

TOURISM MALAYSIA MARKETING **PLAN** 2022 • 2026

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MESSAGE FROM DIRECTOR GENERAL

It gives me great pleasure to present **Tourism Malaysia Marketing Plan for 2022-2026**, which is an initiative to create **integrated** and **holistic** strategies to boost both **supply** and **demand** in our tourism industry.

> DATO' HJ. ZAINUDDIN ABDUL WAHAB Director General, Tourism Malaysia

The rapid spread of the coronavirus caught most of the world unprepared. Countries have to close their borders to foreign travellers, making the tourism industry the first to face the brunt of the impact.

Malaysia is no exception. Our international tourist arrivals recorded a sharp decline following the closure of our borders in March 2020, after COVID-19 was declared a pandemic by the World Health Organisation (WHO). According to the World Tourism Organisation (UNWTO), the world economy is projected to grow by 4% in 2022 and 3.5% in 2023, after a global contraction of 3.4% in 2020 and a rebound of 5.5% in 2021.

The sudden halt in tourism, both internationally and domestically, due to the pandemic, has highlighted the importance of the sector to both national economies and individual livelihoods. Therefore, the restarting of tourism in 2022 and beyond is crucial due to its devastating impact on the service industry, including hotels, tour agencies, food and beverages services, theme parks, and retail trade.

Although most tourism experts do not expect international tourism to return to pre-COVID-19 levels before 2023, we remain positive and hopeful that We are also optimistic that the domestic tourism industry will perform better in 2022, driven by the rising rates of vaccination, consumer confidence, and the government's regulations on relaxing travel restrictions in the new normal.

COVID-19 will become endemic and ease us into accepting more tourists and gradually welcome international tourists again.

We are aware that the challenges in the tourism industry will get tougher in the coming years; hence, it is crucial for the tourism industry to be wellprepared for the post-COVID-19 travel demands and expectations, and to remain focused in order to support its sustainable recovery and rebuild the sector in the coming years.

As such, it gives me great pleasure to present Tourism Malaysia Marketing Plan for 2022-2026, which is an initiative to create integrated and holistic strategies to boost both supply and demand in our tourism industry. It sets out the general outlook and perspectives for the overall marketing programme for Tourism Malaysia, and our strategies and priorities for the next five years to achieve a successful and sustainable tourism industry for the country. This Marketing Plan is prepared upon discussions with industry players and stakeholders, and is in line with the National Tourism Policy 2020-2030 as well as our strategic direction over the next five years.

I would like to take this opportunity to thank all our tourism partners and stakeholders for their input in the formulation of our strategies and the preparation of this plan. We will continue to work closely with them in facing any challenges that may come our way and strive together to achieve the country's tourism goal and elevate the national economy.

Moving forward, let us be cognisant of the importance of digitalisation and innovation in working our way through revitalising the new tourism scene amid this era of technology.

Thank you.

DATO' HJ. ZAINUDDIN ABDUL WAHAB Director General

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ABOUT US

Malaysia Tourism Promotion Board or Tourism Malaysia is an agency under the Ministry of Tourism, Arts and Culture Malaysia (MOTAC). It focuses on the specific task of promoting tourism in Malaysia and overseas. Since its inception in 1972, Tourism Malaysia has grown by leaps and bounds and it has played a prominent role in the international tourism arena.

To date, Tourism Malaysia has 30 overseas offices and 6 marketing representative offices in locations identified as Malaysia's key markets. In addition, there are 6 regional offices and 15 Tourist Information Centres (TICs) at strategic locations within Malaysia.



OUR VISION

To make the tourism industry a primary source of national revenue and a prime contributor to the socio-economic development of the nation.



OUR MISSION

To market Malaysia as a premier destination of excellence in this region.



OUR FUNCTIONS

In accordance with the Malaysian Tourism Promotion Board Act 1992, the functions of the Board (Tourism Malaysia) are as follows:

- Stimulate and promote tourism to and within Malaysia.
- Invigorate, develop and market Malaysia internationally and domestically as a tourist focal point.
- Coordinate all marketing or promotional activities relating to tourism conducted by any organisation, government or non-governmental agency.
- Recommend to the minister relevant measures and programmes that stimulate the development and promotion of the Malaysian tourism industry and to implement them upon approval.





OUR OBJECTIVES

- Promote Malaysia as an outstanding tourist destination.
- Showcase Malaysia's unique wonders, attractions and cultures.
- Enhance Malaysia's share market for meetings, incentives, conventions and exhibitions (MICE).
- Increase Malaysia's tourism revenue by increasing tourist numbers and extend their length of stay.
- Encourage tourism and its related industries in Malaysia.
- Help develop domestic tourism and promote new investments in the country, as well as provide increased employment opportunities. The growth of tourism would also contribute positively to the country's economic development and quality of life.

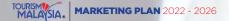


EXECUTIVE SUMMARY

Tourism Malaysia Marketing Plan 2022-2026 is based on Tourism Malaysia's strategic direction, which has been compiled in the Tourism Malaysia Strategic Plan 2022-2026. It is developed by taking into account the country's brand policy, market and travel trends, available resources, budget, network, trade and economic policy, travel formalities, technology know-how, manpower skills, and support from the stakeholders, at both international and domestic levels.







GOALS/ OBJECTIVES

Generally, the Marketing Plan focuses on the domestic market, international recovery, health and safety, digitalisation, and innovation. It aims to:



Tourism Malaysia's domestic and international tourism promotion efforts have been strongly impacted by the outbreak of the COVID-19 pandemic. As there are still uncertainties in the reopening of international borders and positioning Malaysia back in the global map, the country is moving forward and focusing mainly on reviving its economy through domestic tourism, besides marketing the country as a safe holiday destination.

In terms of international promotion, our strategies for the period of 2022 to 2026 aim to boost tourist arrivals to Malaysia post-COVID-19. The strategies are formulated based on market trends and preferences throughout the period, and they are flexible enough to respond to any abrupt changes in travel patterns and in times of crisis.

Tourism Malaysia Strategic Plan stated that in the next five years, we are expected to see a continuation of the trend to move away from mass tourism and towards more flexible, experiential, and individualistic trips, with adventure tourism and special interest holidays gaining more and more importance over traditional and mass tourism.

