

RESEARCH DIVISION UNIT

The Research Division is responsible to provide knowledge and strategic guidance to support STB's marketing and promotions in domestic and international markets, and the sector at large to position Sarawak more competitively and improve destination management through efficient policies and governance.

The division acts as a one-stop centre which provides information on major tourism global trends, consumer demographics, forecasts, recommendations and guidelines for proactive marketing and promotion in STB's key markets. The division also highlights issues and challenges faced in marketing Sarawak.

To obtain deep market intelligence, the division collaborates with international tourism research organisations such as Amadeus, UNWTO, Euromonitor and China Outbound Tourism Research Institute. These collaborations support good practices on tourism planning, marketing, development and management.

The research division assists all other divisions in STB to provide data on market intelligence, trends in source markets, product enhancement and product segmentation based on markets. To accomplish this in 2022, the research division completed 14 research projects in different areas of marketing and promotion. The highlights of some of these projects are as follows:

Projects completed in 2022

1. Singapore residents' travel motivation, perception, and demands to visit Sarawak under new norm travel.
2. Domestic tourism survey–travellers' demands, perceptions and intention to travel to Sarawak post-COVID-19: Domestic consumers and stakeholders study.
3. Sarawak Tourism Product Experience 2021: A holistic analysis.
4. Tourism industry players' perceptions about new norm travel and intentions to visit Sarawak, ASEAN/Asia B2B sessions 2022.
5. Sarawak residents' travel intention, demands, main activities and SSS visibility within the state: Phase 2 survey, May 2022.
6. ITB India 2022: Virtual, 5-7 April
Tourism industry players' response about new norm travel and intention to visit Sarawak: ITB India virtual 2022 B2B session.
7. TAFI Convention, 20 - 22 September 2022
TAFI Convention: Study on Indian tourism industry stakeholders' response towards Sarawak.
8. Responsible Tourism Research titled 'Local community awareness and intention to participate in Responsible Tourism initiatives in Sarawak'.
9. Tourism industry players' perceptions about travellers' intention to visit Sarawak: Seoul, South Korea, October 2022.
10. Rainforest World Music Festival Hybrid 2022–Visitor Experience & Satisfaction study.
11. Borneo Jazz Festival Hybrid 2022–Visitor Experience & Satisfaction study.
12. Research on Japan consumer market: Japanese travel intention & product demands in Sarawak.
13. Tourism industry players' perceptions about Sarawak: WTM London, Nov 2022.
14. Tourism industry players' perceptions and intention to visit Sarawak: Royal Brunei Airlines & Taiwan agents B2B session, December 2022.

1. SINGAPORE RESIDENTS' TRAVEL MOTIVATION, PERCEPTION, AND DEMANDS TO VISIT SARAWAK UNDER NEW NORM TRAVEL

This research aimed to identify and understand Singapore (SG) residents' travel intention and motivation to visit Sarawak; to identify their demographic, psychographic and product-related segments; to ascertain Sarawak's visibility among Singapore residents; and to give recommendations for marketing and promoting Sarawak in Singapore under new norm travel.

Quantitative methodology was applied and deployed through an online survey. The market coverage was Singapore and the respondents were SG citizens and SG permanent residents (PR). The total sample size was 552, where 501 were SG citizens and 51 were SG PR holders. The targeted age group was 18 - 67 years old. The profiling of respondents was based on age, gender, race, income, employment and dwelling type. The sampling selection was based on those who intended to travel overseas.

i. Singapore visitor arrivals in Sarawak 2018 - 2022

YEAR	NUMBER OF VISITORS	% CHANGE (+/-)
2018	43,734	3.69%
2019	46,812	7.04%
2020	7,363	-84.27%
2021	182	-97.53%
2022	32,228	17,607.00%

Source: Department of Immigration, Sarawak & MTCP

The comparison of pre-COVID-19 VA ie, 2019 & Sarawak had a recovery of **68.84%** achieved.

The airline connectivity between Sarawak and Singapore boosted the visitor arrivals.

ii. Key Findings

a. Demographic profiling of the respondents

PROFILE OF ALL RESPONDENTS



Male **50%**
Female **50%**



Married **57%**
Single **39%**



Employed full-time **77%**
Employed part-time **6%**
Self-employed **6%**



18 - 24 years old **13%**
25 - 34 years old **26%**
35 - 44 years old **26%**
45 - 67 years old **34%**



Have children 0 - 6 years old **13%**
Have children 7 - 12 years old **19%**
Have children 13 - 17 years old **13%**
Have children 18 - 20 years old **9%**
No children below 21 years old **53%**



HDB 3-rooms or smaller **24%**
HDB 4-rooms **32%**
HDB 5-rooms or executive **23%**
Condominium / Landed **21%**



Chinese **73%**
Malay **14%**
Indian **13%**



Singapore citizen **82%**
Singapore PR **9%**
Pass holders **9%**

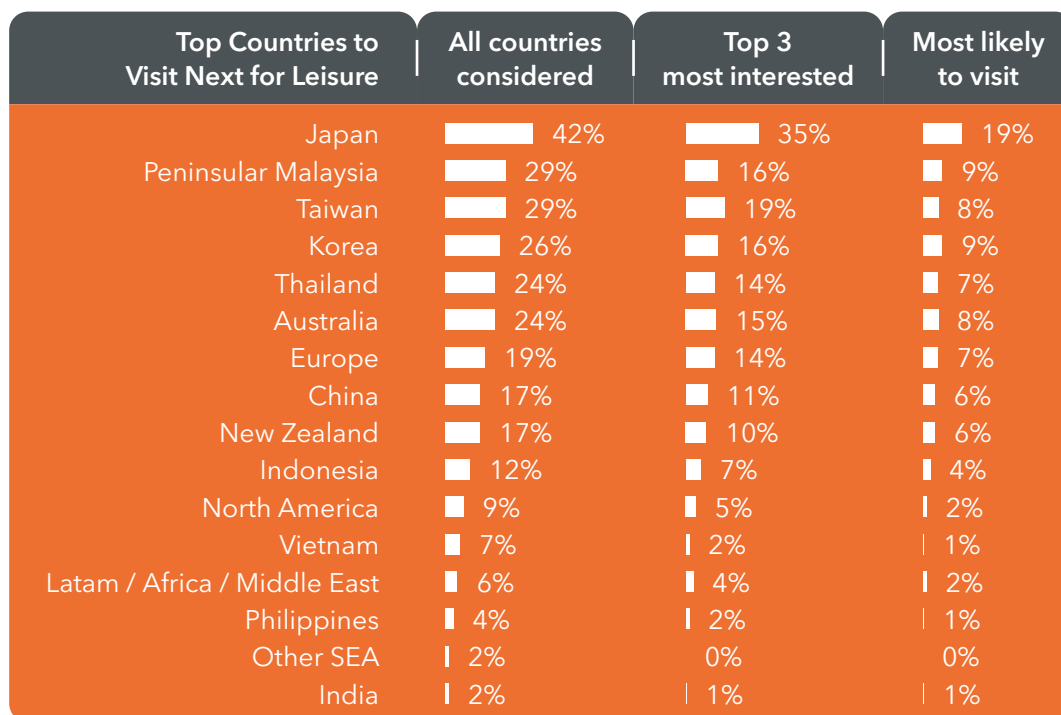


Less than \$5,000 monthly **19%**
\$5,000 - \$9,999 monthly **41%**
\$10,000 or more monthly **37%**

The largest segment of respondents were from the 45 - 67 years old age group (34%) followed by 25 - 44 years old (26%). The significant number of babyboomers reflected Singapore's aging population. However, they have enough disposable income to travel and are interested to take holiday trips. Based on gender, an equal percentage of males and females participated in the survey. Those who were employed full-time (77%) were more likely to be planning to make holiday trips compared to part-timers and the self-employed.

b. Top countries respondents intended to visit for a holiday

Japan, Peninsular Malaysia, Taiwan and Korea are the countries or regions that more leisure travellers would consider, have more interest in or are most likely to visit.

