

REVITALISATION OF THE TOURISM ECONOMY IN SARAWAK: THE MAGIC OF LEAP-FROG EXPANSION STRATEGY

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GEOGRAPHICAL LOCATION OF SARAWAK





REVITALIZATION OF TOURISM ECONOMY IN SARAWAK

SARAWAK STATE: VISION TO
ENHANCE THE TOURISM SECTOR

Post COVID-19 DEVELOPMENT STRATEGY 2030

Aspiration

By 2030, Sarawak will be a leading destination for eco-tourism and business events in ASEAN Region driven by empowered communities to conserve heritage, culture and biodiversity and to promote investment and development through responsible actions

Key Outcomes

11% to GDP
contribution

25% Tourism
employment

10% increase handcraft
sale

7.5% annual growth
in visitor arrivals

50 increase homegrown
business events

20% increase in
community-based tourism



SARAWAK TOURISM MASTER PLAN 2020-2035



18 Tourism Pillars Grouped into 8 Clusters



SARAWAK TOURISM BOARD

The 19th UN Tourism /PATA Forum- Guilin, China SEPT 2025



ENHANCE TOURISM ECONOMY IN SARAWAK

WE IMPLEMENTED TWO STRATEGIES

- 1) 3R STRATEGY 2020-2023
- 2) LEAP-FROG EXPANSION STRATEGY 2024-2025

SARAWAK TOURISM: 3R STRATEGY 2020-2023



3R Strategy

STB had implemented the 3R strategy in the year 2020 aimed for a 4-year strategy to rebuild Sarawak's tourism business ecosystem and to support the tourism industry players to recover their businesses and to promote and market Sarawak beyond leisure tourism in alignment with the State's direction.

The 3 R strategy is based on Responsible Tourism and supported by 3 pillars such as digital platform, PPP, and integrated communication.

LEAP-FROG EXPANSION STRATEGY 2024-2025

THE MAGIC



LEAP-FROG EXPANSION STRATEGY

OBJECTIVE: TO ACHIEVE 5 MILLION VISITOR ARRIVALS IN 2025

6 STRATEGIC GOALS

Escalate
Market
Penetration &
Enhance
Presence

Collaborations
& Partnership

Build Market Trust
& Confidence in
Destination
Offerings

Create
Demand &
Increase Visitor
Arrivals

Consumer
Centric
Marketing
Approach

Product
Diversification &
Creative
Packaging

ACTION PLANS

1st & 2nd Tier
Markets

Airlines, NTOs,
Tour Operators/
DMCs, SPCF, VIP

Highlighting
sustainability best
practices i.e.
CBT, Medical & Event
based tourism

Social Media,
OTAs, KOLs

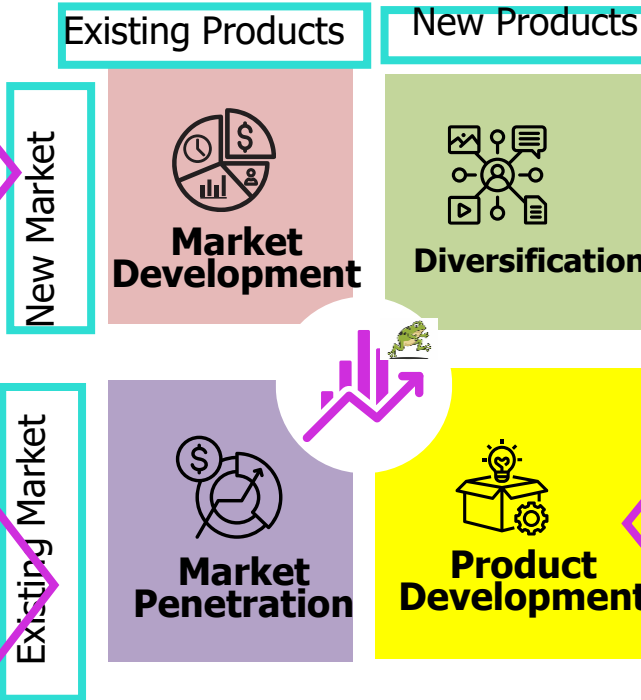
B2B, B2C,
Online, Offline

Geopark,
UNESCO,
Gastronomy,
Experiential tours

STB MISSION & VISION

LEAP FROG EXPANSION STRATEGY: MATRIX

Market Development is to sell more of Sarawak's signature products (CANFF) ie **existing products to our new markets**. This strategy is about reaching new customer segments or expanding internationally by targeting new geographic areas.



The **diversification** strategy is to **introduce new products to a new market**. Generally the highest risk strategy, but it can reap huge rewards and new revenue opportunities.

