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JNTO

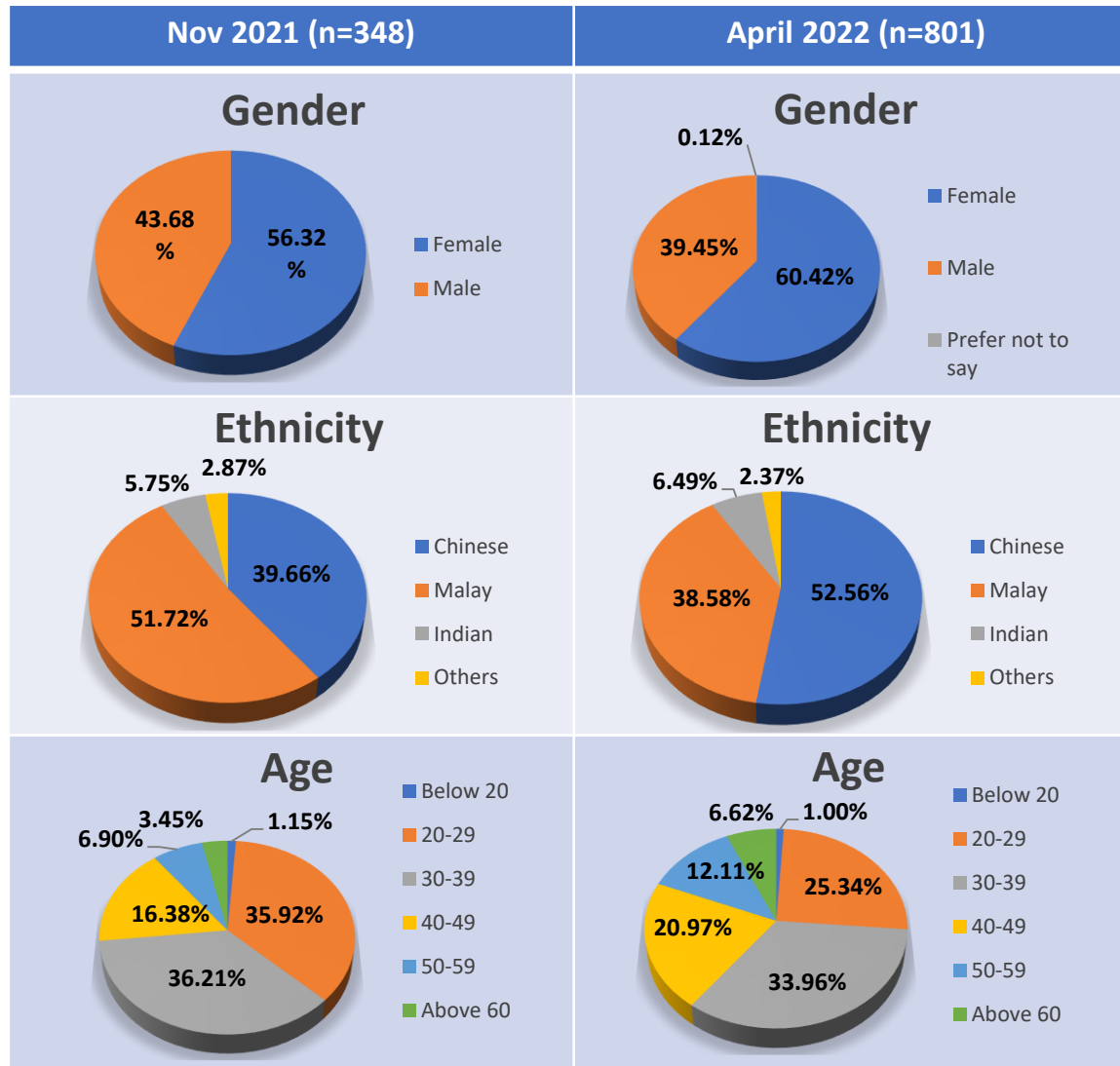
Travel Trends Report

Consumer Survey

Conducted on MATTA Fair KL

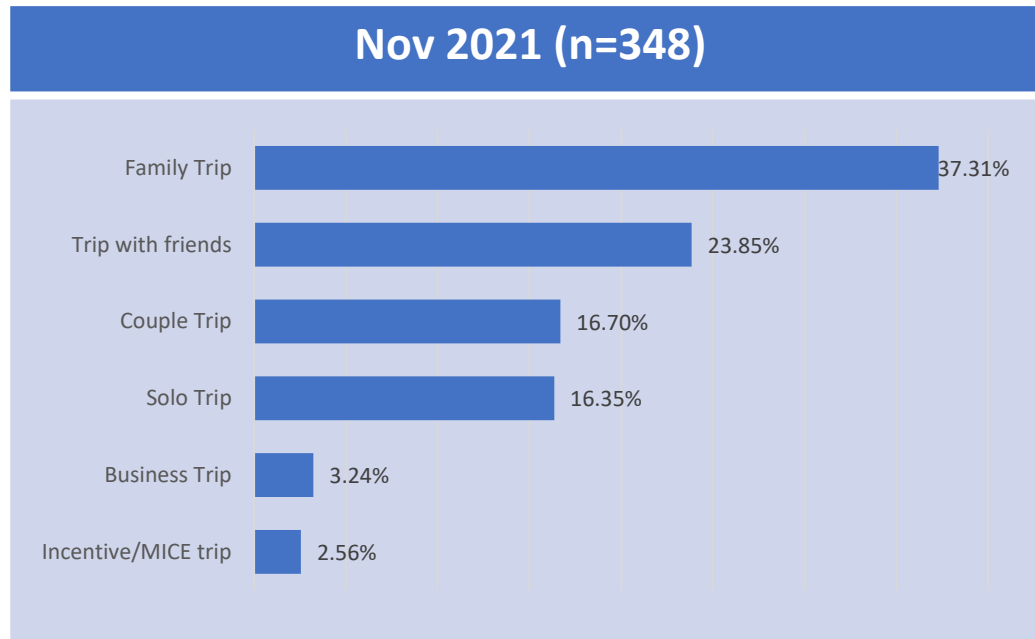
(Nov 2021 & April 2022)