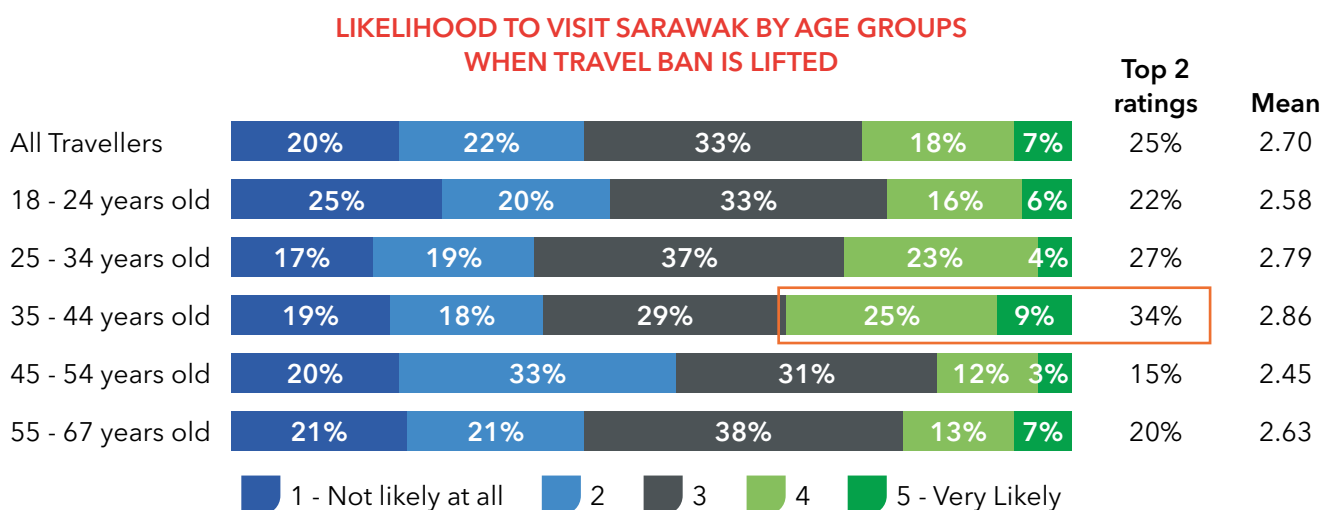


Source: Singapore Market Research-Sarawak Tourism Board in collaboration with STATOS & IPSOS, Jan 2022

However, Japan was the most preferred destination for a holiday.

c. Likelihood to visit Sarawak:-

Leisure travellers who were between 35 - 44 years old were the most inclined to visit Sarawak compared to the other age groups. Older consumers aged over 45 years were less keen on visiting Sarawak.



Source: Singapore Market Research-Sarawak Tourism Board in collaboration with STATOS & IPSOS, Jan 2022

d. Top activities respondents intended to do in Sarawak during the leisure holiday

Culinary experience, nature visits or shopping are common activities that travellers intend to undertake on their next leisure trip.

TOP 3 ACTIVITIES ON NEXT INTENDED LEISURE TRIP



- Eat food at local markets and night markets **40%**
- Visiting natural landscape **32%**
- Eat food at popular local restaurants **32%**
- Shopping at local markets / cultural markets **30%**
- Shopping at major malls / established shopping centres **24%**
- Visiting culture & heritage places **19%**
- Sight-seeing at man-made tourist attractions **13%**
- Relaxing at a family resort or beach resort **12%**
- Eat food at famous restaurants **12%**
- Visiting theme park **11%**
- Immersing with community, living their lifestyle **11%**
- Visiting wildlife conservation & rehabilitation centre, bio-diversity centrem etc **8%**
- Visiting agriculture landscape **6%**
- Attend entertainment events - Music festivals & cultural performances **6%**
- Joining local experiential classes **5%**
- Body-and-mind relaxing activities **5%**
- Checkout investment, business opportunities **4%**
- Attend arts events **3%**

Source: Singapore Market Research-Sarawak Tourism Board in collaboration with STATOS & IPSOS, Jan 2022

Culinary experiences, nature visits, or shopping are the common activities travellers intended to undertake during their next leisure trip. Eating food at local restaurants and enjoying the authentic experience was their main interest if they chose Sarawak as their holiday destination.

e. Barriers & motivations to travel to Sarawak & offerings

The main barriers preventing travellers from Singapore from visiting Sarawak stemmed mainly from:

- Lack of knowledge about Sarawak and activities offered, inconvenience of travelling due to lack of connectivity.
- Lack of public transportation in Sarawak.

Motivations to travel to Sarawak

- Singaporeans were interested in visiting Sarawak due to its natural landscape, and most likely for a leisure or holiday trip, travelling with their spouse/partner or friends, and staying around 3 to 5 days.
- Singaporeans perceived Sarawak as different from Singapore, a place with natural trails and parks and COVID-19-safe.

2. DOMESTIC TOURISM SURVEY: TRAVELLERS' DEMANDS, PERCEPTIONS & INTENTION TO TRAVEL TO SARAWAK DURING POST-COVID-19

This domestic market research aimed to understand travellers' interest in making holiday trips during the post-pandemic period. The study tried to identify their travel preferences, Sarawak's visibility in the domestic market, the product demands of domestic consumers, main information sources they used to learn about Sarawak, and finally to find out their activities and interest when they make a leisure trip to Sarawak.

Quantitative methodology was applied in this research via a questionnaire to collect the necessary data from respondents during the MATTA fair in September 2022.

i. Domestic visitor arrivals in Sarawak 2018 - 2022

YEAR	NUMBER OF VISITORS	% CHANGE
2018	2,317,946	4.54%
2019	2,579,975	11.30%
2020	836,568	-67.57%
2021	212,867	-74.55%
2022	1,238,118	481.64%

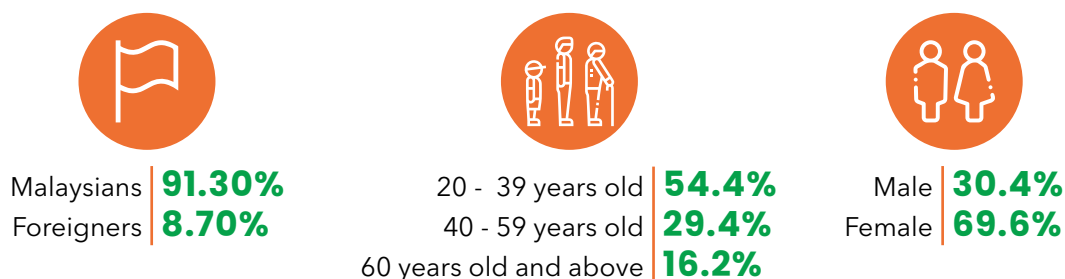
Source: Department of Immigration, Sarawak & MTCP

Domestic market, within these 5 years showed the highest growth in 2016 (+18.92%) and in 2019 (+11.3%). In 2019, the Visit Sarawak Campaign contributed to growth while the years 2020 and 2021 showed devastating negative growth due to the impact of COVID-19. In 2022, the domestic market contributed a significant number of visitors (61%). Compared to 2019, a **47.9%** recovery was recorded.

The key findings of the research are as follows;

ii. Key findings

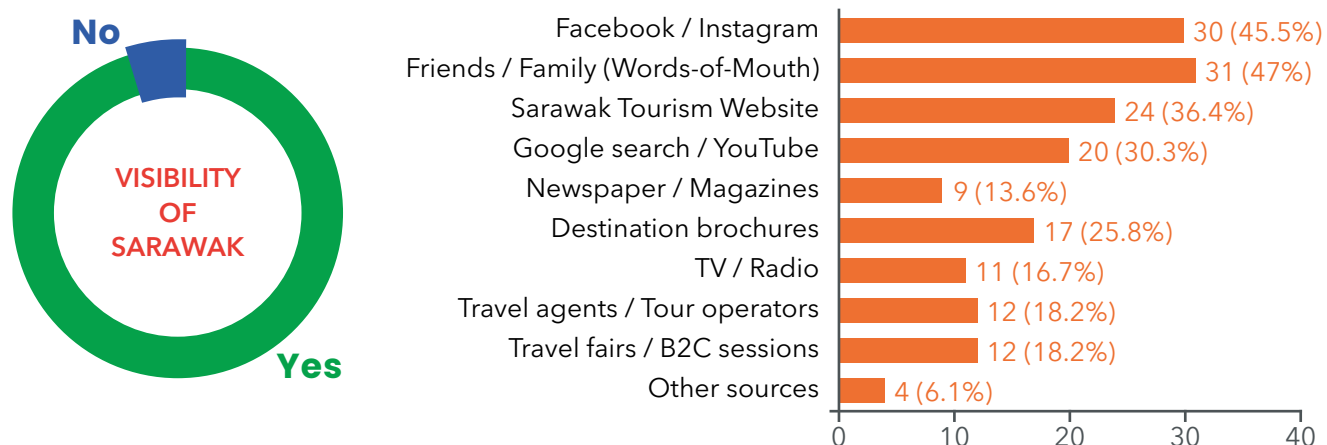
a. Demographic profiling of the respondents



