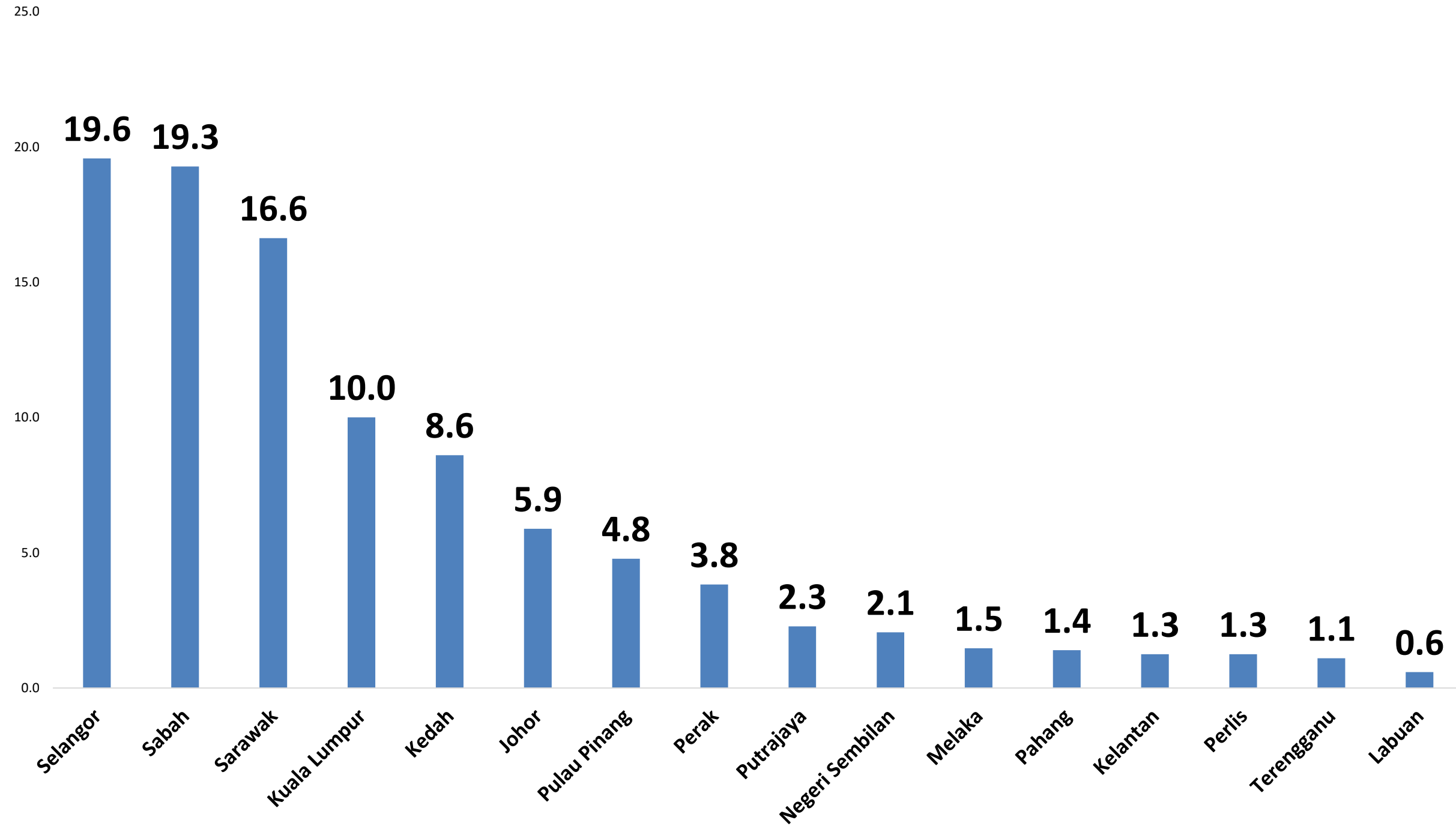
Sector	Value
Private Sector	42.2
Public Sector	32.9
Own business	8.4
Student	7.4
Housewife	3.6
Retiree	3.0
Unemployed	1.8
Gig Economy	0.7

4. Age Group (Years Old)

Age Group	Value
31-40 years	36.9
22-30 years	25.8
41-50 years	21.2
51-60 years	8.5
18-21 years	4.2
>60 years	3.3

5. Marital Status (%)

Married 59.9%

Single 40.1%

6. State of Residence (%)

State	%
Selangor	19.6
Sabah	19.3
Sarawak	16.6
Kuala Lumpur	10.0
Kedah	8.6
Johor	5.9
Pulau Pinang	4.8
Perak	3.8
Putrajaya	2.3
Negeri Sembilan	2.1
Melaka	1.5
Pahang	1.4
Kelantan	1.3
Perlis	1.3
Terengganu	1.1
Labuan	0.6

35.1% have travelled outside Malaysia for an overnight holiday trip in 2023.

The main countries visited by Malaysians in 2023 were Thailand, Indonesia, Singapore, Japan, China, S.Korea, S.Arabia, Vietnam and U.K.

Travel outside Malaysia (Share %)

Yes
35.1%

No
64.9%

COUNTRY	SHARE (%)
Thailand	**30.2**
Indonesia	15.3
Singapore	11.7
Japan	7.5
China	4.6
South Korea	4.6
Saudi Arabia	3.4
Vietnam	2.9
UK	2.1
India	1.9
Switzerland	1.9
France	1.5
Philippines	1.5
Türkiye	1.3
UAE	1.3
Brunei	1.0
New Zealand	1.0

COUNTRY	SHARE (%)
Australia	0.8
Egypt	0.8
Taiwan	0.8
German	0.6
Spain	0.6
United States	0.4
Austria	0.2
Bosnia	0.2
Cambodia	0.2
Hong Kong	0.2
Iraq	0.2
Maldives	0.2
Nepal	0.2
Portugal	0.2
South Africa	0.2
Uzbekistan	0.2

Holiday (91.3%) was the main reason for Malaysians overseas travelling.

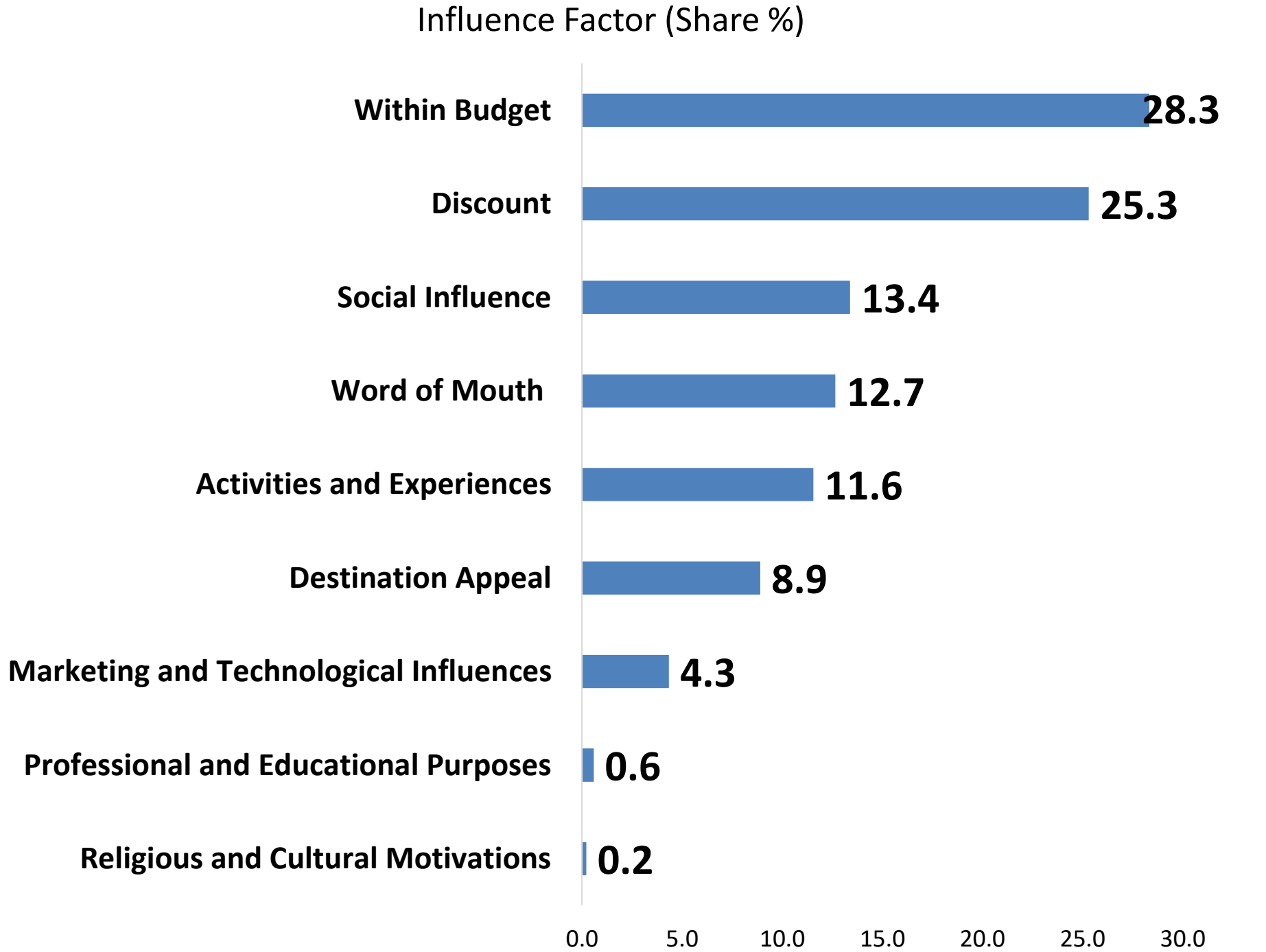| TRAVELLING REASON	SHARE (%)
Holiday/Vacation	**91.3**
Visit Friend/Relatives	9.5
Education	1.3
Religious Purpose	0.9
Business	0.8
Medical	0.7
Honeymoon	0.7
MICE (Meeting/Incentive Travel/Conference/Exhibition)	0.2
Spa and Wellness	0.2
Stopover/Transit one night	0.2
Shopping	0.1
Sports	0.1
Golfing	0.0

