

# SOUTHEAST ASIAN OUTBOUND MARKET UPDATE

HANNAH PEARSON  
27<sup>th</sup> OCTOBER, 2022

# 1. WHAT'S THE SITUATION IN SE ASIA NOW?



# WHERE ARE WE NOW IN SE ASIA?

Week ending Sunday 2<sup>nd</sup> January 2022

COUNTRY	LOCKDOWN	INBOUND TRAVEL RESTRICTIONS	OUTBOUND TRAVEL RESTRICTIONS	CASES	DEATHS
<b>Cambodia</b>	None	Open	Permitted	120,510	3,013
<b>Indonesia</b>	Partial	Bali/ Bintan/ Batam TCA, Travel Corridor	Discouraged	4,263,168	144,097
<b>Laos</b>	Partial	Green Travel Zone Plan	Discouraged	112,767	380
<b>Malaysia</b>	Partial	Langkawi Travel Bubble	Permitted	2,761,472	31,513
<b>Myanmar</b>	Partial	Flight restrictions	Flight restrictions	530,946	19,272
<b>Philippines</b>	Partial	Restricted	Permitted	2,847,4	
<b>Singapore</b>	Partial	Vaccinated Travel Lanes	Vaccinated Travel Lanes	279,8	
<b>Thailand</b>	Partial	Test & Go, Blue Zone	Discouraged	2,229,5	
<b>Vietnam</b>	Partial	Prior approval	Flight restrictions	1,763,0	

Data accurate as of 21:37 (UTC+8) on 02 Jan 2022

Partial lockdown = closure of schools or some non-essential services (e.g., entertainment), recommendation to work from home

Lockdown = closure of all non-essential businesses, restricted movement

COVID-19 case & death statuses from John Hopkins Coronavirus Resource Center

Week ending Sunday 23<sup>rd</sup> October 2022

COUNTRY	LOCKDOWN	INBOUND TRAVEL RESTRICTIONS	OUTBOUND TRAVEL RESTRICTIONS	WEEKLY CASES PER MIL	WEEKLY DEATHS PER MIL
<b>Cambodia</b>	None	Open	Permitted	0.97	0.00
<b>Indonesia</b>	None	Open	Permitted	50.17	0.42
<b>Laos</b>	None	Open	Permitted	10.64	0.00
<b>Malaysia</b>	None	Open	Permitted	432.63	0.86
<b>Myanmar</b>	Partial	Open	Permitted	39.46	0.09
<b>Philippines</b>	Partial	Open	Permitted	109.93	2.33
<b>Singapore</b>	None	Open	Permitted	9869.63	3.48
<b>Thailand</b>	None	Open	Permitted	0.00	0.00
<b>Vietnam</b>	None	Open	Permitted	46.75	0.04

Data accurate as of 21:39 (UTC+8) on 23 Oct 2022

Partial lockdown = closure of schools or some non-essential services (e.g., entertainment), recommendation to work from home

Lockdown = closure of all non-essential businesses, restricted movement

COVID-19 case & death statuses from Our World in Data



# CURRENT ENTRY REQUIREMENTS

## ASEAN COVID-19 Testing Requirements



Fully vaccinated	PRE-DEPARTURE	ON-ARRIVAL
CAMBODIA	None	None
INDONESIA	None	None
LAOS	None	None
MALAYSIA	None	None
PHILIPPINES	RT-PCR within 48h or ART within 24h prior to departure for non-boosted travellers	None
SINGAPORE	None	None
THAILAND	None	None
VIETNAM	None	None