Source: STB domestic market research, September 2022

b. Sarawak's visibility in the domestic market

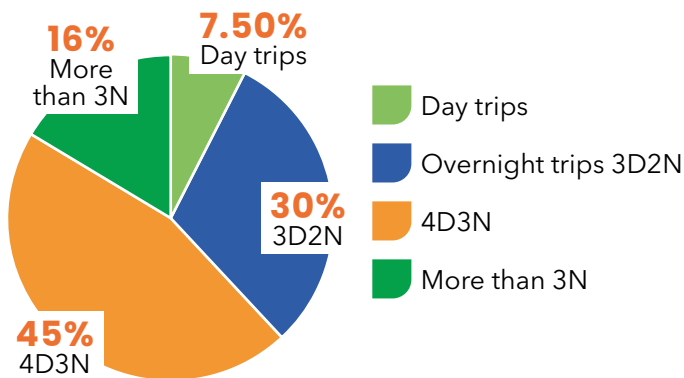
The main information sources used by respondents to learn about Sarawak were word-of-mouth (WOM) and social media platforms.



Source: STB domestic market research, September 2022

c. Estimated length of stay in Sarawak

DOMESTIC MARKET INSIGHTS



The domestic consumers' estimated duration of stay in Sarawak showed a higher percentage would like to stay;

- **4 days 3 nights (45%)**
- **3 days 2 nights (30%)**

TSA report stated that the visitors' average length of stay in Sarawak = 5.1 days (TSA, 2018)

Source: STB domestic market research, September 2022

d. Product demands & activities in Sarawak

DOMESTIC MARKET: PRODUCT DEMANDS

PRODUCTS / ATTRACTIONS	CONSUMER DEMAND (%)	
Museums & heritage places	83.1	
Sarawak Cultural village (SCV)	91.5	
National parks	88.2	
River cruise & dolphin watch	88.2	
Island tours & fishing	79.1	
Adventure tours / hiking	79.4	
Authentic local food experience	92.3	
Wildlife tours & rainforest visit	88.7	
Longhouse visit	83.5	
Mulu caves / caving	81.4	
Kayaking / fishing / bamboo rafting	80.4	
Beach tour / sunset & mangrove tour	87.7	
Highland tour	75	
Waterfalls & co-park visit	80.9	

Authentic local food is the main pull factor to attract visitors from the domestic market.

Source: STB domestic market research, September 2022

e. Main challenges to making a trip to Sarawak

DOMESTIC MARKET INSIGHTS



Source: STB domestic market research, September 2022

3. TRAVEL AGENTS FEDERATION OF INDIA (TAFI) CONVENTION: STUDY ABOUT INDIAN TOURISM INDUSTRY STAKEHOLDERS' RESPONSE TOWARDS SARAWAK

The TAFI convention was hosted in Kuching, Sarawak on 20 – 22 September 2022. This convention was organised through a joint collaboration between STB, Tourism Malaysia and Business Events Sarawak. During the 3-day event, STB conducted a study to identify and understand Indian tourism stakeholders' opinion about Sarawak and interest to promote Sarawak in the Indian outbound travel market.

i. Indian visitor arrivals in Sarawak 2018 – 2022

YEAR	NUMBER OF VISITORS	% CHANGE
2018	27,253	-13.07%
2019	26,791	-1.70%
2020	8,045	-69.97%
2021	2,069	-74.28%
2022	19,568	411.00%

Indian visitor arrivals in Sarawak showed an increasing trend in 2022 with a growth rate of +411%. Compared to 2019, the recovery rate in 2022 was **39.44%**. Sarawak needs more visibility in this new market. Hence more promotional campaigns need to be organised to enhance visibility.

Source: Department of Immigration, Sarawak & MTCP

ii. Key findings of the study are as follows;

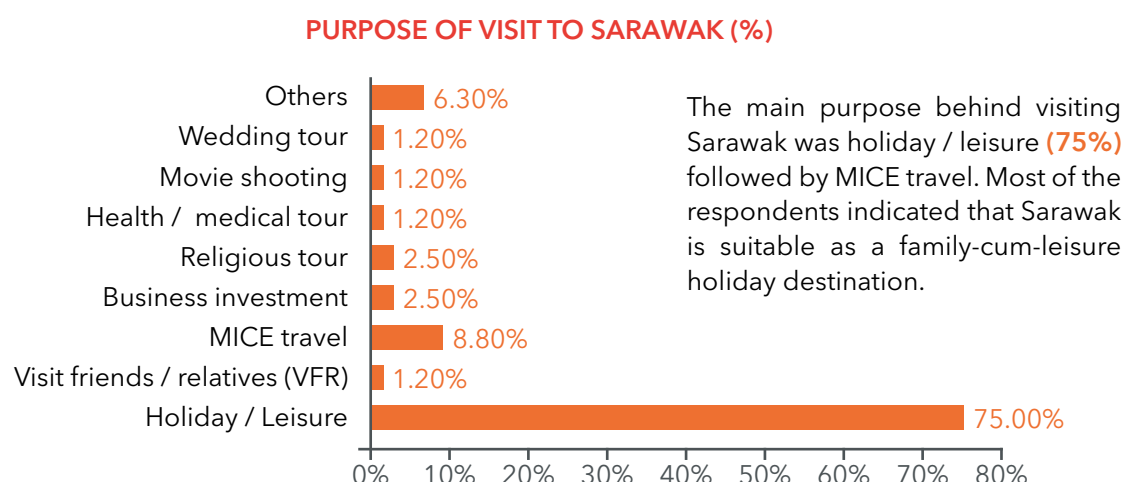
a. Profiling of the respondents

TYPE OF BUSINESS	PERCENTAGE %
Tour operator / travel agent	82.9%
Accommodation sector	2.4%
Tourism product owner	2.4%
Transportation provider	1.2%
Others	11%

Tour operators / travel agents formed the highest percentage of respondents. The category of "others" include airlines, IATA members, tourism technology, and consultancy services. From this, a significant number of respondents (**92.7%**) showed interest in promoting Sarawak in India.

Source: Indian Market Research, STB 2022

b. Main purpose of the visit to Sarawak if Sarawak is the next destination



The main purpose behind visiting Sarawak was holiday / leisure (**75%**) followed by MICE travel. Most of the respondents indicated that Sarawak is suitable as a family-cum-leisure holiday destination.

Source: Indian Market Research, STB 2022

c. Preference of accommodation in Sarawak

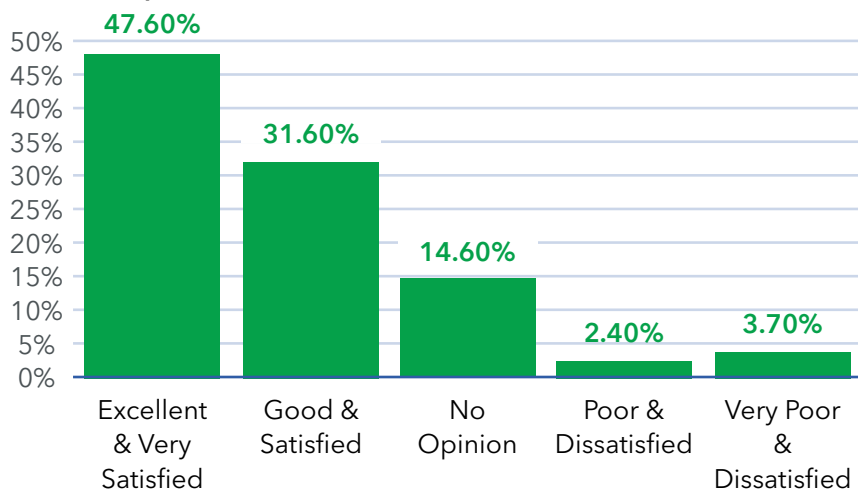
TYPE OF ACCOMMODATION	PERCENTAGE %
Star category hotels	91.3%
Budget hotels	4.9%
Service apartments	2.4%
Homestays	1.2%



About **91.3%** of respondents preferred star-category accommodation in Sarawak.