Travellers' Basic Profile



- Females are more keen to travel and mainly are the ones who make decisions for trips
- Chinese were being more cautious about restarting travel in November 2021 but more willing to travel in April 2022
- The months of Ramadan (fasting months for Muslims) may be a reason for the low turnout of Muslim visitors compared with the Chinese in April 2022
- The number of Malay-based travel agents at MATTA Fair April 2022 is also lower compared with pre-Covid time, which also can influence the overall visitors number.
- Based on the age range, the ones who are willing to travel are mainly the 20s-40s, also those who are supposed to have stable incomes and a good disposable incomes

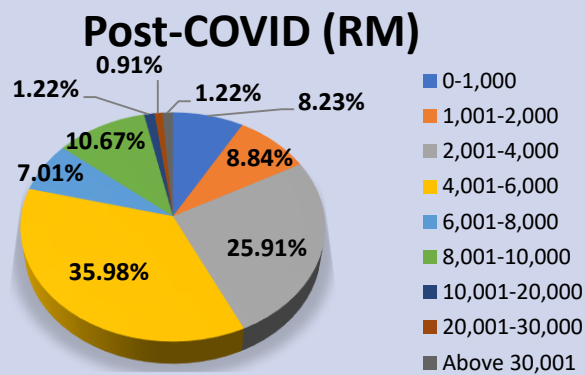
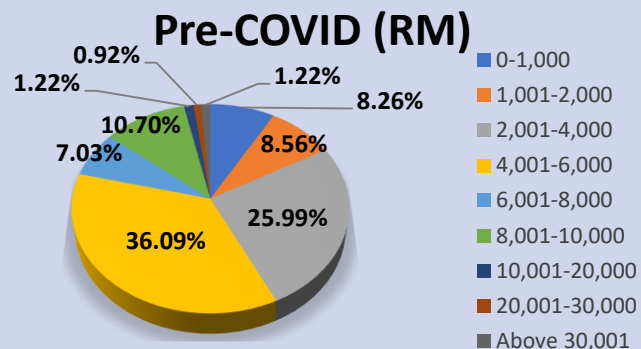
Preferred Travel Type



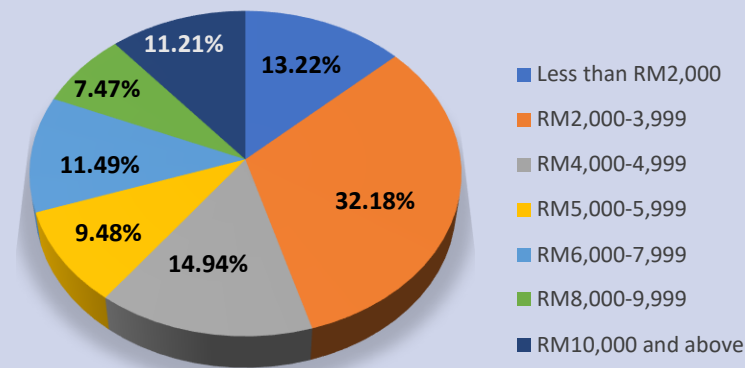
- According to the survey result JNTO conducted during pre-COVID, most Malaysians were travelling in family unit and this remains unchanged after these 2 years

Nov 2021 (n=348)

Travel budget per person when travelling abroad (including airfare, transports, accommodations, shopping, etc.)



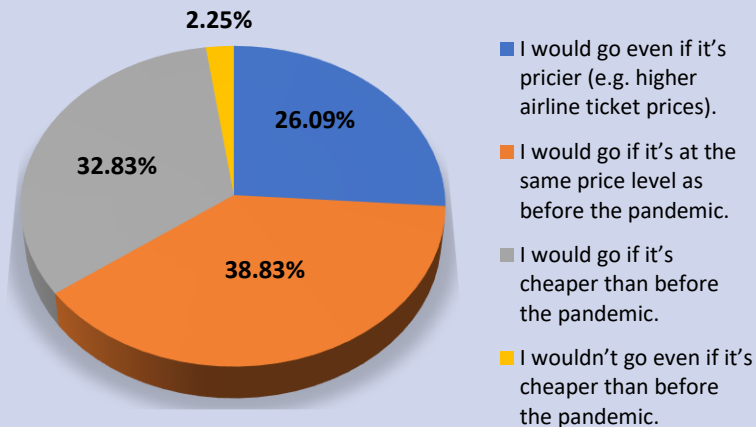
Monthly Incomes



- Although the travel budget has slightly decreased after the pandemic, people are still willing to spend almost the same amount as their 1 month salary to travel abroad

