

# Penang

## Tourist Survey

# 2016

2016

Prepared by:  
**Sustainable Tourism Research Cluster,  
Universiti Sains Malaysia**



Prepared for:  
**Penang Global Tourism Sdn. Bhd.**





# PENANG

## Market Overview



This report provides an overview of tourist profiles to Penang in **2016**. Targeting tourists with a minimum age of 18 and who have spent minimum one night in Penang, the survey gathered **4767 tourists** (2370 international and 2397 domestic) between March and December 2016. Employing stratified random sampling technique, the survey was conducted either by face-to-face interviews with the respondents by enumerator or by self-administered at selected tourist hotspots in Penang (e.g. Penang Hill, Fort Cornwallis, Esplanade, Kek Lok Si Temple, Komtar, Dewan Sri Pinang, Chulia Street, Armenian Street, Muntri Street, Ah Quee Street, Acheh Street, Little India, Love Lane, Kapitan Keling Mosque, Queensbay Mall, Gurney Paragon, Batu Ferringhi, Balik Pulau, Pulau Aman and etc.), and the gateways to Penang, namely airport, bus terminal and ferry jetty. Enumerators asked screening questions at the beginning of the survey to verify that the respondents were tourists and not transient visitors or day trippers.

### This report presents:

- Tourist Profile
- Travel Pattern
- Tourist Expenditure
- Perception of Image
- Travel Satisfaction

**49.7%** (N=2370)

International tourists surveyed in 2016

**50.3%** (N=2397)

Domestic tourists surveyed in 2016

### Tourist profile in 2016



**90.4%** independent travellers

**61.1%** are for leisure

**52.3%** repeat visitors

**18-25 years** largest age group

**RM 1,359.95** average spent

**5.02 nights** average stay



**43.7%** male tourists



**56.3%** female tourists

Penang images:

- **World Heritage Site** (36.4%)
- **Local cuisine** (34.6%)
- **Multicultural society** (7.6%)
- **Sandy beaches** (5.8%)
- **Safe destination** (4.1%)
- **Shopping paradise** (3.1%)

### Top 5 must-do activities in Penang

1. **Experiencing local food** (46.3%)
2. **Sightseeing in the city** (36.4%)
3. **Visiting historical sites** (23.1%)
4. **Shopping** (15.6%)
5. **Visiting museum/art gallery** (12.6%)

# PENANG Market Overview



**3.82/5.00**

Average satisfaction score  
of Penang experience

**3.36/5.00**

Tourist experience met the  
expectation

**92.5%**

Would like to revisit Penang  
in the near future

**98.2%**

Would like to recommend  
Penang to others

## Average visitors



Expenditure per visit **RM 1,359.95**

Stay **5.02 nights**

Repeat visitor **52.3%**

Revisit intention **92.5%**

Satisfaction score **3.82 / 5.00**

## International visitors



Expenditure per visit **RM 1,924.60**

Stay **6.39 nights**

Repeat visitor **26.5%**

Revisit intention **86.4%**

Satisfaction score **3.85 / 5.00**

## Domestic visitors



Expenditure per visit **RM 821.27**

Stay **3.64 nights**

Repeat visitor **77.7%**

Revisit intention **98.5%**

Satisfaction score **3.78 / 5.00**

## Purpose of visit

### Leisure & recreation



Expenditure per visit **RM 1,289.77**

Stay **4.05 nights**

Repeat visitor **51.6%**

Revisit intention **92.5%**

Satisfaction score **3.80 / 5.00**

### Visit friends & relatives



Expenditure per visit **RM 1,227.57**

Stay **7.01 nights**

Repeat visitor **77.1%**

Revisit intention **96.6%**

Satisfaction score **3.86 / 5.00**

### Culture & heritage



Expenditure per visit **RM 1,258.07**

Stay **5.18 nights**

Repeat visitor **26.1%**

Revisit intention **84.3%**

Satisfaction score **3.93 / 5.00**

### Business/meeting



Expenditure per visit **RM 2,326.62**

Stay **6.24 nights**

Repeat visitor **71.1%**

Revisit intention **95.9%**

Satisfaction score **3.69 / 5.00**

### Shopping



Expenditure per visit **RM 2,243.94**

Stay **5.41 nights**

Repeat visitor **67.6%**

Revisit intention **100.0%**

Satisfaction score **3.77 / 5.00**

### Education/training



Expenditure per visit **RM 1,137.39**

Stay **15.49 nights**

Repeat visitor **58.1%**

Revisit intention **97.4%**

Satisfaction score **3.72 / 5.00**

# PENANG Market Overview



## Age group

### 18 to 25 years old



Expenditure per visit **RM 774.32**  
Stay **4.60 nights**  
Repeat visitor **50.0%**  
Revisit intention **93.1%**  
Satisfaction score **3.80 / 5.00**

### 26 to 35 years old



Expenditure per visit **RM 1,395.76**  
Stay **5.11 nights**  
Repeat visitor **49.9%**  
Revisit intention **91.8%**  
Satisfaction score **3.85 / 5.00**

### 36 to 49 years old



Expenditure per visit **RM 2,187.29**  
Stay **5.15 nights**  
Repeat visitor **62.6%**  
Revisit intention **93.6%**  
Satisfaction score **3.77 / 5.00**

### Above 50 years old



Expenditure per visit **RM 2,773.91**  
Stay **6.70 nights**  
Repeat visitor **55.3%**  
Revisit intention **89.6%**  
Satisfaction score **3.86 / 5.00**

## Purpose of visit

### Health treatment



Expenditure per visit **RM 4,275.00**  
Stay **4.47 nights**  
Repeat visitor **72.4%**  
Revisit intention **97.4%**  
Satisfaction score **3.93 / 5.00**

### Convention/conference



Expenditure per visit **RM 1,438.24**  
Stay **3.74 nights**  
Repeat visitor **58.7%**  
Revisit intention **100.0%**  
Satisfaction score **3.89 / 5.00**

### Sporting event



Expenditure per visit **RM 630.13**  
Stay **3.80 nights**  
Repeat visitor **77.6%**  
Revisit intention **100.0%**  
Satisfaction score **3.79 / 5.00**

### Religion/pilgrimages



Expenditure per visit **RM 2,048.89**  
Stay **7.29 nights**  
Repeat visitor **36.0%**  
Revisit intention **96.0%**  
Satisfaction score **3.92 / 5.00**



### Satisfied

1. Local public transport services
2. Prices of local public transportation
3. Hospitality of hotel staff
4. Availability of accommodation
5. Quality of accommodation
6. Accessibility to tourist attractions



### Dissatisfied

1. Cleanliness of beaches and sea
2. Internet connectivity/WIFI
3. Public toilets
4. Money changer/automatic teller machine (ATM)
5. Tourist information centre
6. Cleanliness of eating places
7. The prices of goods
8. Signage at attractions
9. Availability of information for tourist at entry points

Main purpose of travel to Penang:

1. **Leisure & recreation** (61.1%)
2. **Culture & heritage** (13.9%)
3. **Visit friends & relatives** (7.4%)

# PENANG

## Market Profile

### Who are they?

- Penang visitors in 2016 consist of **49.7% international tourists** and **50.3% domestic tourists**.
- The proportion of **gender** is somewhat **equal**; 43.7% male and 56.3% female.
- Majority of visitors are youths, students and young adult travellers; aged below 35 years old. The **average** age is **30 years old**, ranging from 18 to 80 years old (median = 27 years old).
- Single and educated** are dominant travellers.
- About 34.6% of the travellers work as professional and semi-professional. The average monthly income for working travellers is RM 6,647.70.

Gender	International tourist	Domestic tourist	Total
Male	47.8%	39.6%	43.7%
Female	52.2%	60.4%	56.3%
Total	100.0%	100.0%	100.0%
Age			
18-25 years old <sup>a</sup>	32.7%	49.9%	41.4%
26-35 years old <sup>b</sup>	41.0%	32.3%	36.6%
36-49 years old <sup>c</sup>	17.1%	13.5%	15.3%
≥ 50 years old <sup>d</sup>	9.1%	4.3%	6.7%
Total	100.0%	100.0%	100.0%
Average	32 years old	28 years old	30 years old
Marital status			
Single	62.5%	67.8%	65.2%
Married	35.2%	30.8%	33.0%
Divorcee/widowed	2.2%	1.4%	1.8%
Total	100.0%	100.0%	100.0%

Note: N=4767 respondents

a = youth/student traveller; b = young adult traveller; c = adult/mature traveller; d = senior traveller

# PENANG

## Market Profile

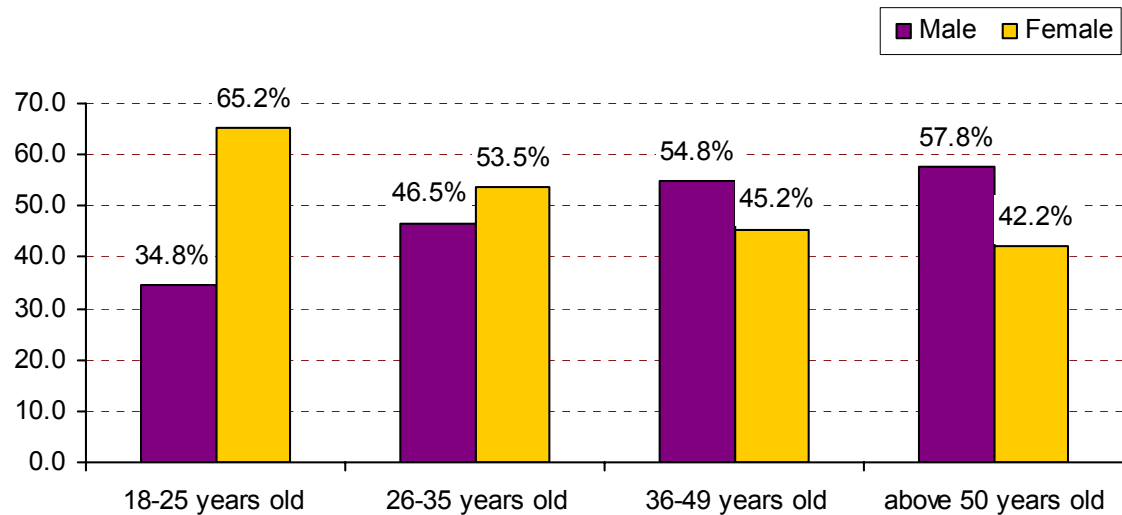
Education attainment	International tourist	Domestic tourist	Total
Higher Degree – Master/PhD	26.3%	10.5%	18.3%
Tertiary Education – Diploma/Degree	58.7%	67.5%	63.2%
Secondary/High School Education	14.6%	21.6%	18.1%
Primary/Elementary Education	0.3%	0.3%	0.3%
No Formal Education	0.0%	0.0%	0.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Occupation			
Students	20.5%	34.7%	27.9%
Technicians & associate professionals	18.0%	18.6%	18.3%
Professionals	20.9%	12.1%	16.3%
Service, shop & market sales workers	11.9%	10.4%	11.1%
Clerical workers	10.5%	11.1%	10.8%
Not working	8.7%	4.4%	6.4%
Legislators, senior officials & managers	4.5%	2.6%	3.5%
Elementary occupations	2.9%	3.4%	3.1%
Armed forces	0.7%	1.4%	1.0%
Plant & machine-operators & assemblers	0.5%	1.2%	0.9%
Skilled agricultural & fishery workers	0.5%	0.2%	0.3%
Craft and related trades workers	0.4%	0.0%	0.2%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
Monthly income			
No income*	25.3%	39.0%	33.2%
≤ RM 1,000	3.5%	6.0%	4.9%
RM 1,001 – RM 5,000	24.8%	48.6%	38.6%
RM 5,001 – RM 10,000	20.3%	5.3%	11.6%
RM 10,001 – RM 50,000	21.9%	1.2%	9.9%
RM 50,001 – RM 100,000	1.8%	0.0%	0.8%
> RM 100,001	2.4%	0.0%	1.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Average</b>	<b>RM 12,989.69</b>	<b>RM 2,048.93</b>	<b>RM 6,647.70</b>

**Note:** \*No income respondents consist of retirees, homemakers, students and in between jobs

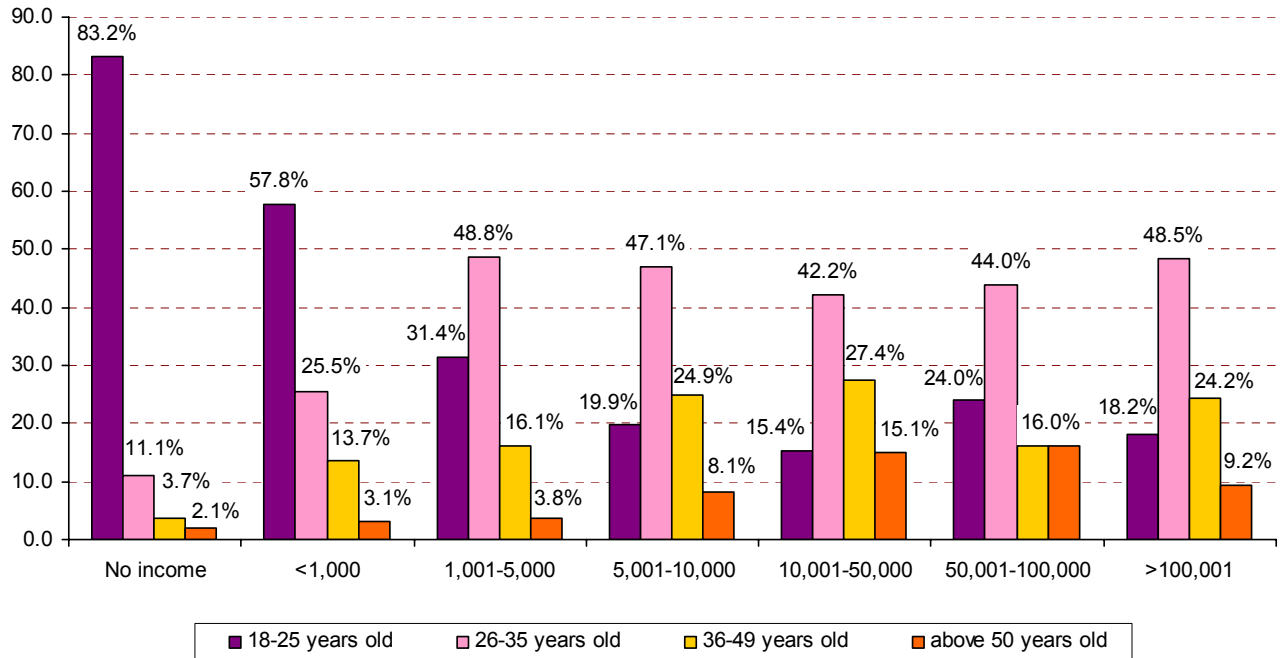
# PENANG

## Market Profile

Gender and age group



Age group and monthly income (RM)

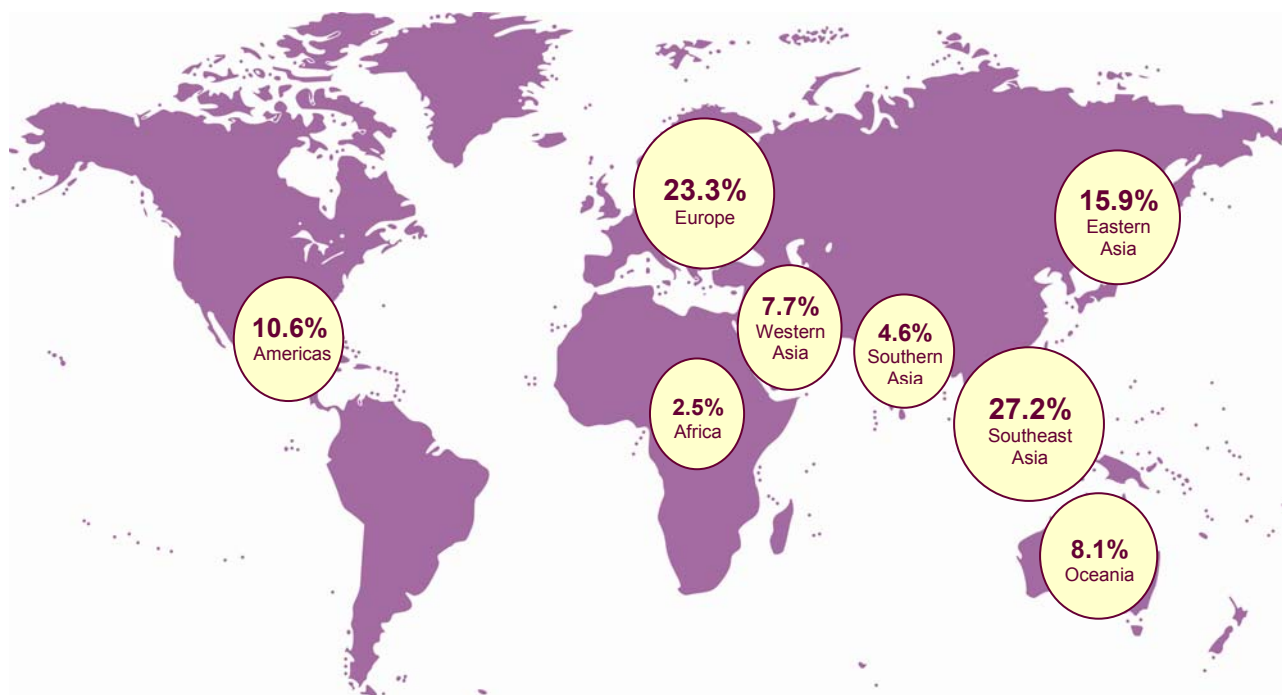


# PENANG

## Market Profile

### The Respondents

Origin of international tourists



Gender	Southeast Asia	Western Asia	Eastern Asia	Oceania	Europe	Americas	Southern Asia	Africa
Male	43.6%	59.3%	42.4%	47.6%	48.1%	44.4%	75.2%	51.7%
Female	56.4%	40.7%	57.6%	52.4%	51.9%	55.6%	24.8%	48.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Age								
18-25 years	29.8%	36.8%	37.1%	23.0%	33.8%	42.5%	20.2%	26.7%
26-35 years	39.5%	40.1%	44.0%	29.8%	43.8%	35.3%	56.0%	48.3%
36-49 years	23.4%	18.7%	14.6%	19.9%	13.6%	11.1%	15.6%	13.3%
≥ 50 years	7.3%	4.4%	4.2%	27.2%	8.9%	11.1%	8.3%	11.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average	32 yrs	30 yrs	30 yrs	39 yrs	31 yrs	31 yrs	32 yrs	33 yrs



# PENANG

## Market Profile

### International tourists by country of origin

#### Europe

Austria	0.3%
Belarus	0.2%
Belgium	0.5%
Bulgaria	0.1%
Croatia	0.1%
Czech Republic	0.3%
Denmark	0.6%
Finland	0.3%
France	2.4%
<b>Germany</b>	<b>5.2%</b>
Hungary	0.3%
Iceland	0.1%
Ireland	0.5%
Italy	0.3%
Lithuania	0.1%
Malta	0.1%
Netherlands	2.3%
Norway	0.1%
Poland	0.6%
Portugal	0.1%
Russia	0.9%
Spain	1.3%
Sweden	0.5%
Switzerland	1.0%
Ukraine	0.2%
<b>United Kingdom</b>	<b>5.0%</b>
<b>Oceania</b>	
<b>Australia</b>	<b>6.8%</b>
New Zealand	1.2%

#### Western Asia

Bahrain	0.1%
Iran	0.2%
Iraq	0.1%
Jordan	0.3%
Kuwait	0.5%
Lebanon	0.1%
Oman	0.6%
Palestine	0.2%
Qatar	0.1%
<b>Saudi Arabia</b>	<b>4.5%</b>
Syria	0.1%
Turkey	0.2%
United Arab Emirates	0.5%
Yemen	0.3%
<b>Southeast Asia</b>	
Brunei	0.7%
Cambodia	0.2%
<b>Indonesia</b>	<b>9.0%</b>
Myanmar	0.1%
Philippines	1.7%
<b>Singapore</b>	<b>8.6%</b>
<b>Thailand</b>	<b>5.8%</b>
Vietnam	1.2%
<b>Eastern Asia</b>	
<b>China</b>	<b>13.1%</b>
Japan	1.0%
South Korea	0.4%
Taiwan	1.4%