Source: Indian Market Research, STB 2022

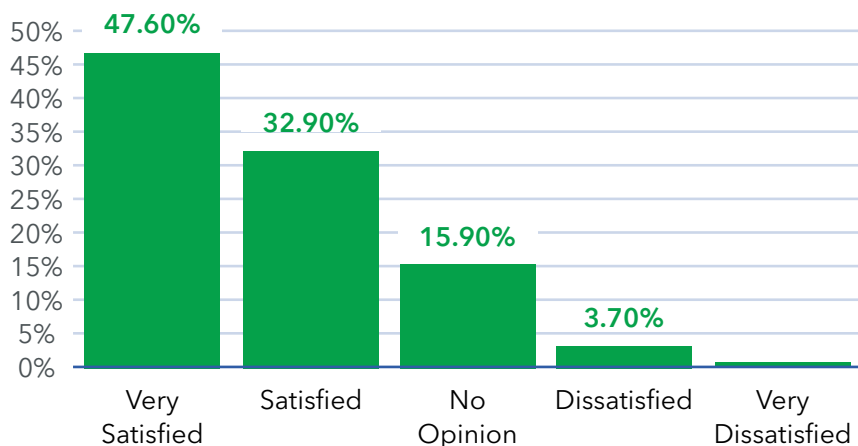
d. Level of Experience and Satisfaction for TAFI Convention 2022 hosted by Sarawak



Source: Indian Market Research, STB 2022

The results of the survey showed that a significant percentage of respondents were satisfied with the TAFI convention hosted by Sarawak. A total of **79.3%** said they were very satisfied / satisfied and the level of experience was excellent / good.

e. TAFI-B2B session: Level of Satisfaction



Source: Indian Market Research, STB 2022

The B2B session was organised by Tourism Malaysia at BCKK. A significant number of respondents (**80.5%**) were satisfied with the B2B sessions organised during the TAFI Convention. They indicated that it was a great platform to meet industry players in Malaysia.

f. Indian market: Product demands in Sarawak

Based on the consumers' interest, the Indian stakeholders indicated the top tourism products or activities were:



National parks & wildlife tours **74%**

National parks & wildlife tours	74%
Rainforests & mountains	60%
River cruise & dolphin watch	54%
City tours & local shopping	49%



Rainforest & mountains **60%**



River cruise & dolphin watch **54%**



Kuching city tour & shopping **49%**



Culture & heritage tours **45.1%**



Bird watching & photography **83.5%**



Museum visit **36.6%**



Beach, sunset & mangrove tour **37.8%**



Forest walk / trekking **35.4%**



Caving / visit Mulu caves **27%**

g. Indian market: Challenges to promote Sarawak in Indian outbound market

CHALLENGES TO PROMOTE SARAWAK IN INDIA

1. Limited airline connectivity / lack of direct airline.
2. Limited choices of Indian restaurants.
3. Limited choice of vegetarian food.
4. Competition from other states in Malaysia and regions such as Singapore, Bali and Vietnam.
5. Low visibility of Sarawak in India.
6. The flight connectivity and cost.
7. Visa restrictions.
8. Limited public transportation.



OPPORTUNITIES OF SARAWAK

1. Authentic natural landscape.
2. National parks and wildlife tours.
3. Less crowded tourist spots.
4. Fantastic shooting locations for wedding shooting, film shooting and documentaries.
5. Facilities for adventure travel.
6. Mulu cave.

Source: Indian Market Research, STB 2022

4. RESEARCH ON JAPAN CONSUMER MARKET: JAPANESE TRAVEL INTENTION & PRODUCT DEMANDS IN SARAWAK

This research was to understand and identify Japanese consumer interest in visiting Sarawak and their product demands if they chose Sarawak as their holiday destination. The data was collected during the Tourism Expo in Tokyo in September 2022 via questionnaire.

i. Japan visitor arrivals in Sarawak 2018 - 2022

YEAR	NUMBER OF VISITORS	% CHANGE
2018	9,308	-13.95%
2019	10,091	8.41%
2020	1,937	-80.80%
2021	162	-91.64%
2022	3,496	2,058.02%

Sarawak recorded the highest number of Japanese visitors in 2019 within the last 5 years. In 2022, the total number of visitors was 3,496. Compared to 2019 levels, the recovery rate was **34.64%**.

Source: Department of Immigration, Sarawak & MTCP

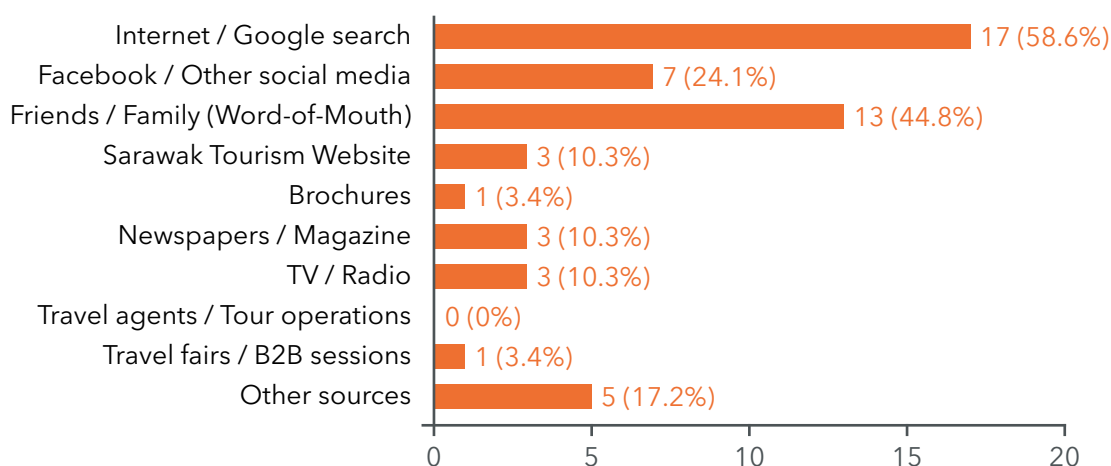
ii. Key results of the survey

a. Demographic profiling of the respondents

The demographic analysis showed that the 23 – 27 age group was more interested in overseas travel. Based on the nationality of the respondents, 86% were Japanese and 14% were foreigners. The foreign nationalities who participated in the survey residing in Tokyo were from Portugal, China, Iran, Malaysia, and Italy. Overall, survey respondents comprised 58.1% male and 41.9% female. Based on the marital status distribution, 53.5% were single, 39.5% were married, 4.7% were widows / widowers and 2.3% were divorced.

Source: Japan Market Research, STB 2022

b. Visibility of Sarawak in Japan market



Source: Japan Consumer Market Research, STB 2022

A higher percentage of respondents (67.4%) had heard about Sarawak while 32.6% didn't know about Sarawak. The main information sources they used to find out about Sarawak are Internet sources (59%) followed by word-of-mouth (44.8%).

c. Preferences of accommodation and purpose of the visit if they choose Sarawak as their holiday destination

PREFERENCE OF ACCOMMODATION

TYPE OF ACCOMMODATION	PERCENTAGE %
Star category hotels	51.20%
Budget hotels	18.60%
Service apartments	16.30%
Homestays	4.70%
Hostels	7%
Service apartments	4.70%
Friends / relatives' house	2.30%

Source: Japan Consumer Market Research, STB 2022

More than half of the respondents' preference for accommodation were star category hotels followed by budget hotels. A low percentage preferred homestays (4.7%).

MAIN PURPOSE OF TRAVEL TO SARAWAK



Holiday / Leisure

72.1%

Note: A higher % like to travel to Sarawak for a holiday / leisure trip (72%) followed by VFR 16.3%.