Source: Various  
Data accurate as of 11:21 (UTC+8) on 26 Oct 2022

View our COVID-19 dashboard:  
<https://www.pearanderson.com/coronavirus/>

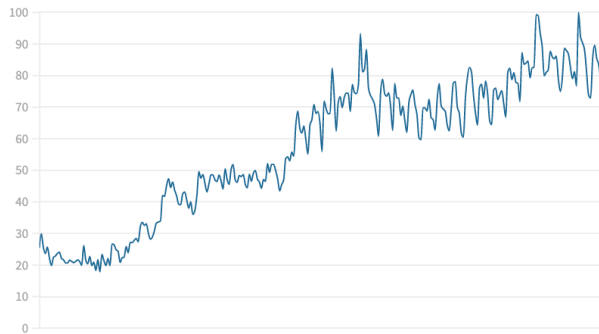
## 2. STATE OF OUTBOUND TRAVEL



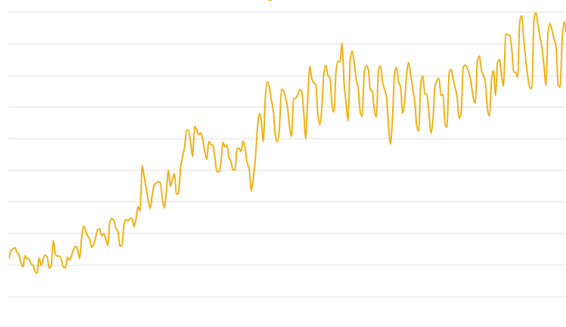
# GOOGLE DESTINATION INSIGHTS

## TRAVEL SEARCHES FROM SOUTHEAST ASIA TO WORLDWIDE DESTINATIONS

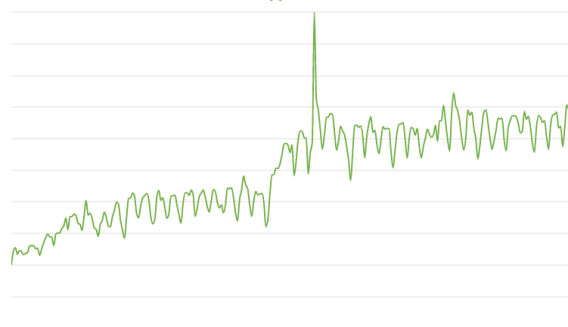
Outbound Travel Searches from Indonesia



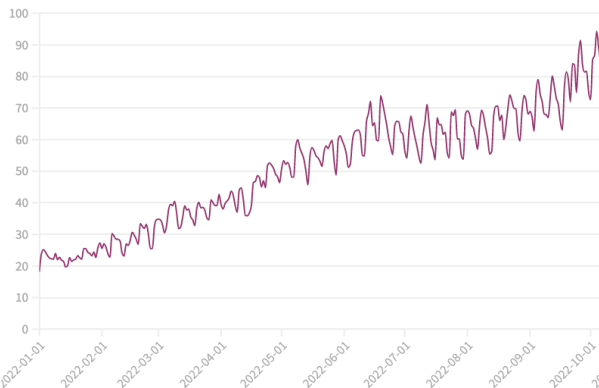
Outbound Travel Searches from Malaysia



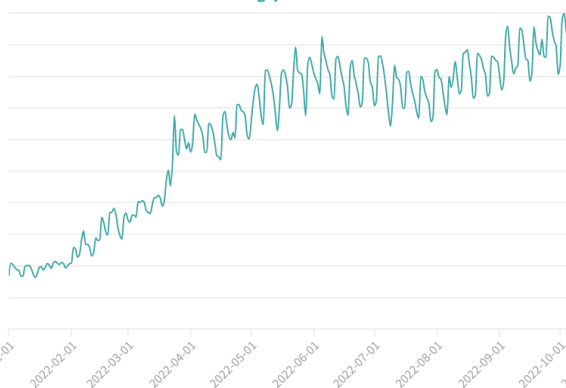
Outbound Travel Searches from Philippines



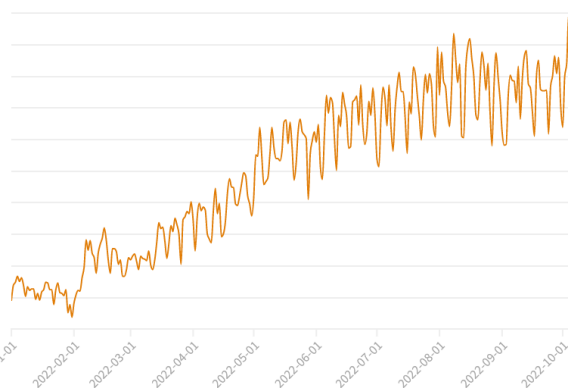
Outbound Travel Searches from Thailand



Outbound Travel Searches from Singapore



Outbound Travel Searches from Vietnam





# INDONESIA: TOP 10 SEARCHED DESTINATIONS

FROM INDONESIA TO WORLDWIDE

H2 2022 YTD (1 Aug-20 Oct)