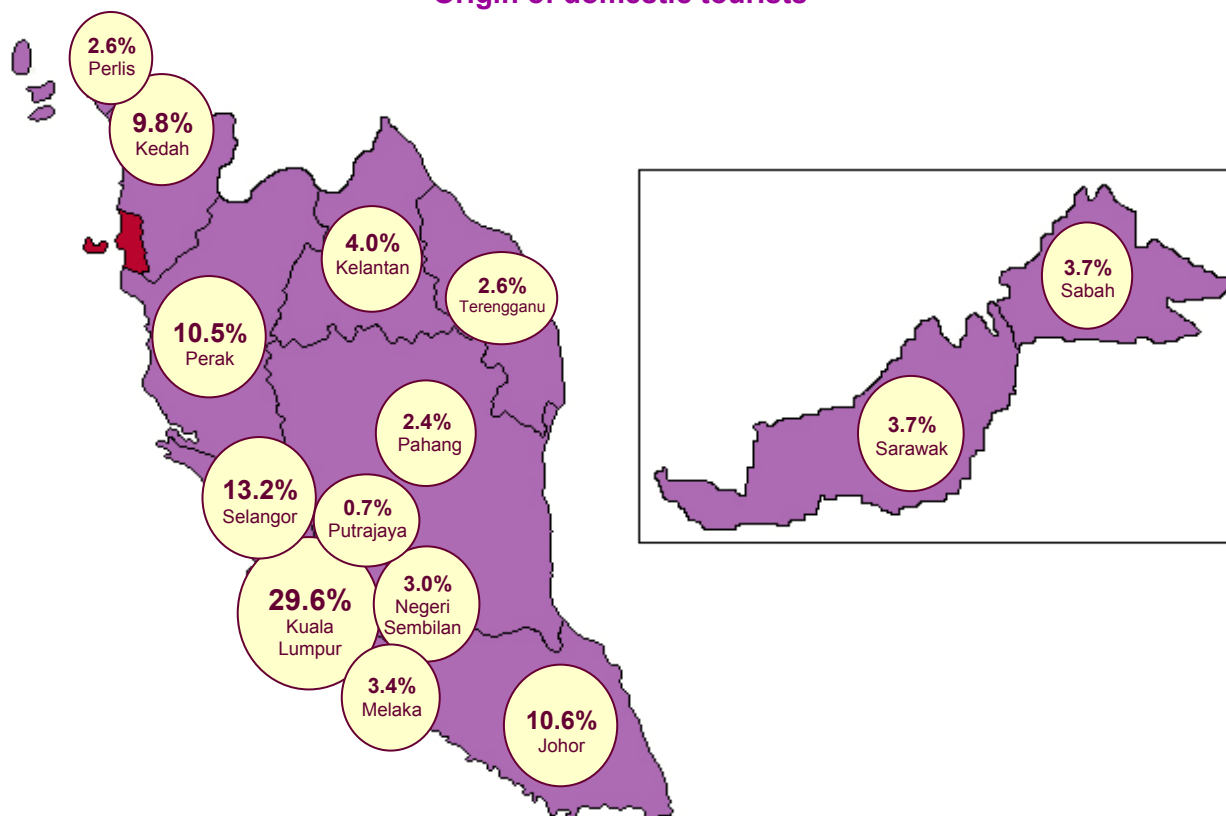
#### America

Argentina	0.5%
Brazil	0.3%
Canada	3.6%
Chile	0.7%
Costa Rica	0.2%
Ecuador	0.2%
Mexico	0.2%
<b>United States</b>	<b>4.8%</b>
Uruguay	0.1%
<b>Southern Asia</b>	
Bangladesh	0.2%
India	3.0%
Nepal	0.2%
Pakistan	0.3%
Sri Lanka	0.8%
<b>Africa</b>	
Algeria	0.5%
Egypt	0.1%
Kenya	0.2%
Mauritius	0.1%
Morocco	0.1%
Namibia	0.1%
Nigeria	0.1%
South Africa	0.8%
Sudan	0.3%
Tanzania	0.1%
Uganda	0.1%

# PENANG

## Market Profile

Origin of domestic tourists



State	Malay & Bumiputera	Chinese	Indian	Others	Total
Kuala Lumpur	14.0%	12.7%	2.4%	0.6%	29.6%
Selangor	9.3%	2.9%	1.0%	0.1%	13.2%
Johor	4.8%	4.8%	0.9%	0.0%	10.6%
Perak	6.4%	2.6%	1.3%	0.3%	10.5%
Kedah	7.5%	1.3%	0.9%	0.1%	9.8%
Kelantan	3.4%	0.6%	0.0%	0.0%	4.0%
Sarawak	1.6%	2.1%	0.0%	0.1%	3.7%
Sabah	2.1%	0.9%	0.3%	0.4%	3.7%
Melaka	1.9%	1.3%	0.2%	0.0%	3.4%
Negeri Sembilan	2.1%	0.4%	0.4%	0.0%	3.0%
Perlis	1.5%	0.8%	0.2%	0.0%	2.6%
Terengganu	2.5%	0.0%	0.0%	0.0%	2.6%
Pahang	1.5%	0.7%	0.2%	0.1%	2.4%
Putrajaya	0.7%	0.0%	0.0%	0.0%	0.7%
<b>Total</b>	<b>59.3%</b>	<b>31.0%</b>	<b>7.8%</b>	<b>1.8%</b>	<b>100.0%</b>

# PENANG

## Market Profile

### Repeat Visitors

- **Domestic travellers** are likely to be Penang most **repeat or loyal visitors**. About 52.3% of the total visitors are repeat visitors to Penang.
- About half of domestic visitors (48.1%) have visited Penang between 2 to 5 times.
- The number of repeat visitors among **international tourists** is lower (26.5%). Majority of them are **first-time visitors**.

Number of visit	International tourist	Domestic tourist	Total
First-time	73.5%	22.3%	47.7%
2 – 5 times	19.5%	48.1%	33.8%
6 – 10 times	2.1%	9.5%	5.8%
> 10 times	1.7%	6.3%	4.0%
Not sure	3.2%	13.8%	8.6%
Total	100.0%	100.0%	100.0%

### Domestic repeat visitors

Number of visit	Malay & Bumiputera	Chinese	Indian	Others	Total
First-time	14.5%	6.0%	1.1%	0.6%	22.3%
2 – 5 times	28.6%	15.0%	3.7%	0.7%	48.1%
6 – 10 times	5.5%	3.1%	0.9%	0.0%	9.5%
> 10 times	2.8%	2.9%	0.4%	0.3%	6.3%
Not sure	7.5%	4.2%	1.8%	0.3%	13.8%
Total	58.9%	31.3%	7.9%	1.9%	100.0%

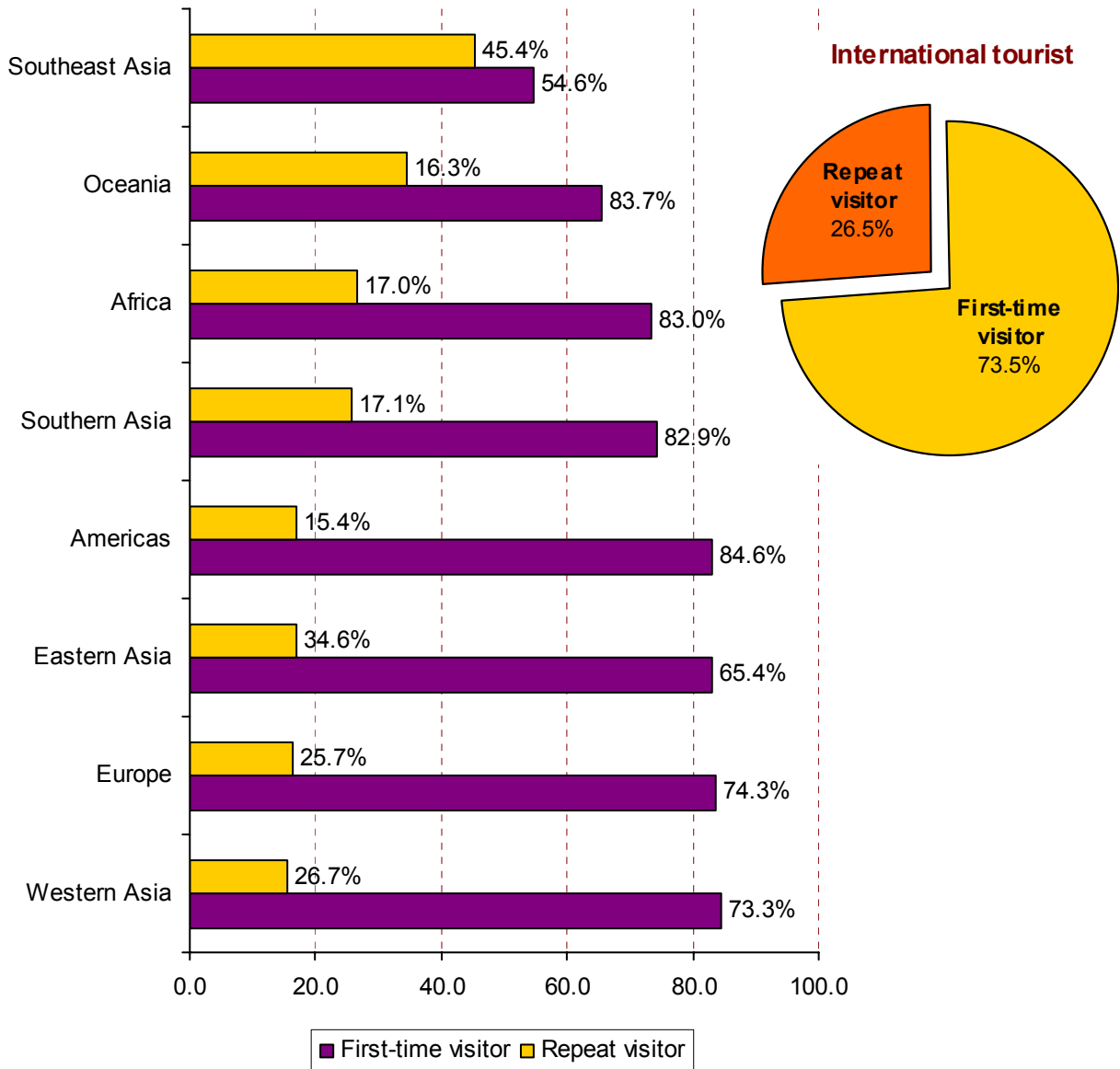
  

Number of visit	18-25 yrs	26-35 yrs	36-49 yrs	> 50 yrs	Total
First-time	13.0%	6.6%	1.7%	1.0%	22.3%
2 – 5 times	24.0%	15.9%	6.6%	1.6%	48.1%
6 – 10 times	4.4%	3.4%	1.3%	0.4%	9.5%
> 10 times	2.3%	2.0%	1.3%	0.8%	6.4%
Not sure	6.1%	4.5%	2.6%	0.6%	13.8%
Total	49.9%	32.3%	13.5%	4.3%	100.0%

# PENANG

## Market Profile

Repeat visitor and region of residence

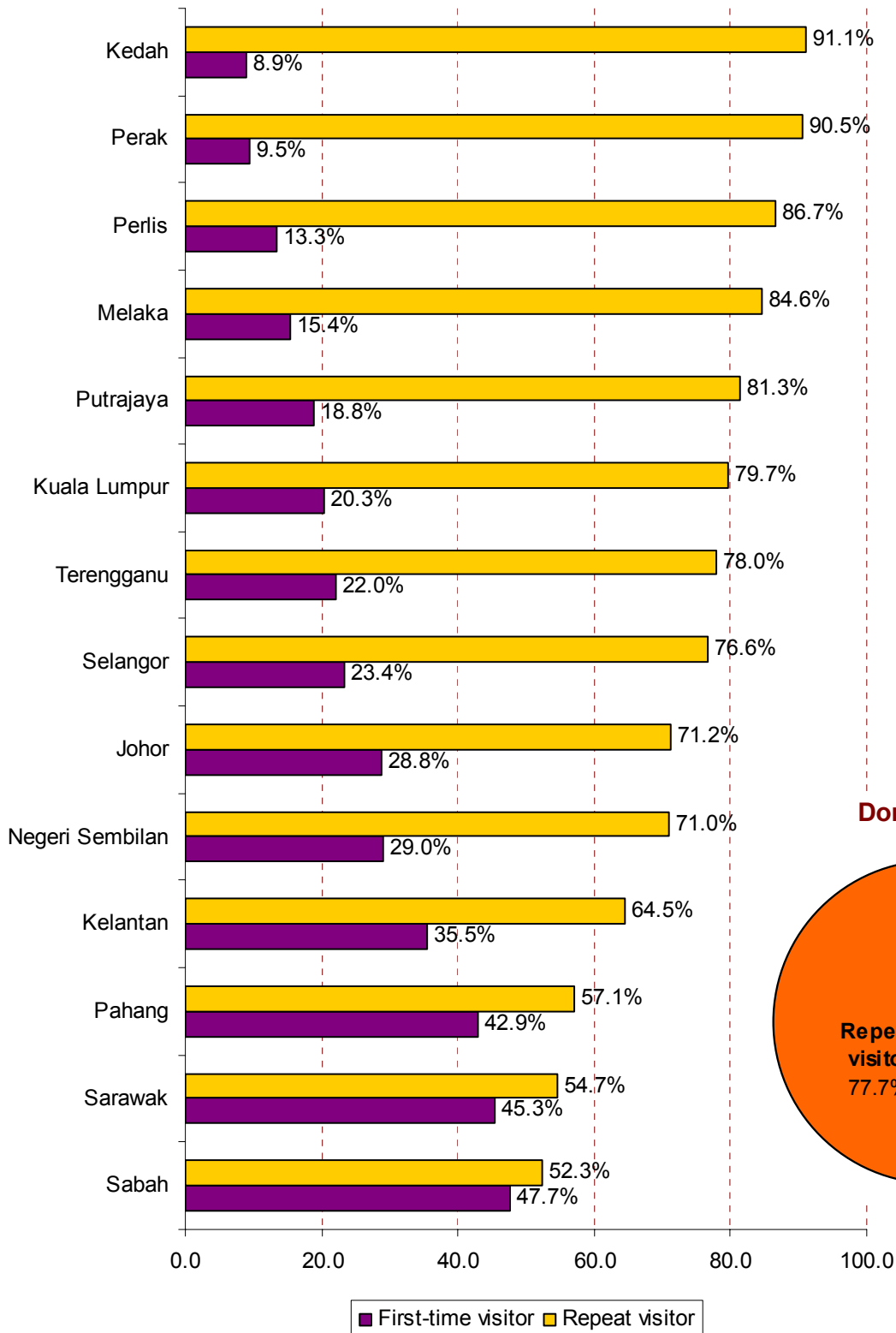




# PENANG

## Market Profile

Repeat visitor and state of residence



# Market Travel Patterns

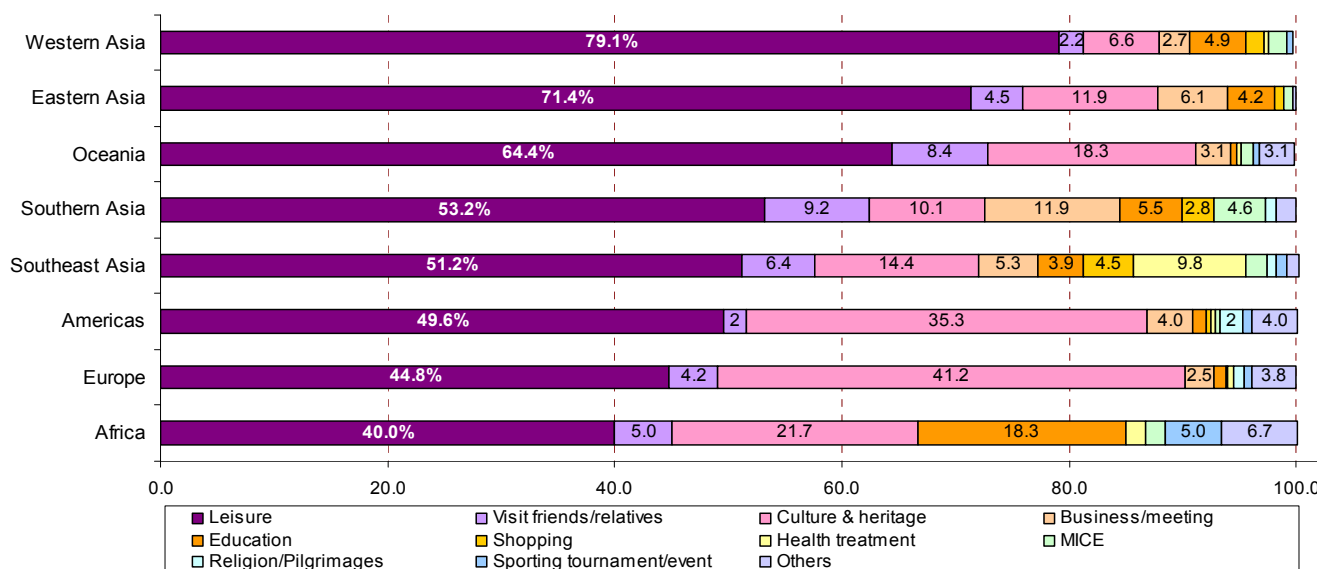
## Purpose of Visit

Three **main purposes** of visit to Penang are mainly for:

1. **Leisure/recreation/holiday** (61.1%)
2. **Culture and heritage** (13.9%)
3. **Visit friends/relatives** (7.4%)

Purpose of visit	International tourist	Domestic tourist	Total
Leisure/recreation/holiday	55.7%	66.3%	61.1%
Culture and heritage	22.2%	5.8%	13.9%
Visit friends/relatives (VFR)	5.1%	9.7%	7.4%
Education/teaching/training	3.2%	6.5%	4.9%
Business/meeting	4.4%	3.7%	4.1%
Shopping	1.7%	3.0%	2.3%
Sport tournament/event	0.7%	2.8%	1.8%
Health treatment	3.0%	0.3%	1.6%
Convention/conference/trade show	1.1%	1.5%	1.3%
Religion/pilgrimages	0.7%	0.4%	0.5%
Others (visa application)	2.2%	0.0%	1.1%
Total	100.0%	100.0%	100.0%

International tourist arrival by region and purpose of visit



# Market Travel Patterns

## Purpose of visit by age group

Purpose of visit	18-25 yrs	26-35 yrs	36-49 yrs	> 50 yrs	Total
Leisure/recreation/holiday	63.0%	60.5%	58.2%	58.8%	61.1%
Culture and heritage	14.3%	15.2%	12.0%	8.8%	13.9%
Visit friends/relatives (VFR)	5.9%	7.7%	8.0%	13.4%	7.4%
Education/teaching/training	7.1%	3.2%	3.4%	4.1%	4.9%
Business/meeting	1.9%	4.8%	8.2%	4.1%	4.1%
Shopping	2.7%	2.1%	2.5%	1.3%	2.3%
Sport tournament/event	2.1%	1.7%	1.4%	1.6%	1.8%
Health treatment	0.7%	1.5%	3.0%	4.4%	1.6%
Convention/conference/trade show	1.0%	1.5%	1.6%	1.3%	1.3%
Religion/pilgrimages	0.4%	0.5%	0.8%	0.9%	0.5%
Others (visa application)	0.9%	1.3%	0.8%	1.6%	1.1%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

## Purpose of visit for first-time visitors and repeat visitors

Purpose of visit	International tourist		Domestic tourist		Total	
	First-time	Repeat	First-time	Repeat	First-time	Repeat
Leisure/recreation/holiday	59.4%	45.5%	69.9%	65.3%	61.9%	60.3%
Culture and heritage	26.1%	11.3%	6.7%	5.5%	21.6%	6.9%
Visit friends/relatives (VFR)	2.6%	11.9%	6.7%	10.6%	3.6%	10.9%
Education/teaching/training	3.2%	3.5%	8.1%	6.1%	4.3%	5.5%
Business/meeting	2.6%	9.4%	1.9%	4.2%	2.5%	5.5%
Shopping	1.4%	2.4%	2.1%	3.2%	1.6%	3.0%
Sport tournament/event	0.4%	1.6%	2.2%	3.0%	0.8%	2.6%
Health treatment	1.1%	8.0%	0.2%	0.3%	0.9%	2.2%
Convention/conference/trade show	0.9%	1.8%	1.9%	1.4%	1.1%	1.5%
Religion/pilgrimages	0.8%	0.3%	0.4%	0.4%	0.7%	0.4%
Others (visa application)	1.4%	4.3%	0.0%	0.0%	1.1%	1.1%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

# Market Travel Patterns

## Length of Stay

- Majority of visitors spend less than 3 days in Penang (54.9%).
- The **average** length of stay for:
  - ✓ **International tourist** is **6 days** (median = 4 days)
  - ✓ **Domestic tourists** is **4 days** (median = 3 days)
- Only 11.9% of total visitors did not decide on their duration of stay.