PRE-TRAVEL

MALAYSIAN OUTBOUND AND DOMESTIC TRAVEL BEHAVIOR

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Majority of the Malaysians *booked directly with hotel and airlines* (34.5%) followed by *OTA* (32.4%) for their outbound travel.
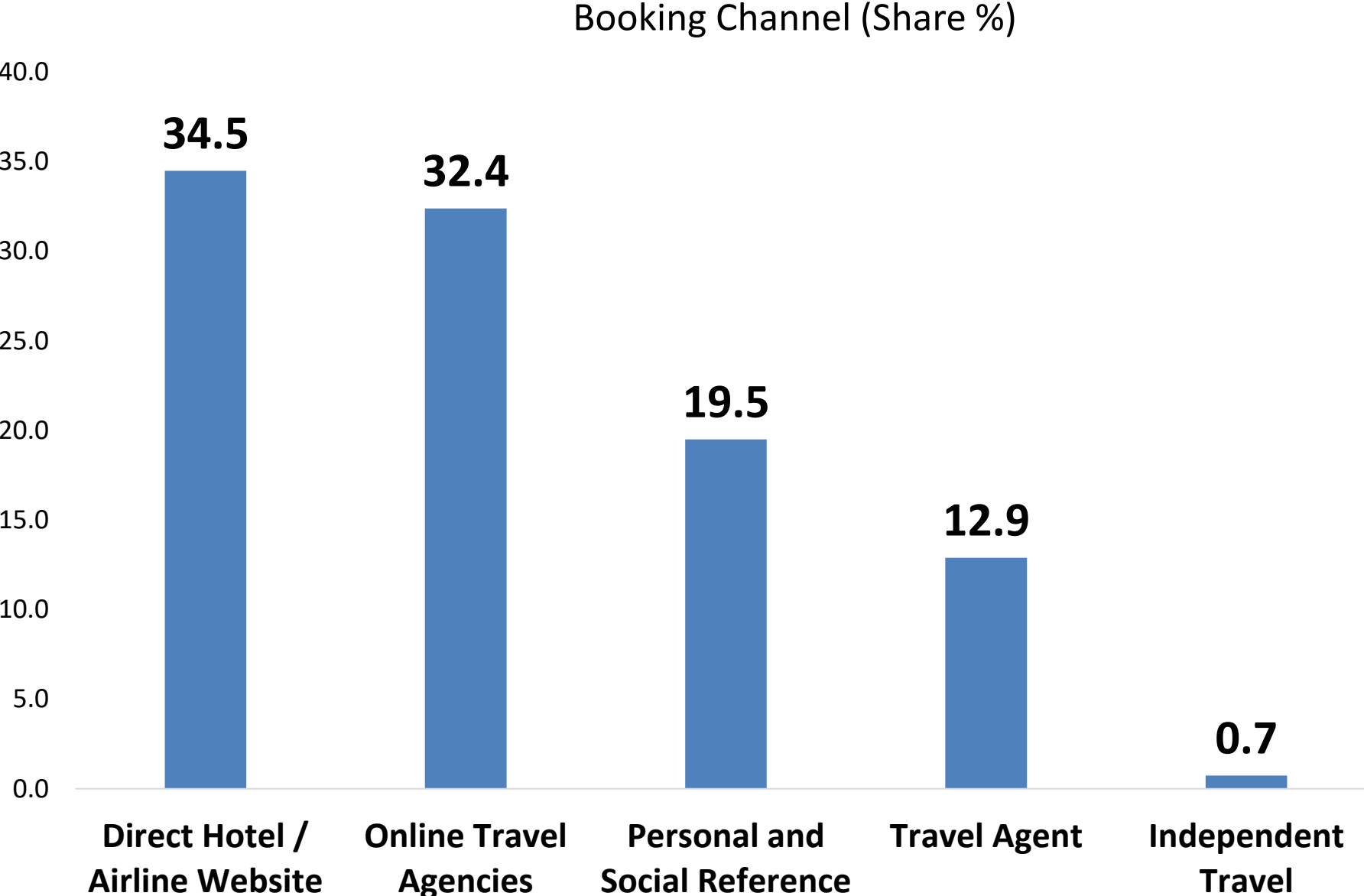
Malaysians mostly were influenced by *budget consideration* (28.3%), *discount received* (25.3%), *social media* (13.4%) and *word of mouth* (12.7%) when making decision on their recent outbound holiday trips.

Booking Channel (Share %)

Channel	Share %
Direct Hotel / Airline Website	34.5
Online Travel Agencies	32.4
Personal and Social Reference	19.5
Travel Agent	12.9
Independent Travel	0.7

Influence Factor (Share %)

Factor	Share %
Within Budget	28.3
Discount	25.3
Social Influence	13.4
Word of Mouth	12.7
Activities and Experiences	11.6
Destination Appeal	8.9
Marketing and Technological Influences	4.3
Professional and Educational Purposes	0.6
Religious and Cultural Motivations	0.2

Malaysians travel with their *family* (32.5%), *friends* (31.9%) and *spouse* (16.9%) during their last holiday trip.

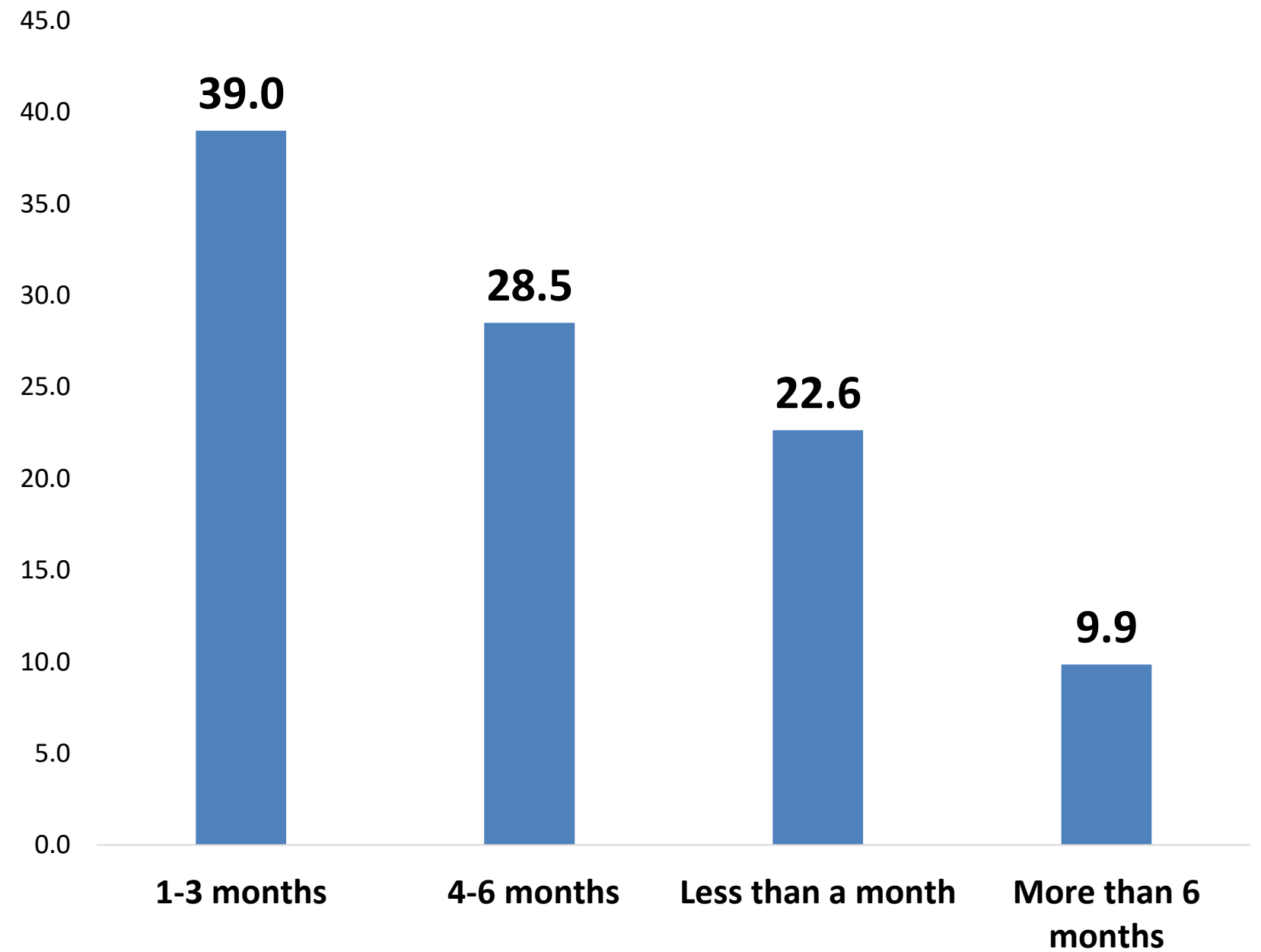Most Malaysian planned around *1-3 months* (39.0%) followed by *4-6 months* (28.5%) for their last overseas holiday trip.

Travel Companion (Share %)

Family	32.5
Friend(s)	31.9
Spouse	16.9
Family & Relatives	6.7
Group	6.2
Alone	3.6
Business Associate(s)	2.2

Plan in ahead time (Share %)