Visiting Friends & Relatives

16.3%



Official / Business

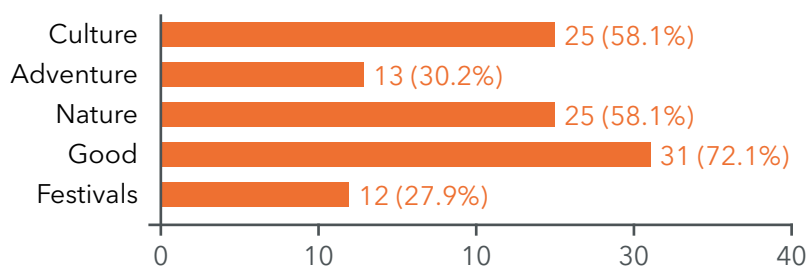
2.3%



Other Purposes

9.3%

d. Product preferences in Sarawak if they chose Sarawak as their next holiday destination

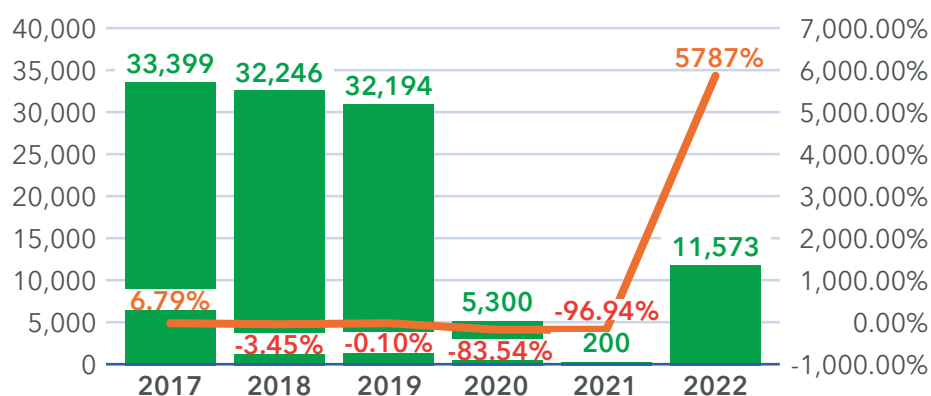


Source: Japan Consumer Market Research, STB 2022

The data showed that, based on Sarawak's signature products such as, Culture, Adventure, Nature, Food and Festivals, their main preference is for the food (72.1%), especially authentic Sarawak cuisine followed by culture and nature (58.1%) respectively.

5. AN ANALYSIS OF THE EUROPE MARKET: TRAVEL INTENTION & PRODUCT DEMANDS IN SARAWAK

Europe is STB's traditional market. In 2022, visitor arrivals from Europe showed a promising increase, especially visitor arrivals from the UK. Sarawak was among the Malaysian states visited the most by Europeans. Historical statistics for tourist arrivals from the UK is as follows:



Note: 2017 recorded the highest number of UK VA to Sarawak (33,399) within the last 5 years.

In 2022, the VA data showed that Sarawak received 11,773 visitors from United Kingdom and it is one of the top 5 visitor arrival contributing country to Sarawak.

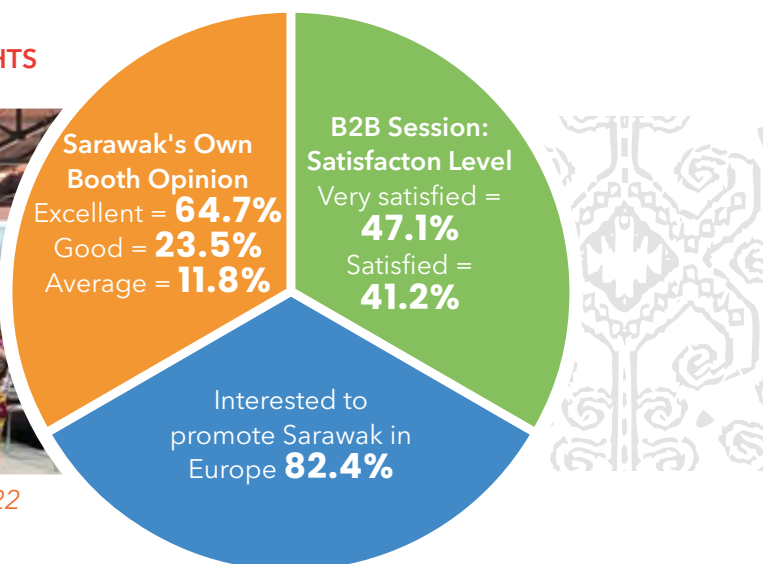
As compared to i.e. **36.56%** recovery achieved as compared to 2019 levels were achieved.

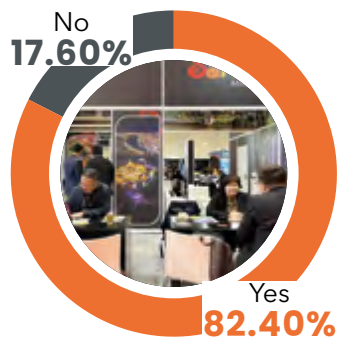
This research was mainly focused on the Europe outbound travellers' travel interest and preferences during the post-pandemic period in Sarawak. The data was collected during World Travel Mart (WTM) in November 2022. The respondents were travel agents / tour operators from European countries. A questionnaire was used to collect data. The key findings of the research are as follows:

WTM LONDON NOVEMBER 2022 INSIGHTS



Source: Europe Market Research, STB 2022





Europeans Travel Plans In 2023

INTEREST TO MAKE HOLIDAY TRIPS IN 2023?

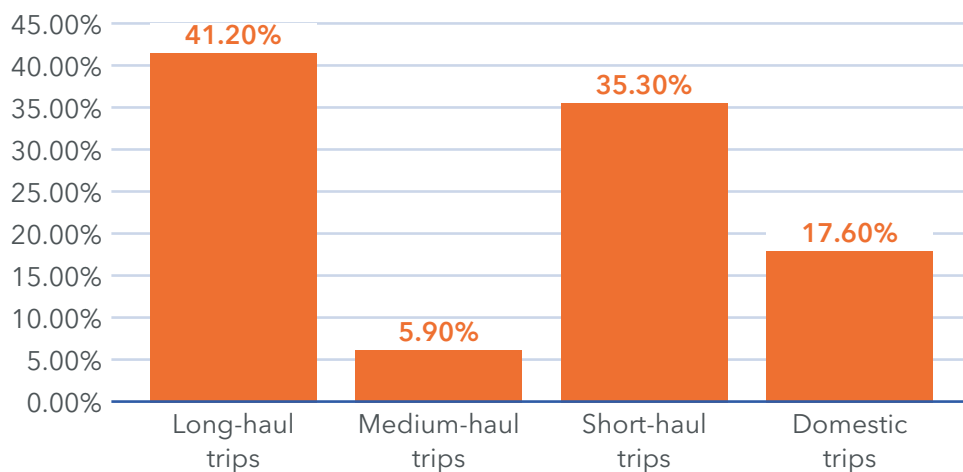
82.4%

Europeans have the interest to make holiday trips.

Source: Europe Market Research, STB 2022

Europeans Choice Of Destination

PREFERENCE FOR HOLIDAY TRIPS (%)?



Source: Europe Market Research, STB 2022

41.2%
Prefer long-haul trips

35.3%
Prefer short-haul trips

Europeans Travel Interest to Malaysia 2023 / 2024



Interest to make holiday trips in Malaysia?

Have you heard about Sarawak?

94.1%

Europeans have an interest to make holiday trips to Malaysia in 2023 / 2024.

Visibility Of Sarawak

47.1% know about Sarawak.