Length of stay	International tourist	Domestic tourist	Total
1 day	2.7%	7.0%	4.9%
2 days	14.1%	23.0%	18.6%
3 days	27.4%	35.3%	31.4%
4-7 days	34.3%	19.1%	26.7%
8-14 days	5.0%	1.8%	3.4%
≥15 days	5.4%	1.0%	3.2%
Not yet decided	11.0%	12.8%	11.9%
Total	100.0%	100.0%	100.0%
Average	6 days	4 days	5 days

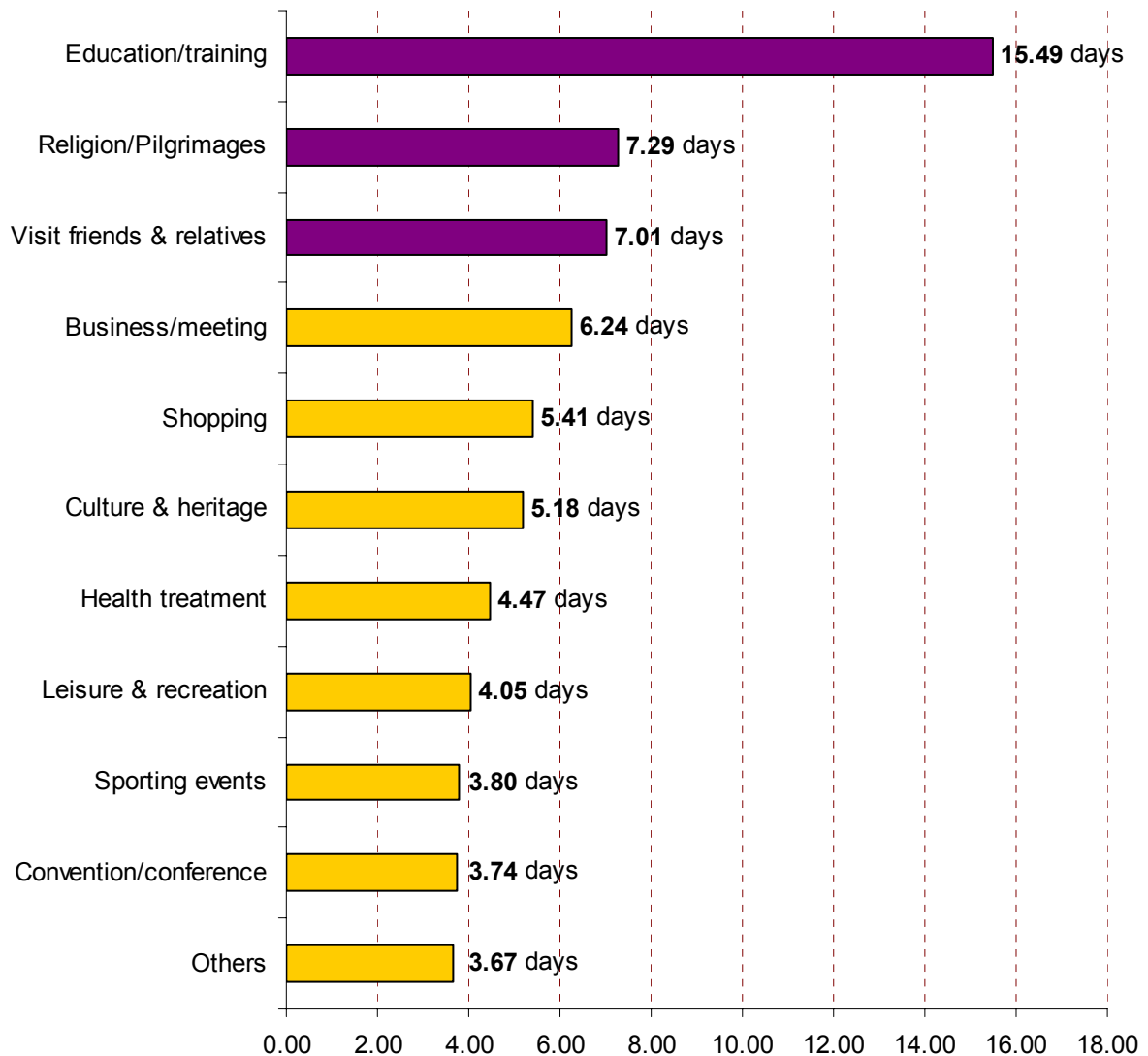
## Length of stay of first-time and repeat visitors

Length of stay	International tourist		Domestic tourist		Total	
	First-time	Repeat	First-time	Repeat	First-time	Repeat
1 day	3.3%	1.1%	5.2%	7.5%	3.7%	5.9%
2 days	16.0%	8.9%	22.8%	23.0%	17.6%	19.5%
3 days	28.9%	23.1%	38.8%	34.3%	31.2%	31.5%
4-7 days	33.2%	37.4%	20.2%	18.7%	30.2%	23.4%
8-14 days	4.4%	6.8%	2.1%	1.8%	3.8%	3.1%
≥15 days	4.0%	9.6%	1.3%	0.9%	3.3%	3.1%
Not yet decided	10.3%	13.1%	9.6%	13.8%	10.1%	13.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



# Market Travel Patterns

Average length of stay by purpose of visit



# Market Travel Patterns

## Source of Information

- Three **important mediums** for information for tourists to Penang are:
  - Internet and social media** (32.7%)
  - Words of mouth** from friends and relatives (25.1%)
  - Past experience** (23.7%); especially for repeat tourists
- Past experiences (30.8%) are the most important sources of information for domestic tourists. While, internet/social media (38.8%) is the strongest source of information for international tourists.

Source of information	International tourist	Domestic tourist	Total
Internet/social media	38.8%	28.2%	32.7%
Friends/relatives/words of mouth	26.8%	23.9%	25.1%
Past experience	14.1%	30.8%	23.7%
Magazine/newspaper/guide book	10.3%	5.8%	7.7%
TV/radio	2.6%	4.8%	3.8%
Expo/exhibition/tourism fair	1.6%	3.0%	2.5%
Travel agency/tour company	3.6%	1.5%	2.4%
National government tourist office	1.2%	1.1%	1.1%
In-flight information	1.2%	1.0%	1.0%
Total	100.0%	100.0%	100.0%

Note: multiple responses

### Source of information by age group

Source of information	18-25 yrs	26-35 yrs	36-49 yrs	> 50 yrs	Total
Internet/social media	32.9%	33.9%	30.8%	28.8%	32.7%
Friends/relatives/words of mouth	26.6%	25.2%	21.9%	22.4%	25.1%
Past experience	22.6%	22.4%	28.3%	28.1%	23.7%
Magazine/newspaper/guide book	7.6%	7.5%	7.8%	8.7%	7.7%
TV/radio	3.9%	3.5%	4.0%	4.3%	3.8%
Expo/exhibition/tourism fair	2.3%	2.8%	1.9%	1.9%	2.5%
Travel agency/tour company	2.4%	2.1%	2.4%	3.7%	2.4%
National government tourist office	0.8%	1.3%	1.5%	1.1%	1.1%
In-flight information	0.8%	1.3%	1.4%	1.0%	1.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

# Market Travel Patterns

## Travelling Party

- Majority of visitors travel to Penang **with friends** (39.1%) and **families/relatives** (22.0%).
- About 16.7% of international tourists and 4.2% of domestic tourists are solo travellers.
- Majority of travellers prefer to **travel in small group** of 2 to 5 persons. The **average** number of travel companion is **5 persons** (median = 3 persons).
- Visitors from **Malaysia, Indonesia, Australia, Hungary, China** and **Singapore** travelled in **large group** of more than 30 persons.

Travel companion	International tourist	Domestic tourist	Total
Friend(s)	32.6%	44.8%	39.1%
Family/relative(s)	16.3%	27.1%	22.0%
Spouse/partner	28.4%	14.8%	21.2%
Alone	16.7%	4.2%	10.1%
Business associate/colleague(s)	3.7%	5.9%	4.9%
Lecturer/teacher	1.1%	2.5%	1.9%
Other traveller met along the way	1.2%	0.6%	0.9%
Student	0.0%	0.1%	0.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Note: multiple responses

Number of travel companion	International tourist	Domestic tourist	Total
Alone	18.1%	5.1%	11.6%
2 persons	44.9%	17.9%	31.4%
Small group	3-5 persons	41.6%	33.1%
	6-10 persons	24.0%	16.5%
Medium group	11-29 persons	6.9%	5.0%
Large group	≥ 30 persons	4.4%	2.4%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Average</b>	<b>3 persons</b>	<b>7 persons</b>	<b>5 persons</b>
<b>Maximum number in the group</b>	<b>100 persons</b>	<b>96 persons</b>	<b>100 persons</b>

# Market Travel Patterns

## Travel Planning and Arrangement

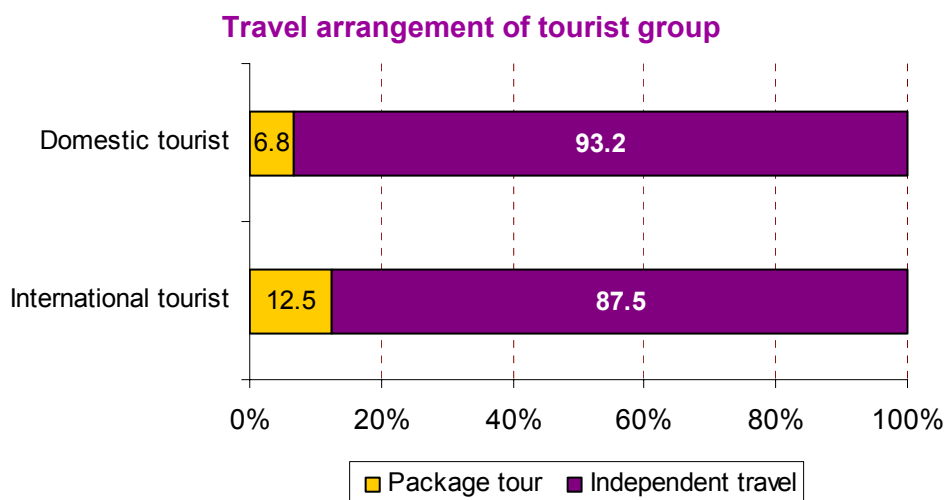
- Planning the trip is deemed necessary to all tourists. With the ease of internet booking engine, the duration for trip arrangement becomes shortened. 38.8% of visitors had **planned** their trip to Penang in **less than a week**.
- Half of domestic tourists (especially the repeat visitors) are likely to have the shortest planning and booking period, i.e. a week before departure.
- Majority of visitors (90.4%) are free-Independent travellers (FITs), travelling on **independent tour**. While, 9.6% of them purchase vacation packages.
- Three main components in vacation packages purchased by:
  - ✓ International tourists: (1) air fare; (2) accommodation; and (3) food and beverages
  - ✓ Domestic tourists: (1) accommodation; (2) food and beverages; and (3) air fare

Time to decide on trip	International tourist	Domestic tourist	Total
1 or 2 days before the trip	9.4%	21.0%	15.3%
A week before the trip	17.2%	29.7%	23.5%
A month before the trip	25.9%	27.4%	26.7%
1 to 3 months	22.1%	12.2%	17.1%
More than 3 months	25.4%	9.7%	17.5%
Total	100.0%	100.0%	100.0%

Time to decide on trip	International tourist		Domestic tourist		Total	
	First-time	Repeat	First-time	Repeat	First-time	Repeat
1 or 2 days before the trip	8.1%	13.0%	15.6%	22.6%	9.9%	20.2%
A week before the trip	16.2%	20.1%	26.3%	30.6%	18.5%	28.0%
A month before the trip	26.1%	25.4%	32.3%	26.0%	27.5%	25.8%
1 to 3 months	22.3%	21.5%	14.4%	11.6%	20.5%	14.1%
More than 3 months	27.3%	20.1%	11.4%	9.2%	23.6%	11.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



# Market Travel Patterns



Category	International tourist	Domestic tourist	Total
Independent travel	87.5%	93.2%	90.4%
Package tour	12.5%	6.8%	9.6%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Package component</b>			
Accommodation	26.6%	34.8%	29.2%
Air fare	32.0%	17.5%	27.5%
Food and beverages	14.6%	19.3%	16.1%
Rental vehicle	11.0%	9.4%	10.5%
Commercial guided tour	6.2%	6.3%	6.2%
Admission fees to attractions	4.8%	9.4%	6.2%
Cruise package	4.9%	3.3%	4.4%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

**Note:** multiple responses

# Market Travel Patterns

## Travel Month

- About 26.7% of visitors claimed that they have **no specific travel month** for outbound trips. Only 14.1% of them enjoy holidaying during **December** holidays. Travel trips are made throughout the year.



Travel month	International tourist			Domestic tourist			Total		
	First-time	Repeat	Total	First-time	Repeat	Total	First-time	Repeat	Total
January	5.3%	5.9%	5.5%	3.0%	3.4%	3.3%	4.9%	4.1%	4.5%
February	4.6%	4.8%	4.7%	2.9%	3.0%	3.0%	4.3%	3.5%	3.9%
March	7.1%	7.8%	7.3%	9.3%	7.9%	8.2%	7.6%	7.9%	7.7%
April	4.5%	5.1%	4.6%	2.9%	2.3%	2.4%	4.2%	3.0%	3.6%
May	7.8%	5.8%	7.3%	6.6%	6.9%	6.8%	7.6%	6.6%	7.1%
June	6.1%	7.1%	6.4%	4.4%	4.4%	4.4%	5.8%	5.1%	5.5%
July	8.0%	4.4%	7.1%	2.4%	2.9%	2.8%	6.9%	3.3%	5.1%
August	9.9%	7.3%	9.2%	5.0%	5.1%	5.0%	9.0%	5.7%	7.3%
September	5.2%	3.9%	4.9%	2.6%	3.3%	3.1%	4.8%	3.4%	4.1%
October	4.1%	3.3%	3.9%	2.5%	2.6%	2.6%	3.8%	2.8%	3.3%
November	5.0%	5.7%	5.2%	9.7%	9.4%	9.5%	5.9%	8.4%	7.2%
December	8.3%	12.7%	9.4%	18.6%	19.7%	19.5%	10.3%	17.8%	14.1%
No specific month	23.9%	26.1%	24.5%	30.0%	29.1%	29.3%	25.1%	28.3%	26.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: multiple responses

# Market Travel Patterns

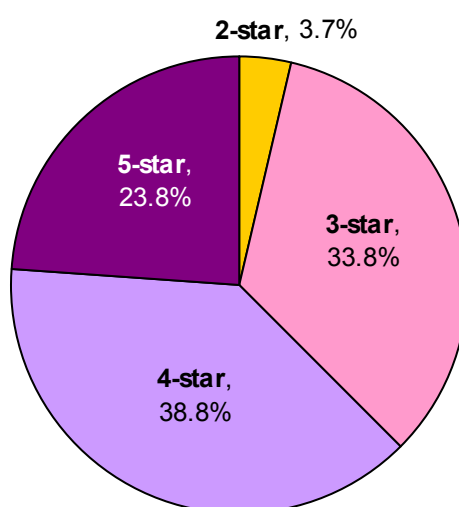
## Type of Accommodation

- The **most preferred** lodging for majority of the visitors (36.4%) is **hotel and resort**. Another one third of the visitors opt for **budget accommodation** such as budget hotel, motel, inn, guest house and hostel.
- The influence of VFR segment is seen in the use of friend or relative's house (11.4%).

Tourist accommodation	International tourist	Domestic tourist	Total
Hotel/resort	40.9%	32.1%	36.4%
Budget hotel/motel/inn/guest house/hostel	41.5%	30.5%	35.8%
Friend or relative's house	6.5%	16.1%	11.4%
Serviced apartment	3.1%	8.7%	6.0%
Residential/short term rental	4.2%	6.9%	5.6%
Homestay program in villages	2.4%	3.6%	3.1%
Bungalow/villa	1.0%	2.1%	1.6%
Others (sea cruise, yacht)	0.4%	0.0%	0.2%
Total	100.0%	100.0%	100.0%

Note: multiple responses

### Preferred star rating by hotel and resort users



# Market Travel Patterns

## Mode of Transportation

- Majority of **domestic visitors** came to Penang with **personal vehicle** and **low-cost airline**. While, **low-cost airline, bus** and **major airline** are the main transportations for **international travellers** to Penang.
- Public transport is the most frequent option for international visitors to move within destination (Penang).
- Besides bus and taxi, 29.5% of international visitors prefer to walk to do sightseeing in the city.