To achieve our goals and objectives for 2022-2026 and taking into consideration the feedback and opinions of industry players through various engagements, Tourism Malaysia is focusing on six strategies for the successful implementation of the country's tourism promotion plan:

- 1. Boost Domestic Tourism
- 2. Forge Smart Partnership
- 3. Enhance Tourism Promotion (Online and Offline)
- 4. Optimise Strategic Communication/Media Engagement
- 5. Implement Travel Bubble
- 6. Undertake Strategic Transformation



STRATEGY FORMULATION

Tourism Malaysia Marketing Plan 2022-2026 is formulated based on:







TOWS Analysis

A TOWS Analysis is an extension of the SWOT Analysis framework that identifies an organisation's strengths, weaknesses, opportunities and threats. This strategic planning tool enables Tourism Malaysia to match the internal strengths of our tourism industry with external opportunities, and highlights our vulnerability to threats based on our weaknesses. This analysis enables Tourism Malaysia to take relevant actions to reduce threats, take advantage of opportunities, overcome weaknesses and exploit strengths.



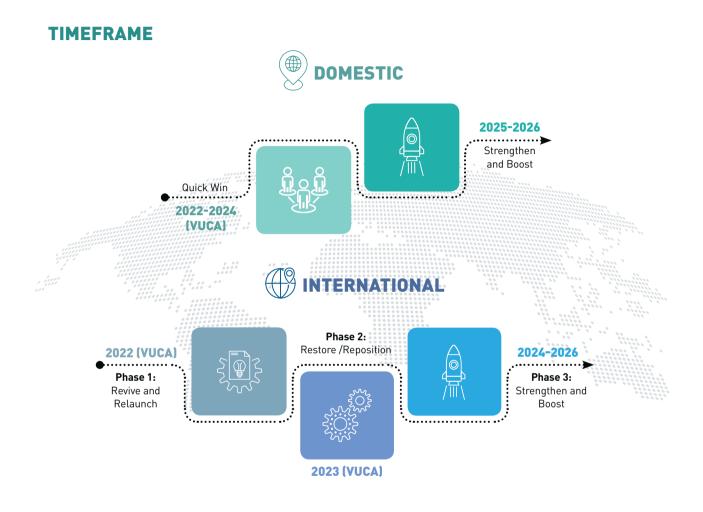


Focus

Our focus shows the lead and support tourism attractions that will be prioritised in Tourism Malaysia's promotional efforts for the domestic and international markets.







VUCA stands for Volatility, Uncertainty, Complexity and Ambiguity. It describes the situation of constant, unpredictable change that is now the norm in certain industries and areas of the business world. VUCA demands that you avoid traditional, outdated approaches to management and leadership, and day-to-day work.



OVERVIEW

GLOBAL

Based on reports from UNWTO, global tourism experienced a 4% upturn in 2021, compared to 2020 (415 million versus 400 million). However, international tourist arrivals (overnight visitors) were still 72% below the pre-pandemic year of 2019, according to preliminary estimates by UNWTO.

This follows on from 2020, the worst year on record for tourism, when international arrivals decreased by 73%. The pace of recovery remains slow and uneven across world regions due to varying degrees of mobility restrictions, vaccination rates and traveller confidence.



A rapid and more widespread vaccination roll-out, followed by a major lifting of travel restrictions, and more coordination and clearer information on travel protocols, are the main factors identified by experts for the effective recovery of international tourism.

According to the UNWTO World Tourism Barometer, the rising rates of vaccination, combined with easing of travel restrictions due to increased cross-border coordination and protocols, have all helped release pent up demand. International tourism rebounded moderately during the second half of 2021, with international arrivals down 62% in both the third and fourth quarters compared to pre-pandemic levels.



UNWTO stated that tourism professionals will see better prospects for 2022 after turbulence in the early months because of the Omicron wave. It predicts a 30% to 78% rise in international arrivals in 2022 over 2021. However, this would still be 50% to 63% below prepandemic levels.

For the period of January-April 2022, the UNWTO Confidence Index shows a slight decline. The rise in COVID-19 cases and the Omicron variant are set to disrupt the recovery and affect confidence through early 2022 as some countries reintroduce travel bans and restrictions for certain markets. At the same time, the vaccination roll-out remains uneven and many destinations still have their borders completely closed, mostly in Asia and the Pacific. A challenging economic environment could put additional pressure on the effective recovery of international tourism, with the surge in oil prices, increase in inflation, potential rise in interest rates, high debt volumes and the continued disruption in supply chains.

Nevertheless, the ongoing tourism recovery in many markets, mostly in Europe and the Americas, coupled with the widespread vaccination rollout and a major coordinated lifting of travel restrictions, could help to restore consumer confidence and accelerate the recovery of international tourism in 2022.



While international tourism bounces back, domestic tourism continues to drive recovery of the sector in an increasing number of destinations, particularly those with large domestic markets. According to experts, domestic tourism and travel close to home, as well as open-air activities, nature-based products and rural tourism are among the major travel trends that will continue shaping tourism in 2022.



Major travel trends in 2022 are naturebased products and rural tourism



Open-air activities



Domestic tourism



Rural tourism



The economic contribution of tourism in 2021 (measured in tourism direct gross domestic product) is estimated at US\$1.9 trillion (RM4.2 trillion), above the US\$1.6 trillion in 2020, but still well below the pre-pandemic value of US\$3.5 trillion.

DOMESTIC

Domestic tourism has always been important to Malaysia, particularly when the country encountered a crisis. The COVID-19 pandemic has further highlighted the importance of domestic tourism; hence Tourism Malaysia has pivoted towards travel bubble with a focus on quality tourists. Through travel bubble, the entry of visitors for business or leisure travel from foreign countries is allowed.

The government has identified Langkawi as the pilot project for the Domestic Travel Bubble and the island was opened to domestic travellers beginning 16 September 2021.

This travel bubble pilot project has successfully revitalised domestic tourism and cultural activities on the island. Up till 31 December 2021, Langkawi recorded over 720,000 domestic tourists, which is more than the 200,000 target set earlier by MOTAC. In addition, these domestic tourists have contributed no less than



RM750 million from 16 September to 15 November 2021.

Following the success of Langkawi as the domestic travel bubble pilot project, the government has also opened the island to international tourists under the Langkawi International Travel Bubble (LITB) beginning 15 November 2021 with stringent Standard Operating Procedures (SOP).

Visitors who are allowed into Langkawi are based on their country of origin, and those from high-risk countries are temporarily banned. In addition, international visitors can travel to other states in the country



As the pilot project, Langkawi recorded over 720,000 domestic tourists



Contributed no less than **RM750** million from 16 September to 15 November 2021



after staying for a certain period of time in Langkawi.