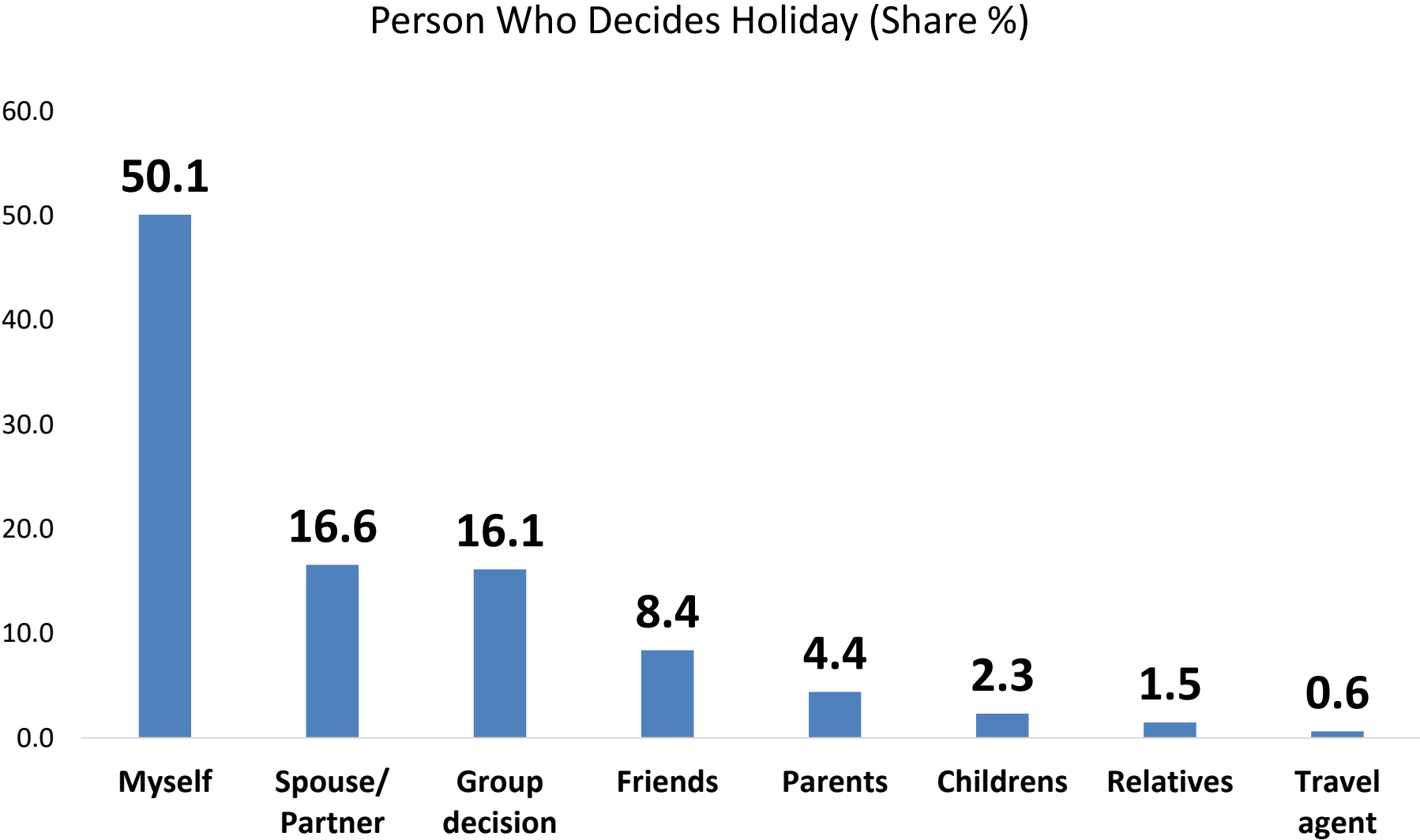| 1-3 months	4-6 months	Less than a month	More than 6 months
39.0	28.5	22.6	9.9
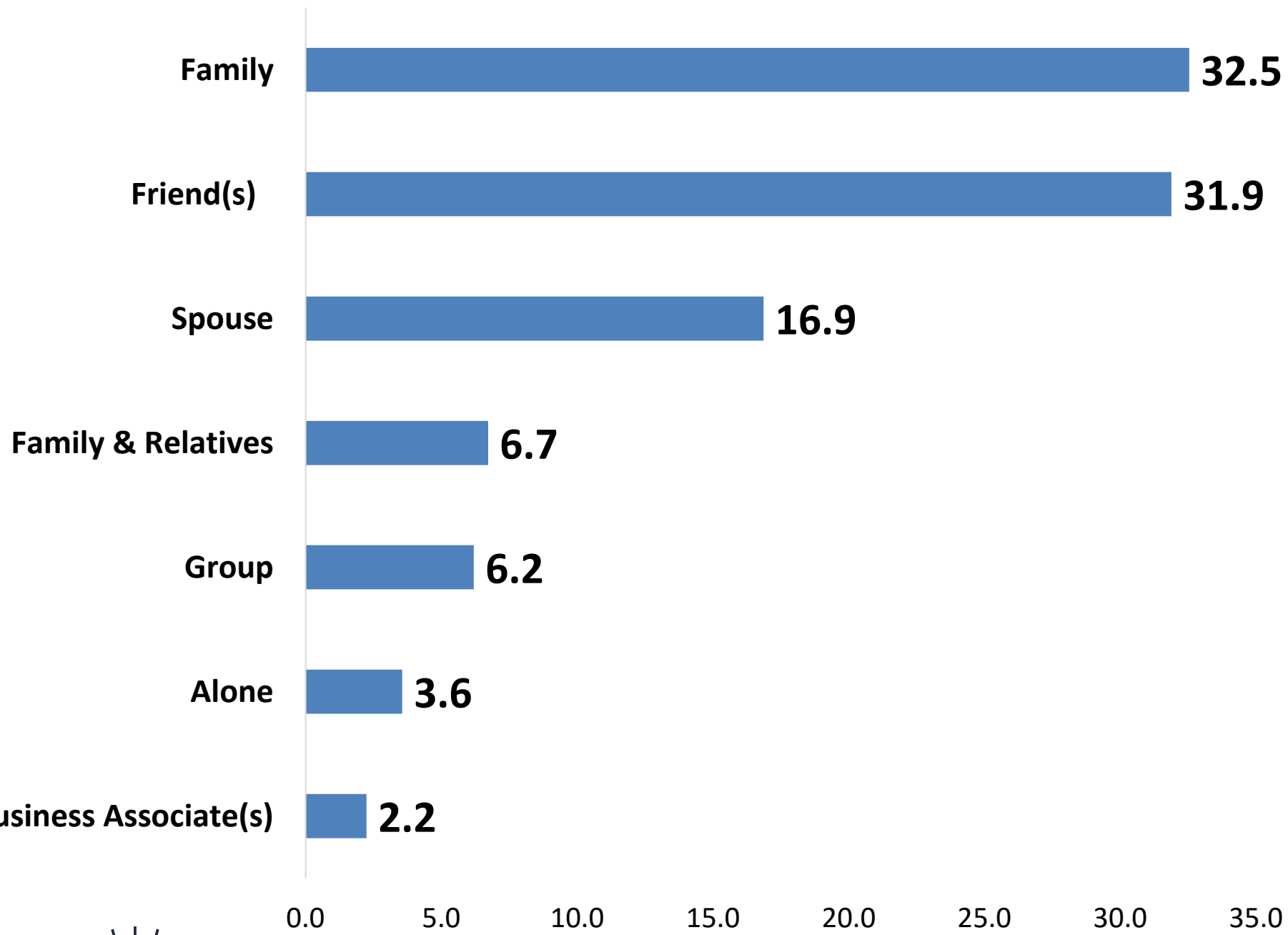
Main sources of information for holiday decision were *personal and social reference* (60.2%) and *OTA* (27.9%) and *Hotel & Airlines Websites* (8.6%).
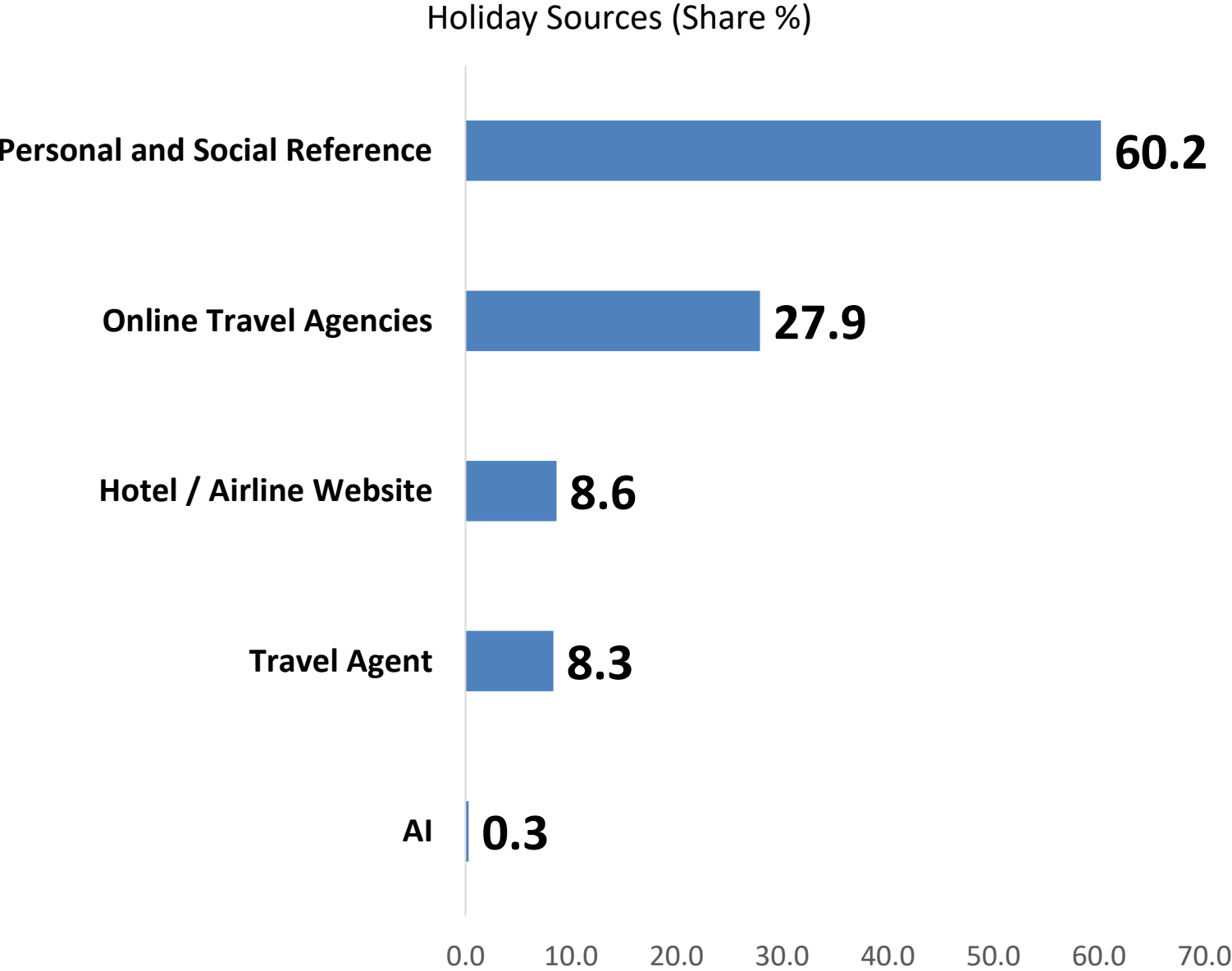
The main decision makers for the holiday destination were *themselves* (50.1%) followed by *spouse/partner* (16.6%) and *group decision* (16.1%).
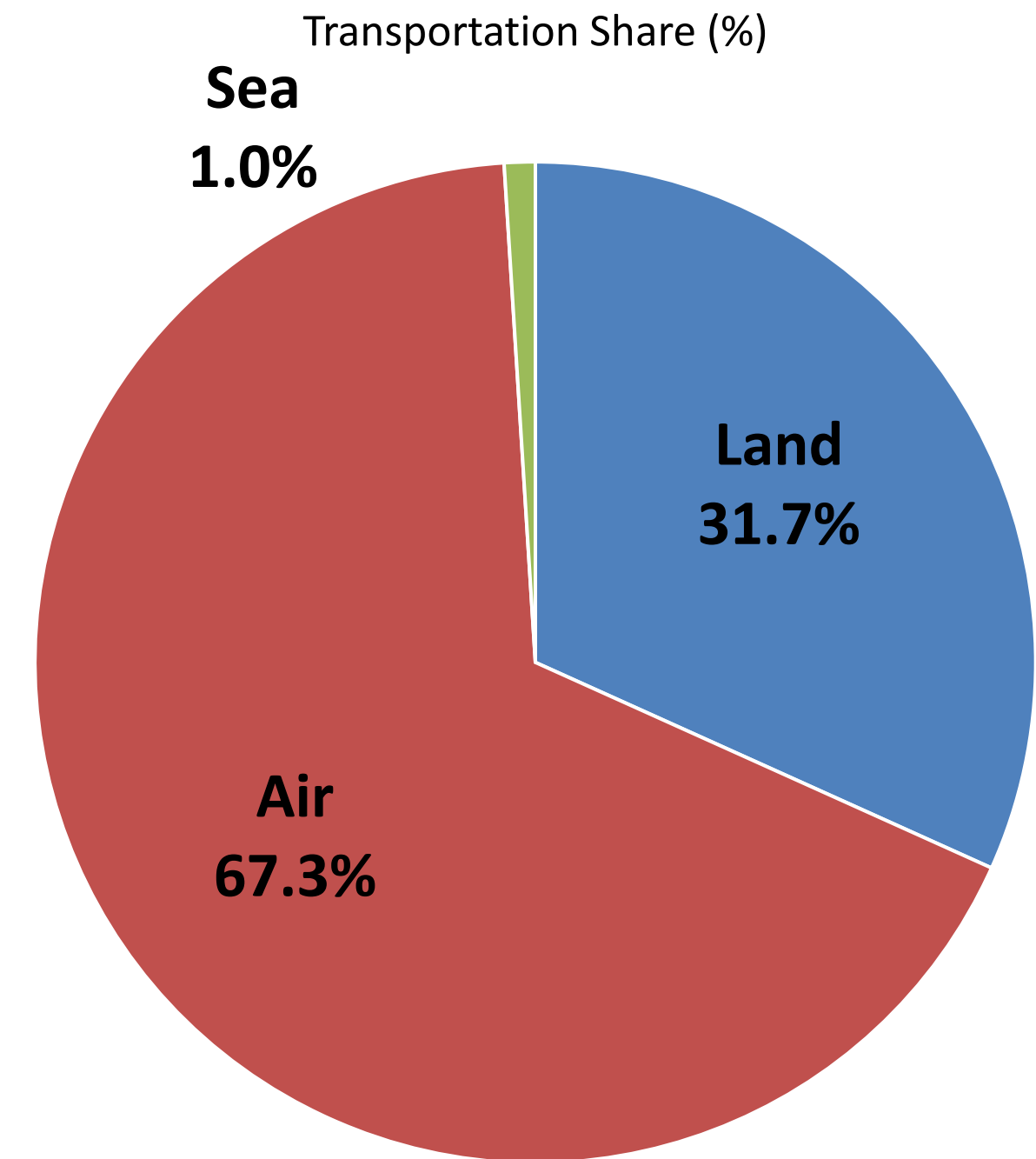
Holiday Sources (Share %)

Person Who Decides Holiday (Share %)

Most of the Malaysians enjoyed *value for money* (21.7%) during their travel, followed by *food* (21.0%) and *historical rich destination* (16.3%).