Transportation used to Penang	International tourist	Domestic tourist	Total
Car/personal vehicle	5.8%	57.7%	31.9%
Low-cost airline	37.6%	22.7%	30.1%
Bus	24.4%	13.4%	18.8%
Major airline	22.0%	2.9%	12.4%
Train	4.9%	3.3%	4.1%
Sea cruise/ferry	4.6%	0.0%	2.3%
Others	0.7%	0.0%	0.3%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Note: multiple responses

Transportation used within Penang	International tourist	Domestic tourist	Total
Public transport (bus, taxi etc)	42.9%	20.6%	32.3%
On foot	29.5%	15.4%	22.7%
Personal/company vehicle	5.6%	40.8%	22.4%
Rented vehicle (car, motorcycle, bicycle etc)	13.9%	15.5%	14.7%
Ride-sharing/non-taxi private transport	5.6%	5.2%	5.4%
Trishaw/rickshaw	2.5%	2.5%	2.5%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

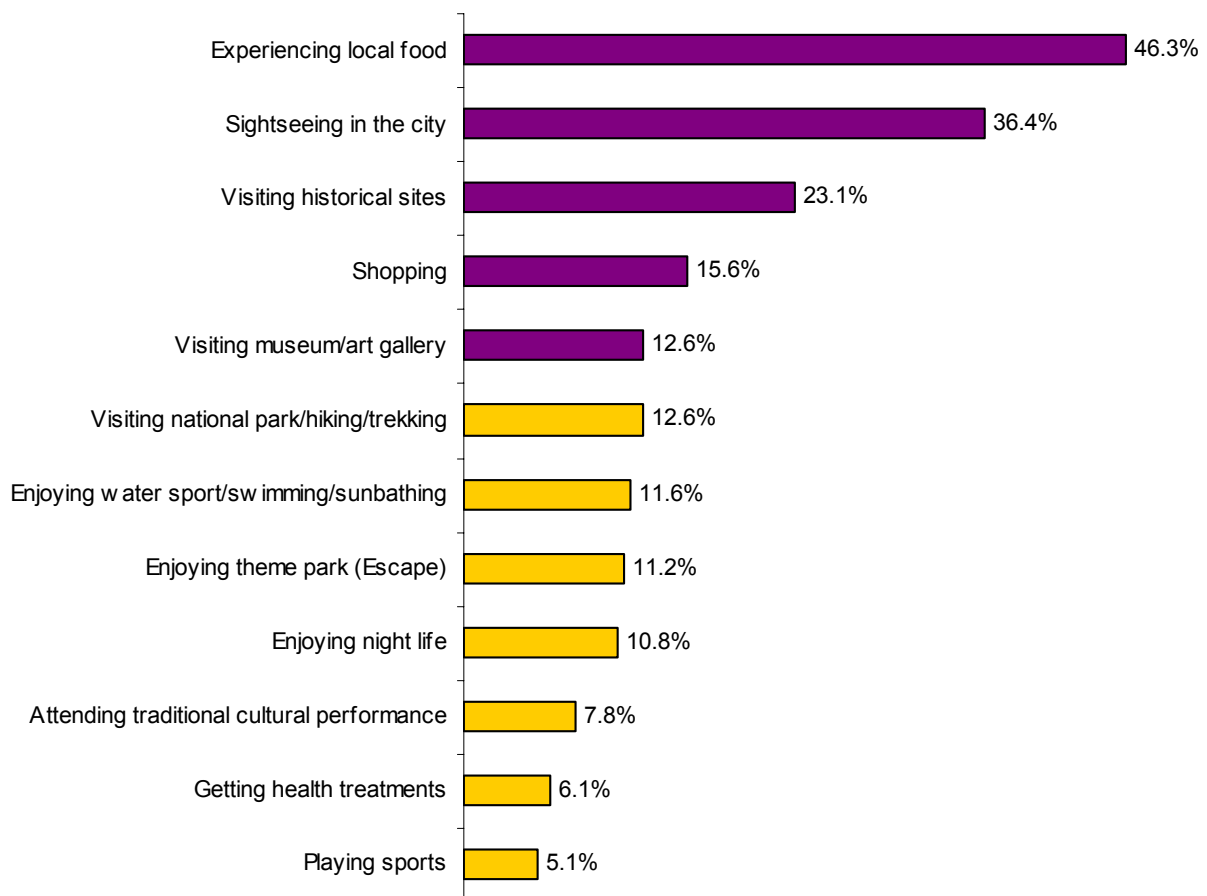
Note: multiple responses



## Tourist Activities

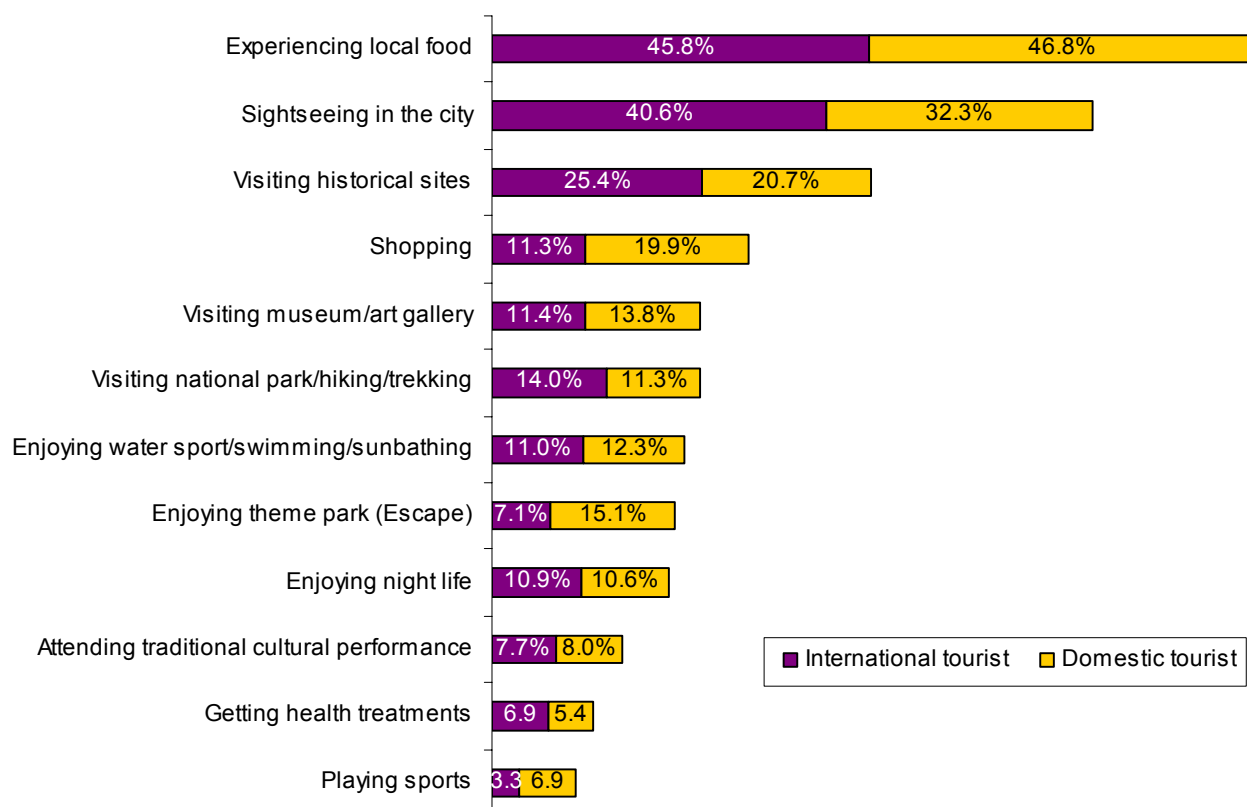
- Penang visitors engaged in a wide range of tourism activities while in Penang.
- Five must-do tourist activities are:
  1. **Experiencing local food** (46.3%)
  2. **Sightseeing in the city** (36.4%)
  3. **Visiting historical sites** (23.1%)
  4. **Shopping** (15.6%)
  5. **Visiting museum/art gallery** (12.6%)
- Playing golf or other sports is the least popular activity to do in Penang.

Top 5 essential activities in Penang



# Market Travel Patterns

**Top 5 essential activities in Penang by tourist group**

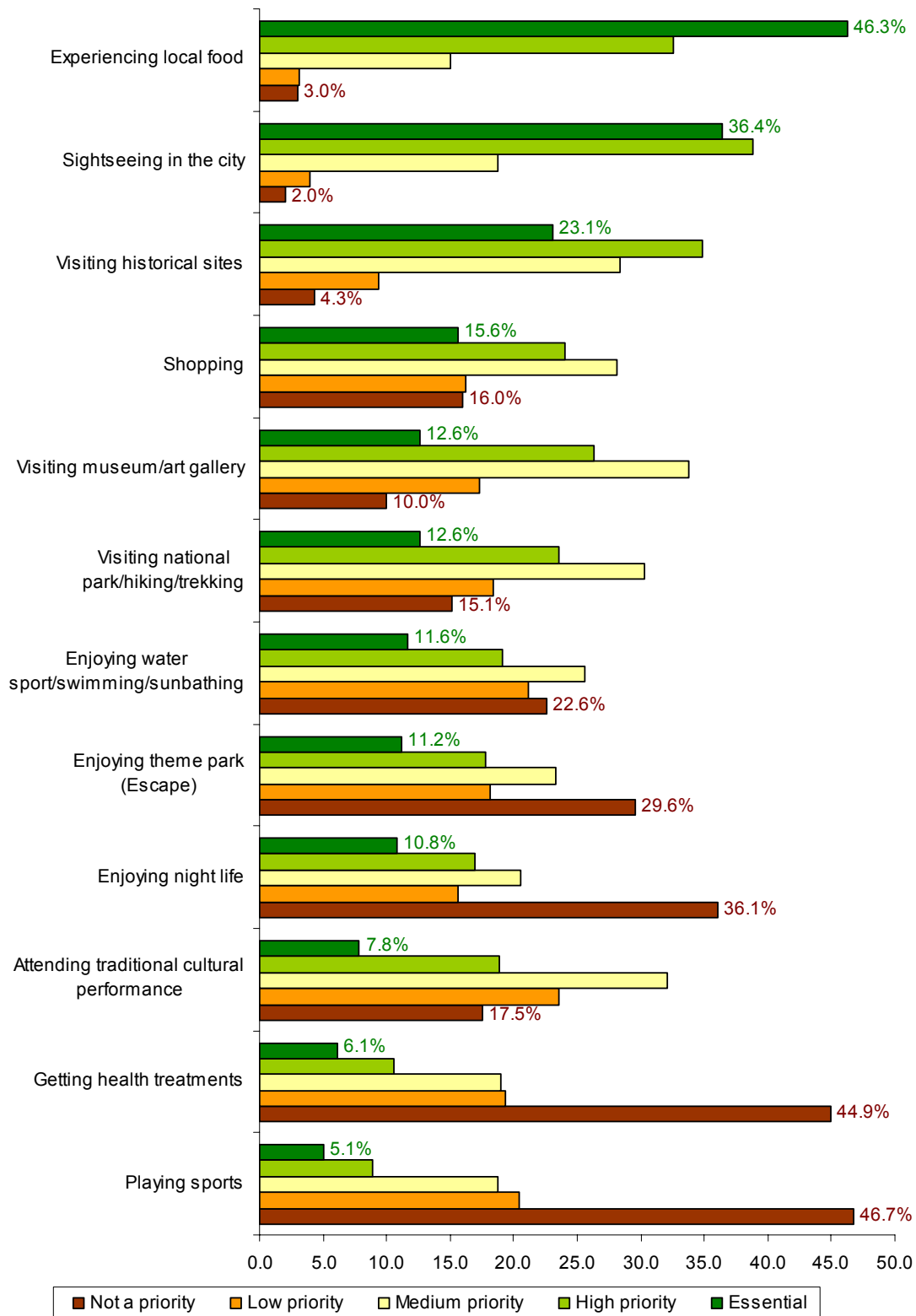


**Essential activities in Penang by age group**

Activities	18-25 yrs	26-35 yrs	36-49 yrs	> 50 yrs
Experiencing local food	21.4%	25.4%	22.9%	24.9%
Sightseeing in the city	18.0%	18.6%	18.0%	19.2%
Visiting historical sites	10.5%	11.7%	13.4%	15.4%
Shopping	8.0%	7.3%	8.2%	9.1%
Visiting museum/art gallery	6.5%	5.9%	7.4%	5.5%
Visiting national park/hiking/ trekking	6.5%	6.6%	5.3%	5.3%
Enjoying water sport/ swimming/sunbathing	6.3%	5.7%	5.1%	4.3%
Enjoying theme park (Escape)	7.3%	4.5%	4.4%	2.1%
Enjoying night life	5.7%	5.2%	5.5%	3.9%
Attending traditional cultural performance/ concert/theatre	4.1%	3.8%	3.9%	3.6%
Getting health treatments	2.7%	3.0%	3.9%	5.7%
Playing sports	3.1%	2.3%	2.1%	1.1%
Total	100.0%	100.0%	100.0%	100.0%

# Market Travel Patterns

Tourist activities engaged by visitors



# Market Travel Patterns

## Tourist activities engaged by visitors

Activities	Not a priority	Low priority	Medium priority	High priority	Essential	Total
Experiencing local food	3.0%	3.1%	15.0%	32.6%	46.3%	100.0%
Sightseeing in the city	2.0%	4.0%	18.7%	38.8%	36.4%	100.0%
Visiting historical sites	4.3%	9.4%	28.4%	34.9%	23.1%	100.0%
Shopping	16.0%	16.2%	28.1%	24.0%	15.6%	100.0%
Visiting museum/art gallery	10.0%	17.3%	33.8%	26.3%	12.6%	100.0%
Visiting national park/hiking/trekking	15.1%	18.4%	30.3%	23.6%	12.6%	100.0%
Enjoying water sport/swimming/sunbathing	22.6%	21.2%	25.6%	19.1%	11.6%	100.0%
Enjoying theme park (Escape)	29.6%	18.2%	23.3%	17.8%	11.2%	100.0%
Enjoying night life	36.1%	15.6%	20.6%	17.0%	10.8%	100.0%
Attending traditional cultural performance/ concert/theatre	17.5%	23.6%	32.1%	18.9%	7.8%	100.0%
Getting health treatments	44.9%	19.4%	19.0%	10.6%	6.1%	100.0%
Playing sports	46.7%	20.4%	18.8%	8.9%	5.1%	100.0%

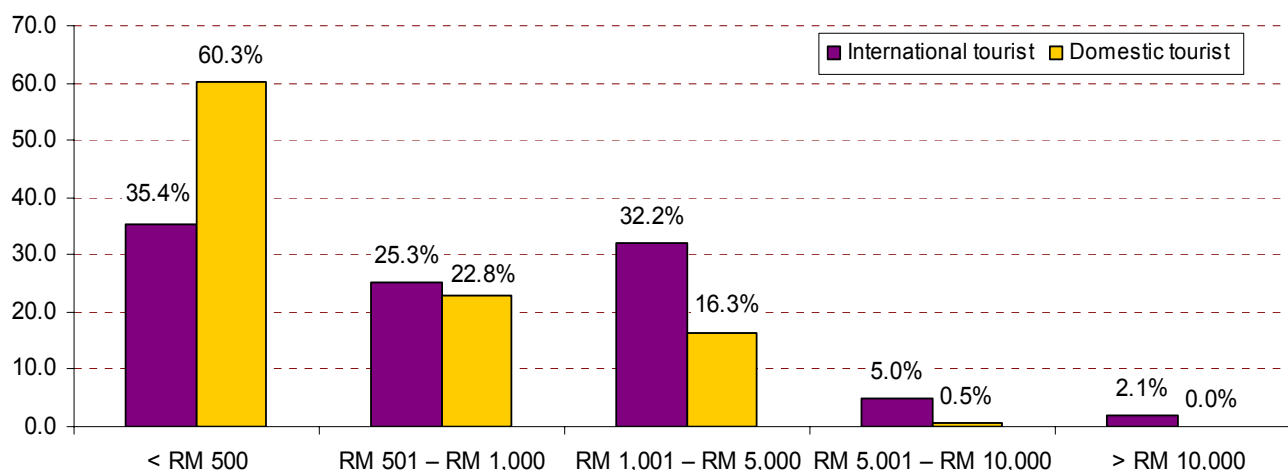
# Market Expenditure Pattern

## Expenditure

- Majority of visitors spent RM 500 and below while holidaying in Penang.
- The **average** expenditure per visitor is **RM 1,359.95** (median = RM 600.00)
- The **largest** spending tourist group is **international traveller**, representing **69.1%** of total spend by Penang visitors
- The **largest** spending age group is **young adult traveller** (26-35 years old), representing **38.3%** of total spend by Penang visitors

Expenditure	International tourist	Domestic tourist	Total
≤ RM 500	35.4%	60.3%	48.2%
RM 501 – RM 1,000	25.3%	22.8%	24.0%
RM 1,001 – RM 5,000	32.2%	16.3%	24.1%
RM 5,001 – RM 10,000	5.0%	0.5%	2.7%
≥ RM 10,001	2.1%	0.0%	1.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Average</b>	<b>RM 1,924.60</b>	<b>RM 821.27</b>	<b>RM 1,359.95</b>
<b>Median</b>	<b>RM 1,000.00</b>	<b>RM 500.00</b>	<b>RM 600.00</b>
<b>Minimum</b>	<b>RM 50.00</b>	<b>RM 50.00</b>	<b>RM 50.00</b>
<b>Maximum</b>	<b>RM 50,000.00</b>	<b>RM 10,000.00</b>	<b>RM 50,000.00</b>
<b>Total expenditure</b>	<b>RM 3,752,979.00</b>	<b>RM 1,678,680.00</b>	<b>RM 5,431,659.00</b>

**Total expenditure at destination by tourist group**



# Market Expenditure Pattern

## Total expenditure at destination by age group

Expenditure	18-25 yrs	26-35 yrs	36-49 yrs	> 50 yrs
≤ RM 500	69.0%	41.3%	22.4%	20.1%
RM 501 – RM 1,000	17.2%	29.9%	26.9%	25.7%
RM 1,001 – RM 5,000	12.7%	25.4%	42.7%	42.0%
RM 5,001 – RM 10,000	0.9%	2.5%	6.0%	7.4%
≥ RM 10,001	0.2%	0.8%	1.9%	4.8%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Average</b>	<b>RM 774.32</b>	<b>RM 1,395.76</b>	<b>RM 2,187.29</b>	<b>RM 2,773.91</b>
<b>Median</b>	<b>RM 400.00</b>	<b>RM 700.00</b>	<b>RM 1,200.00</b>	<b>RM 1,500.00</b>
<b>Minimum</b>	<b>RM 50.00</b>	<b>RM 50.00</b>	<b>RM 60.00</b>	<b>RM 100.00</b>
<b>Maximum</b>	<b>RM 50,000.00</b>	<b>RM 50,000.00</b>	<b>RM 35,000.00</b>	<b>RM 30,000.00</b>
<b>Total expenditure</b>	<b>RM 1,250,527.00</b>	<b>RM 2,079,681.00</b>	<b>RM 1,347,369.00</b>	<b>RM 746,182.00</b>

## Total expenditure at destination by first-time visitors and repeat visitors

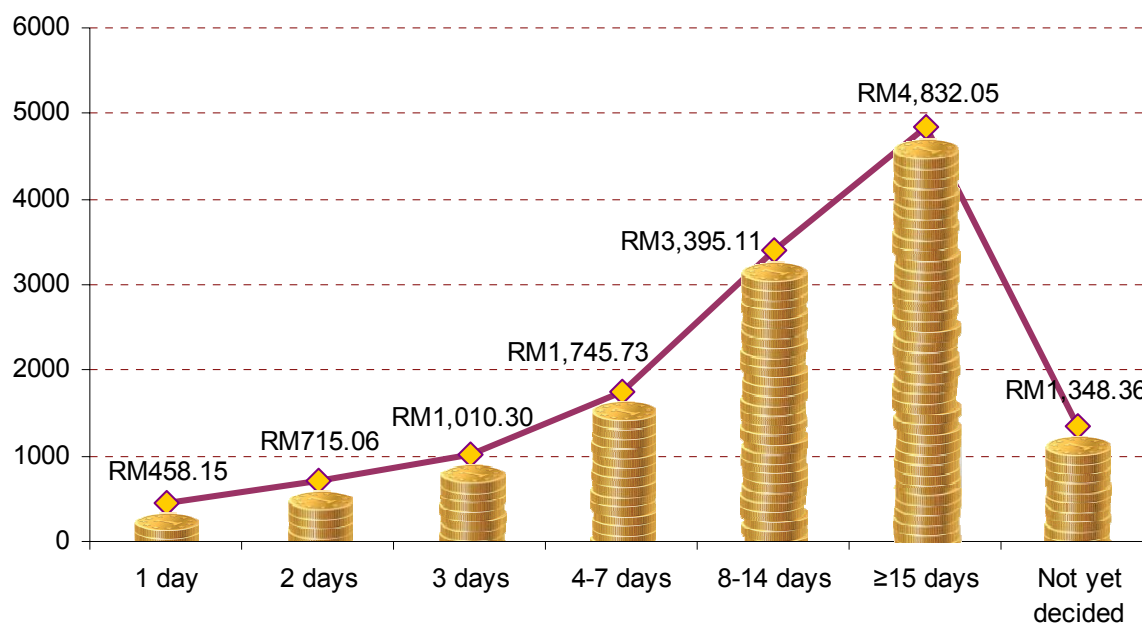
Expenditure	International tourist		Domestic tourist		Total	
	First-time	Repeat	First-time	Repeat	First-time	Repeat
≤ RM 500	40.4%	21.9%	61.4%	60.0%	45.5%	50.5%
RM 501 – RM 1,000	25.4%	24.9%	23.7%	22.5%	25.0%	23.1%
RM 1,001 – RM 5,000	28.8%	41.4%	14.2%	16.9%	25.3%	23.0%
RM 5,001 – RM 10,000	4.0%	7.8%	0.7%	0.5%	3.2%	2.3%
≥ RM 10,001	1.3%	4.0%	0.0%	0.0%	1.0%	1.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Average</b>	<b>(RM) 1,680.70</b>	<b>2,584.91</b>	<b>795.50</b>	<b>828.57</b>	<b>1,467.78</b>	<b>1,264.55</b>
<b>Median</b>	<b>(RM) 750.00</b>	<b>1,500.00</b>	<b>500.00</b>	<b>500.00</b>	<b>600.00</b>	<b>500.00</b>
<b>Minimum</b>	<b>(RM) 50.00</b>	<b>50.00</b>	<b>50.00</b>	<b>50.00</b>	<b>50.00</b>	<b>50.00</b>
<b>Maximum</b>	<b>(RM) 50,000.00</b>	<b>35,000.00</b>	<b>10,000.00</b>	<b>10,000.00</b>	<b>50,000.00</b>	<b>35,000.00</b>
<b>Total expenditure</b>	<b>(RM) 2,393,314.00</b>	<b>1,359,665.00</b>	<b>358,771.00</b>	<b>1,319,909.00</b>	<b>2,752,085.00</b>	<b>2,679,574.00</b>