Apart from Langkawi, Malaysia is also allowing foreigners to travel from Singapore via a Vaccinated Travel Lane (VTL) between the republic and Malaysia beginning 29 November 2021. Under this programme, all VTL travellers will need to be fully vaccinated and will be required to undergo administered COVID-19 test once they arrived in Malaysia. Up till 31 December 2021, close to 38,000 tourists have entered Malaysia via the VTL.

Besides that, Malaysia is also working towards establishing the VTL with other neighbouring countries followed by other regions to increase inbound visitors to the country. To ensure the success of Langkawi as the travel bubble pilot project, Tourism Malaysia has also set up helpdesks at the Kuala Lumpur International Airport (KLIA) to assist tourists and ensure a smooth, hasslefree experience at the airport despite going through the stringent SOPs implemented by the government.

Tourism Malaysia will also collaborate with green countries on 'point to point' (city to city) travelling to focus on attracting high-value tourists and increasing tourist expenditure.

The pandemic has had a significant impact on tourism sector and players; hence, the government has introduced various initiatives and funds to assist them during these challenging times and to boost domestic tourism, such as the "Galakan Melancong Malaysia (GAMELAN)" Fund and "Geran Sokongan Pelancongan, Seni dan Budaya" Fund (GSPSB 2021), which are special allocations from the Ministry of Finance channelled through MOTAC with Tourism Malaysia appointed as implementer.

Besides that, under Budget 2022, seven key initiatives, involving a total value of RM1.6 billion, will be implemented in 2022 to revive the tourism sector. They include the allocation of RM600 million as specific financing for the tourism sector under PENJANA Tourism Financing and BPMB Rehabilitation Scheme; RM85 million in special assistance to more than 20,000 tourism operators registered under MOTAC for a period of three months, and RM50 million



Vaccinated Travel Lane (VTL)



38,000 tourists have entered Malaysia via the VTL









RM600 million for the tourism sector under PENJANA Tourism Financing and BPMB Rehabilitation Scheme



RM85 million for over 20,000 tourism operators registered under MOTAC







for the maintenance of tourism infrastructure.

Besides that, a sum of RM30 million is allocated in matching grants for the repair of 738 budget hotels that are registered under MOTAC and for registered homestay owners; RM50 million in matching grants to companies to organise arts and culture-related programmes, and RM60 million in incentive funds for activities to promote domestic tourism. In order to revive the health tourism industry to strengthen Malaysia's position as a preferred health tourism destination, a total of RM20 million has been allocated to the Malaysia Healthcare Travel Council (MHTC).

Under the Twelfth Malaysia Plan (2021-2025), the government has set a target of 24.3 million international tourist arrivals with a contribution of RM73 billion in receipts by the year 2025, and a total revenue of RM100 billion from domestic tourists.



Sipadan Island, Semporna – Sabah



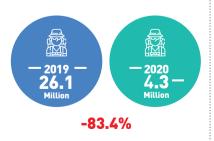


MALAYSIA'S TOURISM PERFORMANCE 2020 MALAYSIA MALAYSIA'S TOURISM PERFORMANCE 2020

Malaysia began closing its borders from 18 March 2020 for any social visit activities following the outbreak of the COVID-19 pandemic. This move caused a significant decrease in the number of foreign tourist arrivals, starting from April 2020.

Since the closure of the Malaysian borders, the influx of foreign tourists was from the category of essential movement, EP1 and EP2 level expatriate pass holders, foreign spouses and family members married to Malaysian citizens, long-term visit pass holders, and vaccine experts from the People's Republic of China, the United States and the United Kingdom.

TOURIST ARRIVALS





-83.5% Medium-haul market

Short-haul market

Long-haul market

-84.7%

The massive drop in international tourist arrivals is attributed to the closure of Malaysia borders since 18 March 2020 due to the spread of the COVID-19 pandemic.



Percentage Share of Contributors of International Tourists to Malaysia in 2020



Short-haul market (Southeast Asia) **68.1%**



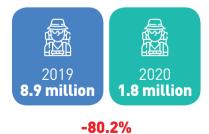
Medium-haul market (East Asia and South Asia) **20.1%**

Long-haul market (West Asia, Central Asia, America, Oceania, Europe and Africa) 11.8%





Excursionist arrivals to Malaysia



The top 10 markets for excursionist arrivals to Malaysia in 2020 were Singapore (1.3 million), Thailand (151,390), Brunei (54,221), Indonesia (51,131), the People's Republic of China (23,493), the Philippines (21,899), India (19,221), South Korea (18,174), Japan (14,655) and Australia (11,639).



TOURIST RECEIPTS

Malaysia's tourist receipts plunged 85.3% from RM86.1 billion in 2019 to RM12.7 billion in 2020, with the average per capita expenditure recorded a total of RM2,928.40, a decline of 11.3% from RM3,300.40 in 2019.

The main contributors to the overall expenditure of foreign tourists in 2020 were – Singapore (RM2.7 billion), Indonesia (RM2.0 billion), the People's Republic of China (RM1.8 billion), India (RM741.9 million) and Thailand (RM605.2 million).

Tourist receipts from all the top five markets registered a decrease in 2020

against 2019 – Singapore (-86.8%), Indonesia (-84.9%), the People's Republic of China (-88.1%), India (-79.5%) and Thailand (-84.7%).

The per capita expenditure for the top five countries for 2020 was contributed by the long-haul and medium-haul markets, namely Saudi Arabia [RM10,762.2 (-7.7%)], India [(RM4,759.1 (-3.3%)], the United Kingdom [(RM4,742.6 (-22.2%)], the People's Republic of China [(RM4,495.8 (-8.6%)] and Australia [(RM4,387.9 (-7.1%)].

DOMESTIC TOURISM

On the domestic front, there were 46.3 million domestic tourists in 2020, signifying a decline of 45.4%

Domestic tourists

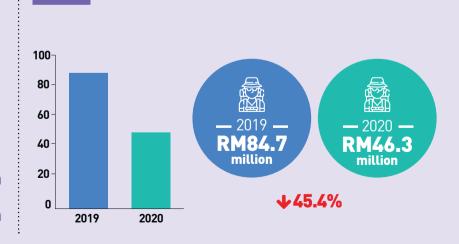
compared to 84.7 million domestic tourists in 2019. For the same period, receipts from domestic tourists decreased by 65.9% to RM23.2 billion from RM67.9 billion.

Meanwhile, the average per capita expenditure for domestic tourists dropped 37.5% to RM501 in 2020, while their average length of stay (ALOS) decreased by 23.4% to 1.9 nights.