Majority of the Malaysians travel by *air* (67.3%) followed by *land* (31.7%) for their last outbound holiday trips.

Most Enjoy International Travel Experience (Share %)

Category	Share %
Value for money	21.7
Food haven	21.0
Historical rich destination	16.3
Wildlife	13.7
Shopping Haven	9.2
Vibrant and modern cities	6.0
Soft Adventure	5.3
Medical and Welness Destination	4.6
Family fun and friendly	4.2
Cultural / festival diversity	3.1
Easy Access	0.1

0.0   5.0   10.0   15.0   20.0   25.0

Transportation Share (%)

Sea 1.0%
Land 31.7%
Air 67.3%

Air Transportation (Share %)

More than half of Malaysians flew with Malaysian owned airlines.

- Local airlines 51.3%
- International airlines 48.7%

Sea Transportation (Share %)
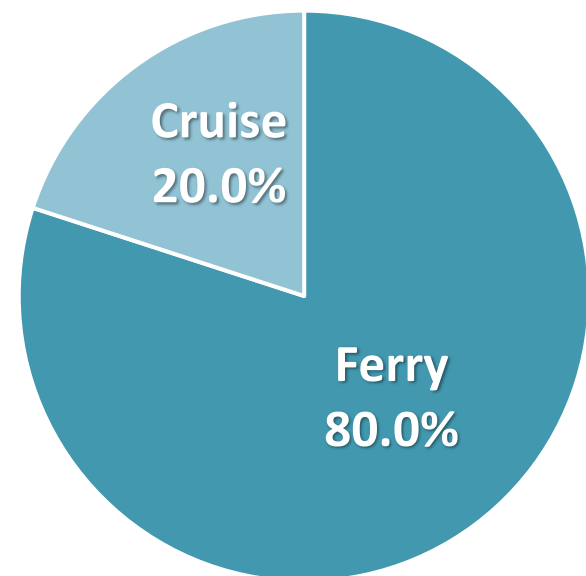
80.0% of Malaysians used ferries when travelling.abroad.

- Cruise 20.0%
- Ferry 80.0%

Most Malaysians used their *own vehicles* (39.0%), *rental vehicles* (22.0%) and *train* (19.5%) for their last outbound travel.

Land Transportation (Share %)

Category	Share %
Own vehicle	39.0
Rental	22.0
Train	19.5
E-hailing	15.1
Public transport	1.3
Bus	1.3
Travel agent	0.6
Chartered bus	0.6
Bus-Provided by travel agency	0.6
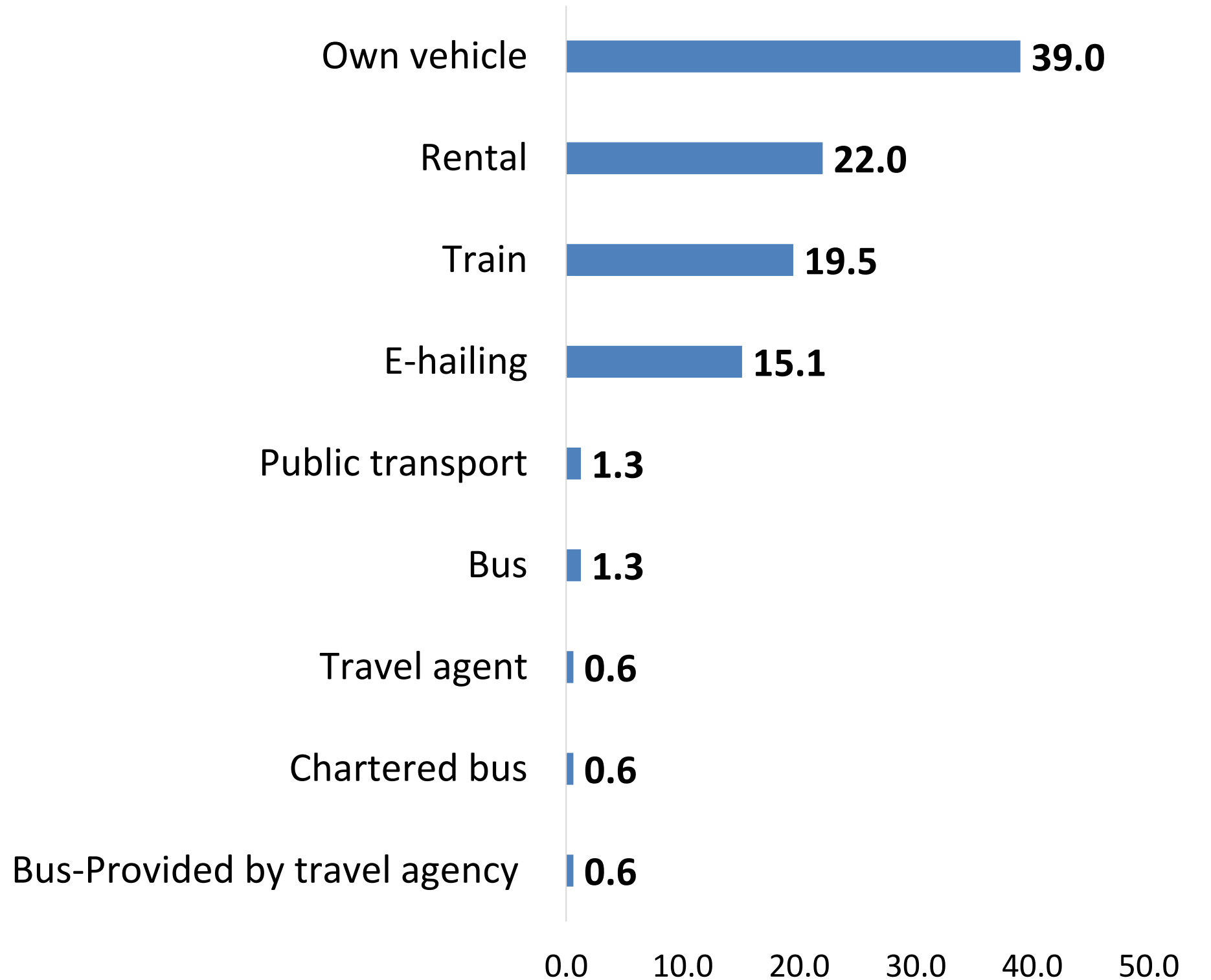
Malaysians preferred to travel for their holiday during *long weekends* (28.2%) followed *weekdays* (24.6%) and *weekends* (16.0%).
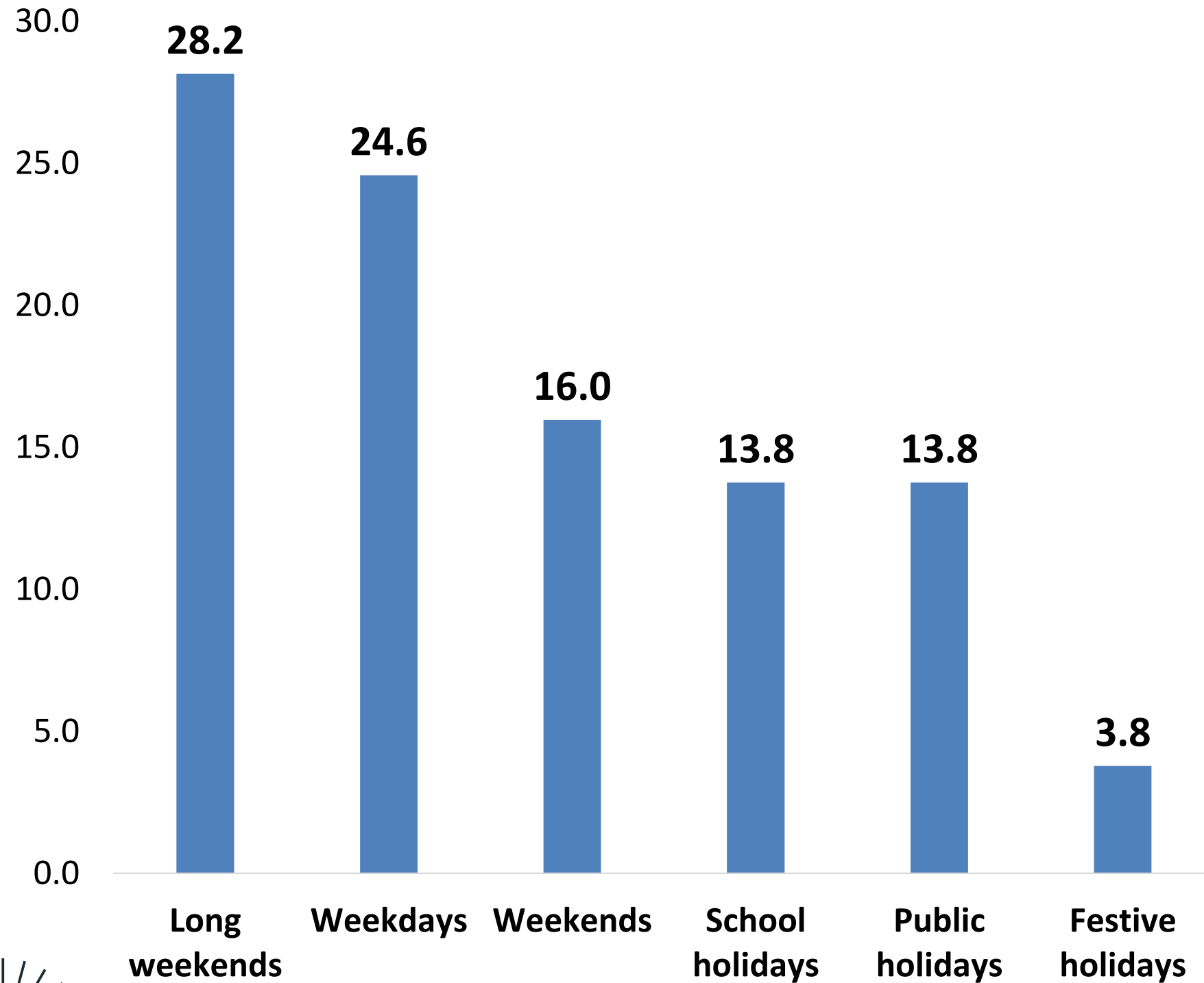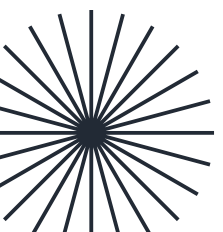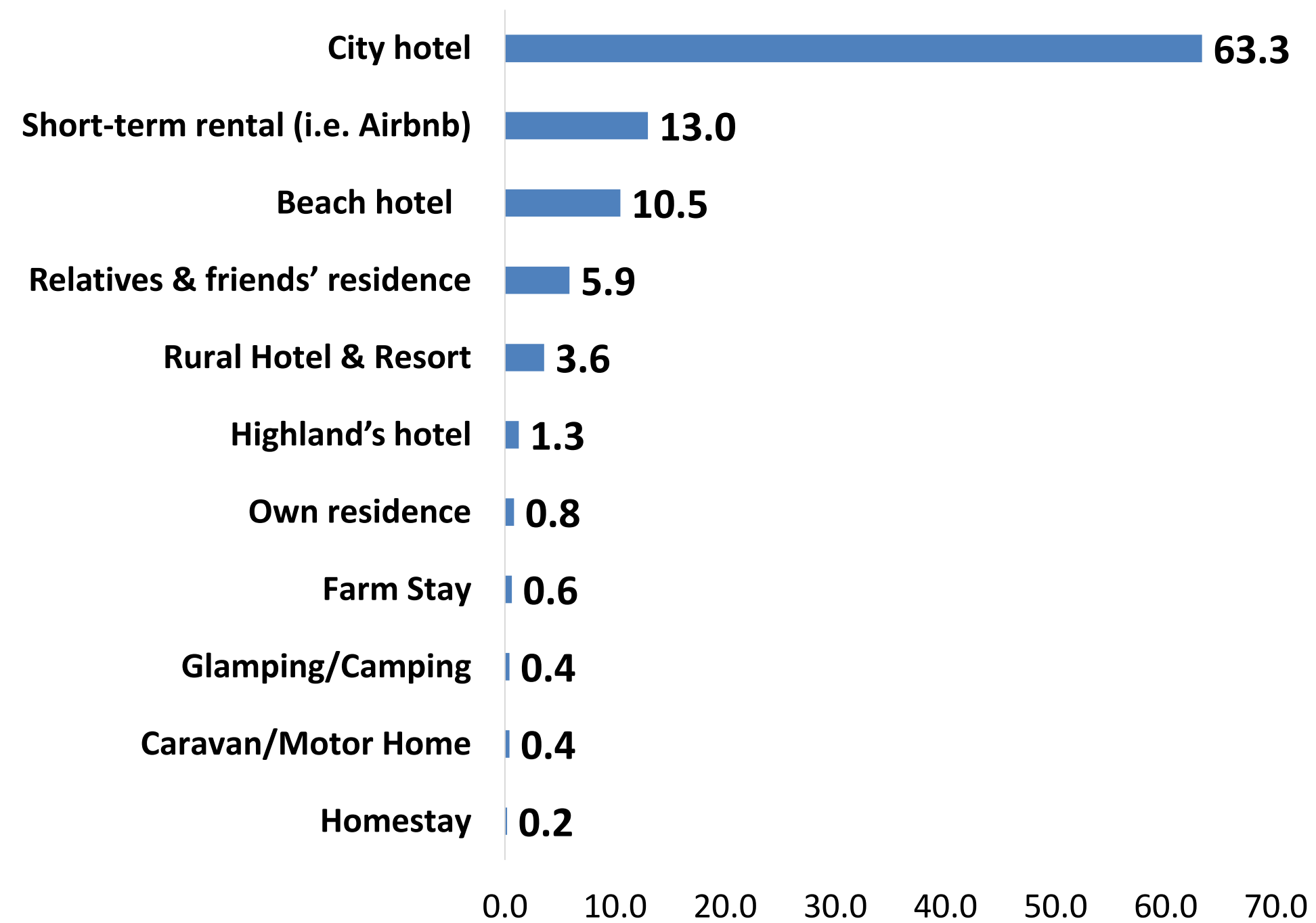
Most Malaysians stayed in *city hotel* (63.3%) followed by *Airbnb* (13.0%) and *beach hotel* (10.5%) during their last holiday trips.