April 2022 (n=801)

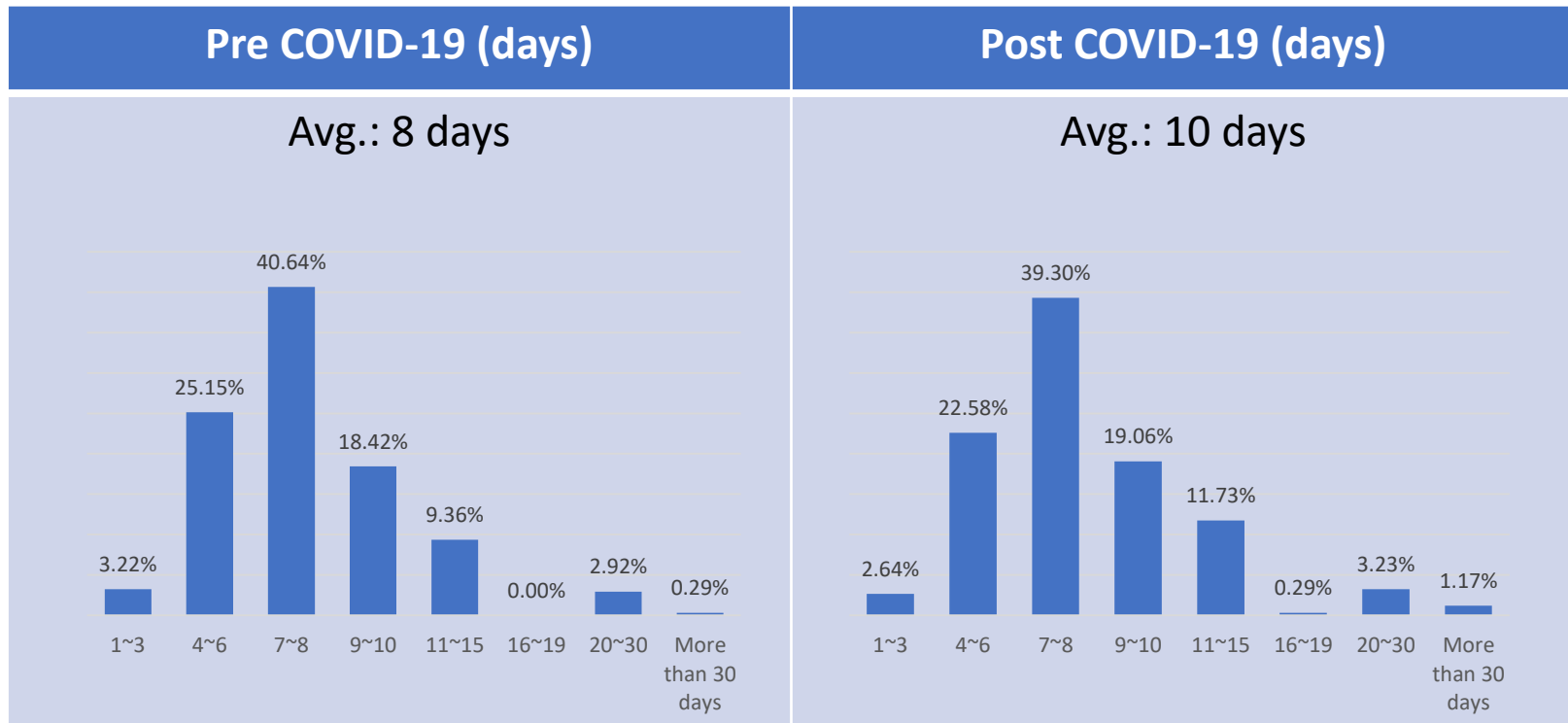
Compared to pre-pandemic, has the travel budget changed your consideration of going for a Japan trip?



- Although the economy level has decreased under the result of COVID-19 pandemic, there are still 26.09% of people willing to travel to Japan even if it is pricier than pre-pandemic period



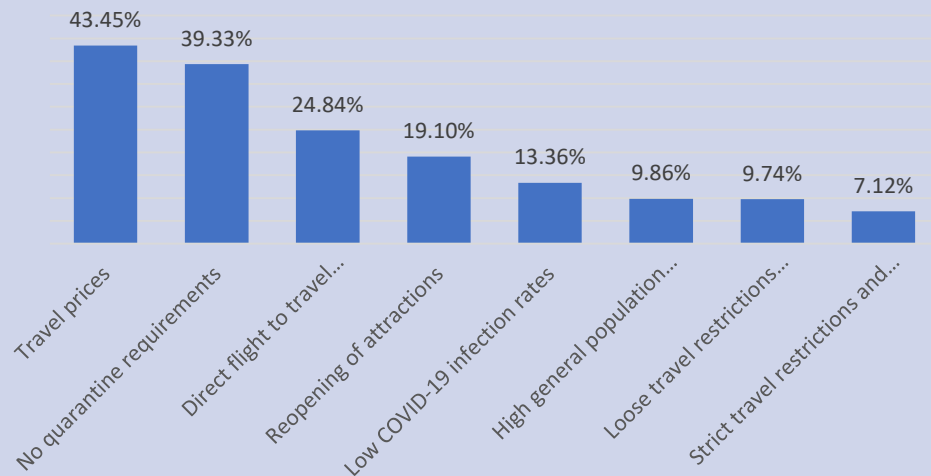
Travel Duration



- Having a long period without travelling might be the reason people wanting to spend more days for overseas travel
- Besides, having unused paid leaves from previous year might be one of the reason as well