In 2020, shopping recorded the highest share of expenditure by domestic tourists with 40.9%. In terms of purpose of visit, visiting relatives and friends (61.5%) emerged as the most prevalent purpose for domestic tourists in

Main contributors to the overall expenditure of foreign tourists in 2020









making a trip. It was followed by holiday/leisure/relaxation (30.1%), shopping (3.6%), incentive travel/ others (1.8%), official business/ education (1.2%), medical treatment/ wellness (1.1%), entertainment/ attending special event/sports (0.6%), and religious purpose/visit places of worship (0.1%).

In 2020, the percentage share of domestic tourists who stayed at relatives and friends' house was the highest (65.1%), followed by hotel (24.1%), rest house (3.9%), homestay/ vacation homes (3.8%), apartment (2.3%), and chalet (0.8%). Pahang was the most popular state in 2020 with 5.2 million (tourists), followed by Perak (4.9 million tourists), Selangor (4.7 million tourists), Johor (4.0 million tourists) and Kuala Lumpur(3.7 million tourists).

HOTELS AND AVERAGE OCCUPANCY RATE

Up till 2020, Malaysia recorded a total of 5,339 hotels (-0.8%), offering 332,817 rooms (-2.3%). The top five states with the highest number of paid accommodations were Sabah (614), Sarawak (581), Johor (557), Pahang (482) and Kuala Lumpur (472), while the top five states with the highest number of rooms were Kuala Lumpur (60,095), Selangor (34,610), Johor (33,487), Pahang (31,175) and Sarawak (28,511).





Top 5 states with the highest number of paid accommodations





The hotel industry in Malaysia recorded an average occupancy rate of 30.9% in 2020, signifying a drop of 27.9 percentage points compared to 58.8% in 2019.

The total paid accommodation guests in 2020 was 35.4 million, registering a decline of 55.7%. It was comprised of 13.3% (4.7 million – a drop of 83.7%) international guests and 86.7% (30.7 million – a decrease of 39.9%) domestic guests.

The five states that recorded the highest number of hotel guests were Pahang (7.3 million), Kuala Lumpur (6.1 million), Johor (3.9 million), Penang (2.9 million), and Sarawak (2.8 million).

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Top 5 states with the highest number of hotel guests



Pahang 7.3 million



Kuala Lumpur 6.1 million



Johor 3.9 million

Penang



2.9 million Sarawak 2.8 million



INDUSTRY PERFORMANCE

In 2019, the country's tourism industry contributed RM240.2 billion or 15.9% to the Gross Domestic Product (GDP) and involved 3.6 million workers; however, in 2020, economic activities related to the tourism industry were affected by the COVID-19 pandemic, with an estimated total loss exceeding RM100 billion.

Contributions of Malaysia's tourism industry in 2019



Darul Hana Bridge, Kuching – Sarawak

TOURISM MALAYSIA **MARKETING PLAN** 2022 - 2026

EVENT STRATEGIES

Tourism Malaysia aims to invigorate domestic tourism and intensify the promotion of tourist hotspots and destinations among domestic tourists. The domestic tourism industry is the prime source of national revenue and main contributor to the socioeconomic of the nation.



For the period of 2022-2024 (assuming a 3.5% growth rate of domestic tourist arrivals), Tourism Malaysia aims to:

- Refresh and elevate 'Cuti-Cuti Malaysia' brand and image to promote domestic tourism aggressively through various programmes and activities to attract Malaysians to travel locally.
- Leverage digital platforms in tactical campaigns of domestic promotions.
- Entice domestic tourists to buy packages and travel within the

country with confidence while adapting to the next normal.

- Highlight Malaysia's unique wonders, attractions and cultural diversity as part of experiential tourism, and drive repeat tourists within inter and intrastate.
- Grow Malaysia's tourism revenue by increasing tourist expenditure and extend their length of stay.
- Identify and develop at least one selected tourism product in each district as the main highlight of tourism destination.

For the period of 2025-2026 (assuming a 7% growth rate of domestic tourist arrivals), Tourism Malaysia aims to:

- Promote Malaysia tourism products aggressively and drive repeat tourists within inter and intrastate.
- Market and promote 'one product one district' as the main attractions of tourism destinations for domestic tourists.
- Heighten Malaysia's tourism revenue by increasing domestic tourist arrivals and length of stay.



Action Plans



boosting ads on these platforms. We will also enhance our engagement with relevant influencers to get their assistance in promoting tourist destinations and tourism products.







Activity: Gegar Misi Jualan Domestik

Detail: Participates by tourism industry players (i.e. travel agents, hotels, product owners, etc.) and state governments to hard sell travel packages directly to consumers.



Activity: MATTA Fair

Detail: A major annual businessto-consumer (B2C) fair that attracts thousands of tourism industry players and consumers from all over Malaysia. It offers many tour packages and great deals at attractive prices.



Activity: Malaysia Mega Festival

Detail:To showcase tourism, arts and culture. It features cultural parades, tourism exhibition, demonstrations and pocket shows. Participants include tourism industry players, state governments, cultural troops and demonstrators, agencies and ministries, etc.



Activity: Malaysia Domestic Trade Fair

Detail: This business-to business (B2B) trade fair will involve tourism industry players, product owners, hoteliers, state tourism organisations, and e-commerce/ e-marketplace providers. It encompasses talk shows, B2B sessions, luncheon with industry players, and exhibitions.



Activity: Jom Cuti-Cuti Malaysia Travel Fair

Detail: To showcase tourism, arts and culture. It features cultural parades, tourism exhibition, demonstrations and pocket shows. Participants include tourism industry players, state governments, cultural troops and demonstrators, agencies and ministries, etc.



Activity: Malaysia Travel Mall (e-Travel Mall)

Detail: This initiative intends to develop a B2C e-travel mall where all tourism stakeholders can update their travel packages and new promotions in one platform for consumers to make direct booking and online purchase.

Saloma Link Bridge -Kuala Lumpur

TOURISM MALAYSIA .

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MARKETING PLAN 2022 - 2026

PROMOTION STRATEGIES





SOUTHEAST ASIA

For the Southeast Asian market, Tourism Malaysia aims to effectively communicate the diversity of Malaysia's tourism product offerings, increase visitors' length of stay and local expenditure, and attract return visitors.

In addition, Tourism Malaysia will also strive to maintain the sustainability of the Southeast Asian market growth in terms of tourist arrivals to Malaysia

and receipts, and remain relevant and competitive in the tourism ecosystem with the adaption of technological advancements and dynamic marketing approaches.