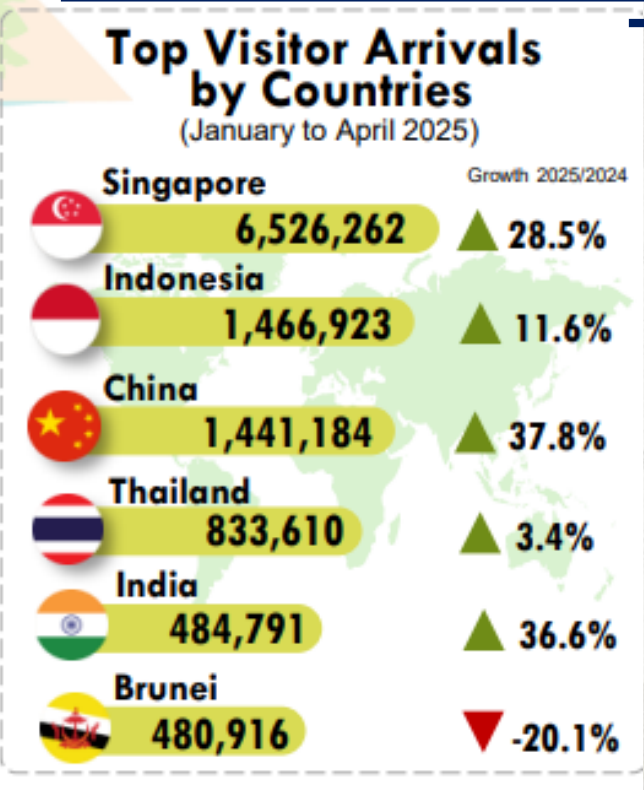
Product Development:- is about **developing and selling new products to existing markets**. The tour packages/ existing products need to make some modifications based on consumer demand to give increased value to the customers for their purchase or to launch new products alongside with the existing product offerings.

This matrix adopted from Ansoff Product Expansion Matrix.

THE IMPACT OF LEAP-FROG EXPANSION STRATEGY IN SARAWAK VISITOR ARRIVALS (VA) AND TOURISM REVENUE (TR)