INFORMATION SOURCES ABOUT SARAWAK



Facebook, Instagram & other social media



Word-Of-Mouth / Family / Friends



Sarawak Tourism Board website



Trade fairs / B2B sessions

Source: Europe Market Research, STB 2022

Europe Market Insights

MAIN PURPOSE OF TRAVEL TO SARAWAK



76.5%
Holiday / Leisure



11.8%
Official / Business /
MICE



5.9%
Visiting friends &
relatives



5.9%
Education / Training

Source: Europe Market Research, STB 2022

PREFERRED TOURISM PRODUCTS & ACTIVITIES IN SARAWAK



Culture & Heritage Tours



Visiting museums



National parks & wildlife Tours



Bird watching & photography



Authentic local food

Source: Europe Market Research, STB 2022

European Travellers' Demands

PREFERENCE OF ACCOMMODATION



Star category Hotels
35.3%



Budget Hotels
29.4%



Homestays
17.6%



Service
apartments
5.9%



Friends /
relatives /
residents
5.9%

Source: Europe Market Research, STB 2022

6. RESPONSIBLE TOURISM (RT) RESEARCH: LOCAL COMMUNITY AWARENESS AND INTENTION TO PARTICIPATE IN RT INITIATIVES IN SARAWAK

This research aimed to identify and understand awareness about RT among the local communities in Sarawak. This was a state-wide study to understand the local communities' knowledge about RT, its practices and benefits in communities. This research was a joint collaboration with STB and Swinburne University, Sarawak. There were 5 objectives in this research:

- To identify RT awareness among the local communities in Sarawak.
- To find out the intention/ willingness of local communities to participate in RT initiatives or activities of the government.
- To design ways to empower local community participation in RT activities and projects.
- Test and fine-tune RT guidelines of STB.
- Make recommendations and design strategic directions to implement RT initiatives in Sarawak.

Mixed methodology was applied in this research. Sample selection was based on geographical location. The geographical segmentation was as follows:

1 South-West region =
Kuching, Samarahan, Serian

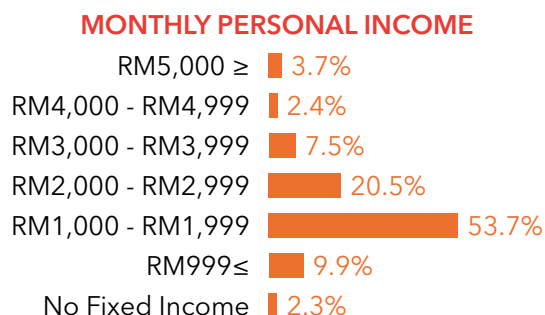
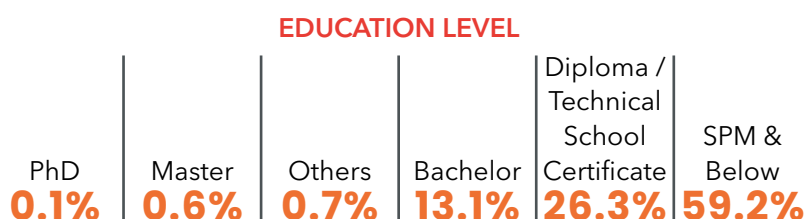
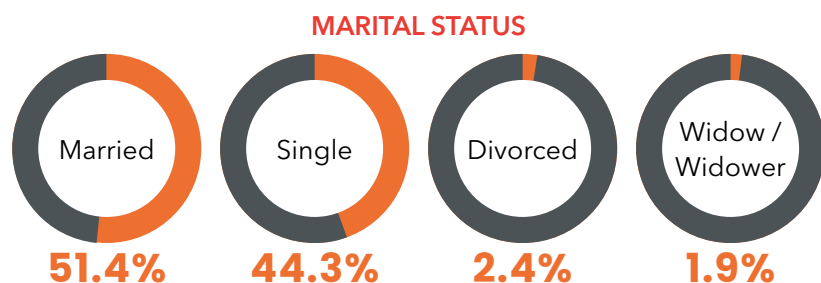
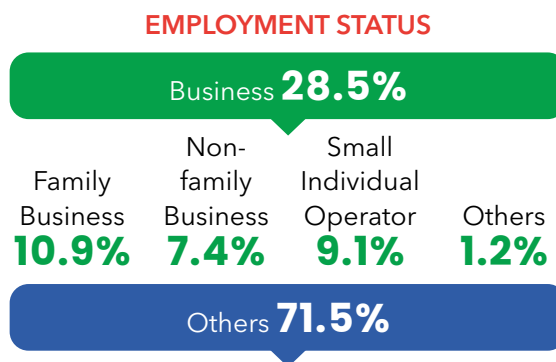
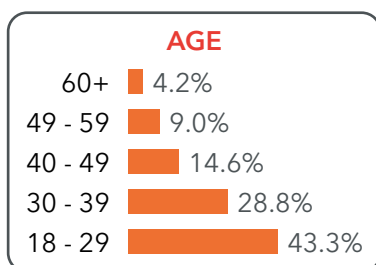
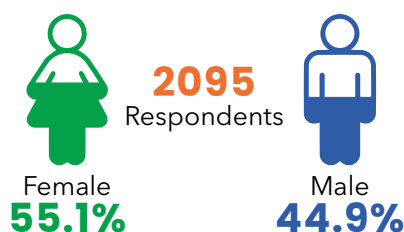
2 Central region =
Sibu, Mukah, Kapit, Serikin

3 Northern region =
Miri, Limbang, Bintulu

Purposive sampling was used and the samples were selected from those who are directly or indirectly involved in the tourism sector. The questionnaire was designed based on the research objectives for administering the survey. For the qualitative study, focus group discussion was applied.

The key findings of the research are follows:

a. Demographic profiling of the respondents



Source: Responsible Tourism Research, STB-Swinburne 2022

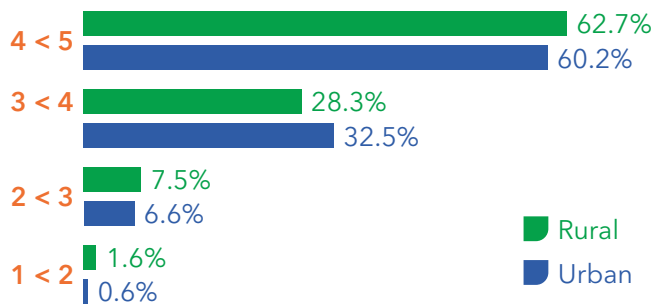
There was a total of 2,095 study respondents with 55.1% female and 44.9% male. A significant percentage were in the 18 – 29 age group (43.3%). Based on the participants' employment status, 28.5% were business people. By education segment, 59.2% held SPM certificates or lower followed by diploma or technical school certificate holders (26.3%).

By business segment, respondents were in:

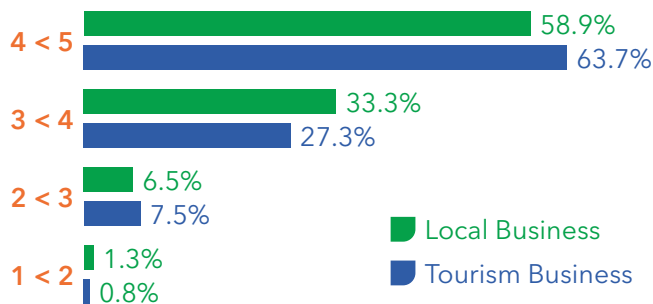
- Accommodation sector **34.6%**
- Food & beverage **29.8%**
- Excursions & transport **11.3%**
- Retail **10.2%**
- Leisure & attraction **9.3%**
- Others **4.8%**

b. Awareness about RT

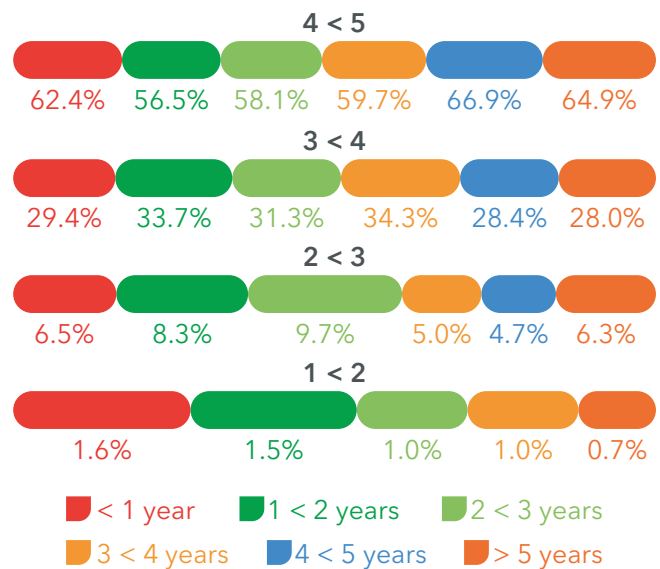
AWARENESS OF RESPONSIBLE TOURISM AND RESPONDENTS' LOCATION



AWARENESS OF RESPONSIBLE TOURISM AND RESPONDENTS' TYPES OF BUSINESS



AWARENESS OF RESPONSIBLE TOURISM AND RESPONDENTS' YEARS OF EXPERIENCE



No significant differences on awareness of RT among rural / urban, and among local business and tourism businesses.