Goals/Objectives

- To continue promoting Malaysia as a family oriented and shopping holiday destination for tourists from Brunei Darussalam, and positioning the country as one of the top five tourist contributing markets to Malaysia.
- To maintain Singapore's position as the top contributor of tourist arrivals to Malaysia, increase the market share of air arrivals of Singaporean tourists to Malaysia, and explore new prospects and niche products to be promoted in the market.



- To make Malaysia a top-of-mind holiday destination for Indonesian families and a pocket-friendly destination for young travellers, as well as a shopping, sports and Meetings, Incentives, Conferences and Exhibitions (MICE) destination. Besides that, we also intend to make Malaysia a trusted and affordable medical destination for Indonesians.
- To strengthen relationship and cooperation with travel agents in Sumatra, Indonesia, to attract more tourists to Malaysia. In addition, we will also continue to forge stronger relationship and cooperation with media in Sumatra to create higher awareness of Malaysia and provide wider publicity to the country as an ideal holiday destination.
- To explore new prospects and niche products to be promoted to tourists from the Philippines, and maintain Malaysia's presence and visibility in the market, as well as strive to ensure the country remains as one of the top 10 contributors of tourist arrivals to Malaysia.
- To extend the Average Length of Stay (ALOS) of tourists from Thailand and Myanmar, besides

increasing tourist arrivals from both countries. In addition, we aim to boost the share of the MICE market by attracting more Thai and Myanmar organisations to hold their events in Malaysia.

- To forge stronger bilateral ties with Vietnam and more cooperation with travel trade partners and airlines in the country to boost tourist arrivals from Vietnam. We also intend to promote Malaysia as a key destination for MICE.
- To increase the number of tourist arrivals from Laos, and explore new prospects and niche products to be promoted in the market.



• Joint promotion with local travel agents to create and sell attractive travel packages to Malaysia.



 Forge smart partnership with airlines (e.g. Malaysia Airlines, AirAsia, Royal Brunei Airlines, Scoot, Jetstar Asia, Philippine Airlines, etc.) and carry out joint promotion with them at travel fairs and events to increase the market share of air travel to Malaysia.



- Collaborate with the Malaysia Healthcare Travel Council (MHTC) to promote medical services to attract more healthcare travellers to seek treatment in Malaysia.
- Collaborate with Online Travel Agents (OTA) (e.g. Klook and Trip. com) and work together with the Malaysian Association of Hotels (MAH) and other Malaysia hotels to provide discounted rooms and meals to increase ALOS, besides offering great deals like shopping vouchers.



 Develop unique packages (e.g. diving, spooky tour, Muslim packages, kampung tours, etc.) for specific groups to boost arrivals.



 Collaborate with travel bloggers and Key Opinion Leaders (KOL) to promote tourism offerings in Malaysia, and maximise the use of online media (social media and digital ads) to boost media coverage of the country as a safe destination for travellers. and TV stations to make Malaysia an umrah hub and the best choice for transit.

 Collaborate with influencers, bloggers, etc. to promote Malaysia as an affordable and enjoyable golf and cycling destination. The country offers many cycling routes that are not only challenging, but also instaworthy.





- Work together with the Malaysia Shopping Secretariat to make Malaysia a shopping destination, and collaborate with Muslim influencers, national/local radio
- Organise post-COVID-19 product updates for travel agents and media, besides carrying out aggressive promotions with local agents to develop special travel packages to boost arrivals to Malaysia.
- Create wellness/leisure packages with local agents to sell packages through travel fairs and tactical campaign over the next six months after the opening of borders.



- Partner with travel portals/OTAs to increase free independent travellers (FIT) arrivals to Malaysia by 5% over the next 12 months after the opening of borders. We will leverage OTAs' digital marketing capabilities and network of partners, create curated promotions for products and experiences, and develop engaging content about Malaysia. In addition, FAM trips for KOLs will also be organised.
- For the period of 2022-2023, Tourism Malaysia aims to restore confidence and strengthen our branding by collaborating with Malaysian product owners and Malaysian Embassies to update tour operators through a series of webinars.
- Develop new packages based on the demands from travellers to increase arrivals. They include luxury island tour, cruise tour, outlet shopping tour, theme park tour, etc.

Activities/Programmes

Activity: Consumer Fairs/ Trade Exhibitions

Detail: Participate in various consumer fairs (e.g. Brunei Travel Fair, Philippines Travel Madness Fair, Thai International Travel Fair (TITF), Malaysia Festival, Myanmar International Travel Fair, That Luang Festival, etc.) to promote attractive travel packages and tourist destinations in Malaysia.



Activity: Malaysia Food & Culture Festival

Detail: Smart partnership with relevant parties (e.g. the Royal Brunei Culinary) to showcase Malaysia cuisines and cultures.



Activity: Presentations to Higher Institution Education

Detail: Presentation sessions and participation in HRD Education Services Roadshow to create direct awareness on Malaysia and education in Malaysia.



Activity: Social Media Campaigns

Detail: Collaborate with influencers, KOLs and bloggers to create content on food, destinations, lifestyle, etc., and organise online advertising campaigns with different travel portal sites (including their Facebook and Instagram) through articles, videos and posts.



Activity: Bus and Airline Promotional Campaigns

Detail: Involves partnership with OTAs, promotion of campaigns through media, and incentivising tour bus operators.



Activity: Travel Malaysia Fair and Malaysia Fest

Detail: This consumer fair aims to promote tourist destinations and tourism products in Malaysia to travellers.





Activity: Joint Promotions with Tour Operators

Detail: A collaboration with tour operators who organise group departures. Cultural dance troupe will be engaged to perform at these departures, besides having ribbon cuttings, giveaways and lion dance.



Activity: Familiarisation Trips for Media/Bloggers/Influencers/ Travel Agents

Detail: Bring media/bloggers/ influencers to various destinations (e.g. Penang, Melaka, Langkawi, Sabah, Sarawak, etc.) to cover and experience new tourism products and destinations in Malaysia.



Activity: Advertising

Detail: TV commercials on local TV channels to promote Malaysia's tourism attractions.



Activity: Roadshows

Detail: Organise roadshows to various parts of Southeast Asian countries to promote Malaysia's tourism offerings.

MARKETING PLAN 2022 - 2026

ASIA AND AFRICA

Based on the current situation, there is a change of demand in Asia and Africa's outbound markets towards experiential and special interest tourism. There is also a change in tourist behaviour, which indicates a move away from mass group holidays, to more sophisticated and flexible holidays.