MATTA KL April 2022 (n=801)

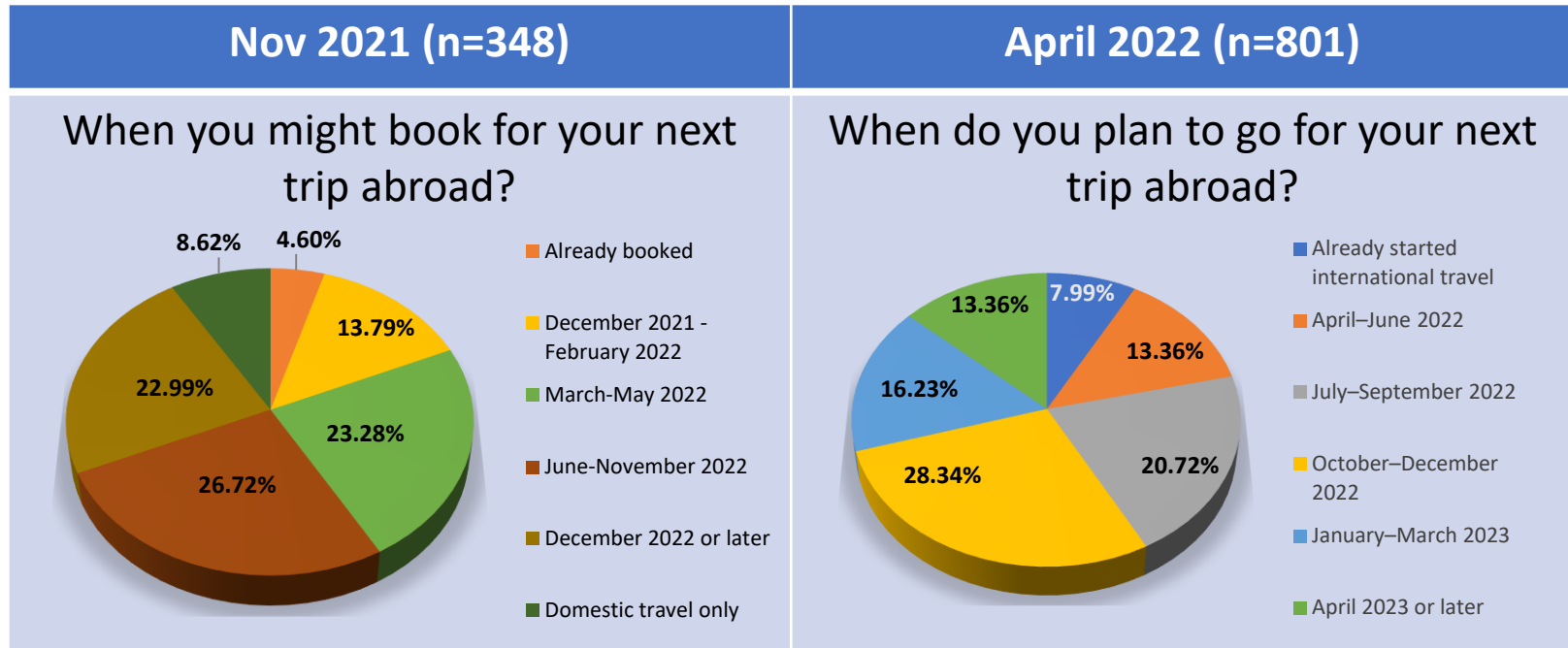
When choosing an international travel destination, which of the followings do you prioritize most?



- Travel prices, no quarantine requirements and direct flight to destination are Malaysians' top 3 travel concerns and these 3 options are all related to one's travel budget
- Although Malaysian travelers might have more unused paid leave after the pandemic, Malaysians are more used to efficient travel and not willing to "waste" their time for quarantine and transit



Travel Restart Timing

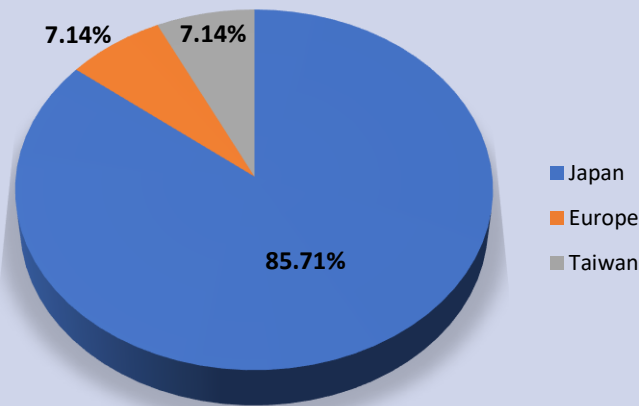


- In Nov 2021, around 50% visitors plan to book their trip on March – November 2022 which is almost the same figure as the survey conducted in April 2022
- Malaysians are now well-prepared to travel after these two years