Travel Period (Share %)

Category	Share %
Long weekends	28.2
Weekdays	24.6
Weekends	16.0
School holidays	13.8
Public holidays	13.8
Festive holidays	3.8

Accommodation (Share %)

Category	Share %
City hotel	63.3
Short-term rental (i.e. Airbnb)	13.0
Beach hotel	10.5
Relatives & friends' residence	5.9
Rural Hotel & Resort	3.6
Highland's hotel	1.3
Own residence	0.8
Farm Stay	0.6
Glamping/Camping	0.4
Caravan/Motor Home	0.4
Homestay	0.2

FUTURE OUTBOUND TRAVEL PLANNING-2024

MALAYSIAN OUTBOUND AND DOMESTIC TRAVEL BEHAVIOR

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69.0% Malaysians have planned to take vacations abroad in 2024.

Plan in taking overseas vacation 2024
(Share %)

Destination appeals (41.9%), *within budget* (25.5%) and *activities & experiences in the destination* (24.9%) are the top 3 factors influencing the future outbound holiday trips.
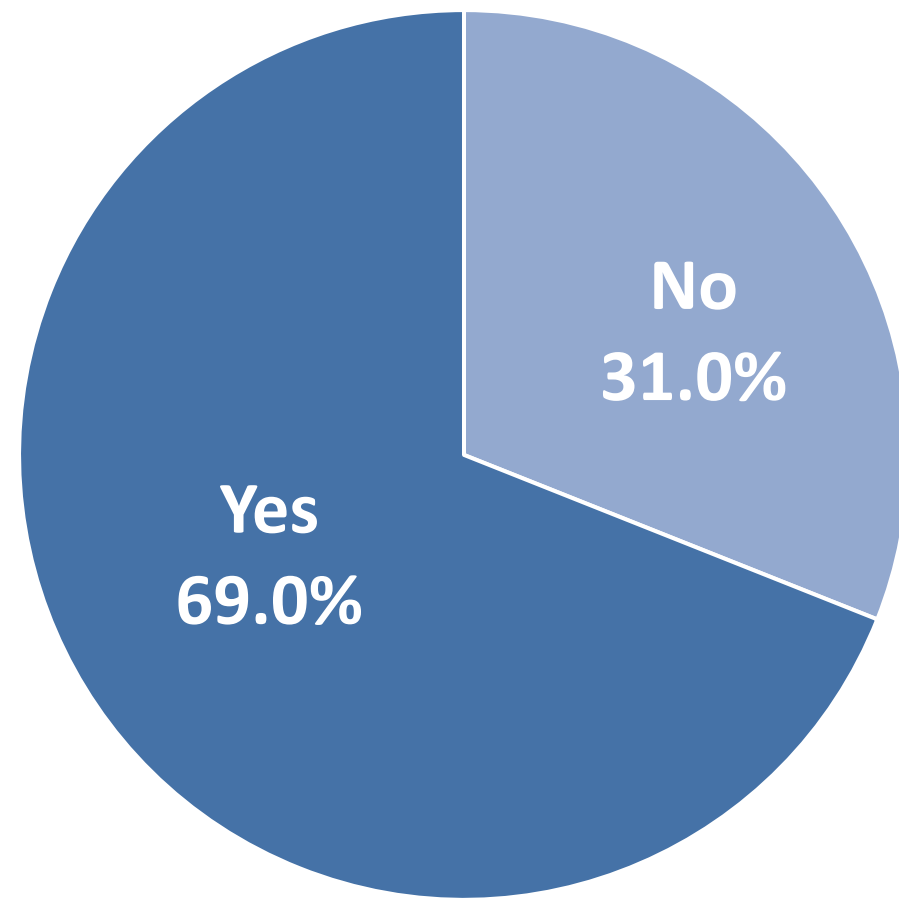
Factor Influencing Future Holiday Trip (Share %)
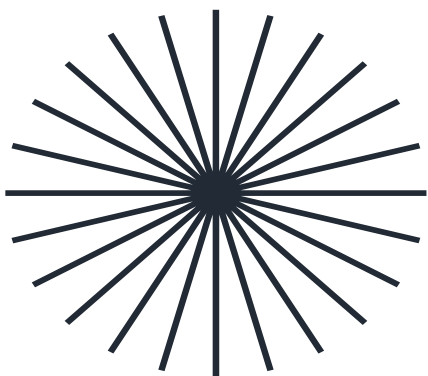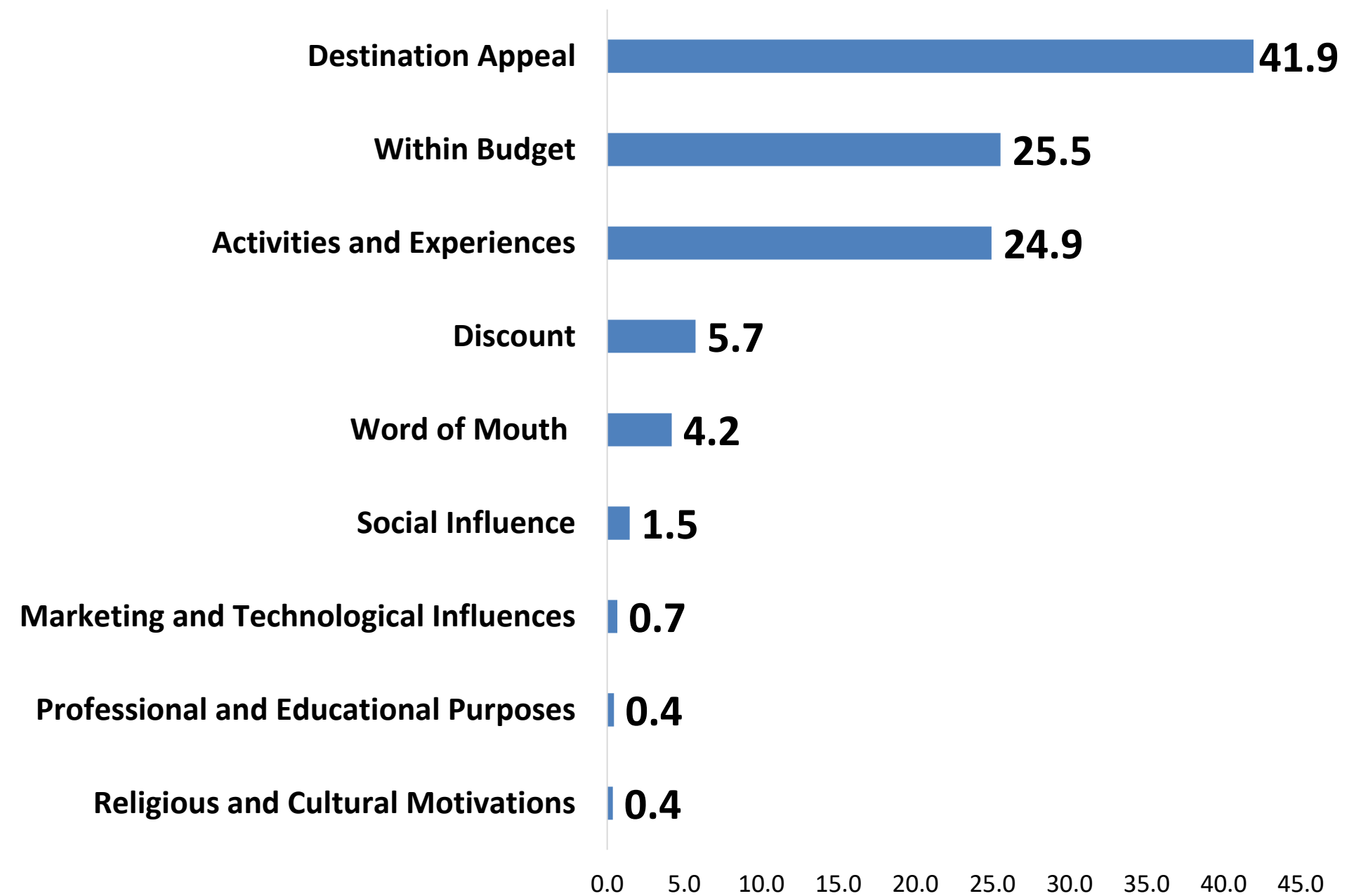
Southern Thailand, Indonesia, Vietnam, Japan, Singapore, Korea and Turkiye topped the list of holiday destinations in 2024 for Malaysians.

DESTINATION	SHARE (%)
Southern Thai	**24.3**
Indonesia	18.2
Vietnam	8.2
Japan	7.9
Singapore	7.9
Korea	7.3
Turkiye	6.4
China	4.0
Saudi Arabia	4.0
England	3.6
India	3.6
Australia	3.3
Europe	2.7
UK	2.7
Switzerland	2.1

DESTINATION	SHARE (%)
Taiwan	1.8
Thailand (Bangkok, Chiang Mai)	1.8
Istanbul	1.5
Italy	1.5
USA	1.5
Brunei	1.2
France	1.2
Jakarta	1.2
Pakistan	1.2
Bali	0.9
New Zealand	0.9
Austria	0.6
Brazil	0.6
East Europe	0.6
Hong Kong	0.6
Iceland	0.6

DESTINATION	SHARE (%)
North Africa	0.6
Philippines	0.6
Batam	0.3
Bulgaria Romania	0.3
Cambodia	0.3
Central Europe	0.3
Czech Republic	0.3
Egypt	0.3
Finland	0.3
Greece	0.3
Hungary	0.3
Jogjakarta	0.3
Qatar	0.3
South Africa	0.3
Syria	0.3
UAE	0.3
West Europe	0.3

On average, the respondents will visit **1.3** overseas destinations in 2024.