Goals/Objectives

- To restore tourist confidence and promote Malaysia as a safe destination for holidays.
- To promote new destinations and tourism products in Malaysia and make Malaysia a top-of-mind holiday destination for repeat tourists.
- To make Malaysia a leading destination in Asia for business tourism.



- To further increase tourist arrivals from the regions of Asia and Africa
- To extend the average length of stay of tourists, which will indirectly increase tourism receipts.

Action Plans

- Adopt Malaysia Truly Asia "coming back stronger" as the tagline for 2022-2026 in promoting Malaysia to the regions of Asia and Africa.
- Rebuild confidence through rebranding and communication by leveraging Malaysia's positive reputation as a safe and trusted travel destination.





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- Enhance tourism offline promotions by actively engaging with Asian and African travel trade.
- Consolidate targeted and integrated marketing efforts for offline and online promotions.



• Increase online promotions and upgrade Tourism Malaysia's existing online platform.



 Forge smart partnership through inter-agency collaboration to promote various segments, and continue collaboration with the private sector and other National Tourism Organisations (NTO).



- Participate in fairs and exhibitions to increase awareness of travel agents about Malaysia's tourism products, and constantly update them on our products through workshops and seminars.
- Joint promotions with big agents/ OTAs and look for new partners in second and third tier cities.
- Participate in major trade shows, conduct webinars and seminars, launch tactical campaign with airlines, and utilise social media to attract tourists to Malaysia.





 Highlight new destinations in Johor, Sarawak, Sabah, Terengganu, Perak, etc. through major trade shows, agent/media fam trip (in collaboration with state tourism boards), and joint tactical campaign with tour operators and airlines.



Activities/Programmes



Activity: Online Promotions/Campaigns

Detail: Participate in online fiesta to enhance publicity and online promotions through social media (i.e. Instagram, Facebook and Twitter) with selected OTAs and search engines.



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Activity: Media/Influencers/ KOL Promotions/Fam Trips

Detail: Organise familiarisation tours to selected products and destinations for media and influencers. Publicity and online promotions, focusing on thematic, such as destination and lifestyle, will also be organised to maximise the utilisation of KOLs on social networking service (SNS) platform.



Activity: Roadshows/Travel Fairs

Detail: Participate in selected travel fairs (e.g. Korea Tourism Fair, Busan International Tourism Fair, Taiwan International Travel Fair, and Tourism Expo Japan) in line with product segmentation to assist Malaysian sellers (tour agents, airlines and state governments) to secure sales lead and explore market segment. Roadshows to selected cities will be organised to introduce new products and packages, and to offer support to boost tourist arrivals to Malaysia.





Activity: Joint Promotions/Smart Partnership (Airlines and Agencies)

Detail: To form strategic alliance with partners and to synergise resources to promote identified travel segments/destinations/ products.



Activity: Local Promotions

Detail: Organise tourism engagement programmes, seminars and workshops throughout the year.



Activity: Advertisements

Detail: To engage, rebrand and restore Malaysia's tourism branding in media outlets.



Activity: TV Home Shopping

Detail: TV home shopping hot sales promotions with agencies/airlines throughout the years.

Activity: PR Activities

Detail: Rebrand and communicate Malaysia's tourism branding and promotions through PR activities such as editorial, advertorial, interviews, content management, etc.

AMERICA, EUROPE AND OCEANIA

For the American, European and Oceania markets, Tourism Malaysia aims to market Malaysia as a destination of excellence, and continue to make the tourism sector the pillar and contributor to the development of the country's economy. We will also position the country as a safe, attractive and quality tourism destination, which offers a wide range of unique tourist attractions and tourism products.



 To increase tourist arrivals from America, Europe and Oceania to Malaysia by 2025/2026, and regain market share post-COVID-19 pandemic by showcasing its key brand attractions and diverse tourism products for tourists from these markets, such as island and beaches, nature and adventure, culture and arts, gastronomy, and lifestyles.



 To enhance awareness of Malaysia as a diverse tourism destination among UK travellers, and strengthen relationship and forge collaboration with travel trade partners and airlines in the UK to make Malaysia a top-of-mind destination.

 To collaborate with airlines and relevant tour operators to make Malaysia a holiday destination of choice for travellers from the Irish market and extend their ALOS, besides promoting business tourism in this market.



 To increase visibility and awareness of Malaysia among travellers from the Nordic countries and the Benelux. Establish close cooperation with local travel trade partners and airlines to highlight our diverse tourism attractions with different focus and partners in different target segments.

- To ensure the Netherlands maintains as the fourth largest contributor of tourist arrivals to Malaysia from Europe after the United Kingdom, France and Germany.
- To collaborate with social media influencers, media and KOLs to promote Malaysia as a safe, must-visit and diverse ecotourism destination for travellers from the Benelux.





- To reposition Malaysia as an outstanding tourism destination in various markets – such as Germany, Turkey, United States of America, France, Spain and Portugal – through promotional activities and partnerships with the travel trade and media.
- To increase the arrival of families and youth/millennials from America, execute concerted and innovative marketing programmes, and increase awareness of American travellers through social media and digital marketing.



- Create an aggressive multi-faceted consumer campaign within six months from the opening of borders, and increase tourist arrivals to Malaysia over the six-year period through tactical campaigns with airlines, support from tour operators, participation in trade shows and travel fairs, fam and press trips, celebrity endorsement, and digital and social media campaigns.
- Build stronger relationship with travel trade members by leveraging OTA's digital marketing capabilities

and network of partners, creating curated promotions for products and experiences, creating engaging content about Malaysia, and developing digital marketing strategy to boost spending.



- Plan an integrated public relations and social media campaign to build consumer confidence and regain market share through Facebook contests, collaborations with tour operators and media, brand partnership, media trips, and advertising campaigns.
- Improve air connectivity to Malaysia by establishing strategic partnerships with airlines and major tour operators.
- Intensify and diversify products and partnerships with trade and airlines via online and offline promotional and booking platforms through interactive online campaigns,



media and trade fam trips, etc. Besides that, we intend to consolidate traditional products and introduce new products to Gen Z via airline and trade partnerships.

- Create unique ecotourism packages with local tour operators and collaborate with airlines to promote Malaysia and sell seats through joint promotions and fam trips for social media influencers and KOLs.
- Reposition Malaysia through the implementation of long-term advertising (online and offline) and public relations campaigns.