Travel Restart Timing

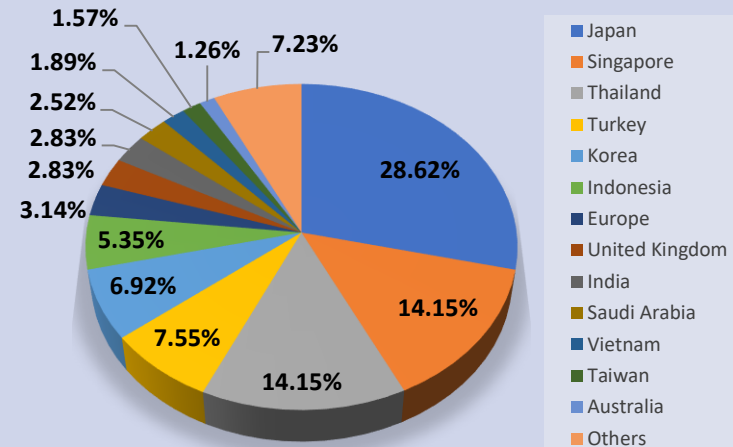
Nov 2021 (n=348)

If you have already booked your next trip abroad, where is your destination?



April 2022 (n=801)

If you have already started to travel abroad, which country have you been to? (including business travel)

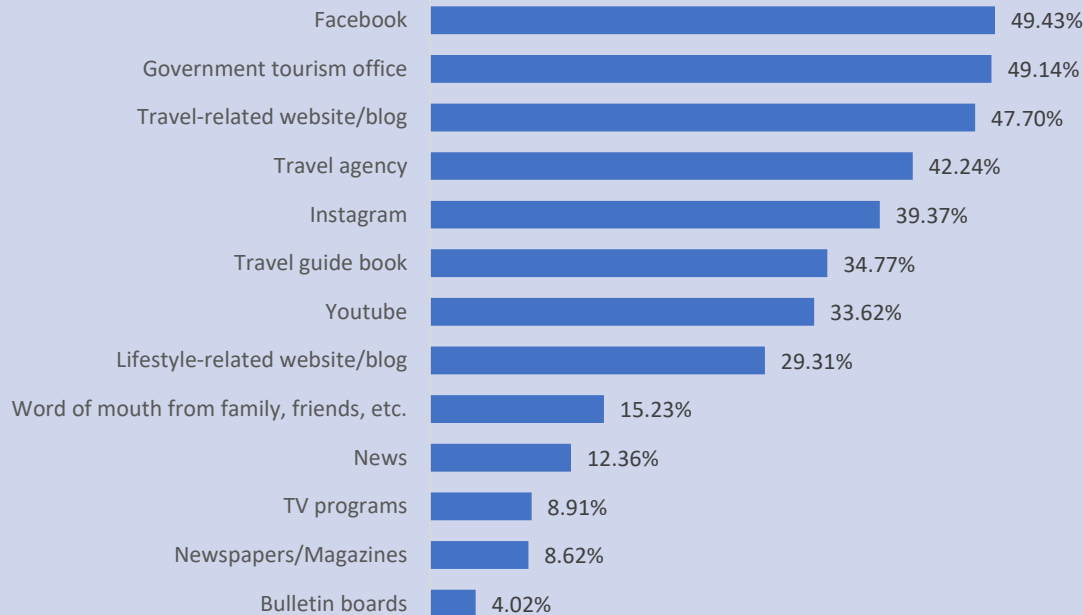


- Based on the survey on Nov 2021, most of the countries' border remained close to tourists and that might be the reason of people having less travel destination options
- In April 2022, many countries (especially those without quarantine and PCR test requirements) open up their borders to international tourists, more available travel destinations options



Nov 2021 (n=348)

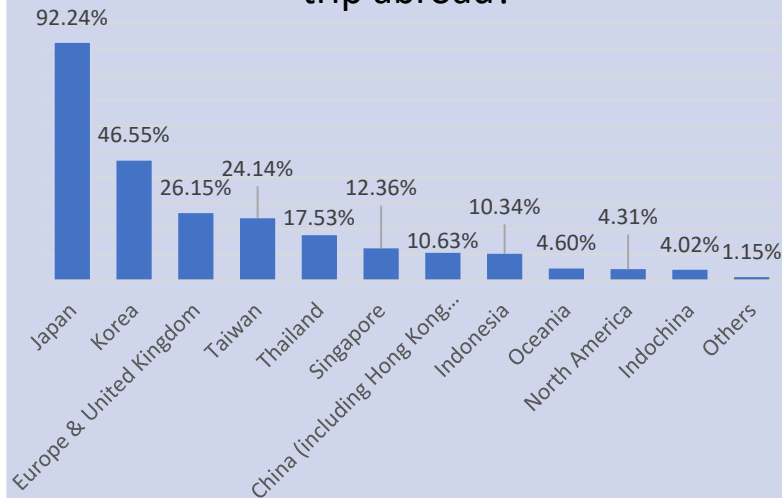
What are your information sources when considering a trip?