AUSTRALIA



UK



MALAYSIA



NETHERLANDS



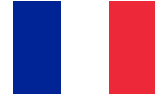
THAILAND



SAUDI ARABIA



UAE



FRANCE



USA



GERMANY

**Where do Nordic countries fall?**

- 39. Finland
- 40. Iceland
- 41. Denmark



# YUGOV DESTINATION INDEX

## DESTINATION RANKINGS 2022: INDONESIA



JAPAN



SWITZERLAND



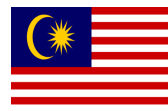
SINGAPORE



AUSTRALIA



SOUTH KOREA



MALAYSIA



UAE



NETHERLANDS



SAUDI ARABIA



NEW ZEALAND

The survey was based on the views of “**Responsible Travellers**”, which YouGov defined as “those who indicate they are wellness-focused, care about environmental impact and are culturally minded”





# MALAYSIA: TOP 10 SEARCHED DESTINATIONS

FROM MALAYSIA TO WORLDWIDE

H2 2022 YTD (1 Aug-20 Oct)



THAILAND



UAE



INDONESIA



JAPAN



AUSTRALIA



VIETNAM



UK



CHINA



INDIA



NEPAL

**Where do Nordic countries fall?**

33. Iceland  
39. Finland  
42. Denmark



# PHILIPPINES: TOP 10 SEARCHED DESTINATIONS

FROM PHILIPPINES TO WORLDWIDE

H2 2022 YTD (1 Aug-20 Oct)



US



INDONESIA



AUSTRALIA



UK



UAE



JAPAN



THAILAND



MALAYSIA



CANADA



QATAR

**Where do Nordic countries fall?**

31. Denmark

34. Iceland

38. Finland

47. Norway



# THAILAND: TOP 10 SEARCHED DESTINATIONS

FROM THAILAND TO WORLDWIDE

H2 2022 YTD (1 Aug-20 Oct)



AUSTRALIA



LAOS



INDIA



VIETNAM



JAPAN



US



UK



CAMBODIA



INDONESIA



MALAYSIA

## Where do Nordic countries fall?

- 26. Finland
- 29. Denmark
- 30. Sweden
- 37. Norway
- 39. Iceland



# YUGOV DESTINATION INDEX

## DESTINATION RANKINGS 2022: THAILAND



JAPAN



CHINA



SOUTH KOREA



FRANCE



SWITZERLAND



AUSTRALIA



SINGAPORE



HONG KONG



US



LAOS

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# SINGAPORE: TOP 10 SEARCHED DESTINATIONS

FROM SINGAPORE TO WORLDWIDE

H2 2022 YTD (1 Aug-20 Oct)



THAILAND



US



INDIA



UK



INDONESIA



PHILIPPINES



MALAYSIA



VIETNAM



AUSTRALIA



JAPAN

**Where do Nordic countries fall?**

- 30. Finland
- 31. Iceland
- 32. Denmark
- 47. Norway



# YOUGOV DESTINATION INDEX

DESTINATION RANKINGS 2022: SINGAPORE



JAPAN



SOUTH KOREA



NEW ZEALAND



THAILAND



AUSTRALIA



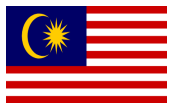
TAIWAN



SWITZERLAND



GERMANY



MALAYSIA



UK

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# MILLIEU INSIGHT SURVEY: SINGAPORE

- 81% of Singaporeans intend to travel overseas for leisure within the next year
- Top travel destinations are Japan (34%), Malaysia (28%), and Thailand (22%)
- Top purposes of overseas leisure travel is to relax (86%), to try new things (59%), and to bond with family/friends (56%)