- Restore travellers confidence in travelling to Malaysia and increase their awareness of Malaysia's new tourism products through digital campaigns, media trips and support from tour operators.
- Implement e-learning platform for travel agents with specific modules on different products and segments to help and encourage them to sell tour packages to Malaysia, and increase engagement with social media influencers/KOLs on gastronomy, adventure, family vacation, and niche products.



 Develop packages related to culture, food, wildlife and adventure, and niche packages like diving, rural, and ecotourism, and advertise them directly to the target groups.



- Collaborate with major events (e.g. Coachella Music Festival, 88 Rising, etc.), besides creating more relevant contents/write-ups and fam trips for media, agents and selected business groups to provide first-hand experience on destinations in Malaysia.
 - Music Festival

 Continue to participate in local travel exhibitions/fairs (e.g. Flight Centre Travel Fair, Malaysia Festival, IMM Travel Media event, etc.) to drive interest in travelling to Malaysia, besides collaborating with Malaysian agencies, Malaysia Embassies/High Commissions/ Consulates, Malaysia Healthcare Travel Council (MHTC), and Malaysian associations/clubs and students, to organise or participate in tourism events.



• Organise tourism roadshows in major cities (e.g. Sydney, Melbourne, Auckland, Christchurch, etc.).



Activities/Programmes

.....

America, Europe and Oceania

Activity: Consumer Fairs/Trade

Detail: Participate in annual trade/ consumer fairs (e.g. World Travel Market (WTM) London, Kazakhstan International Tourism Fair, FITUR, IFTM Top Resa, etc.) with industry players and state tourism boards to showcase Malaysia's tourism attractions and sell tour packages to Malaysia.

Activity: Roadshows and Joint Promotions with Travel Agents and Airlines

Detail: Work with travel agents, airlines and hotels to offer attractive travel deals and special tour packages to travellers from America, Europe and Oceania.



Activity: Strengthen Digital Marketing in the America, Europe and Oceania Markets

Detail: Strengthen online presence through suitable digital platforms targeting B2B and B2C segments.



Activity: B2B Networking Events/Sales Missions/ Roadshows

Detail: Networking sessions in key regional cities (e.g. Manchester, Birmingham, Glasgow, Edinburgh, etc.) together with Malaysian sellers.



Activity: Malaysia Food & Culture Festival

Detail: A collaboration with embassies, Malaysia External Trade Development Corporation (MATRADE), etc. to organise this consumer event at shopping sites to showcase Malaysia tourism products, tour packages, etc.





Activity: Partnership with OTAs and Media

Detail: Collaborate with leading digital travel platforms and media to increase awareness of tourism products and destinations in Malaysia.

Activity: Media and Fam Trips

Detail: Invite writers, journalists, and influencers, as well as travel agents to Malaysia for product update to create new contents and articles. Also to educate travel agents on selling Malaysia and serves as an incentive for top agents.



Activity: AeroMeet

Detail: A virtual travel mart and destination presentations with Malaysian and foreign travel trade members.



Activity: Malaysia Culinary Promotion

Detail: Promote Kuala Lumpur as a stopover destination for foodies, and include short themes such as weekend in the city, beach getaways, etc.



Activity: Flight Centre Travel Expo

Detail: Carry out direct engagement with consumers to promote Malaysia tour packages in major cities (e.g. Auckland, Wellington, Christchurch, etc.). MARKETING PLAN 2022 - 2026

NICHE/HIGH-YIELD SEGMENT STRATEGIES

The Package Development Division will support the Marketing Plan 2022-2026 by focusing on the promotion of niche tourism segment, including diving, golf, shopping, gastronomy, theme parks, edutourism, health and wellness, ecotourism, etc. These niche tourism attractions will generate high returns to help achieve the goals and objectives of the organisation.



- To establish and develop more creative and experiential niche tour packages for the domestic and international markets in line with the National Tourism Policy 2020-2030.
- To strengthen relationship with niche industry partners and forge smart partnership and collaboration to promote niche tourism packages.
- To make Malaysia a top-of-mind choice for niche/high-yield segment.

Action Plans

- Identify, plan, develop and monitor Malaysia's niche products and packages for domestic and international markets.
- Enhance cooperation and strategic collaboration with stakeholders and other agencies (including state government agencies).
- Intensify the initiatives of product owners in developing potential niche tourism products to be marketed to domestic and international tourists.

- Share knowledge with travel agents and product owners on product marketing through seminars and workshops, as well as data collection.
- Coordinate with other divisions on special interest product events such as Miss SHOPhia Shopping Hunt for the shopping segment.
- Collaborate with the Domestic and Event Division and International Promotion Divisions to carry out promotional activities of special interest products at both domestic and international exhibitions, seminars, and tourism expos.

Lata Berkoh, Jerantut – Pahang

A BEAS

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INTEGRATED COMMUNICATION STRATEGIES

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ADVERTISING AND DIGITAL DIVISION

The Advertising and Digital Division will support the Marketing Plan 2022-2026 by focusing on the following plans to help achieve the goals and objectives of the organisation.



 To design advertising campaigns with the objective to position Malaysia as a unique holiday destination with diverse attractions and multicultural society.



- Advertising campaigns for the period of 2022-2026 will be focusing on three pillars:
 - Global
 - In-market (Southeast Asia, Asia and Africa, and America, Europe and Oceania)
 - Domestic

- Rejuvenate Malaysia Truly Asia and 'Cuti-Cuti Malaysia' brandings with fresh TV commercials, creatives and songs.
- Emphasise on mobile advertisements. It is the future of advertising, and it grows faster than any other ad formats as mobile commerce has been accelerated due to the pandemic. In addition, more users and potential consumers are skipping desktop or laptop computers and would rather use their mobile devices.
- The implementation of future advertising campaigns will emphasise

on restoring the confidence of tourists to travel to Malaysia by focusing on the following factors:

- STP (Segmenting, Targeting and Positioning) Strategy – the Malaysia Truly Asia advertising campaigns will be consistent across all markets.
- Develop a unifying thematic expressed as an image, slogan, or a combination that is central to all the elements, in order to achieve maximum coherence.





- Across-the-board consistency, which will be reflected not just in our advertisements, but also on Tourism Malaysia website, social media platforms, brochures, media releases, events, roadshows, and trade trainings, as these mediums are part of the essential media of communication.
- Advertising campaigns will emphasise on restoring consumer

confidence and rebuilding awareness of Malaysia as a unique and distinctive holiday destination.

• The Malaysia Truly Asia brand will use its elements to convert potential global travellers to include Malaysia in their travel plans.