- Currently people are more relying on online medias to collect information
- This might be the result of the person who are collecting information for travel, are those between 20s-40s and they are more familiar with the online medias
- The only “offline” information source to be one of the Top 5 main information sources is “Travel Agency”. This is the sign of people trusting and believing the professionals will provide them accurate and reliable information

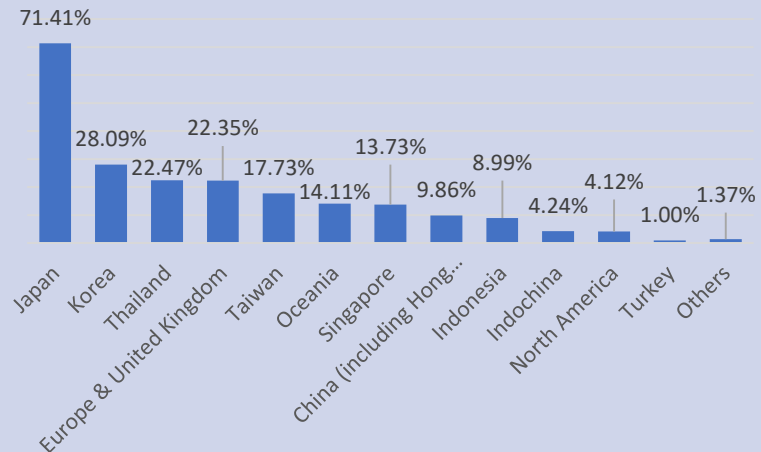
Nov 2021 (n=348)

Where would you like to go for your next trip abroad?



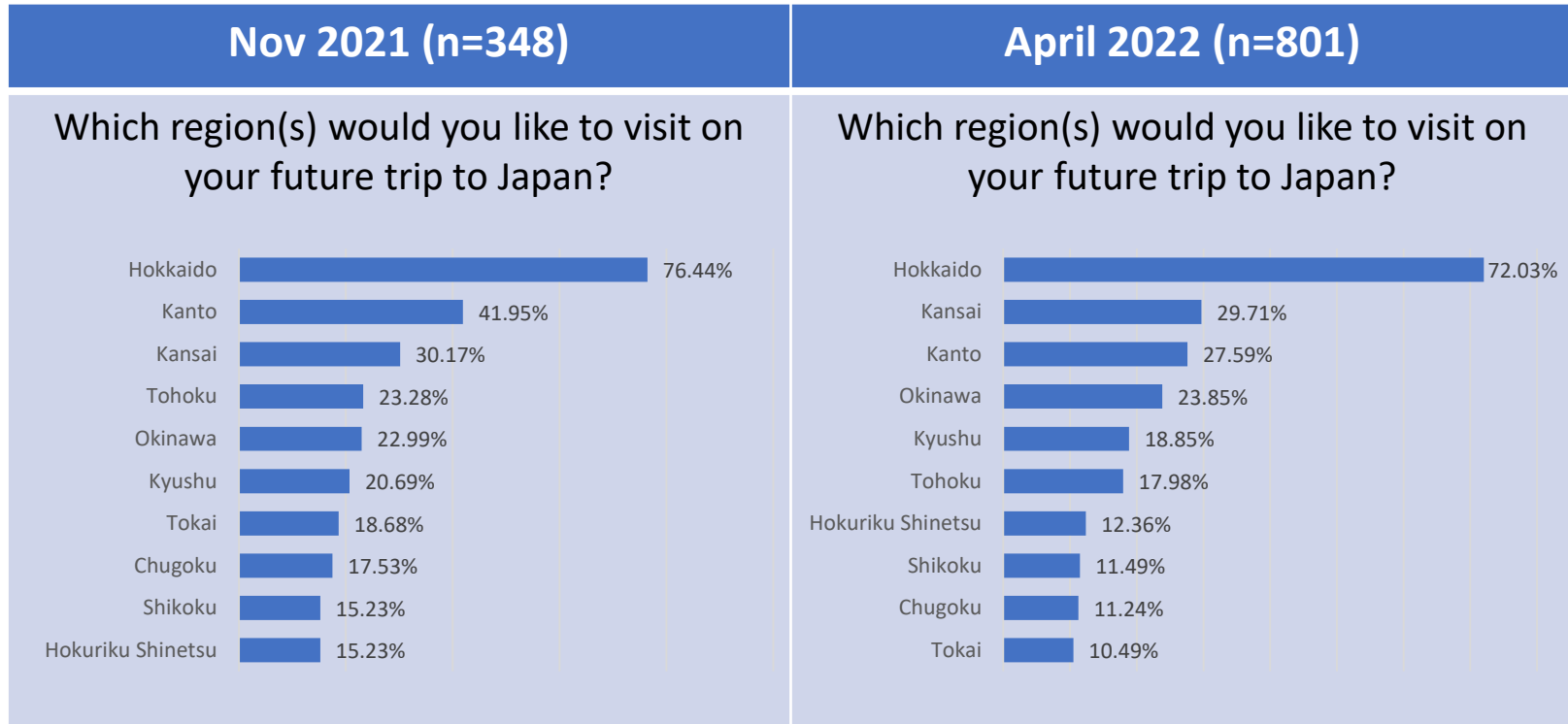
April 2022 (n=801)

Where would you like to go for your next trip abroad?



