

# ETC MARKET STUDY



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**SOUTH-EAST ASIAN  
OUTBOUND TRAVEL MARKET**

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**EUROPEAN  
TRAVEL  
COMMISSION**

# **STUDY ON THE SOUTH-EAST ASIAN OUTBOUND TRAVEL MARKET**

## **WITH A FOCUS ON EUROPE AS A TOURISM DESTINATION**

A report produced for  
the European Travel Commission  
by Market Vision Research & Consulting Services



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### **South-East Asian Outbound Travel Market**

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## EXECUTIVE SUMMARY

The four key outbound travel markets in the South-East Asian region: Singapore, Malaysia, Indonesia and Thailand, have shown tremendous growth over the past several years, generating over 40 million outbound departures and USD 53 billion outbound travel expenditure in 2017. These markets have the potential to make a significant contribution to European inbound travel flows in the coming years.

This study was conducted amongst **potential visitors to Europe**, both first-time and repeat visitors, who intend to visit Europe in the next five years. Findings of this study are therefore specific to this target segment and need not necessarily apply to general outbound travellers from South-East Asia.

Overall outcomes from this study appear to be quite similar across the four markets under examination, albeit with some differences in travel habits, behaviour and perceptions.

The study reveals that Europe is the most aspirational holiday spot among long-haul destinations for South-East Asian travellers. The region is perceived as a destination that offers scenic beauty and natural landscapes, good weather, diversity of cultural/historical attractions, holiday experiences and activities. These elements are what drive travel to Europe among both first-time and repeat visitors.

Europe's image as a prestigious holiday destination is also an important motivating factor for South-East Asians to visit the continent. In fact, first-time visitors who tend to visit multiple destinations on their trip, prioritise countries that are perceived to be more 'prestigious' such as France, Italy and Germany. The ease of borderless travel between countries, backed by a well-developed tourism infrastructure, adds to Europe's appeal as a continent with 'unity in diversity'.

Holiday activities centre on sightseeing, visiting historical and cultural attractions, local gastronomy and shopping, which mirror the main drivers for travel to Europe. Specific exploration of different passion-related or interest-based travel themes among South-East Asian consumers establishes Europe's perceived competitive advantage on slow adventure, culture and history, nature, city life and local gastronomy - the top five travel themes considered as 'important to be able to experience it' or as the 'main reason for travel'.

On the negative side, Europe is seen as an expensive holiday destination which is the main barrier to travel to the continent. Limited air connectivity (direct flights), especially from Malaysia and Indonesia, and the need to apply for a Schengen visa (for citizens of Indonesia and Thailand) are other key deterrents for travel to Europe from these markets.

## RECOMMENDATIONS

Based on an overall analysis of Europe's main strengths and opportunities, from a tourism destination marketing perspective, a focus on specific tourism products, Pan-European multi-destination travel themes and experiences for the South-East Asian market is recommended:

### Tourism products, themes and activities

- **Multi-destination interest-based travel themes**

A combination of city life, culture/history, nature and local gastronomy would appeal to both first-time and repeat visitor segments to Europe. Promotion of Pan-European multi-destination itineraries (regions and countries) that give due consideration to different interests, with a focus on city-based holidays, is recommended.



- **Mono-destination immersive travel experiences**

Slow adventure, incorporating local interactions and culturally authentic experiences, and local culinary experiences would be a draw among young couples and families. Destinations with high repeat visitation can develop and promote experiential itineraries that encourage dispersion of tourists to small towns and the rural countryside.

- **Seasonal festivals, events and experiences**

South-East Asian consumers are motivated to visit destinations to participate in festivals, events and unique experiences in different parts of the world, including in Europe. Potential opportunities exist to promote European regions and destinations for seasonal events and festivities - an annual calendar of events can be promoted in the South-East Asian markets. This can include art and culture, music and entertainment, global sporting events, nature and landscape, food festivals, etc.

- **Solo travel experiences**

Young solo travellers are the best prospects for budget-friendly backpacking and adventure trips. Luxury solo travellers, especially financially independent working women in Singapore and Malaysia, are also a growing segment. Destinations would benefit from targeting the relevant consumer segment with appropriate tourism products and travel experiences.