## Market Expenditure Pattern

Proportion of expenditure by tourist group

Category	International tourist	Domestic tourist	Total
Food and beverages	25.5%	28.1%	26.7%
Accommodation	24.1%	24.4%	24.3%
Local transportation	23.1%	15.4%	19.4%
Shopping	12.4%	15.7%	14.0%
Entertainment	10.6%	10.8%	10.7%
Others	4.3%	5.5%	4.9%
Total	100.0%	100.0%	100.0%

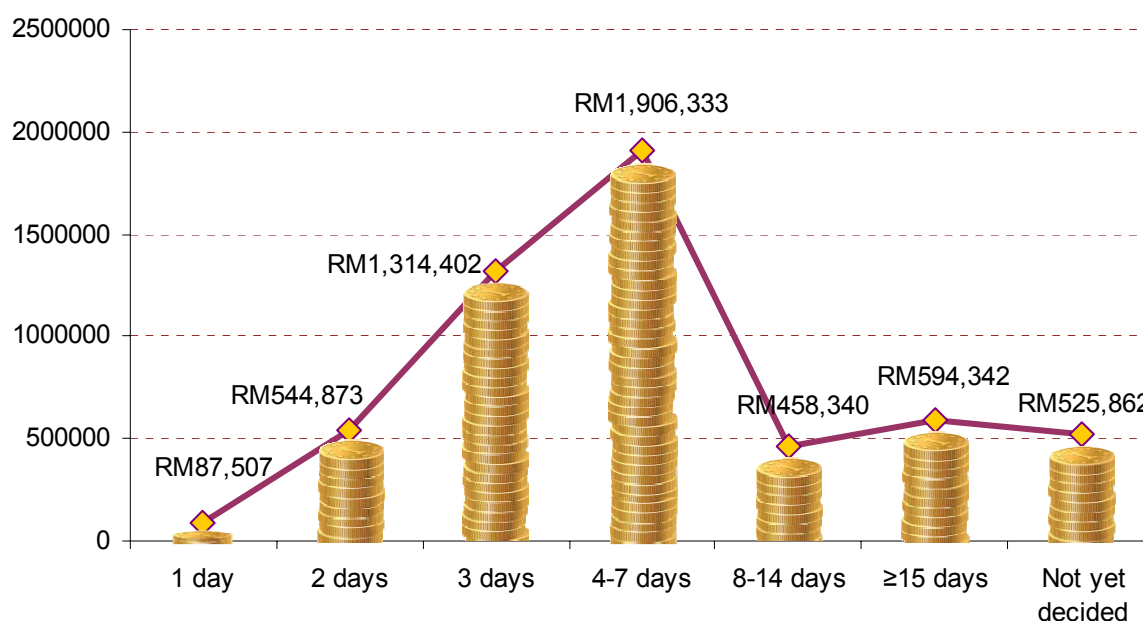
Average expenditure at destination by length of stay





## Market Expenditure Pattern

Total expenditure at destination by length of stay



Total expenditure at destination by purpose of visit

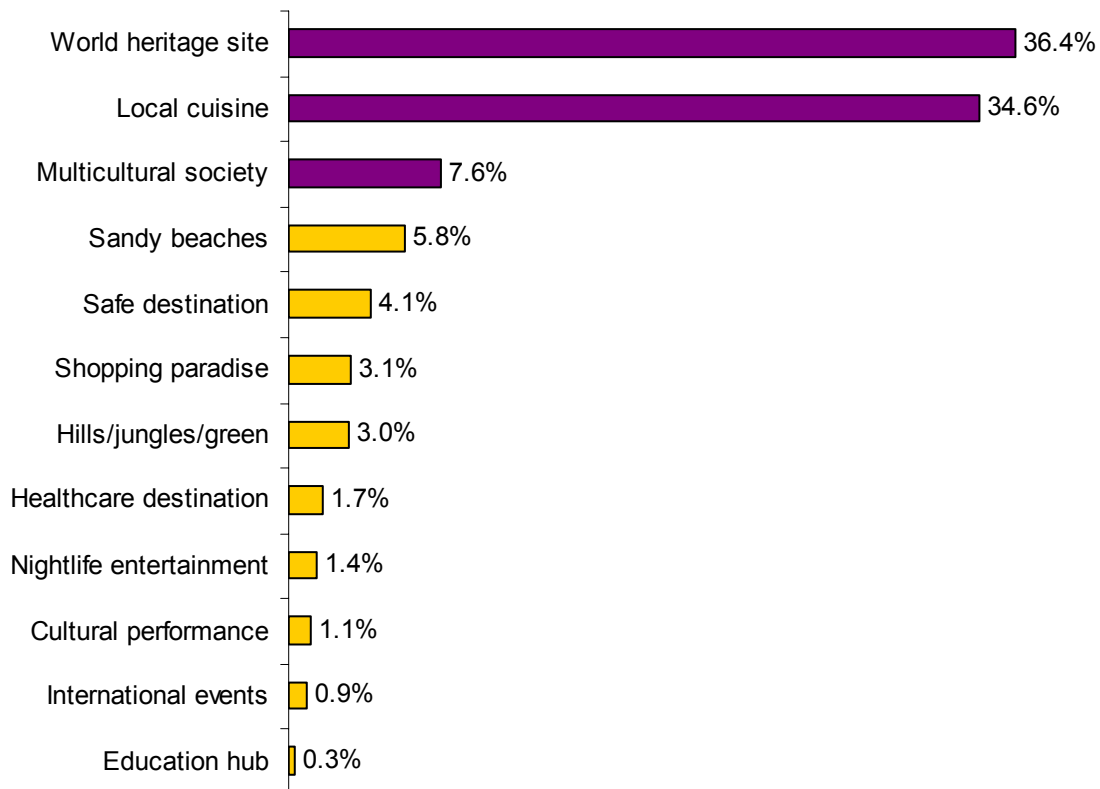
Expenditure	≤ RM 500	RM 501 – RM 1,000	RM 1,001 – RM 5,000	RM 5,001 – RM 10,000	≥ RM 10,001	Total
Leisure/recreation/holiday	47.5%	24.3%	24.9%	2.6%	0.7%	100.0%
Culture and heritage	55.3%	22.3%	19.0%	2.5%	0.9%	100.0%
Visit friends/relatives (VFR)	50.7%	24.6%	22.9%	0.7%	1.1%	100.0%
Education/teaching/training	47.5%	23.2%	27.1%	2.2%	0.0%	100.0%
Business/meeting	35.0%	26.8%	28.7%	5.1%	4.5%	100.0%
Shopping	40.2%	26.4%	25.3%	4.6%	3.4%	100.0%
Sport tournament/event	66.7%	22.7%	10.7%	0.0%	0.0%	100.0%
Health treatment	15.4%	11.5%	53.8%	11.5%	7.7%	100.0%
Convention/conference/trade show	56.9%	13.7%	21.6%	7.8%	0.0%	100.0%
Religion/pilgrimages	27.8%	33.3%	22.2%	16.7%	0.0%	100.0%
Others (visa application)	51.1%	38.3%	10.6%	0.0%	0.0%	100.0%

# Market Perception of Penang Image

## Image of Penang

- Majority of visitors perceived the image of Penang to be:
  - World Heritage Site** (36.4%)
  - Local cuisine** (34.6%)
  - Multicultural society** (7.6%)
- Only 0.3% of tourists are likely to associate Penang's image with education hub.

The images of Penang as perceived by visitors



## Market Perception of Penang Image

Image of Penang	International tourist	Domestic tourist	Total
World Heritage Site	38.5%	34.3%	36.4%
Local cuisine	27.3%	41.9%	34.6%
Multicultural society	11.4%	3.9%	7.6%
Sandy beaches	5.8%	5.9%	5.8%
Safe destination	4.5%	3.7%	4.1%
Shopping paradise	2.5%	3.7%	3.1%
Hills/jungles/green	3.6%	2.5%	3.0%
Healthcare destination	2.9%	0.6%	1.7%
Nightlife entertainment	1.5%	1.3%	1.4%
Cultural performance	1.4%	0.8%	1.0%
International events	0.4%	1.3%	0.9%
Education hub	0.3%	0.3%	0.3%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Image of Penang	18-25 yrs	26-35 yrs	36-49 yrs	> 50 yrs
World Heritage Site	34.8%	36.3%	39.7%	38.7%
Local cuisine	36.6%	35.0%	30.4%	30.7%
Multicultural society	7.1%	8.1%	7.9%	7.7%
Sandy beaches	7.0%	5.2%	4.3%	5.4%
Safe destination	3.6%	4.9%	2.9%	5.4%
Shopping paradise	2.5%	2.9%	5.2%	2.6%
Hills/jungles/green	3.0%	3.0%	3.1%	3.2%
Healthcare destination	1.2%	1.2%	3.2%	4.2%
Nightlife entertainment	1.4%	1.5%	1.0%	1.3%
Cultural performance	1.4%	0.9%	1.0%	0.6%
International events	0.9%	0.8%	1.0%	0.3%
Education hub	0.3%	0.3%	0.3%	0.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

# Market Perception of Penang Image

## Penang Image Assessment

- The figure below illustrates the **average score** of the elements of Penang's image based on the **Scale of 1 to 5**.

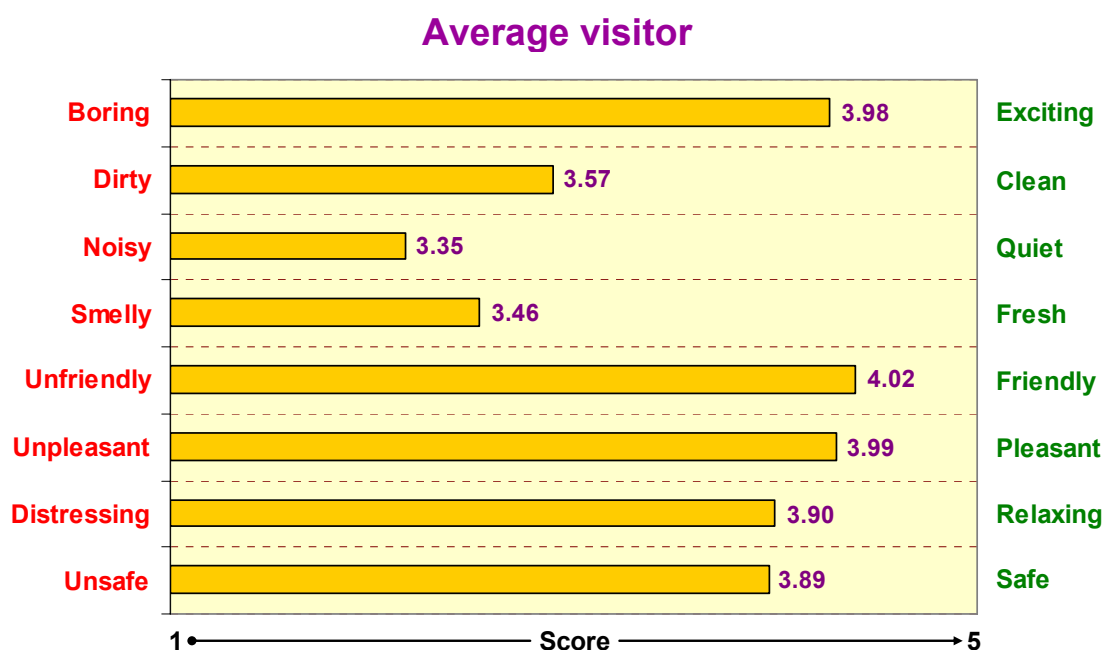
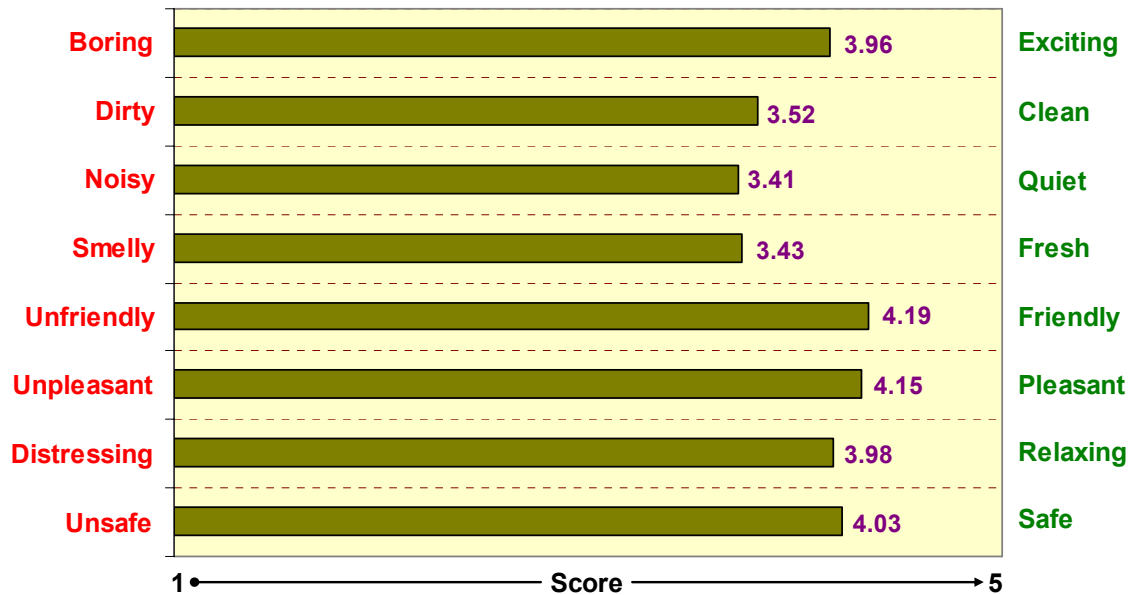


Image	Score 1	Score 2	Score 3	Score 4	Score 5	Image
Boring	1.4%	2.6%	21.3%	45.4%	29.2%	Exciting
Dirty	2.2%	7.8%	38.0%	35.1%	16.9%	Clean
Noisy	3.3%	12.7%	42.8%	28.1%	13.1%	Quiet
Smelly	2.7%	10.4%	40.7%	30.6%	15.6%	Fresh
Unfriendly	1.8%	3.3%	19.5%	41.7%	33.6%	Friendly
Unpleasant	1.5%	3.5%	20.1%	44.5%	30.5%	Pleasant
Distressing	1.7%	4.5%	23.7%	42.2%	27.9%	Relaxing
Unsafe	2.0%	3.8%	25.8%	40.0%	28.4%	Safe

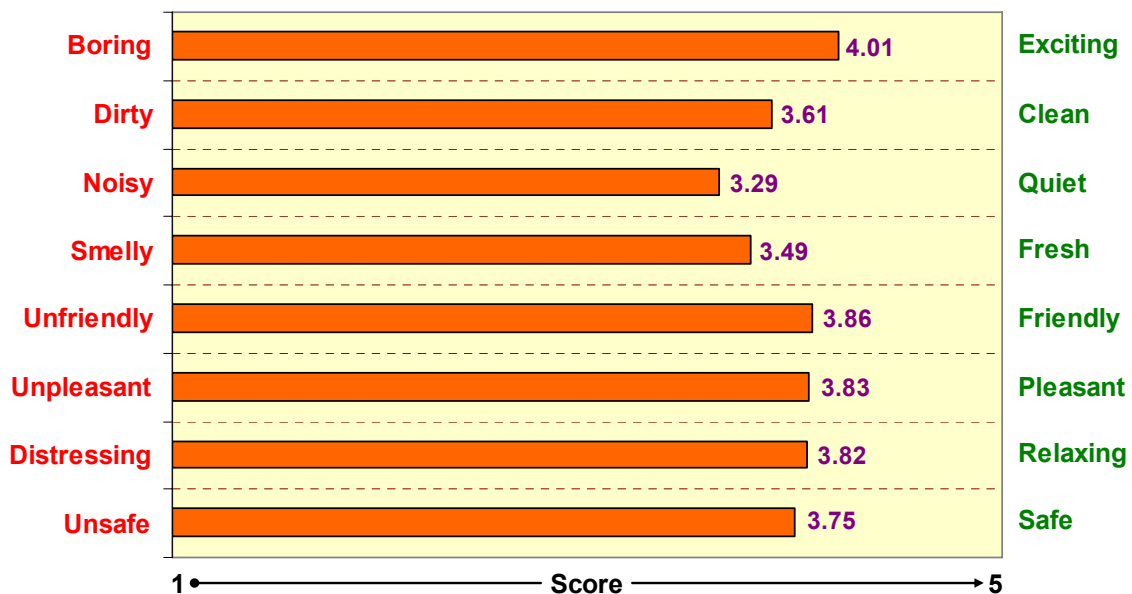
I felt safe walking alone in Penang	International tourist	Domestic tourist	Total
During daytime	57.0%	63.7%	60.1%
At night	43.0%	36.3%	39.9%
Total	100.0%	100.0%	100.0%

# Market Perception of Penang Image

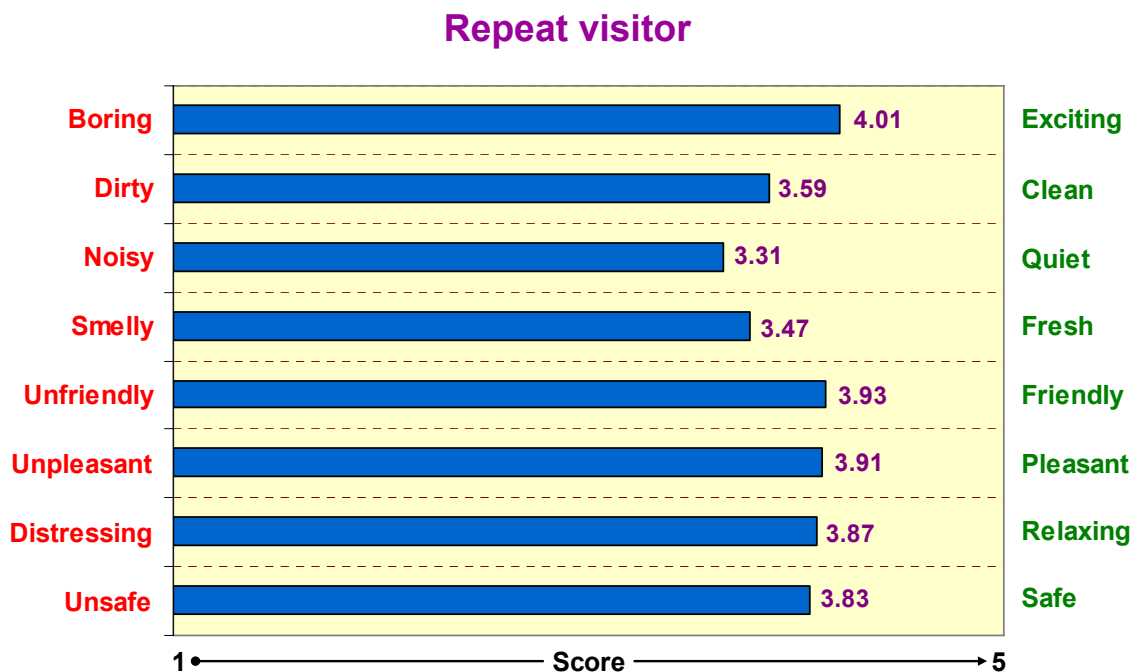
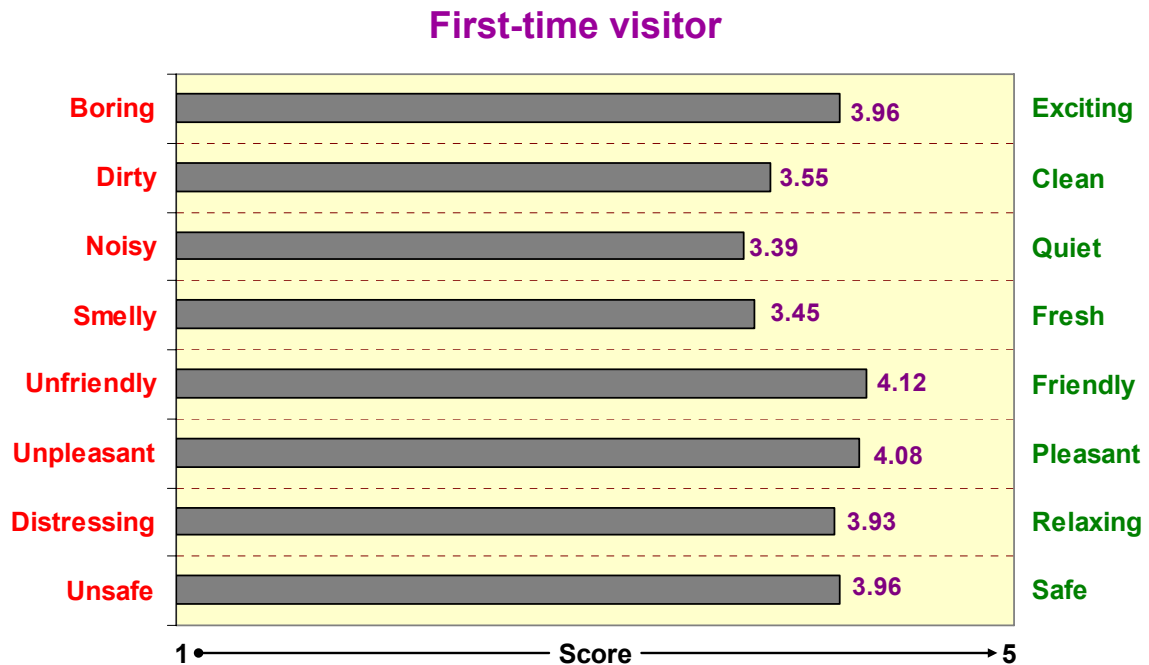
## International visitor