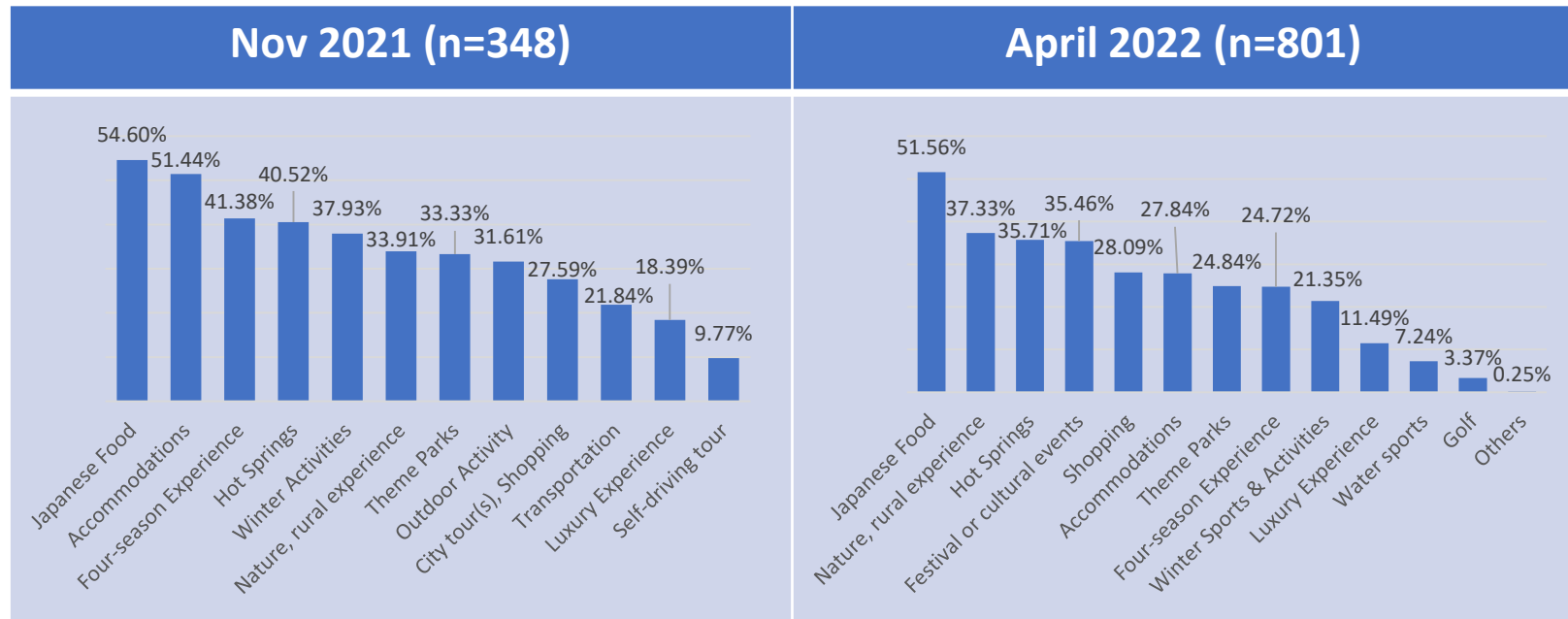
- In Nov 2021, although Japan border remain to be closed as April 2022, most of the countries' borders were still closed at the same time. This might be the reason why the figures for other countries were low
- Japan remained to be the top option to Malaysians while travelling abroad although the border restrictions are still not clear during both survey period
- Based on the charts above, countries which have eased their border restrictions in April 2022, people's interests to travel to these countries almost doubled up and caused the decreasing of interest towards Japan travel





- Hokkaido remains to be the most popular travel destination in Japan among Malaysians for its snow experience, while Kanto and Kansai area managed to keep their places in the Top 3 range.
- Interestingly, the 4th place goes to Okinawa in April 2022 while previously it was Tohoku area in Nov 2021. The reason might be the people's desire to beautiful seaside and a relaxing resort trip with foreign cultural environment

Popular Activities in Japan



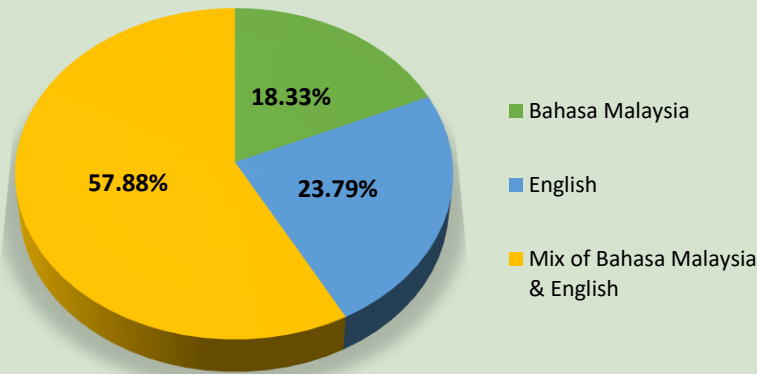
- Japanese food, Four-season experience, nature, hot springs and accommodations are the Top 5 most popular travel elements to enjoy in Japan
- Malaysians are famous of being food lovers among the tourism industry while Japanese food is definitely one of the favourite cuisine style among them
- The rich nature and four-season experience that cannot be found in Malaysia are also the main attracting points to Malaysian travellers

[Muslim] Preferred Reading Language JNTO

Japan National
Tourism Organization

April 2022 (n=801)

What is your preferred language to read tourism information?