## **Marketing, trade and PR activities**

In order to promote Europe's tourism destination products and travel themes in the market, first and foremost, a one-stop information toolkit is advised, that includes regional and destination information, product and thematic travel itineraries, seasonal events calendar, etc, that can be easily accessed by the travel trade and media in the South-East Asian markets.

Additionally, ongoing marketing, trade and PR activities are recommended, that include but are not limited to, the following:

- In-market or online training sessions for travel agents and OTAs in South-East Asia
- Familiarisation trips for travel agents to experience the tourism products and travel themes first-hand
- Press tours and media trips, including for online media (bloggers/influencers)
- Year-round content distribution to local and regional media
- Co-promotion campaigns with airlines, travel agents and OTAs in each market
- Joint road shows and sales visits by regional destinations in each source market
- Online campaigns and promotions with OTAs, on travel review websites and social media
- Partnership with local celebrities for consumer campaigns to improve awareness and knowledge of European regions and destinations, while promoting thematic travel across Europe
- Participation in travel trade shows and fairs in South-East Asia

For Muslim consumers in South-East Asia, information on Halal gastronomy in Europe can be curated and shared via destination websites and social media accounts.

It is recommended that ETC, along with its member countries, consider participation in ITB Asia, the most prominent travel trade show in South-East Asia, held annually in Singapore.

Finally, it is advised that market dynamics in South-East Asia be regularly monitored to stay on top of trends in consumer travel habits and behaviour, that may impact future travel to Europe.