* Note: Multiple Response

74.2% are aware of the **"Cuti-Cuti Malaysia" campaign** by Tourism Malaysia.

80.6% of Malaysians are **aware of the CCM campaign** through the *social media and online platforms*, through *advertisements (53.5%)* and *travel agents (17.7%)*.

Cuti-Cuti Malaysia Campaign Awareness (Share %)
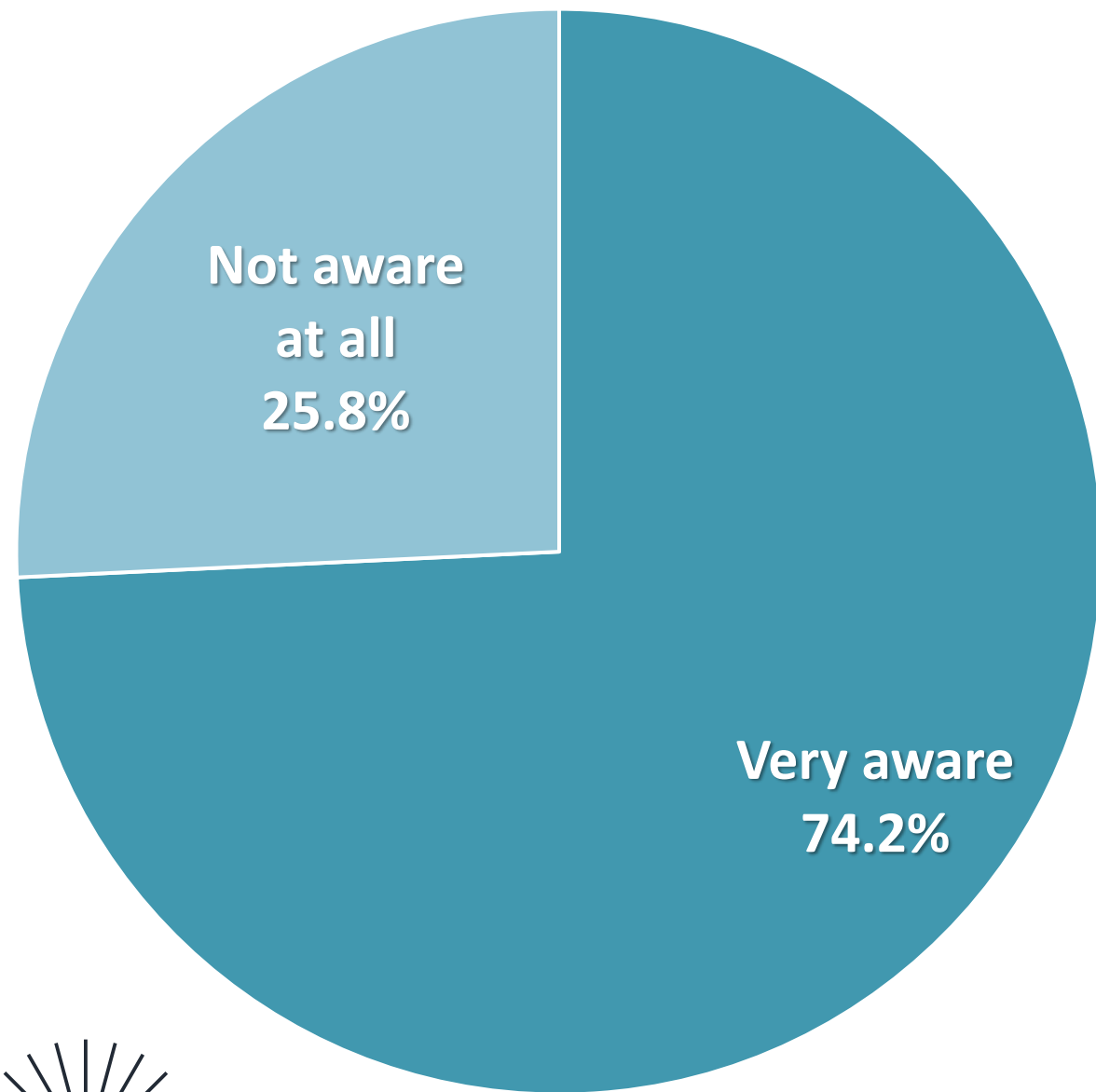
Awareness Medium for CCM* (Share %)

	Share %
Social Media and Online Platforms	80.6
Advertisements	53.5
Travel Agencies	17.7
Cultural and Entertainment Influences	17.4
Online Communities and Reviews	14.1
Word of Mouth and Personal Recommendation	13.3
Events and Fairs	13.2
Official Websites and Guides	11.8
Technological Influences	1.2

Pie chart: Not aware at all 25.8%, Very aware 74.2%

X-axis: 0.0 10.0 20.0 30.0 40.0 50.0 60.0 70.0 80.0 90.0

* Note: Multiple Response

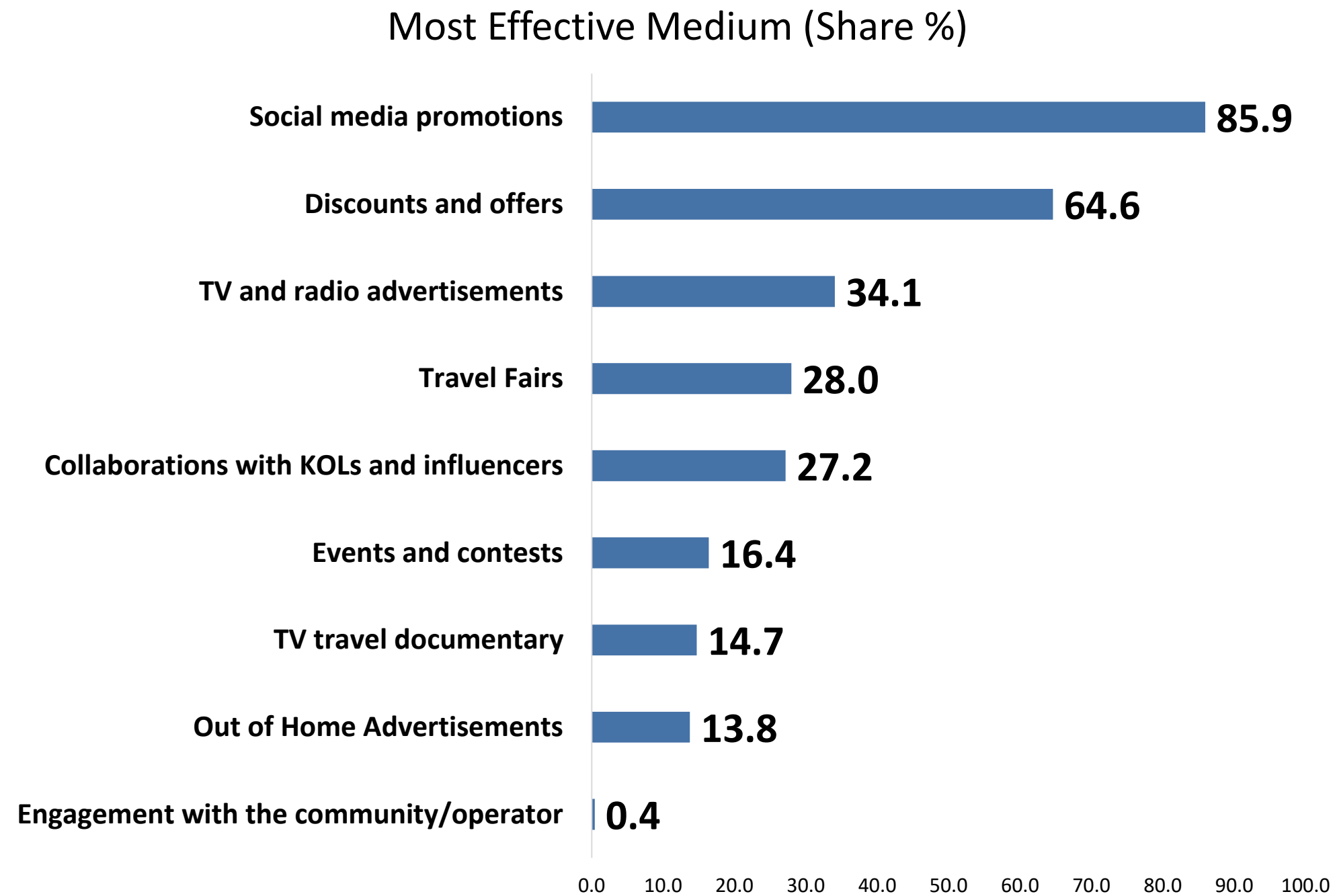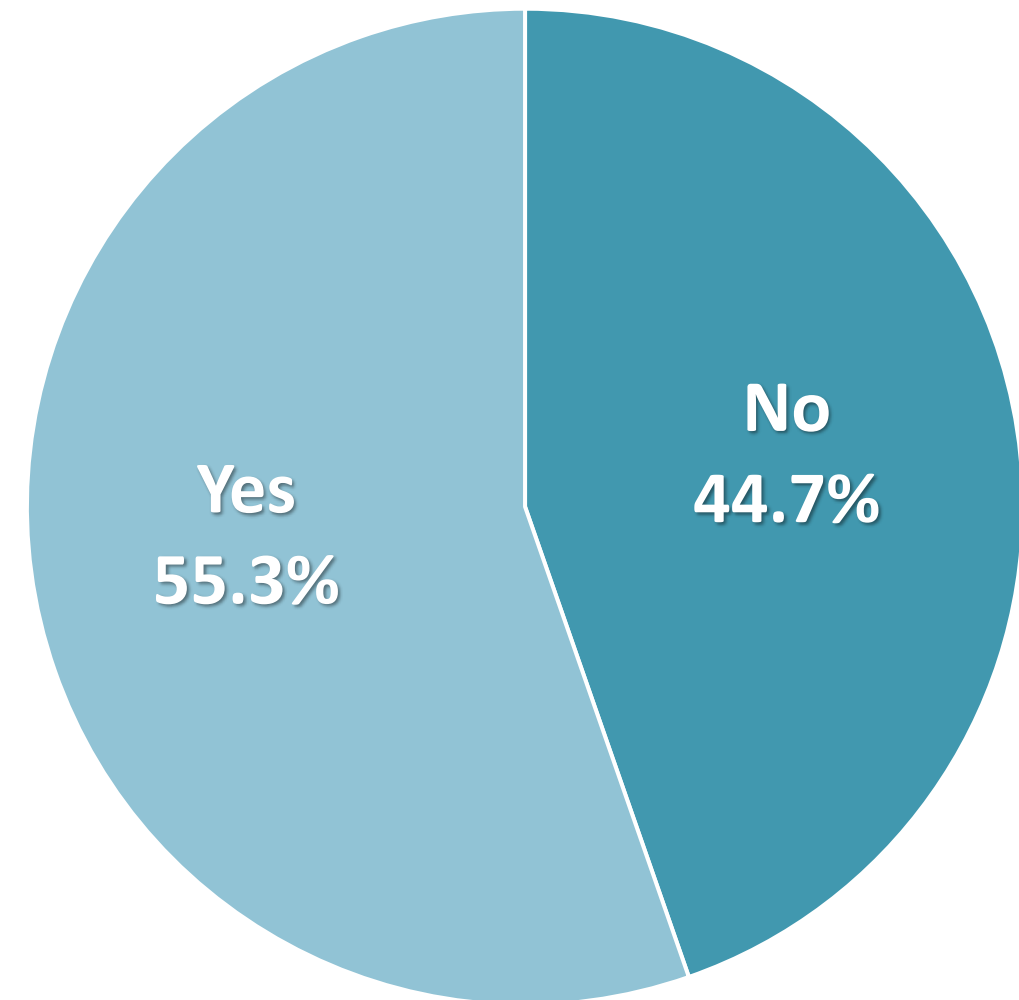**85.9%** of the respondents felt that *social media* are the most effective medium to promote CCM campaign followed by *Disounts and offers* (64.6%) and through *TV and radio advertisements* (34.1%).