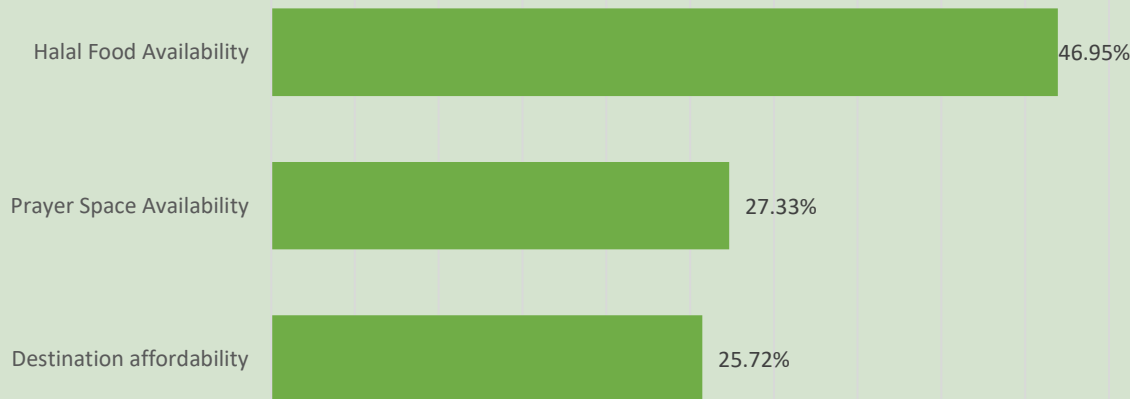


- We thought that most Muslims will prefer to get their information in fully Bahasa Malaysia, but the chart above shows that Muslims are actually open to the blending language of Bahasa Malaysia & English
- The reason might be the lack of information in full Bahasa Malaysia and people are used to read information in mix languages



April 2022 (n=801)

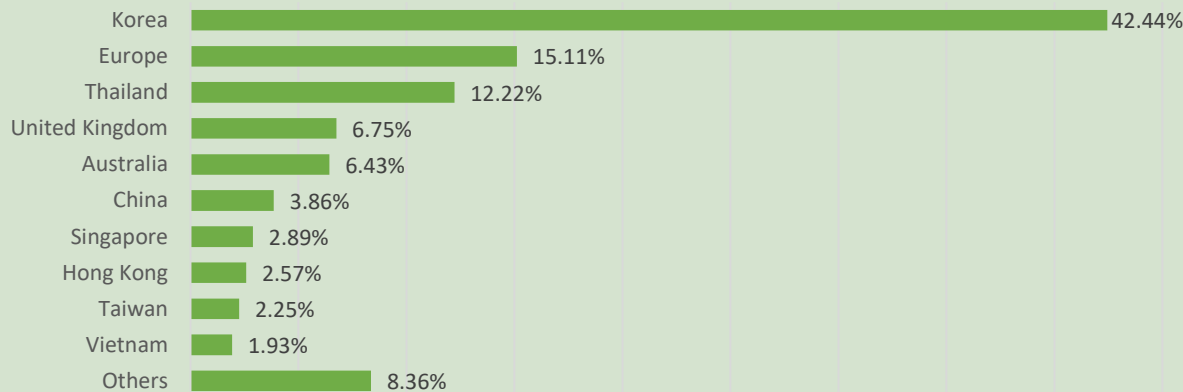
Which of the following do you prioritize the most at a travel destination?



- Halal food at travel destination is the biggest concern among Muslims while travelling
- Although it is hard for non-Islamic countries to develop 100% Halal food, this can be solved by providing more Muslim-friendly restaurants information to the Muslim audiences

April 2022 (n=801)

Other than Japan, which non-Islamic countries have you travelled to / considered as a travel destination?



- Under the effect of Hallyu (K-pop, K-drama, etc.), not only among the Chinese market, even among the Muslim market, South Korea has become the biggest competitor country to Japan

General

- Malaysian travelers are mainly the 20s-40s with stable monthly incomes and good disposable incomes
- The major market in Malaysia is the Muslim market followed by Chinese market
- Regardless of ethnicity, Malaysian usually travel in family unit for 7-10 days with travel budget of their one month salary per person
- Malaysians are ready to restart their international travel in 2022 and the countries with loose border restrictions (no quarantine requirements) are the priority travel destinations
- Malaysians are used to gather travel information via online medias and travel agencies

Japan Travel

- Japan remained to be the top travel destination choice among Malaysians although the border is still closed to international tourists (as of 25th May 2022)
- Hokkaido, Kansai and Kanto area remained to be the Top 3 destinations in Japan
- Japanese food, nature and seasonal experiences are the 3 most popular activities to enjoy in Japan.

Muslim Travel

- The most important point for Muslim travel is the Halal food availability in travel destination
- Most of the Muslims does not have a clear preference in their reading language while gathering travel information
- Under the impact of Hallyu, South Korea is the biggest competitor to Japan in tourism