3 Pillars of Advertising Campaign 2022-2026



Global





Domestic

CORPORATE COMMUNICATIONS DIVISION

The Corporate Communications Division will support the Marketing Plan 2022-2026 by focusing on the following action plans to help achieve the goals and objectives of the organisation.



Goals/Objectives

- To carry out action plans in line with the National Tourism Policy 2020-2030 and the United Nations Sustainable Development Goals (UNSDGs), as well as the focus to promote Malaysia as the Top of Mind Ecotourism Destination of the World.
- To increase publicity and awareness of Malaysia's sustainable and responsible tourism through ecotourism, rural tourism, experiential tourism, community-based tourism,

agrotourism, and cultural and heritage tourism.

- To communicate and disseminate information effectively to the public, travel trade partners, and media.
- To leverage new age media in reaching various target markets and promoting the latest travel trends according to tourists' preferences.
- To boost Tourism Malaysia's marketing and promotional efforts through mainstream and social media platforms.
- To promote and publicise any promotional programmes/ events by Tourism Malaysia and/ or the Ministry of Tourism, Arts and Culture Malaysia, as well as industry players.





Organise domestic media familiarisation trips in collaboration with state tourism boards and industry players. The media fam trips include Ekspresi Cuti-Cuti Malaysia (for mainstream media and travel writers) and Influencer X Cuti-Cuti Malaysia (for new age media, influencers/KOLs). Organise networking trips and sessions, including Facebook live, to update media and industry الم players on new and upgraded tourism products. Organise Media Appreciation event to thank the media fraternity for their ongoing support on the 占 282 tourism sector's recovery from COVID-19 and to strengthen relations with media. Carry out strategic international media collaborations with potential KOLs/content creators, and organise the International Tourism Influencer Conference. Carry out more strategic collaborations with hoteliers, airlines, tourism product owners, travel C C D trade partners, and influential brands. Engage a domestic public relations agency to maintain a strong brand reputation, and to run specific domestic campaigns for tourism recovery, as well as social media listening and crisis management. Continue to engage with Tourism Ambassadors through diplomacy programmes on tourism attractions, gastronomy, arts and culture of Malaysia. Promote and amplify the Cuti-Cuti Malaysia campaign to Malaysian residents and expatriates, as well as diplomats. Continue to participate in the Pacific Asia Travel Association (PATA) major tourism events, including PATA Adventure Travel and Tourism Conference and Mart (ATTCM), PATA Annual Summit (PAS), and PATA Travel Mart (PTM) to strengthen business network with international tourism players. Focus on guality content development and management of social media platforms (Facebook, Instagram, Twitter, YouTube, TikTok, and travel blogs), including travel articles and advertorials for both international and domestic markets, to increase social media engagement and followers.

CONCLUSION

According to the UNWTO Panel of Experts, most tourism professionals (61%) see better prospects for 2022. While 58% expect a rebound in 2022, mostly during the third quarter, 42% point to a potential rebound only in 2023. A majority of experts (64%) now expect international arrivals to return to 2019 levels only in 2024 or later, up from 45% in the September survey.

Many countries, including Malaysia, are highly dependent on tourism and are eagerly awaiting a return to normal. With the rising global vaccination rates and development of antiviral COVID-19 pill, many countries are now moving towards the endemic phase where we will continue to live alongside COVID-19 in life under the new normal. This will ease lockdown measures and travel restrictions, as well as lift bans on international travel eventually.

Accordingly, Tourism Malaysia expects international tourist arrivals to gradually increase by 2022. Naturally, we foresee the first international tourist arrivals to be more likely coming from neighbouring countries such as Singapore, Thailand, Indonesia, and Brunei, followed by other Southeast Asia and Asian countries, before we start receiving arrivals from Europe and the Americas.

It is no doubt that the tourism industry will face many challenges and obstacles, particularly in the next few years, post-COVID-19 pandemic. We are making all the necessary preparations now and remain positive that we will be able to go through this challenging time, and the tourism landscape in the country will be blessed with many success stories in the future. We will continue to forge smart partnership and stronger collaboration with local and international tourism players and stakeholders to achieve all our goals and objectives. Generally, one of our major focus is to boost domestic tourism, besides intensifying digitisation in the tourism sector, which is absolutely essential, particularly post-COVID-19 to move towards digital transformation.

Our strategies and plans for 2022-2026 are geared towards achieving the government's tourism objectives, in line with the direction of the National Tourism Policy 2020-2030 and Tourism Malaysia's strategic direction for 2022-2026.

In conclusion, this Marketing Plan is prepared as a guide for users in planning and implementing tourism promotion activities and efforts for 2022-2026. These guiding principles can be applied according to the creativity and innovation of the user, and the suitability and needs at a specific time, place and situation.

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- National Eco Tourism Plan 2016-2025
- Tourism Malaysia Strategic Plan 2022-2026
- Malaysia Tourism Statistics in Brief
 2020
- Domestic Tourism Statistics in Brief 2020
- Malaysia Tourism Key Performance
 Indicators 2020
- Malaysia Tourist Profile 2020 By Selected
 Market
- UNWTO Tourism Barometer

ABBREVIATIONS

ALOS	Average Length of Stay	NTO	National Tourism Organisation
FIT	Free Independent Travellers	OTA	Online Travel Agent
KOL	Key Opinion Leaders	PATA	Pacific Asia Travel Association
LADA	Langkawi Development	SNS	Social Networking Service
	Authority	SOP	Standard Operating Procedure
MAH	Malaysian Association of	TIC	Tourist Information Centre
	Hotels	TMCC	Tourism Malaysia Contact
MATTA	Malaysian Association of Tour		Centre
	and Travel Agents	UNSDGs	United Nations Sustainable
МНТС	Malaysia Healthcare Travel		Development Goals
	Council	UNWTO	United Nations World Tourism
MICE	Meetings, Incentives,		Organization
	Conferences and Exhibitions	VTL	Vaccinated Travel Lane
MOTAC	Ministry of Tourism, Arts and		
	Culture Malaysia		

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- Director General of Tourism Malaysia
- Deputy Director General (Promotion) of Tourism Malaysia
- Deputy Director General (Planning) of Tourism Malaysia

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- Administration Division
- Human Resource Division
- Finance Division

Special Appreciation

- Ministry of Tourism, Arts and Culture Malaysia
- Task Force Members, Tourism Malaysia
- Department of Statistics Malaysia
- State Government Agencies
- Tourism Associations and Industry Players
- Universities

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• All individuals involved, both directly and indirectly, in the preparation of this Tourism Malaysia Marketing Plan



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