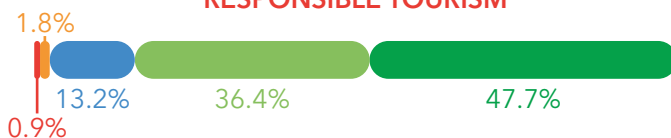
Respondents with the least amount of experience (<2 years) seem to indicate the weakest awareness of RT.

Source: Responsible Tourism Research, STB-Swinburne 2022

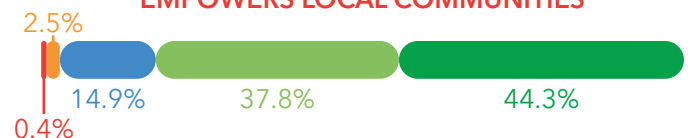
c. Perceptions towards RT

Rating 1 2 3 4 5

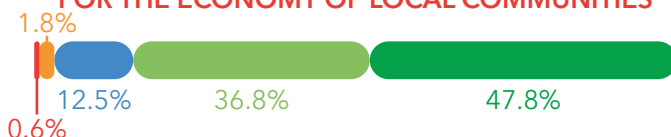
I LIKE THE IDEA OF RESPONSIBLE TOURISM



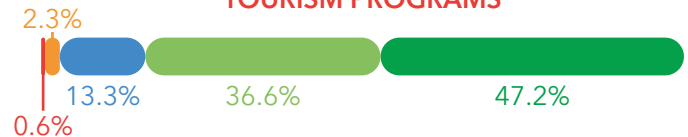
I BELIEVE RESPONSIBLE TOURISM EMPOWERS LOCAL COMMUNITIES



I BELIEVE THAT RESPONSIBLE TOURISM IS GOOD FOR THE ECONOMY OF LOCAL COMMUNITIES

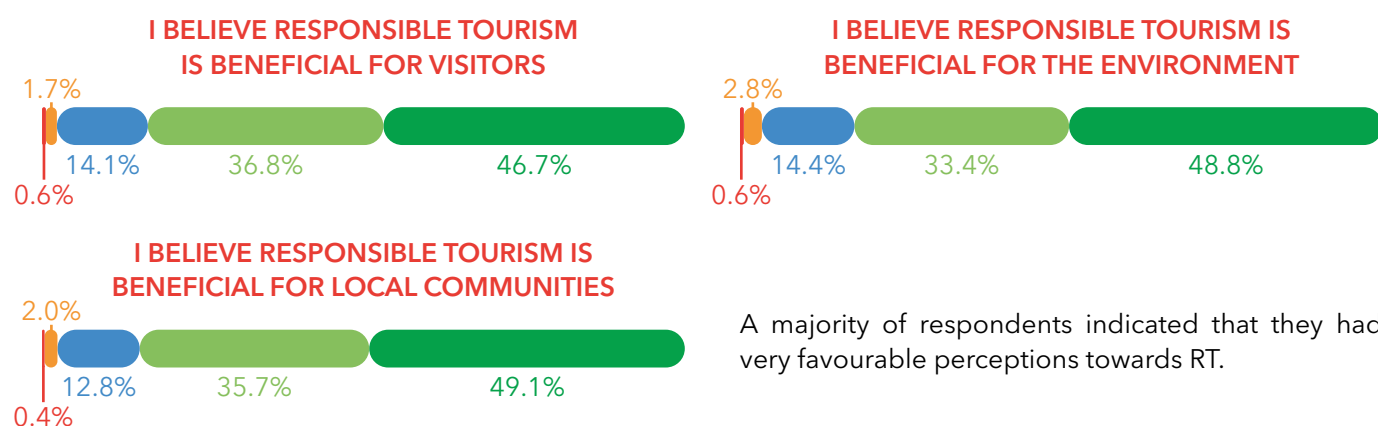


I FEEL IT IS GOOD TO BE PART OF RESPONSIBLE TOURISM PROGRAMS



cont'd

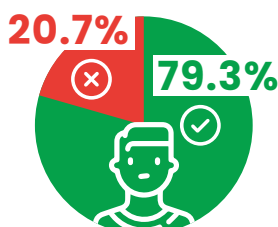
Rating 1 2 3 4 5



Source: Responsible Tourism Research, STB-Swinburne 2022

d. Sources of information about RT

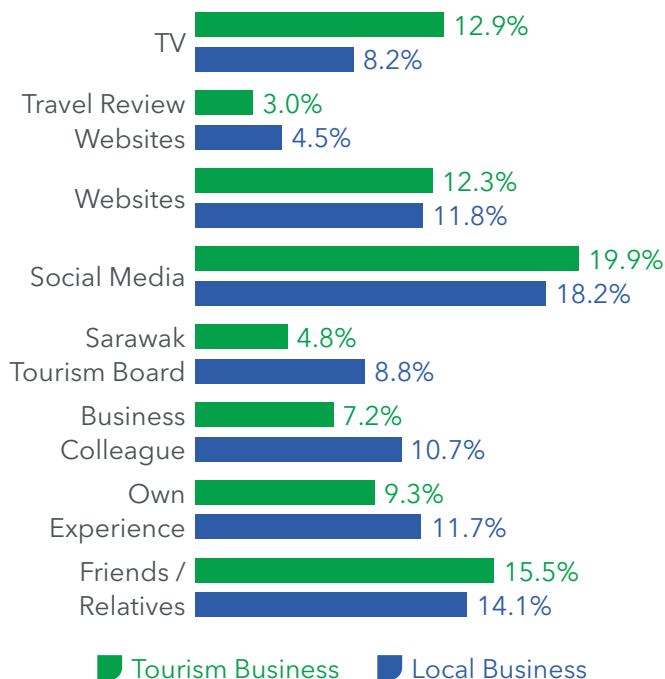
The Distribution of respondents by whether they **knew** or **did not know** about Responsible Tourism programs, events, activities and initiative.



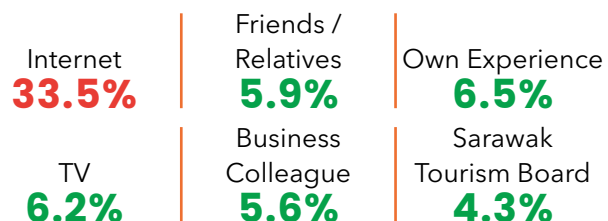
Tourism business are more likely to rely on information sources related to the tourism industry, such as STB, travel agents, travel review websites, business colleagues and own experiences.

Traditional media like TV and radio is more popular among local businesses.

SOURCE OF INFORMATION CHANNELS AND TYPE OF BUSINESS



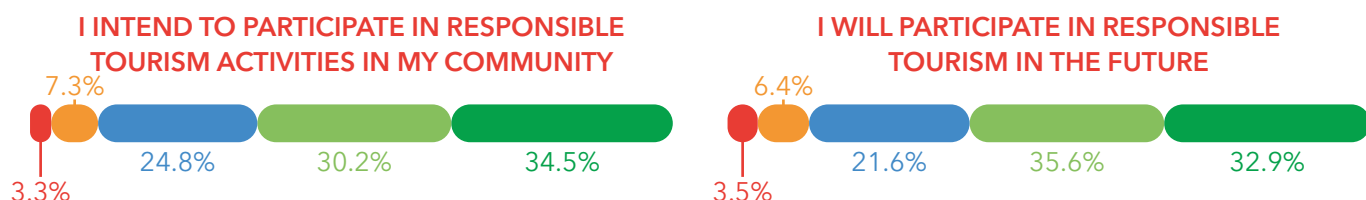
TOP 6 SOURCE OF INFORMATION CHANNELS



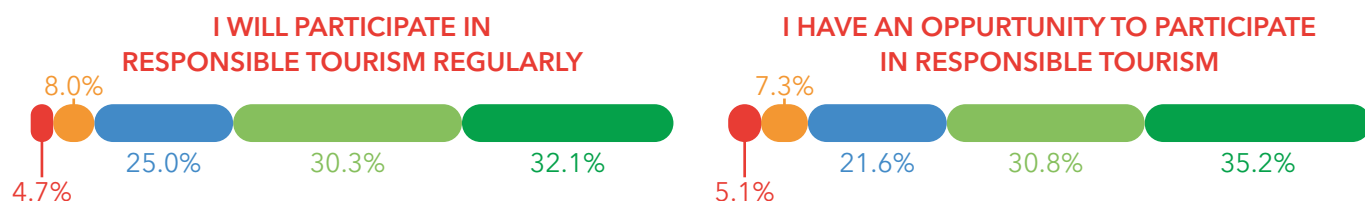
Source: Responsible Tourism Research, STB-Swinburne 2022