# VIETNAM: TOP 10 SEARCHED DESTINATIONS

FROM VIETNAM TO WORLDWIDE

H2 2022 YTD (1 Aug-20 Oct)



THAILAND



US



CAMBODIA



INDIA



AUSTRALIA



FRANCE



INDONESIA



LAOS



MALAYSIA



UAE

**Where do Nordic countries fall?**

25. Denmark

29. Finland

41. Iceland

46. Sweden

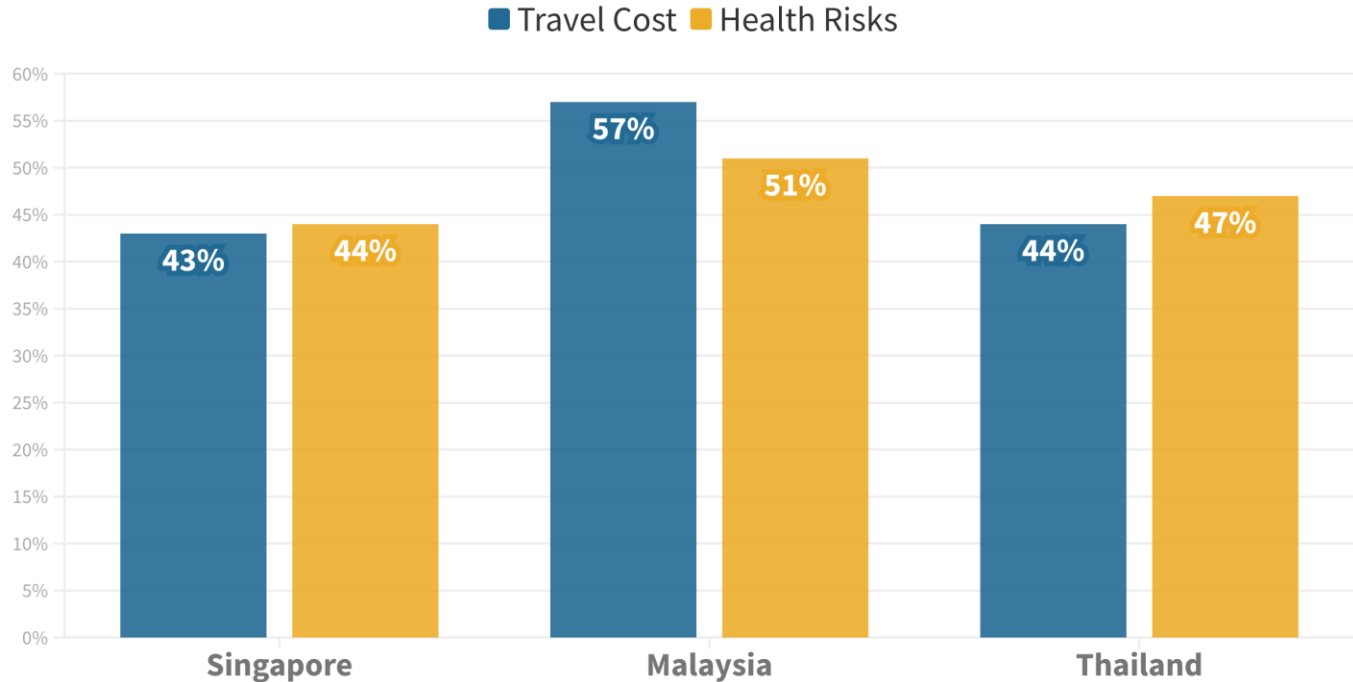


# 3. OTHER TRENDS



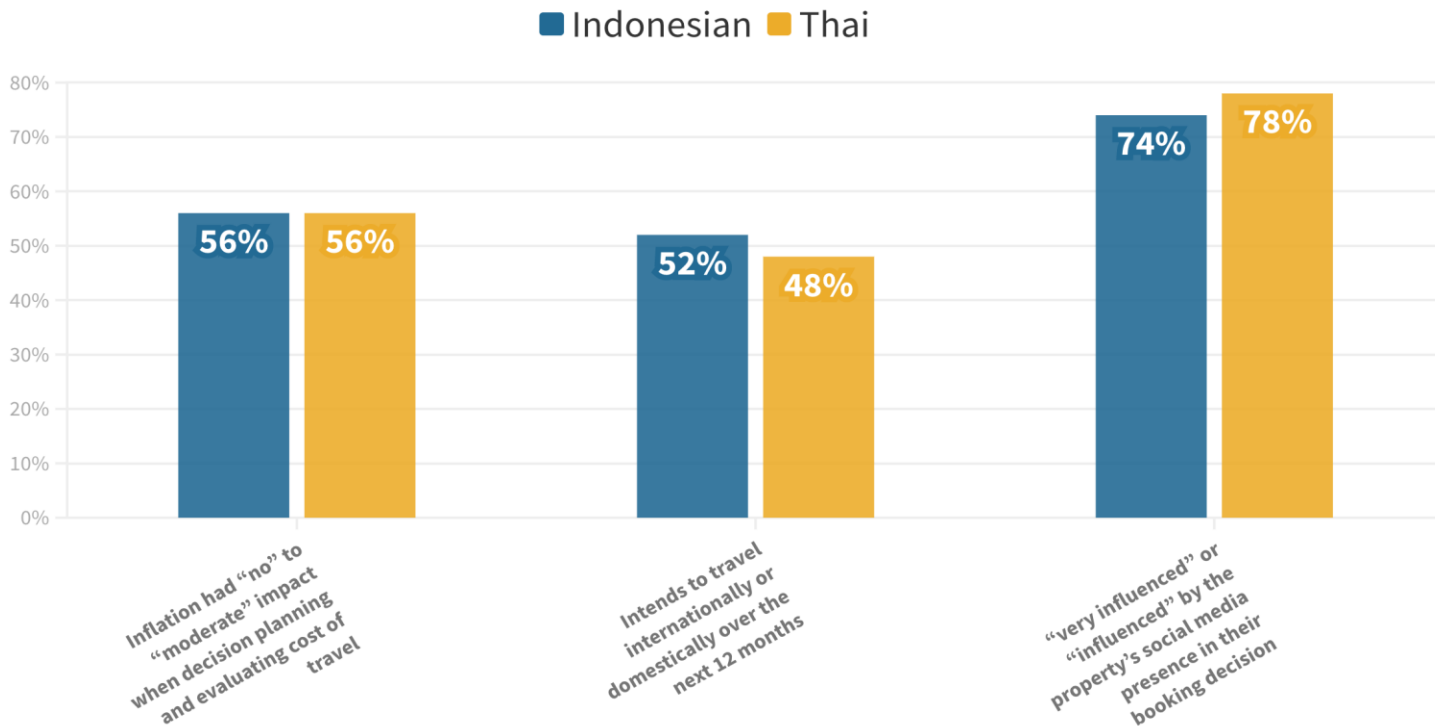
# THAILAND, SINGAPORE MORE CONCERNED ABOUT HEALTH

## TOP OBSTACLES FOR TRAVEL



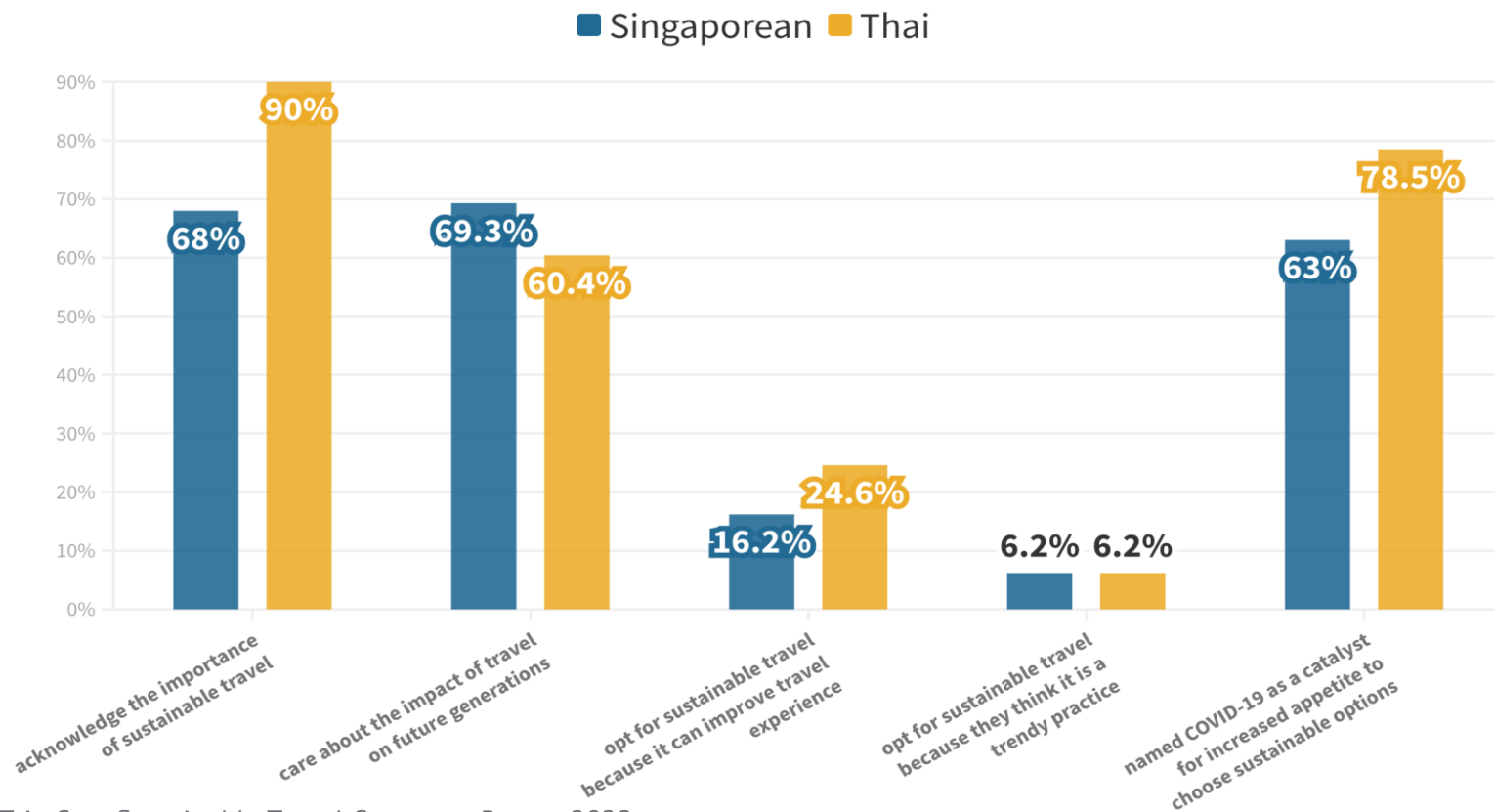