## Domestic visitor

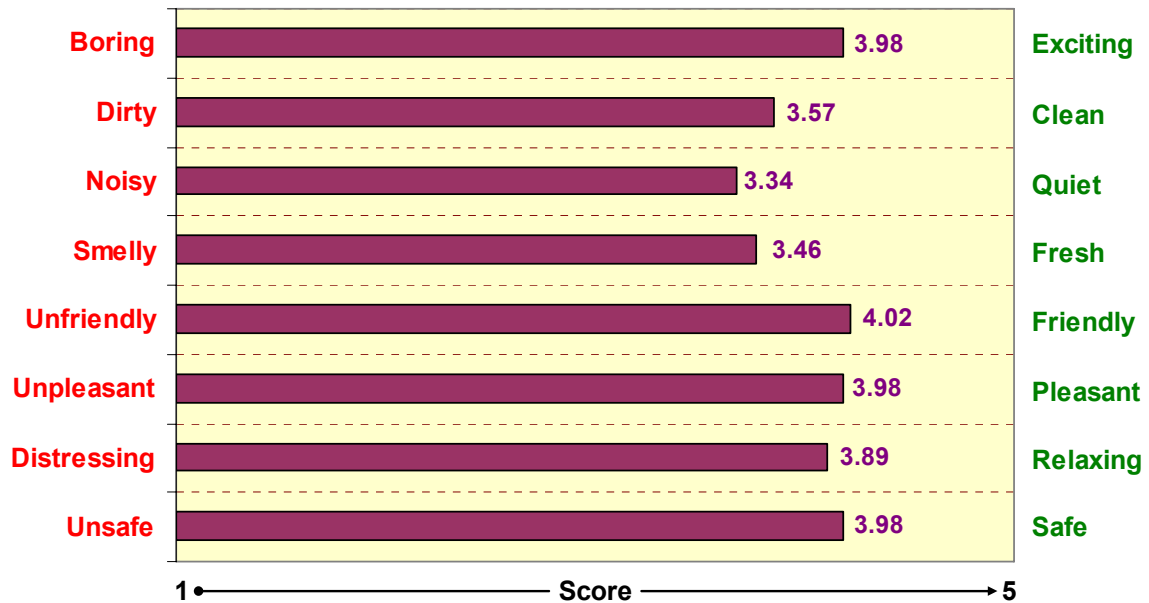


# Market Perception of Penang Image

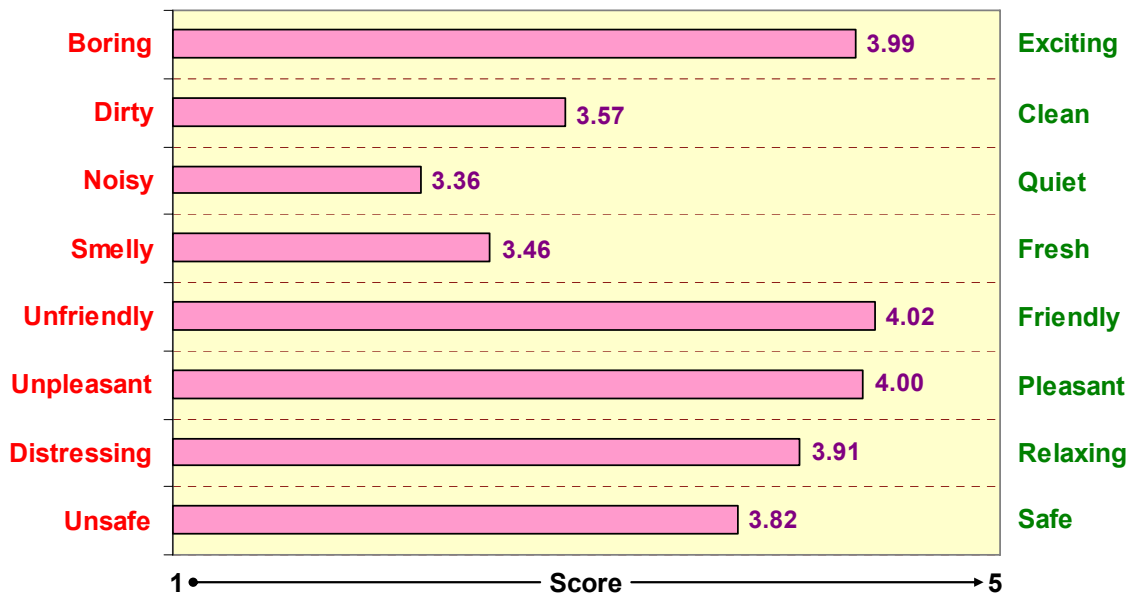


# Market Perception of Penang Image

## Male visitor



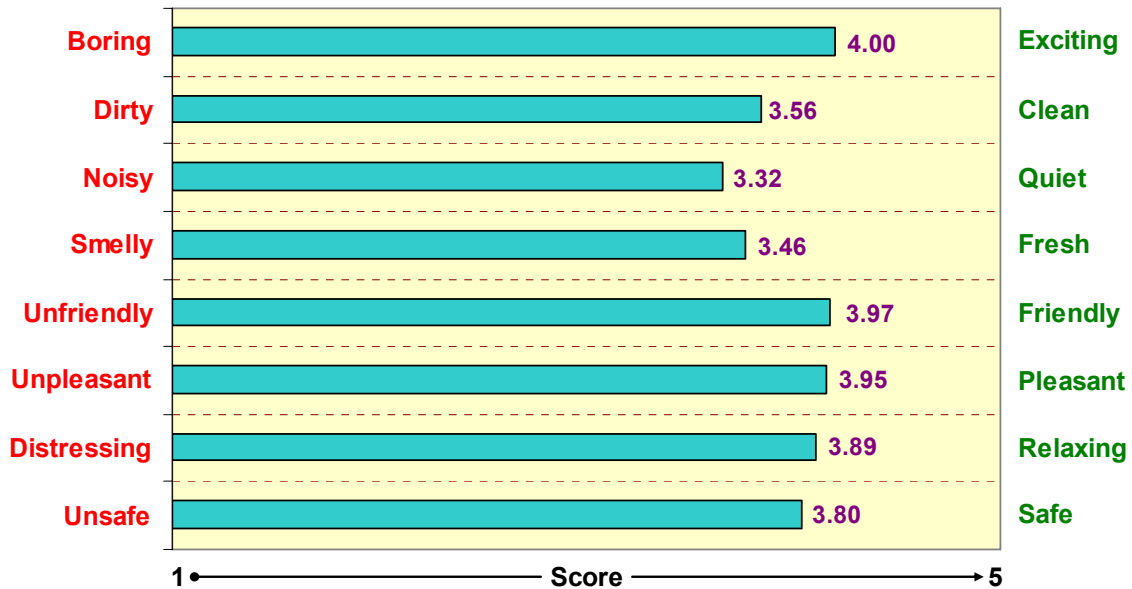
## Female visitor



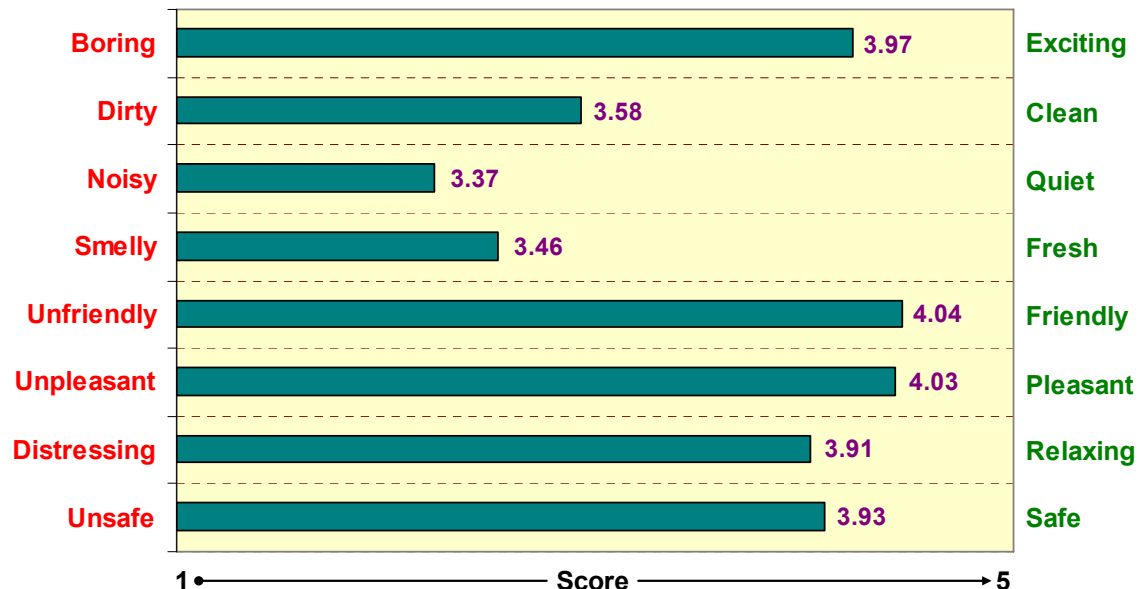


# Market Perception of Penang Image

Age group - 18 to 25 years old

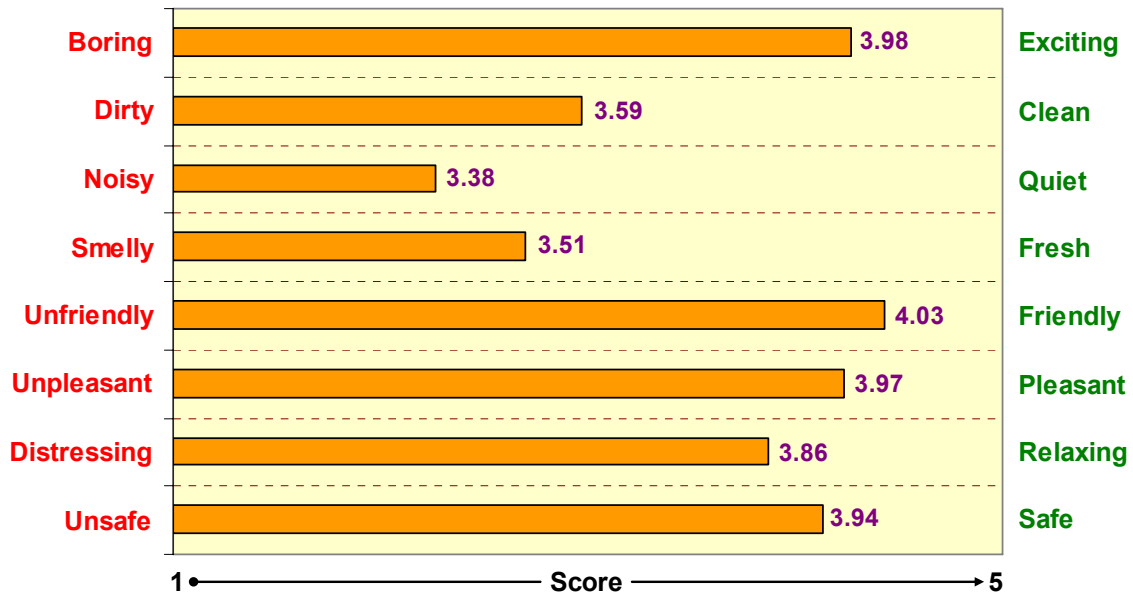


Age group - 26 to 35 years old

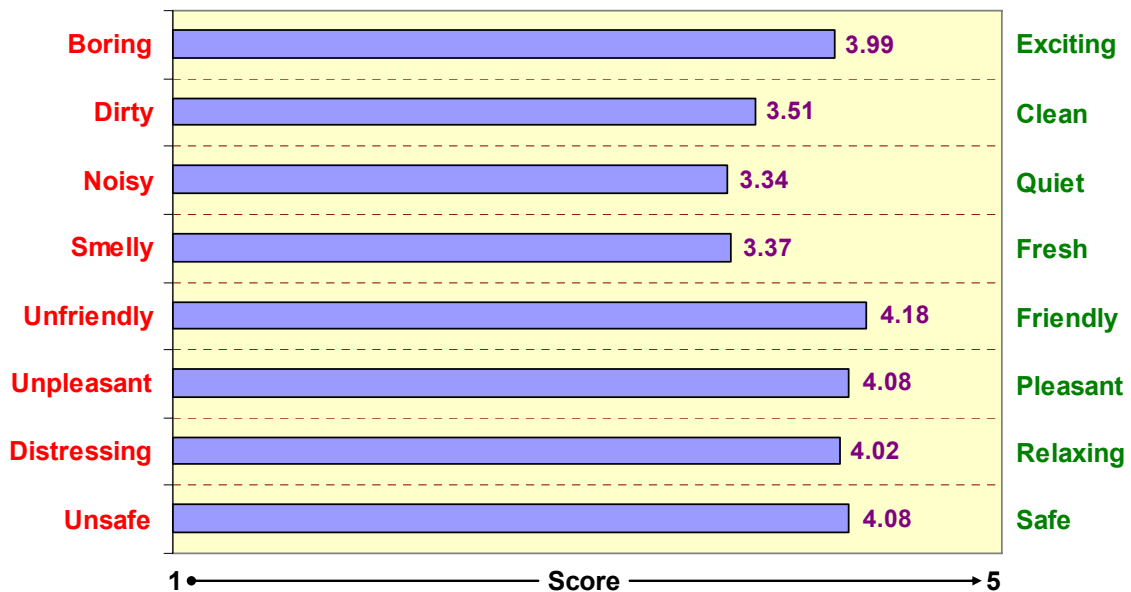


# Market Perception of Penang Image

**Age group - 36 to 49 years old**



**Age group - Above 50 years old**



# PENANG

## Travel Satisfaction

### Travel Satisfaction Score

#### Average visitor



**Average satisfaction score 3.82 / 5.00**

Not at all satisfied	0.4%
Slightly satisfied	3.1%
Somewhat satisfied	25.7%
<b>Very satisfied</b>	<b>56.0%</b>
Extremely satisfied	14.8%

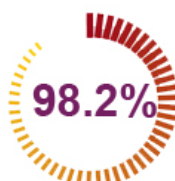
**Average experience - expectation score 3.36 / 5.00**

Did not meet expectations	0.7%
Partially met expectations	8.9%
<b>Met expectations</b>	<b>49.8%</b>
Exceeded expectations	34.6%
Far exceeded expectations	6.0%

#### Penang revisit intention



#### Willingness to recommend Penang



# PENANG

## Travel Satisfaction

### International visitor



Average satisfaction score **3.85 / 5.00**

Not at all satisfied	0.4%
Slightly satisfied	3.6%
Somewhat satisfied	23.1%
<b>Very satisfied</b>	<b>55.9%</b>
Extremely satisfied	17.0%

### Domestic visitor



Average satisfaction score **3.78 / 5.00**

Not at all satisfied	0.3%
Slightly satisfied	2.6%
Somewhat satisfied	28.3%
<b>Very satisfied</b>	<b>56.1%</b>
Extremely satisfied	12.7%

Average experience - expectation score

**3.39 / 5.00**

Did not meet expectations	1.1%
Partially met expectations	9.6%
<b>Met expectations</b>	<b>45.4%</b>
Exceeded expectations	36.5%
Far exceeded expectations	7.4%

Average experience - expectation score

**3.33 / 5.00**

Did not meet expectations	0.3%
Partially met expectations	8.2%
<b>Met expectations</b>	<b>54.2%</b>
Exceeded expectations	32.7%
Far exceeded expectations	4.6%

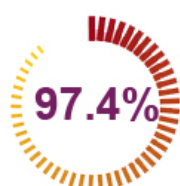
### Penang revisit intention



### Penang revisit intention



### Willingness to recommend Penang



### Willingness to recommend Penang



# PENANG

## Travel Satisfaction

### First-time visitor



Average satisfaction score **3.82 / 5.00**

Not at all satisfied	0.3%
Slightly satisfied	4.3%
Somewhat satisfied	23.7%
<b>Very satisfied</b>	<b>56.4%</b>
Extremely satisfied	15.3%

### Repeat visitor



Average satisfaction score **3.81 / 5.00**

Not at all satisfied	0.4%
Slightly satisfied	2.1%
Somewhat satisfied	27.6%
<b>Very satisfied</b>	<b>55.6%</b>
Extremely satisfied	14.4%

Average experience - expectation score

**3.37 / 5.00**

Did not meet expectations	1.3%
Partially met expectations	9.8%
<b>Met expectations</b>	<b>45.8%</b>
Exceeded expectations	36.5%
Far exceeded expectations	6.6%

Average experience - expectation score

**3.35 / 5.00**

Did not meet expectations	0.2%
Partially met expectations	8.0%
<b>Met expectations</b>	<b>53.6%</b>
Exceeded expectations	32.9%
Far exceeded expectations	5.4%

### Penang revisit intention



### Penang revisit intention



### Willingness to recommend Penang



### Willingness to recommend Penang



# PENANG

## Travel Satisfaction

### Male visitor



**Average satisfaction score 3.85 / 5.00**

Not at all satisfied	0.4%
Slightly satisfied	2.3%
Somewhat satisfied	24.5%
<b>Very satisfied</b>	<b>57.6%</b>
Extremely satisfied	15.1%

### Female visitor



**Average satisfaction score 3.80 / 5.00**

Not at all satisfied	0.3%
Slightly satisfied	3.7%
Somewhat satisfied	26.7%
<b>Very satisfied</b>	<b>54.7%</b>
Extremely satisfied	14.6%

**Average experience - expectation score**

**3.39 / 5.00**

Did not meet expectations	0.7%
Partially met expectations	6.9%
<b>Met expectations</b>	<b>50.6%</b>
Exceeded expectations	35.9%
Far exceeded expectations	5.9%

**Average experience - expectation score**

**3.34 / 5.00**

Did not meet expectations	0.7%
Partially met expectations	10.4%
<b>Met expectations</b>	<b>49.3%</b>
Exceeded expectations	33.6%
Far exceeded expectations	6.1%

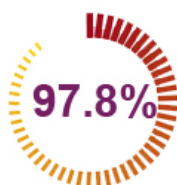
### Penang revisit intention



### Penang revisit intention



### Willingness to recommend Penang



### Willingness to recommend Penang



# PENANG

## Travel Satisfaction

### Age group

#### 18 to 25 years old



Average satisfaction score **3.80 / 5.00**

Not at all satisfied	0.4%
Slightly satisfied	3.5%
Somewhat satisfied	25.8%
<b>Very satisfied</b>	<b>55.9%</b>
Extremely satisfied	14.4%