e. Intention to participate in RT

Rating 1 2 3 4 5



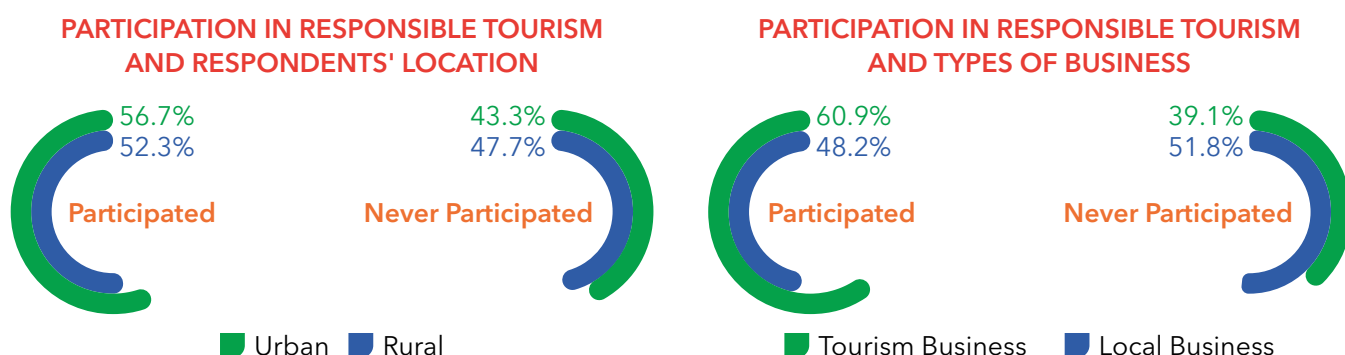
Rating 1 2 3 4 5



Respondents generally indicated strong intentions to participate in Responsible Tourism.

Source: Responsible Tourism Research, STB-Swinburne 2022

f. Respondents' participation in RT programmes & type of programmes attended

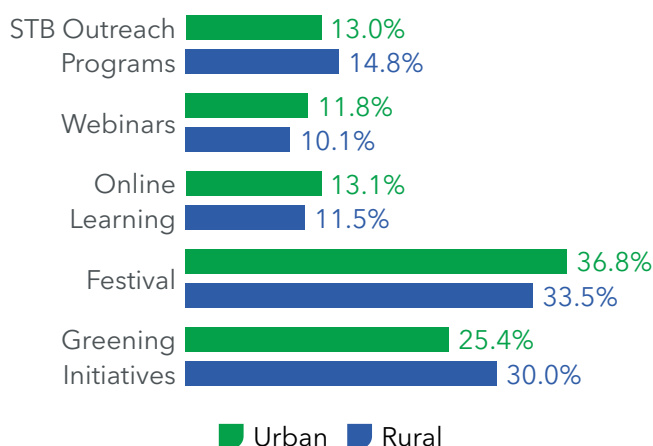


Urban respondents have slightly higher rate of participation in Responsible Tourism programs, activities, events and initiatives, compared to rural respondents.

Tourism businesses have higher rates of participation in Responsible Tourism programs, activities, events and initiatives, compared to local businesses.

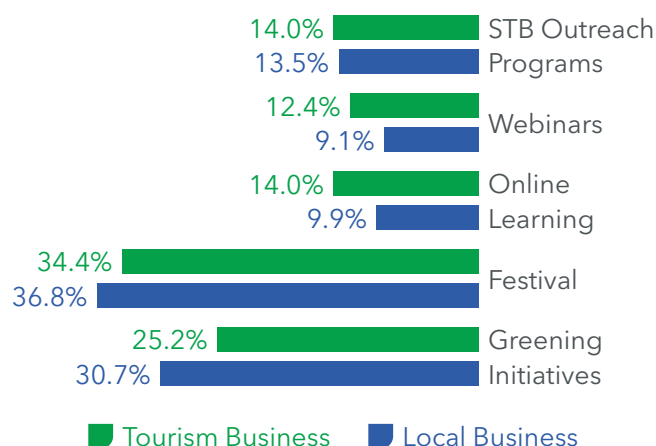
Source: Responsible Tourism Research, STB-Swinburne 2022

TYPES OF RESPONSIBLE TOURISM PROGRAMS, ACTIVITIES, EVENTS AND INITIATIVES THAT RESPONDENTS PARTICIPATED IN AND THEIR LOCATIONS



Festivals and greening initiatives are the most popular for all categories of rural and urban respondents, and local and tourism businesses.

TYPES OF RESPONSIBLE TOURISM PROGRAMS, ACTIVITIES, EVENTS AND INITIATIVES THAT RESPONDENTS PARTICIPATED IN AND TYPES OF BUSINESSES



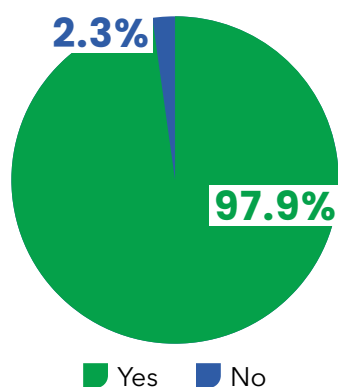
Festivals and greening initiatives seem to be more popular among local businesses.

Online learning, webinars and STB outreach programs seems to be more popular among tourism businesses.

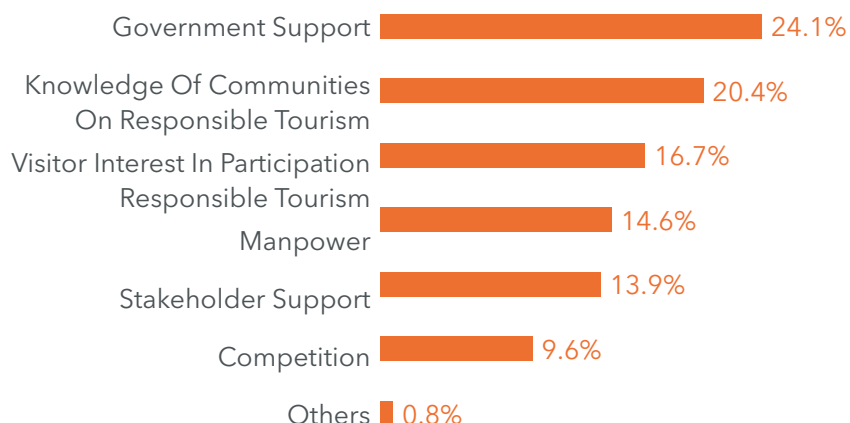
Source: Responsible Tourism Research, STB-Swinburne 2022

g. Challenges faced in participating in RT programmes

WILLINGNESS TO RECOMMEND RESPONSIBLE TOURISM PROGRAMS, EVENTS, ACTIVITIES AND INITIATIVES



CHALLENGES FACED IN CONDUCTING OR PARTICIPATING IN RECOMMEND RESPONSIBLE TOURISM PROGRAMS, EVENTS, ACTIVITIES AND INITIATIVES



Source: Responsible Tourism Research, STB-Swinburne 2022

h. Recommendations to improve RT awareness and community participation in Sarawak

- 1 Improve participation of local communities in greening initiatives in major festivals in Malaysia.
- 2 Use social media and word-of-mouth to disseminate information about RT among the public and the importance of RT in the tourism business.
- 3 Create opportunities for business and employment - RT mentorship programme for entrepreneurship development.
- 4 Preserve culture and environment - educate tourists, communities and stakeholders.
- 5 Collaboration and partnerships between stakeholders, government agencies and industry players.
- 4 Preserve culture and environment - educate tourists, communities and stakeholders.

Kaul Festival,
Mukah