# CLOSE TO HALF OF THAIS, INDONESIANS HAVE SEEN IMPACT FROM INFLATION ON TRAVEL PLANS



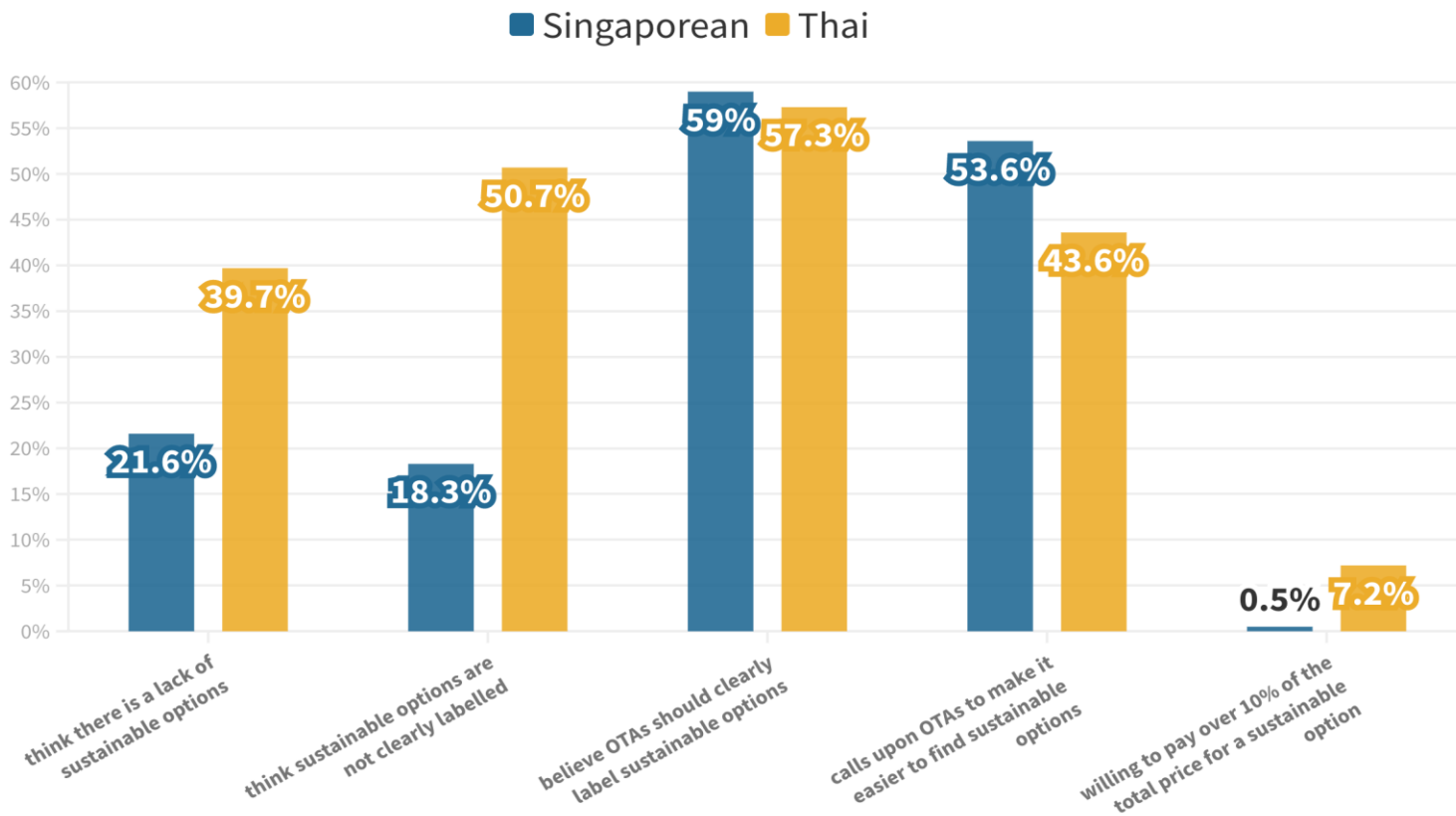


# SUSTAINABILITY BECOMING MORE IMPORTANT





# ... BUT CONSUMERS STILL NOT WILLING TO PAY MORE FOR SUSTAINABLE OPTIONS





# TRAVEL AGENCY STATS

- EU Holidays saw bookings for New Zealand packages surge 200% in Aug 2022 vs 2019
- Super Travels (Singapore) reported that outbound bookings for Europe have recovered to 80% of 2019 levels in Aug 2022, whilst bookings for Asian destinations are at 65%
- Trip.com revealed searches for Japan increased 91% MoM from the Philippines, 520% MoM from Singapore, 463% MoM from Thailand, in Sep as Japan announced border reopening
- Klook Philippines saw international travel bookings growing 5,962% YoY in H1 2022, of which the majority are bookings to Singapore, Thailand, and South Korea

# 4. WHAT CHALLENGES ARE OUTBOUND TOUR OPERATORS FACING?



# TOP CHALLENGES FOR OUTBOUND TOUR OPERATORS

- Difficulty in obtaining visas, especially for European destinations
- Inflation/ rise in cost of living affecting outbound demand
- Rising airfares
- Lack of flights/ limited seats and connectivity





**Looking for a weekly update  
on Southeast Asia's  
tourism recovery?**

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