TOP FOREIGN COUNTRIES VISITOR ARRIVALS TO MALAYSIA VS SARAWAK 2025

MALAYSIA :JAN- APRIL 2025



Total VA
13.38mil

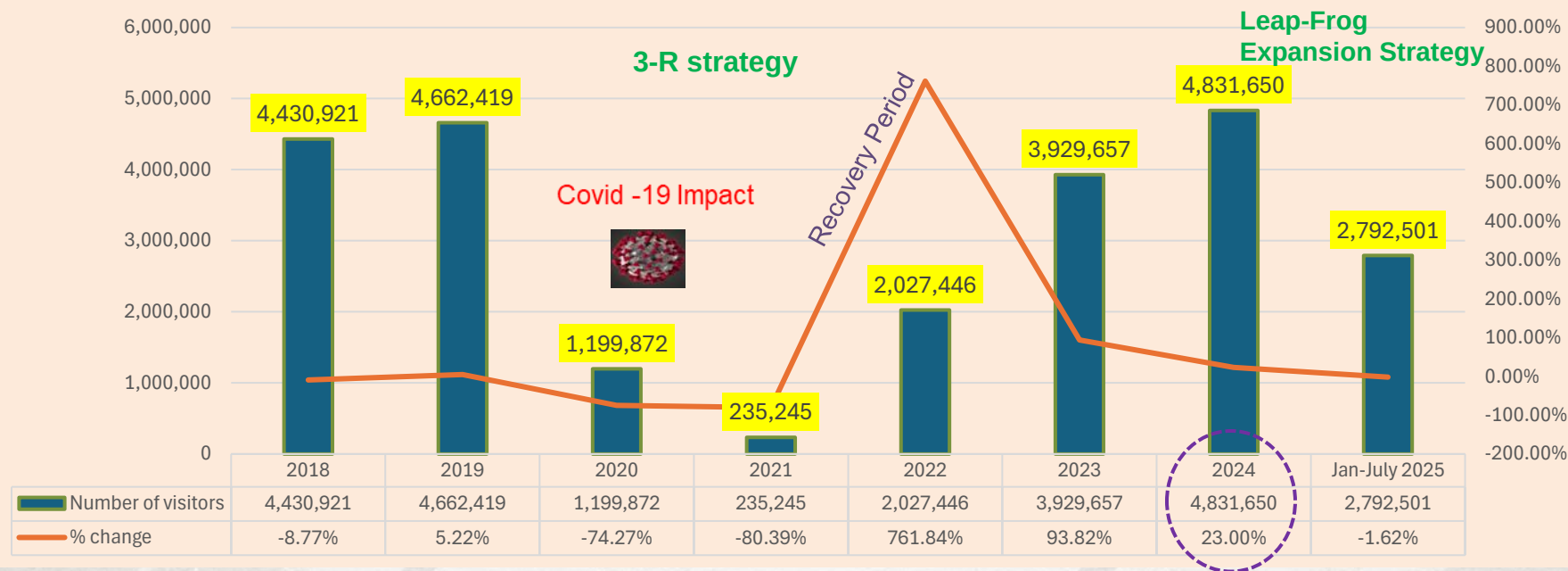
SARAWAK :JAN- JUNE 2025



Total VA
2.41mil

SARAWAK VISITOR ARRIVAL TRENDS: 2018 – 2024 & JAN- JULY 2025

TRENDS OF SARAWAK VISITOR ARRIVALS (VA): 2018 - 2024 & JAN-JULY 2025

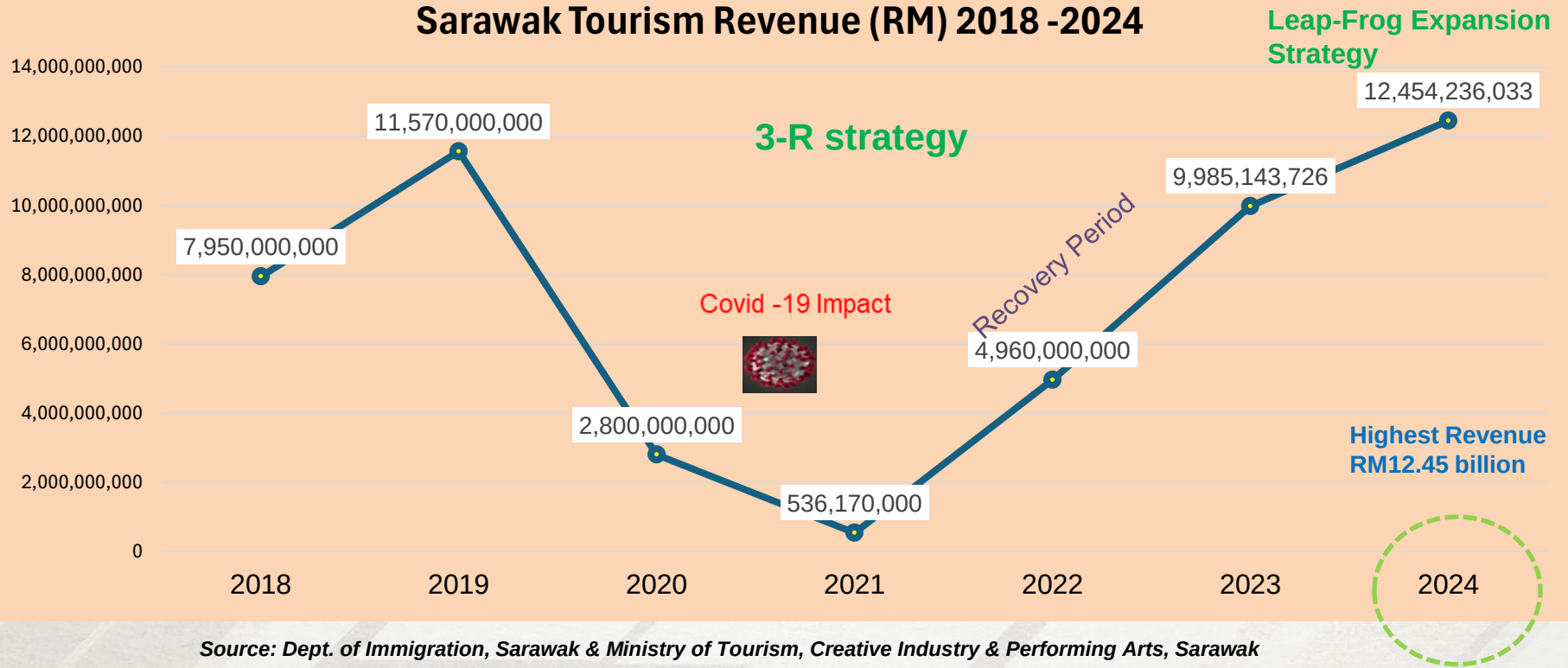


Source: Dept. of Immigration, Sarawak & Ministry of Tourism, Creative Industry & Performing Arts, Sarawak

Note:- The VA arrival data from 2018 to 2024 indicates that Sarawak successfully surpassed the impact of Covid-19 in terms of visitor arrivals in 2024. The state recorded a total of 4.8 million visitor arrivals with a GR of +23%, exceeding the levels seen in 2019, which serves as the benchmark for comparison.

SARAWAK TOURISM REVENUE: 2018 – 2024

Sarawak Tourism Revenue (RM) 2018 -2024



Source: Dept. of Immigration, Sarawak & Ministry of Tourism, Creative Industry & Performing Arts, Sarawak

KEY INDICATORS TO MEASURE TOURISM'S SOCIO-ECONOMIC SECTOR CONTRIBUTION: CASE OF SARAWAK TOURISM



Visitor Arrivals (VA)



Tourism Stakeholders' Confidence Rating



Tourism Revenue (TR)



Departure Visitor Satisfaction Survey (DVS) RTSA



Average Hotel Occupancy Rate



SME Sector Growth Rate



Average Length of Stay



Responsible Tourism Effectiveness Rating among Rural Communities in Sarawak





MOVING FORWARD

SARAWAK TOURISM

Boost
Connectivity



Human Capital
Development &
Skill
Enhancement



Boost Digital
Marketing
Landscape



Innovative
Sustainable
Initiatives &
Responsible
Tourism Practices



Public-Private
Partnership &
Collaborations



Leap-Frog
Expansion
Strategy



THANK YOU

FOR MORE INFORMATION,
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www.sarawaktourism.com