55.3% of the respondents were **influenced by the "Cuti-Cuti Malaysia" campaign** to holiday domestically in 2023.

Most Effective Medium (Share %)

Medium	Share
Social media promotions	85.9
Discounts and offers	64.6
TV and radio advertisements	34.1
Travel Fairs	28.0
Collaborations with KOLs and influencers	27.2
Events and contests	16.4
TV travel documentary	14.7
Out of Home Advertisements	13.8
Engagement with the community/operator	0.4

Influenced by Cuti-Cuti Malaysia Campaign (Share %)

Yes 55.3%

No 44.7%

Domestic destinations visited because of CCM campaign were led by Langkawi, Penang, Sabah, Redang, KL and Melaka.

1. STATE	SHARE (%)
Penang	8.2
Sabah	7.8
Kuala Lumpur	5.2
Melaka	4.4
Terengganu	3.7
Johor	2.5
Perak	2.3
Perlis	1.6
Sarawak	1.6
Pahang	1.5
Kelantan	1.1
Kedah	0.4
Selangor	0.3
Negeri Sembilan	0.2
Putrajaya	0.1

2. CITY/LOCALITY	SHARE (%)
Ipoh	1.5
Kuching	1.3
Kuantan	0.6
Johor Bahru	0.5
Seremban	0.2
Tawau	0.2
Bintulu	0.1
Georgetown	0.1
Kapit	0.1
Kota Bharu	0.1
Kota Tinggi	0.1
Kuala Kangsar	0.1

CITY/LOCALITY	SHARE (%)
Kuala Selangor	0.1
Miri	0.1
Muar	0.1
Sandakan	0.1
Sitiawan	0.1
Taiping	0.1
Tawau	0.1
Ranau	0.1
Taiping	0.1
Teluk Intan	0.1

Domestic destinations visited because of CCM campaign (continue).

3. ENTERTAINEMNT	SHARE (%)
Genting Highlands	1.9
Malaysia Heritage Studio	0.1
Zoo Melaka	0.1

4. HIGHLANDS	SHARE (%)
Cameron Highland	2.6
Bukit Fraser	0.1
Bukit Tinggi	0.1

5. ISLAND	SHARE (%)
Pulau Langkawi	24.8
Pulau Redang	5.3
Pulau Tioman	3.1
Pulau Semporna	2.4
Pulau Perhentian	2.1
Pulau Mabul	0.7
Pulau Pangkor	0.6
Pulau Kapas	0.3
Pulau Kapalai	0.2
Pulau Sipadan	0.2
Pulau Tenggol	0.2
Pulau Manukan	0.1
Pulau Batu	0.1
Pulau Besar	0.1
Pulau Mantanani	0.1
Pulau Pemanggil	0.1
Pulau Sibuan	0.1
Pulau Rawa	0.1

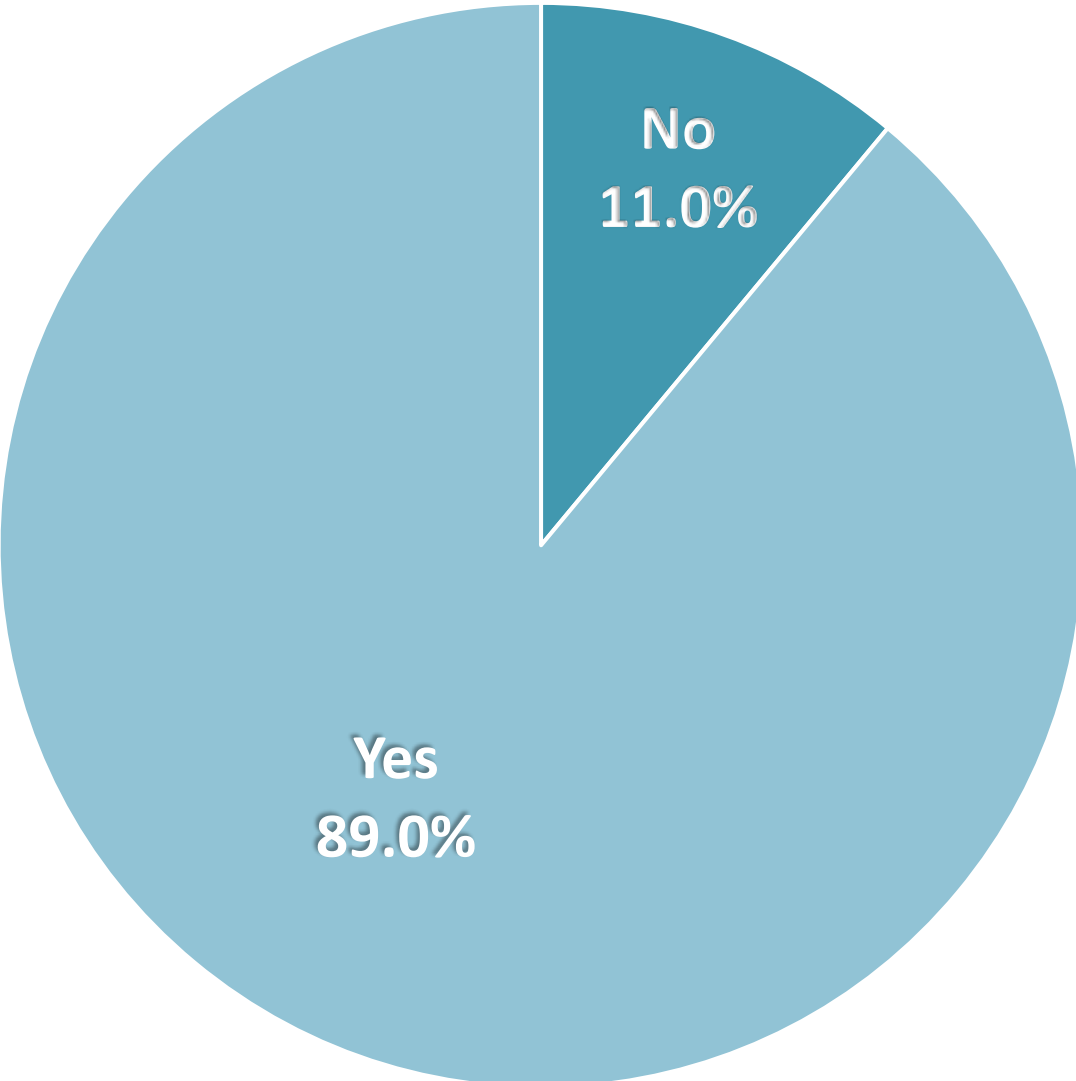| 6. NATURE & BEACHES	SHARE (%)
Kota Kinabalu	2.3
Kundasang	1.9
Port Dickson	1.0
Desaru	0.2
Gunung Jerai	0.2
Mulu National Park	0.2
Baling	0.1
Janda Baik	0.1
Kenyir	0.1
Mersing	0.1
Pantai Siring	0.1
Taman Negara	0.1
Teluk Malanoa	0.1
Cherating	0.1
Dabong	0.1
Lenggong	0.1
Pos Kuala Mu	0.1
Ulu Bendol	0.1

Most Malaysians enjoyed the *natural attractions* (40.6%), *local cuisines* (29.1%), *accommodation quality & amenities* (20.3%) and *cultural and heritage sites* (19.1%).

89.0% will **recommend the "Cuti-Cuti Malaysia"** to friends or family.

Most Enjoyed Cuti-Cuti Malaysia Experienced* (Share %)

Category	Share %
Natural attractions (e.g., beaches, mountains, parks)	40.6
Local cuisine and dining experiences	29.1
Accommodation quality and amenities	20.3
Cultural and heritage sites	19.1
Adventure and outdoor activities	16.9
Value for money	12.6
Shopping opportunities	9.0
Entertainment and events	7.5
Overall hospitality and friendliness	4.0
Transportation services	3.9
Interaction with local communities	2.9

Recommend Cuti-Cuti Malaysia to People (Share %)
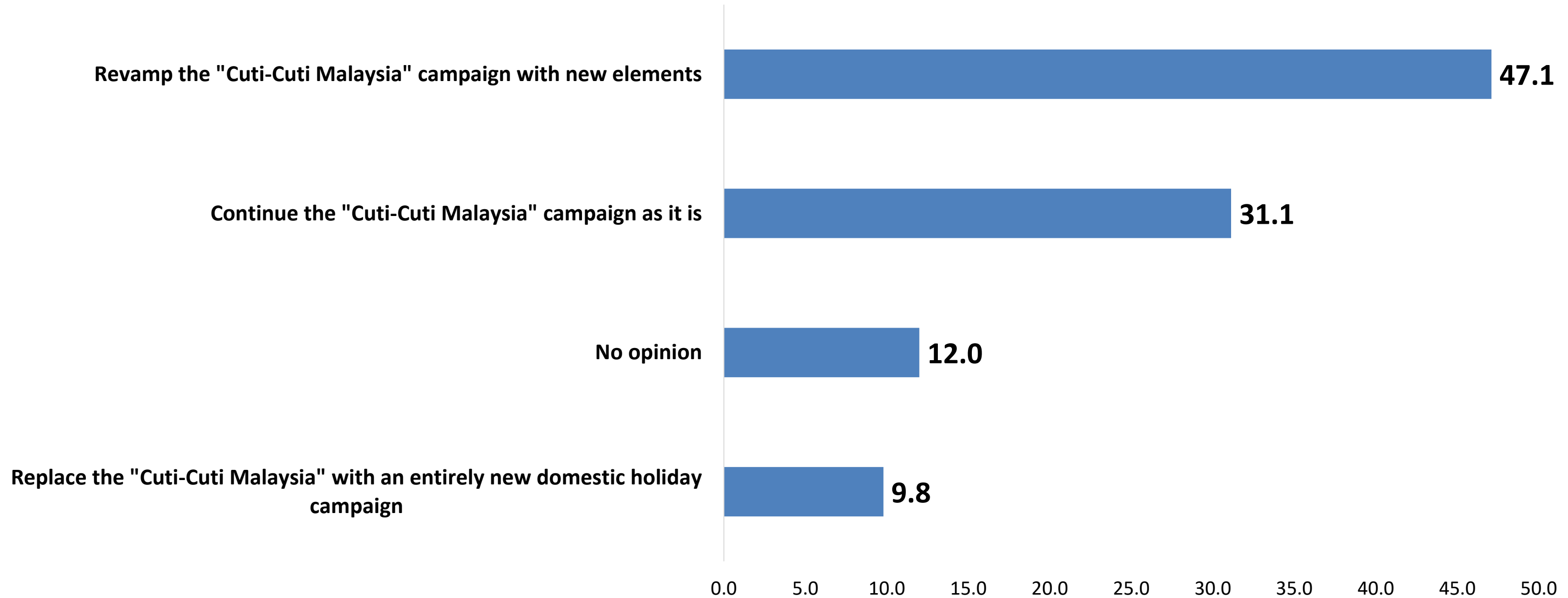
No 11.0%

Yes 89.0%

* Note: Multiple Response

47.1% proposed *revamping the CCM campaign by including new elements*. Whilst 31.1% felt that TM should *continue the CCM campaign as it is* and only 9.8% proposed the *CCM to be replaced with a completely new campaign*.