#### 26 to 35 years old



Average satisfaction score **3.85 / 5.00**

Not at all satisfied	0.3%
Slightly satisfied	2.6%
Somewhat satisfied	24.4%
<b>Very satisfied</b>	<b>57.3%</b>
Extremely satisfied	15.4%

Average experience - expectation score  
**3.36 / 5.00**

Did not meet expectations	1.0%
Partially met expectations	8.8%
<b>Met expectations</b>	<b>49.5%</b>
Exceeded expectations	34.5%
Far exceeded expectations	6.2%

Average experience - expectation score  
**3.37 / 5.00**

Did not meet expectations	0.6%
Partially met expectations	9.0%
<b>Met expectations</b>	<b>50.1%</b>
Exceeded expectations	34.0%
Far exceeded expectations	6.4%

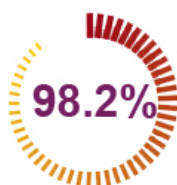
#### Penang revisit intention



#### Penang revisit intention



#### Willingness to recommend Penang



#### Willingness to recommend Penang





# PENANG

## Travel Satisfaction

### 36 to 49 years old



Average satisfaction score **3.77 / 5.00**

Not at all satisfied	0.3%
Slightly satisfied	3.9%
Somewhat satisfied	29.0%
<b>Very satisfied</b>	<b>52.4%</b>
Extremely satisfied	14.4%

Average experience - expectation score

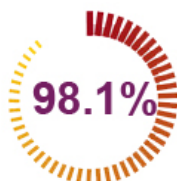
**3.35 / 5.00**

Did not meet expectations	0.6%
Partially met expectations	9.1%
<b>Met expectations</b>	<b>50.0%</b>
Exceeded expectations	36.1%
Far exceeded expectations	4.3%

Penang revisit intention



Willingness to recommend Penang



### Above 50 years old



Average satisfaction score **3.86 / 5.00**

Not at all satisfied	0.6%
Slightly satisfied	1.9%
Somewhat satisfied	24.5%
<b>Very satisfied</b>	<b>57.4%</b>
Extremely satisfied	15.7%

Average experience - expectation score

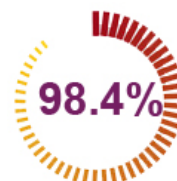
**3.40 / 5.00**

Did not meet expectations	0.0%
Partially met expectations	8.2%
<b>Met expectations</b>	<b>50.0%</b>
Exceeded expectations	35.2%
Far exceeded expectations	6.6%

Penang revisit intention



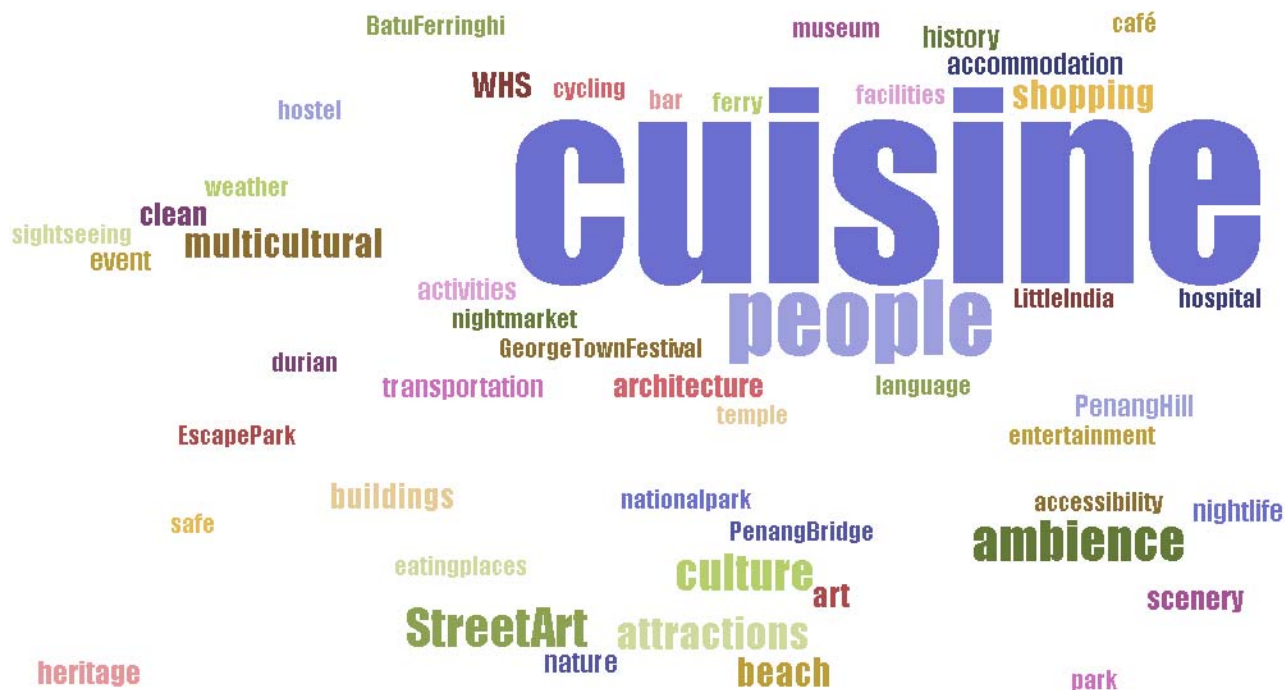
Willingness to recommend Penang



# PENANG

## Travel Satisfaction

What tourist LIKE about Penang?



	Like	Frequency	Total
1	Cuisine	1109	41.0%
2	The people	352	13.0%
3	Ambience	138	5.1%
4	Street Art	127	4.7%
5	Culture	124	4.6%
6	Attractions	97	3.6%
7	Multicultural	68	2.5%
8	Beach	66	2.4%
9	Shopping	65	2.4%
10	Buildings	45	1.7%
11	World Heritage Site	42	1.6%
12	Art	40	1.5%
13	Heritage	37	1.4%
14	Architecture	32	1.2%
15	Clean	27	1.0%

.....

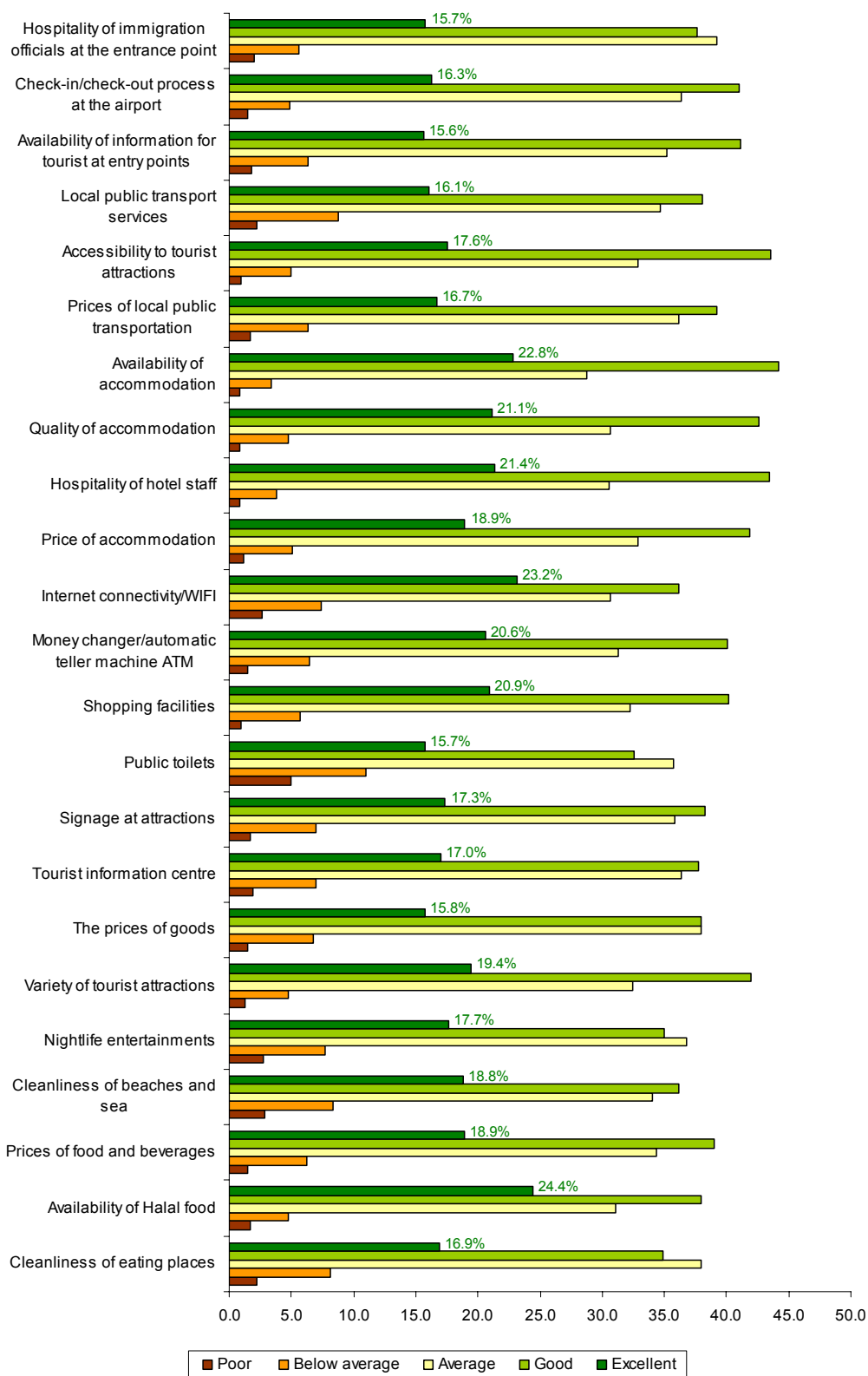
[illegible]

.....

# PENANG

## Travel Satisfaction

Tourist expectation of Penang destination attributes



# PENANG

## Travel Satisfaction

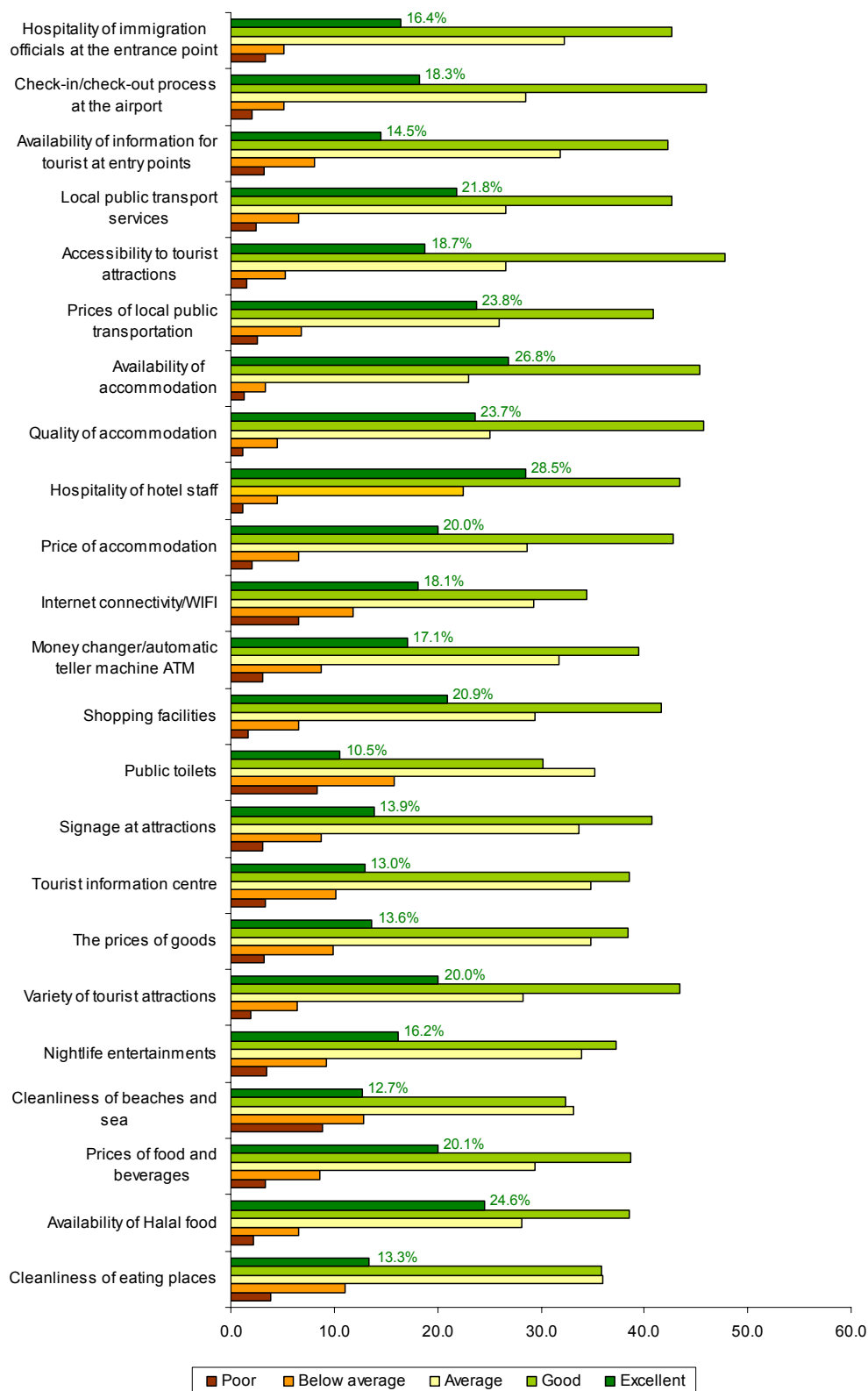
### Tourist expectation of Penang destination attributes

Attribute	Poor	Below average	Average	Good	Excellent	Total
<b><u>Accessibility</u></b>						
Hospitality of immigration officials at the entrance point	2.0%	5.6%	39.2%	37.6%	15.7%	100.0%
Check-in/check-out process at the airport	1.5%	4.9%	36.4%	41.0%	16.3%	100.0%
Availability of information for tourist at entry points	1.8%	6.3%	35.2%	41.1%	15.6%	100.0%
Local public transport services	2.2%	8.8%	34.7%	38.1%	16.1%	100.0%
Accessibility to tourist attractions	1.0%	5.0%	32.9%	43.5%	17.6%	100.0%
Prices of local public transportation	1.7%	6.3%	36.1%	39.2%	16.7%	100.0%
<b><u>Accommodation</u></b>						
Availability of accommodation	0.8%	3.4%	28.7%	44.2%	22.8%	100.0%
Quality of accommodation	0.8%	4.8%	30.7%	42.6%	21.1%	100.0%
Hospitality of hotel staff	0.8%	3.8%	30.6%	43.4%	21.4%	100.0%
Price of accommodation	1.2%	5.1%	32.9%	41.9%	18.9%	100.0%
<b><u>Tourist Amenities</u></b>						
Internet connectivity/WIFI	2.6%	7.4%	30.7%	36.1%	23.2%	100.0%
Money changer/automatic teller machine (ATM)	1.5%	6.4%	31.3%	40.1%	20.6%	100.0%
Shopping facilities	1.0%	5.7%	32.2%	40.2%	20.9%	100.0%
Public toilets	5.0%	11.0%	35.7%	32.6%	15.7%	100.0%
Signage at attractions	1.7%	7.0%	35.8%	38.3%	17.3%	100.0%
Tourist information centre	1.9%	7.0%	36.4%	37.7%	17.0%	100.0%
The prices of goods	1.5%	6.8%	37.9%	38.0%	15.8%	100.0%
Variety of tourist attractions	1.3%	4.8%	32.4%	42.0%	19.4%	100.0%
Nightlife entertainments	2.7%	7.7%	36.8%	35.0%	17.7%	100.0%
Cleanliness of beaches and sea	2.9%	8.3%	34.0%	36.1%	18.8%	100.0%
<b><u>Food/Meals</u></b>						
Prices of food and beverages	1.5%	6.2%	34.4%	39.0%	18.9%	100.0%
Availability of Halal food	1.7%	4.8%	31.1%	37.9%	24.4%	100.0%
Cleanliness of eating places	2.2%	8.1%	37.9%	34.9%	16.9%	100.0%

# PENANG

## Travel Satisfaction

### Tourist experience of Penang destination attributes



# PENANG

## Travel Satisfaction

### Tourist experience of Penang destination attributes

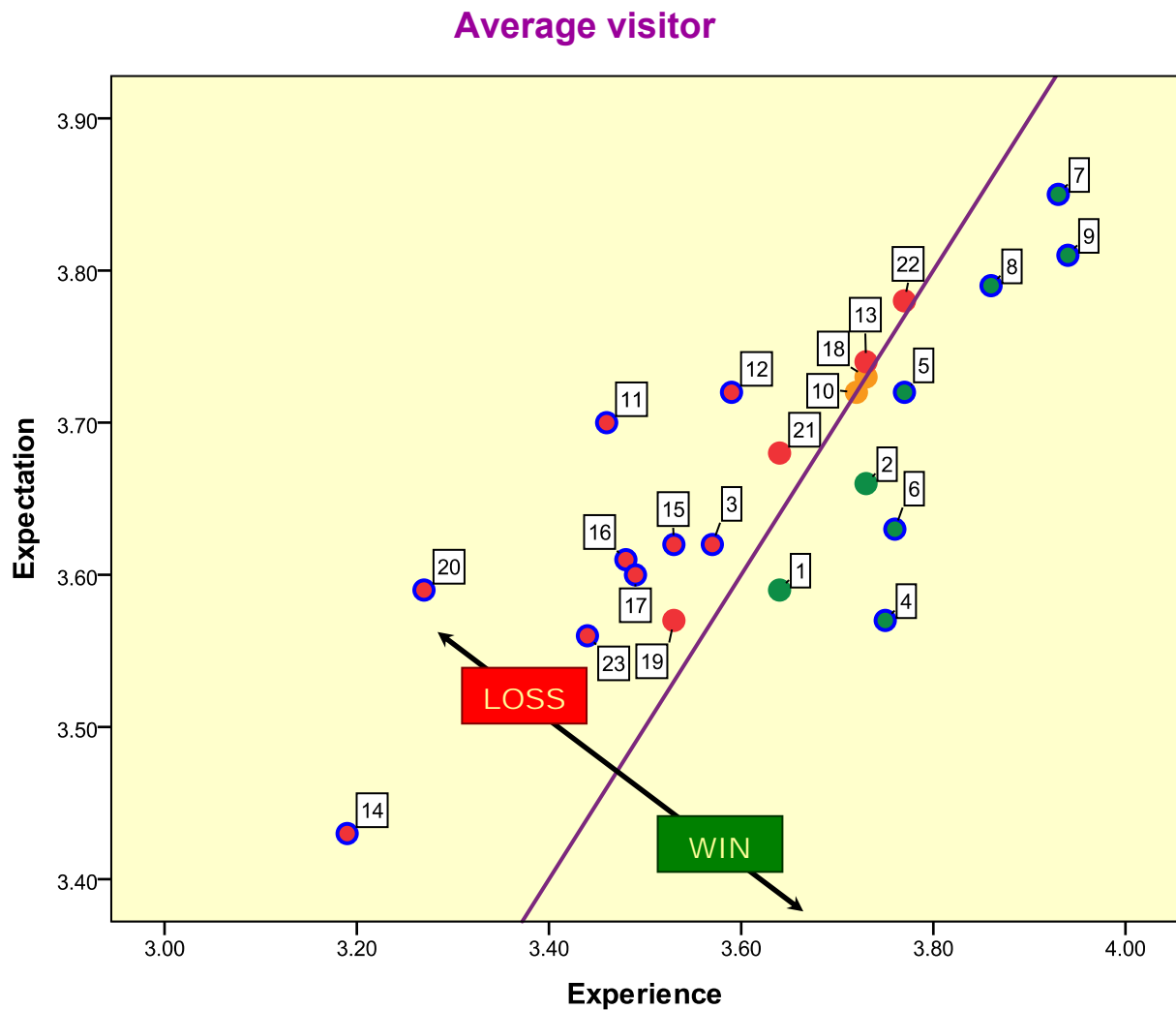
Attribute	Poor	Below average	Average	Good	Excellent	Total
<b><u>Accessibility</u></b>						
Hospitality of immigration officials at the entrance point	3.4%	5.2%	32.3%	42.7%	16.4%	100.0%
Check-in/check-out process at the airport	2.1%	5.2%	28.5%	46.0%	18.3%	100.0%
Availability of information for tourist at entry points	3.2%	8.1%	31.9%	42.3%	14.5%	100.0%
Local public transport services	2.5%	6.5%	26.6%	42.7%	21.8%	100.0%
Accessibility to tourist attractions	1.6%	5.3%	26.6%	47.8%	18.7%	100.0%
Prices of local public transportation	2.6%	6.8%	25.9%	40.9%	23.8%	100.0%
<b><u>Accommodation</u></b>						
Availability of accommodation	1.3%	3.4%	23.0%	45.4%	26.8%	100.0%
Quality of accommodation	1.1%	4.5%	25.0%	45.7%	23.7%	100.0%
Hospitality of hotel staff	1.1%	4.5%	22.5%	43.4%	28.5%	100.0%
Price of accommodation	2.0%	6.5%	28.7%	42.8%	20.0%	100.0%
<b><u>Tourist Amenities</u></b>						
Internet connectivity/WIFI	6.5%	11.8%	29.3%	34.4%	18.1%	100.0%
Money changer/automatic teller machine (ATM)	3.1%	8.8%	31.7%	39.4%	17.1%	100.0%
Shopping facilities	1.7%	6.5%	29.4%	41.6%	20.9%	100.0%
Public toilets	8.3%	15.8%	35.2%	30.2%	10.5%	100.0%
Signage at attractions	3.1%	8.8%	33.6%	40.7%	13.9%	100.0%
Tourist information centre	3.3%	10.2%	34.8%	38.6%	13.0%	100.0%
The prices of goods	3.2%	9.9%	34.8%	38.4%	13.6%	100.0%
Variety of tourist attractions	1.9%	6.4%	28.3%	43.4%	20.0%	100.0%
Nightlife entertainments	3.5%	9.2%	33.9%	37.2%	16.2%	100.0%
Cleanliness of beaches and sea	8.9%	12.8%	33.1%	32.4%	12.7%	100.0%
<b><u>Food/Meals</u></b>						
Prices of food and beverages	3.3%	8.6%	29.4%	38.7%	20.1%	100.0%
Availability of Halal food	2.2%	6.5%	28.1%	38.6%	24.6%	100.0%
Cleanliness of eating places	3.9%	11.0%	36.0%	35.8%	13.3%	100.0%