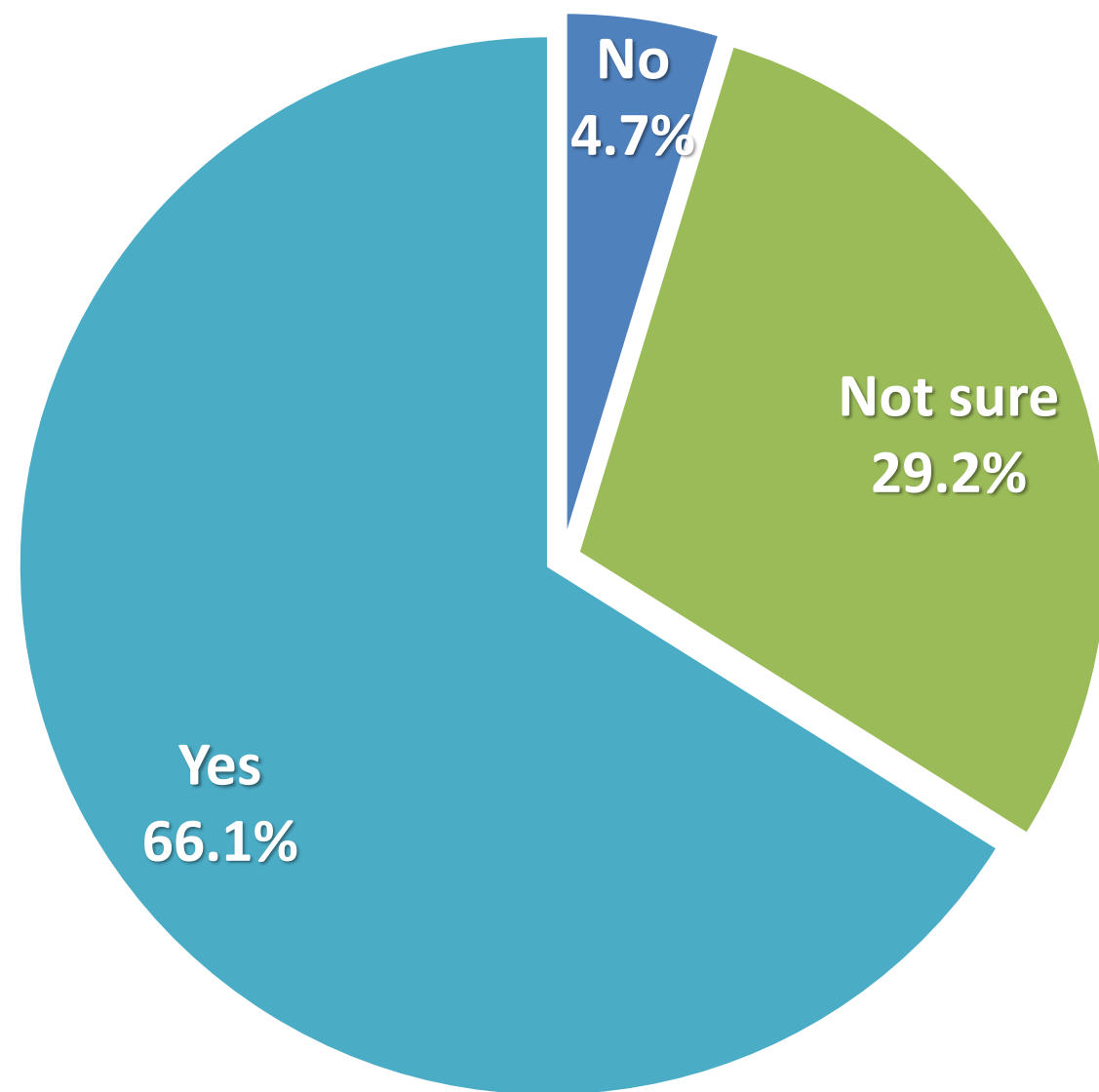Change of Cuti-Cuti Malaysia Campaign (Share %)

FUTURE DOMESTIC TRAVEL PLANNING-2024

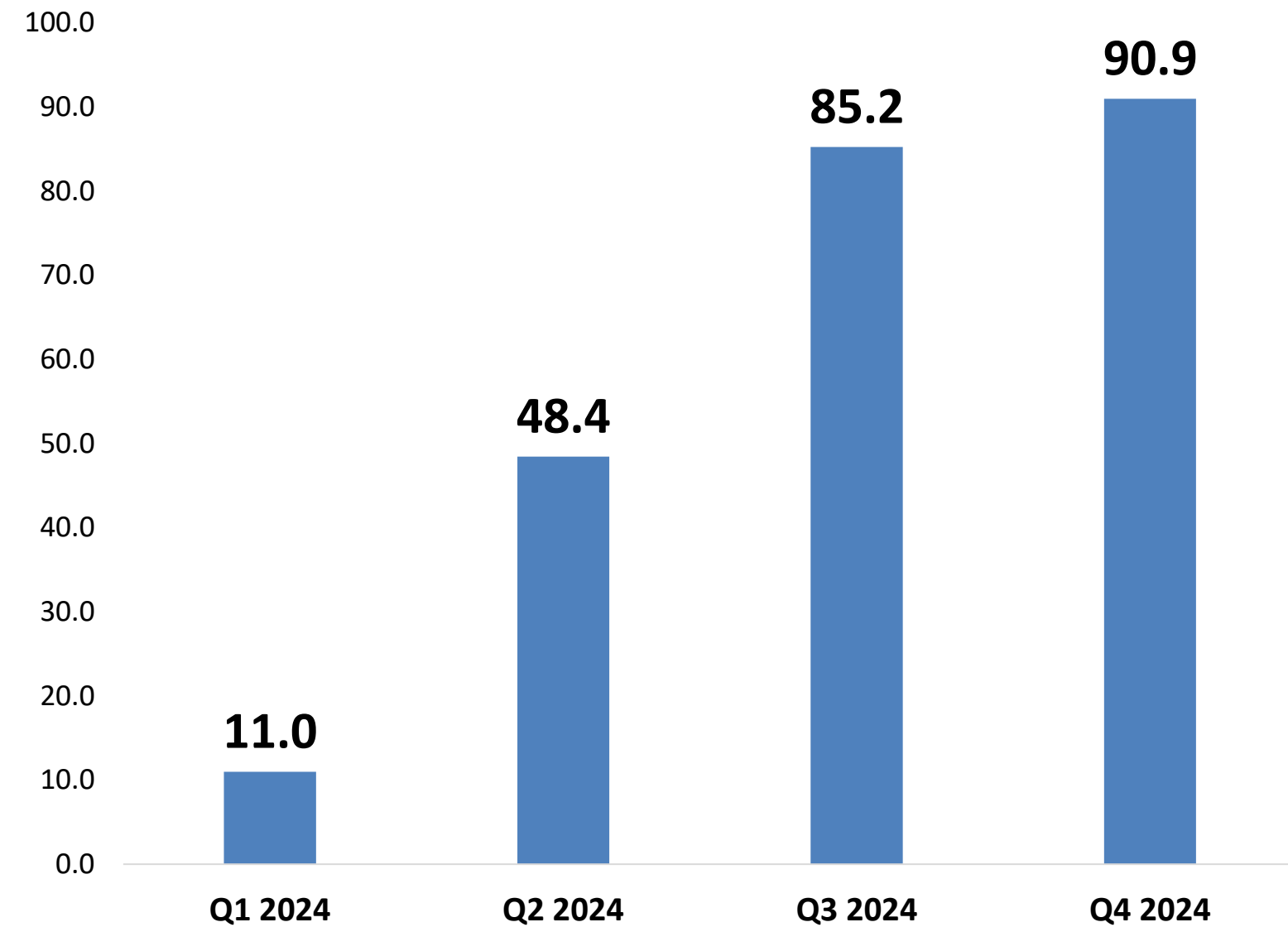MALAYSIAN INTERNATIONAL AND DOMESTIC TRAVEL BEHAVIOR

66.1% plan to take holiday domestically in 2024.

Plan taking holiday domestically (Share %)

90.9% plan to take holiday in *Q4 2024* followed by *Q3 2024* (85.2%) and 48.4% *during Q2 2024.* On average, Malaysians will make 2.4 domestic holiday trips in 2024.

When Planning to Take Holiday*(%)

* Note: Multiple Response

Main domestic destinations planned for 2024 are Langkawi, Penang, Sabah, Redang, KL, Melaka, Terengganu and Tioman.

1. STATE	SHARE (%)
Penang	8.7
Sabah	8.2
Kuala Lumpur	5.5
Melaka	4.7
Terengganu	3.9
Johor	2.7
Perak	2.4
Perlis	1.7
Sarawak	1.7
Pahang	1.6
Kelantan	1.1
Kedah	0.4
Selangor	0.3
Negeri Sembilan	0.2
Putrajaya	0.1

2. CITY/LOCALITY	Share (%)
Ipoh	1.6
Kuching	1.3
Kuantan	0.7
Johor Bahru	0.6
Tawau	0.3
Seremban	0.2
Taiping	0.2
Bintulu	0.1
Georgetown	0.1
Kapit	0.1
Kota Bharu	0.1
Kota Tinggi	0.1
Kuala Kangsar	0.1

CITY/LOCALITY	SHARE (%)
Kuala Selangor	0.1
Miri	0.1
Muar	0.1
Ranau	0.1
Sandakan	0.1
Sitiawan	0.1
Teluk Intan	0.1

* Note: Multiple Response

Main domestic destinations planned for 2024 (continue).

3. HIGHLANDS	SHARE (%)
Cameron Highlands	2.8
Bukit Frazer	0.2

4. ENTERTAINTMENT	SHARE (%)
Genting Highlands	2.0
Malaysia Herritage Studio	0.1
Zoo Melaka	0.1

On average, the respondents will visit **1.1** local destinations in 2024.

5. ISLAND	SHARE (%)
Pulau Langkawi	26.2
Pulau Redang	5.6
Pulau Tioman	3.2
Pulau Semporna	2.6
Pulau Perhentian	2.2
Pulau Mabul	0.8
Pulau Pangkor	0.7
Pulau Kapas	0.3
Pulau Kapalai	0.2
Pulau Sipadan	0.2
Pulau Tenggol	0.2
Pulau Manukan	0.1
Pulau Batu	0.1
Pulau Besar	0.1
Pulau Mantanani	0.1
Pulau Pemanggil	0.1
Pulau Sibuan	0.1
Pulau Rawa	0.1

6. NATURE & BEACHES	SHARE (%)
Kota Kinabalu	2.4
Kundasang	2.0
Port Dickson	1.0
Desaru	0.3
Gunung Jerai	0.2
Mersing	0.2
Mulu National Park	0.2
Baling	0.1
Janda Baik	0.1
Kenyir	0.1
Pantai Siring	0.1
Taman Negara	0.1
Teluk Malanoa	0.1
Ulu Bendol	0.1
Cherating	0.1
Dabong	0.1
Lenggong	0.1
Pos Kuala Mu	0.1

* Note: Multiple Response

WHY MALAYSIANS ARE NOT HOLIDAYING DOMESTICALLY

MALAYSIAN OUTBOUND AND DOMESTIC TRAVEL BEHAVIOR

TOURISM MALAYSIA

Not budgeted (38.0%), *local destinations are expensive* (15.0%), *going for overseas holiday* (14.0%), *local destinations are not attractive* (13.0%) and *have visited all major destinations in Malaysia* (12.0%) are the main reasons for not holidaying in Malaysia.
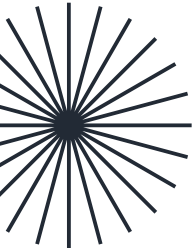
Reason for not holidaying domestically (Share %)