# PENANG

## Travel Satisfaction

Holiday Satisfaction = Experience - Expectation



**Note:** Win = improvement of visitor's expectation; Loss = reduction in visitor's expectation; Drawline = closely matching of visitor's expectation

# PENANG

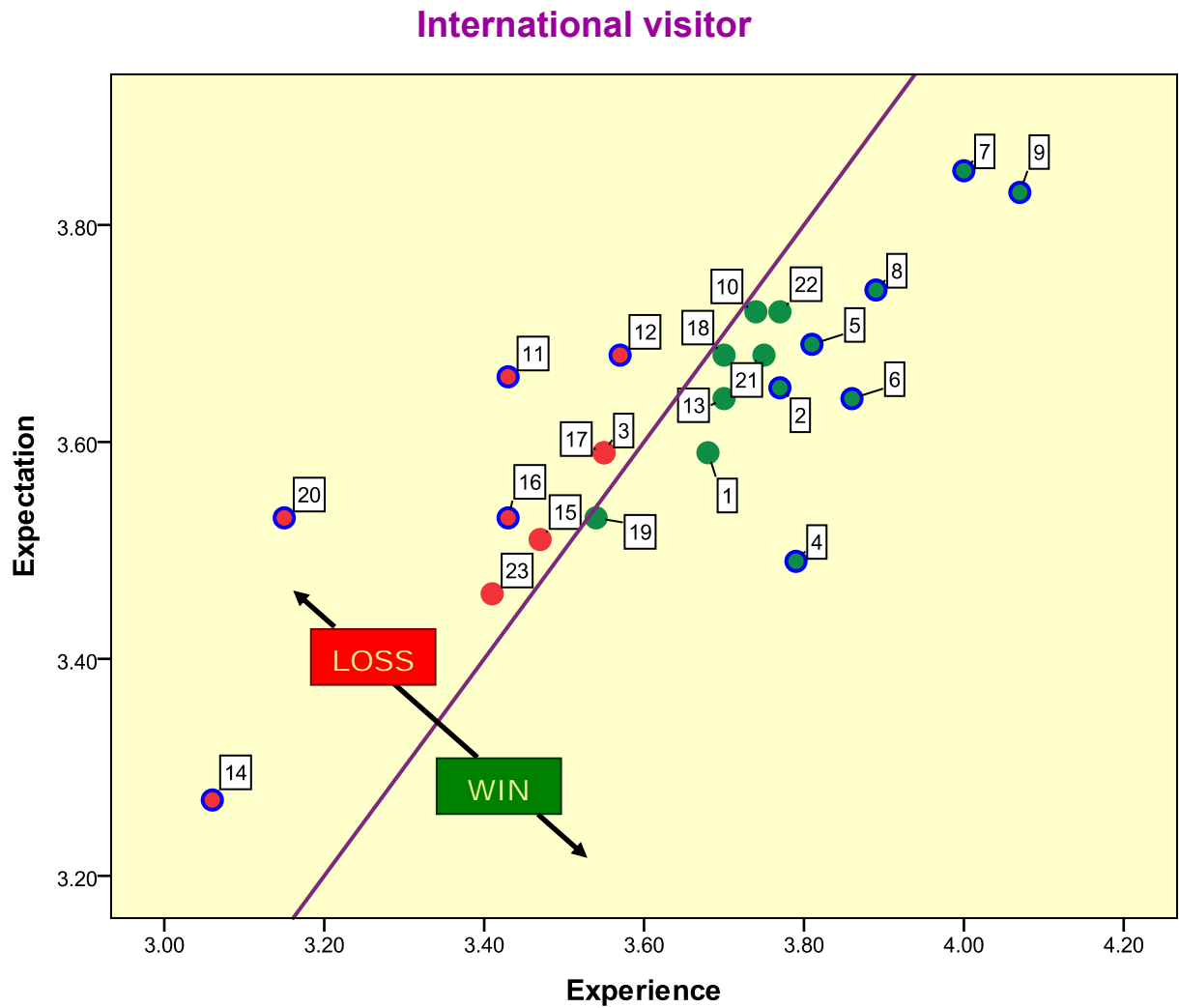
## Travel Satisfaction

### Summary of result for average tourist

No	Attribute	Expectation (Expt)		Experience (Exp)		(Exp – Expt) <sup>1</sup>	t-TEST	
		Mean	SD	Mean	SD		t <sup>2</sup>	SIG <sup>3</sup>
<b><u>Accessibility</u></b>								
1	Hospitality of immigration officials at the entrance point	3.59	0.886	3.64	0.932	0.05	0.173	0.863
2	Check-in/check-out process at the airport	3.66	0.859	3.73	0.891	0.07	-2.762	0.006
3	Availability of information for tourist at entry points	3.62	0.882	3.57	0.944	<b>-0.05</b>	4.252	0.000
4	Local public transport services	3.57	0.935	3.75	0.949	<b>0.18</b>	-8.944	0.000
5	Accessibility to tourist attractions	3.72	0.846	3.77	0.867	<b>0.05</b>	-3.487	0.000
6	Prices of local public transportation	3.63	0.891	3.76	0.975	<b>0.13</b>	-5.434	0.000
<b><u>Accommodation</u></b>								
7	Availability of accommodation	3.85	0.840	3.93	0.866	<b>0.08</b>	-5.781	0.000
8	Quality of accommodation	3.79	0.856	3.86	0.865	<b>0.07</b>	-4.795	0.000
9	Hospitality of hotel staff	3.81	0.844	3.94	0.887	<b>0.13</b>	-7.423	0.000
10	Price of accommodation	3.72	0.868	3.72	0.922	0.00	0.856	0.392
<b><u>Tourist Amenities</u></b>								
11	Internet connectivity/WIFI	3.70	0.990	3.46	1.111	<b>-0.24</b>	12.153	0.000
12	Money changer/automatic teller machine (ATM)	3.72	0.915	3.59	0.971	<b>-0.13</b>	7.860	0.000
13	Shopping facilities	3.74	0.887	3.73	0.919	-0.01	0.129	0.897
14	Public toilets	3.43	1.040	3.19	1.085	<b>-0.24</b>	13.860	0.000
15	Signage at attractions	3.62	0.907	3.53	0.942	<b>-0.09</b>	5.704	0.000
16	Tourist information centre	3.61	0.912	3.48	0.957	<b>-0.13</b>	8.446	0.000
17	The prices of goods	3.60	0.885	3.49	0.956	<b>-0.11</b>	6.681	0.000
18	Variety of tourist attractions	3.73	0.872	3.73	0.916	0.00	-0.080	0.936
19	Nightlife entertainments	3.57	0.957	3.53	0.982	-0.04	2.081	0.037
20	Cleanliness of beaches & sea	3.59	0.978	3.27	1.115	<b>-0.32</b>	16.672	0.000
<b><u>Food/Meals</u></b>								
21	Prices of food and beverages	3.68	0.901	3.64	1.001	-0.04	2.668	0.008
22	Availability of Halal food	3.78	0.927	3.77	0.965	-0.01	0.610	0.542
23	Cleanliness of eating places	3.56	0.936	3.44	0.983	<b>-0.12</b>	8.144	0.000

**Note:** 1. Mean of differences; 2. Value of t; 3. SIG: Level of significance, \*\*\*p<0.001 (1:1000); Statements highlighted in light green indicate satisfaction, while statements highlighted in light red indicate dissatisfaction

# Travel Satisfaction



**Note:** Win = improvement of visitor's expectation; Loss = reduction in visitor's expectation; Drawline = closely matching of visitor's expectation

# PENANG

## Travel Satisfaction

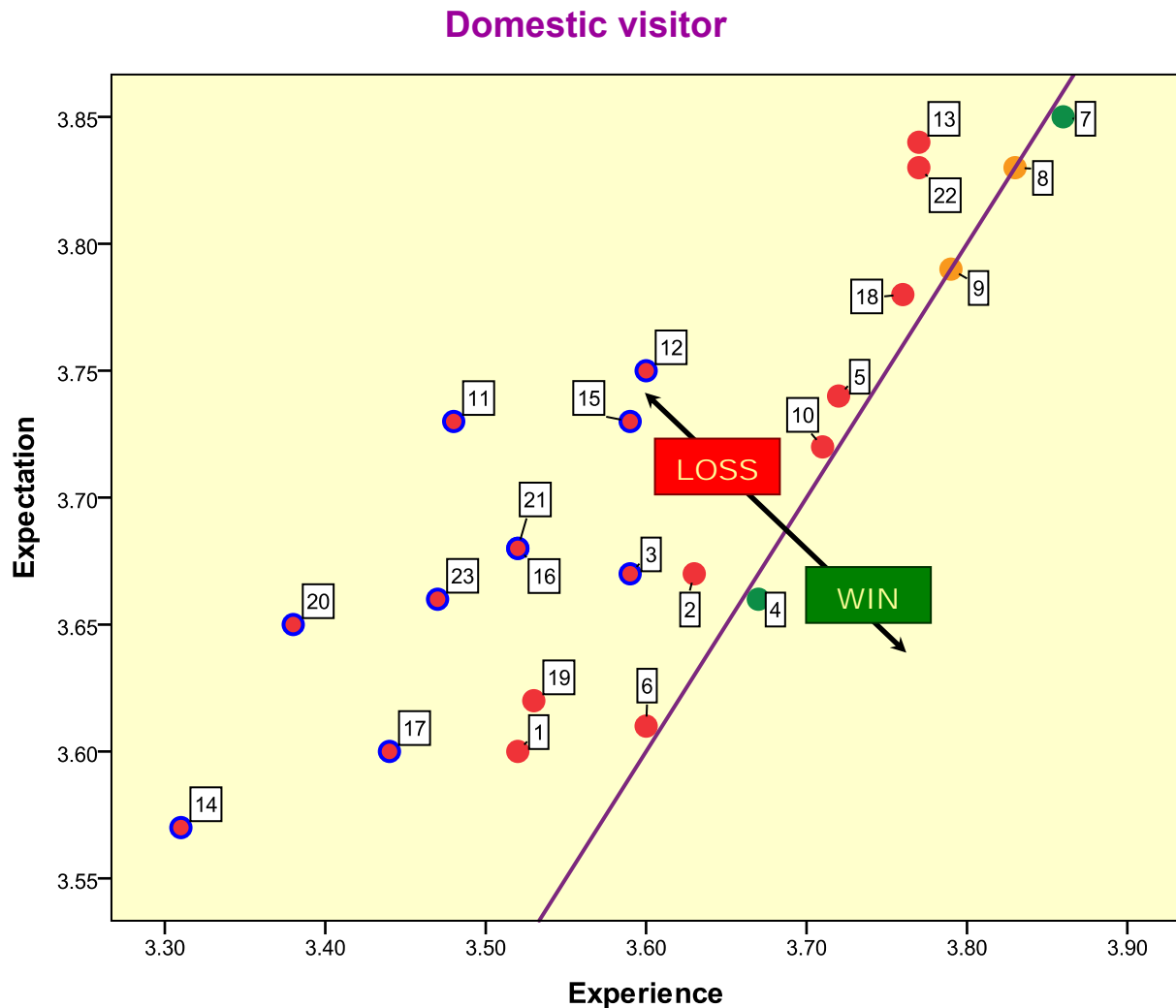
### Summary of result for international tourist

No	Attribute	Expectation (Expt)		Experience (Exp)		(Exp – Expt) <sup>1</sup>	t-TEST	
		Mean	SD	Mean	SD		t <sup>2</sup>	SIG <sup>3</sup>
<b><u>Accessibility</u></b>								
1	Hospitality of immigration officials at the entrance point	3.59	0.927	3.68	0.953	0.09	-0.936	0.349
2	Check-in/check-out process at the airport	3.65	0.895	3.77	0.898	<b>0.12</b>	-3.901	0.000
3	Availability of information for tourist at entry points	3.59	0.920	3.55	1.001	-0.04	2.444	0.015
4	Local public transport services	3.49	0.994	3.79	0.966	<b>0.30</b>	-10.182	0.000
5	Accessibility to tourist attractions	3.69	0.871	3.81	0.893	<b>0.12</b>	-5.540	0.000
6	Prices of local public transportation	3.64	0.924	3.86	0.997	<b>0.22</b>	-7.054	0.000
<b><u>Accommodation</u></b>								
7	Availability of accommodation	3.85	0.850	4.00	0.882	<b>0.15</b>	-7.030	0.000
8	Quality of accommodation	3.74	0.901	3.89	0.900	<b>0.15</b>	-6.461	0.000
9	Hospitality of hotel staff	3.83	0.863	4.07	0.892	<b>0.24</b>	-10.367	0.000
10	Price of accommodation	3.72	0.889	3.74	0.964	0.02	-0.334	0.738
<b><u>Tourist Amenities</u></b>								
11	Internet connectivity/WIFI	3.66	1.031	3.43	1.166	<b>-0.23</b>	7.525	0.000
12	Money changer/automatic teller machine (ATM)	3.68	0.951	3.57	1.014	<b>-0.11</b>	4.468	0.000
13	Shopping facilities	3.64	0.935	3.70	0.941	0.06	-2.506	0.012
14	Public toilets	3.27	1.116	3.06	1.136	<b>-0.21</b>	8.400	0.000
15	Signage at attractions	3.51	0.944	3.47	0.967	-0.04	1.939	0.053
16	Tourist information centre	3.53	0.943	3.43	1.006	<b>-0.10</b>	4.711	0.000
17	The prices of goods	3.59	0.907	3.55	0.971	-0.04	2.419	0.016
18	Variety of tourist attractions	3.68	0.890	3.70	0.951	0.02	-0.427	0.669
19	Nightlife entertainments	3.53	0.978	3.54	1.008	0.01	-0.197	0.844
20	Cleanliness of beaches & sea	3.53	1.045	3.15	1.195	<b>-0.38</b>	12.686	0.000
<b><u>Food/Meals</u></b>								
21	Prices of food and beverages	3.68	0.929	3.75	0.995	0.07	-3.188	0.001
22	Availability of Halal food	3.72	0.988	3.77	1.008	0.05	-1.531	0.126
23	Cleanliness of eating places	3.46	0.977	3.41	1.004	-0.05	2.438	0.015

**Note:** 1. Mean of differences; 2. Value of t; 3. SIG: Level of significance, \*\*\*p<0.001 (1:1000); Statements highlighted in light green indicate satisfaction, while statements highlighted in light red indicate dissatisfaction

# PENANG

## Travel Satisfaction



**Note:** Win = improvement of visitor's expectation; Loss = reduction in visitor's expectation; Drawline = closely matching of visitor's expectation

# PENANG

## Travel Satisfaction

### Summary of result for domestic tourist

No	Attribute	Expectation (Expt)		Experience (Exp)		(Exp – Expt) <sup>1</sup>	t-TEST	
		Mean	SD	Mean	SD		t <sup>2</sup>	SIG <sup>3</sup>
<b><u>Accessibility</u></b>								
1	Hospitality of immigration officials at the entrance point	3.60	0.836	3.52	0.869	-0.08	1.812	0.070
2	Check-in/check-out process at the airport	3.67	0.814	3.63	0.868	-0.04	1.127	0.260
3	Availability of information for tourist at entry points	3.67	0.835	3.59	0.873	<b>-0.08</b>	3.737	0.000
4	Local public transport services	3.66	0.858	3.67	0.913	0.01	-0.473	0.636
5	Accessibility to tourist attractions	3.74	0.818	3.72	0.836	-0.02	0.861	0.389
6	Prices of local public transportation	3.61	0.855	3.60	0.912	-0.01	0.791	0.429
<b><u>Accommodation</u></b>								
7	Availability of accommodation	3.85	0.830	3.86	0.843	0.01	-0.860	0.390
8	Quality of accommodation	3.83	0.807	3.83	0.824	0.00	0.157	0.875
9	Hospitality of hotel staff	3.79	0.823	3.79	0.858	0.00	0.773	0.440
10	Price of accommodation	3.72	0.845	3.71	0.875	-0.01	1.686	0.092
<b><u>Tourist Amenities</u></b>								
11	Internet connectivity/WIFI	3.73	0.946	3.48	1.053	<b>-0.25</b>	9.966	0.000
12	Money changer/automatic teller machine (ATM)	3.75	0.877	3.60	0.927	<b>-0.15</b>	6.803	0.000
13	Shopping facilities	3.84	0.827	3.77	0.896	-0.07	2.915	0.004
14	Public toilets	3.57	0.942	3.31	1.021	<b>-0.26</b>	11.365	0.000
15	Signage at attractions	3.73	0.857	3.59	0.915	<b>-0.14</b>	6.227	0.000
16	Tourist information centre	3.68	0.876	3.52	0.908	<b>-0.16</b>	7.369	0.000
17	The prices of goods	3.60	0.864	3.44	0.937	<b>-0.16</b>	7.076	0.000
18	Variety of tourist attractions	3.78	0.852	3.76	0.880	-0.02	0.359	0.720
19	Nightlife entertainments	3.62	0.935	3.53	0.955	-0.09	3.337	0.001
20	Cleanliness of beaches & sea	3.65	0.910	3.38	1.027	<b>-0.27</b>	10.860	0.000
<b><u>Food/Meals</u></b>								
21	Prices of food and beverages	3.68	0.874	3.52	0.993	<b>-0.16</b>	6.963	0.000
22	Availability of Halal food	3.83	0.875	3.77	0.932	-0.06	2.280	0.023
23	Cleanliness of eating places	3.66	0.884	3.47	0.960	<b>-0.19</b>	9.337	0.000

**Note:** 1. Mean of differences; 2. Value of t; 3. SIG: Level of significance, \*\*\*p<0.001 (1:1000); Statements highlighted in light green indicate satisfaction, while statements highlighted in light red indicate dissatisfaction