## CHAPTER 2



# REGIONAL PROFILE: SOUTH-EAST ASIA





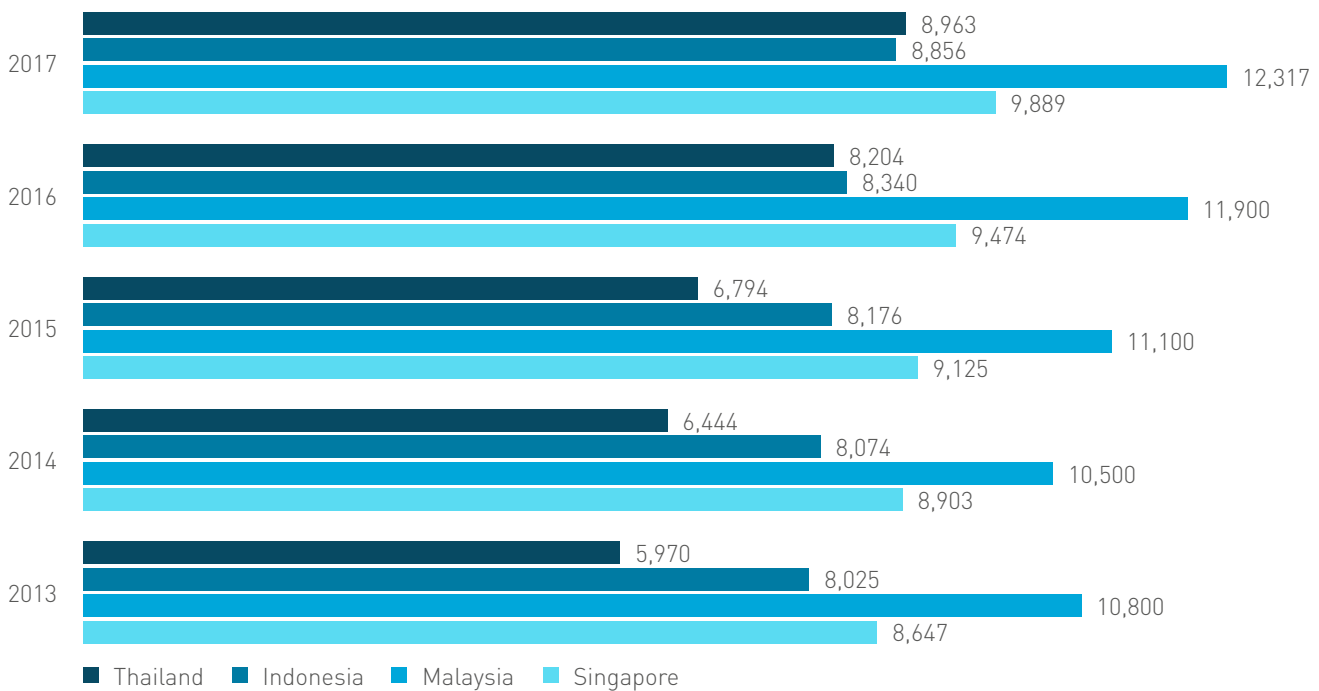


## 2. REGIONAL PROFILE: SOUTH-EAST ASIA

### 2.1 TRAVEL MARKET OVERVIEW

The four South-East Asian outbound travel markets – Singapore, Malaysia, Indonesia and Thailand, together generated over 40 million outbound departures in 2017, up from 33 million in 2013, growing at a cumulative average growth rate (CAGR) of 4.6% during this period. Outbound travel expenditure during the same period rose from USD 51 billion to USD 53 billion. Malaysia is the largest outbound market in terms of travel volume, while Singapore is the largest in terms of outbound travel expenditure.

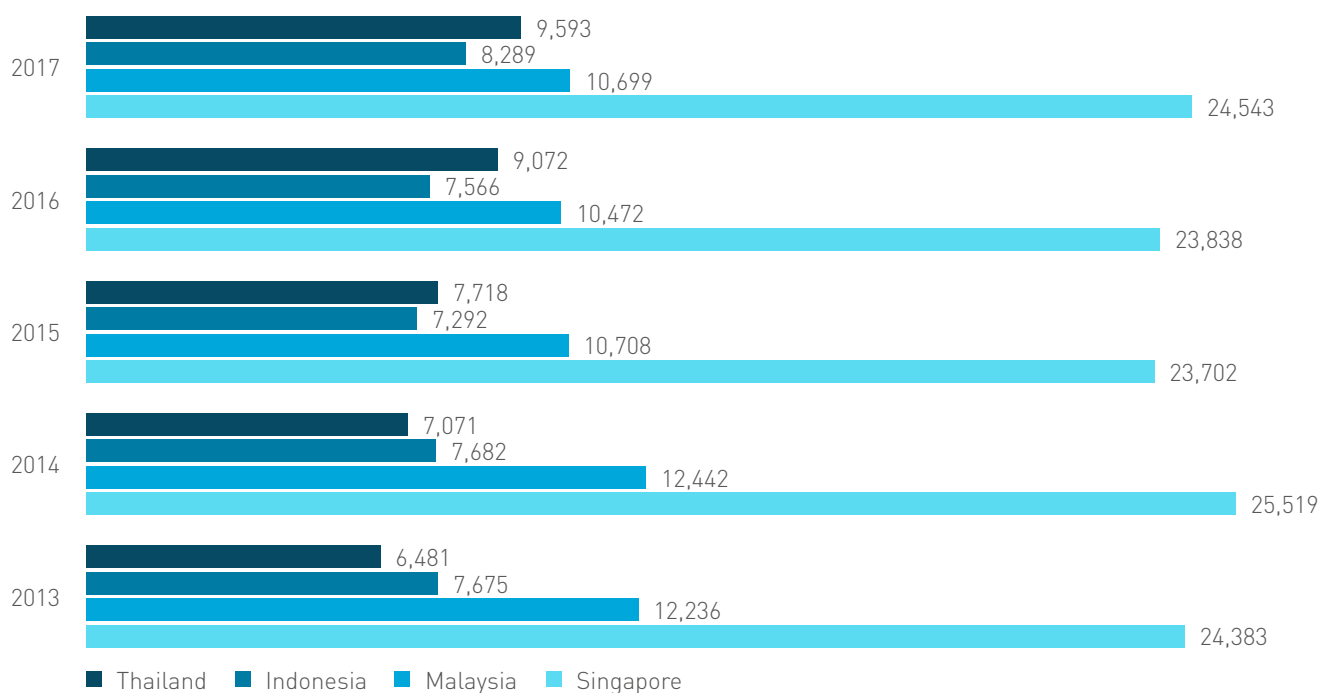
Figure 1 – Outbound departures (000)



Source: World Tourism Organization (2018), Compendium of Tourism Statistics dataset



Figure 2 – Outbound expenditure (US\$ Mn)



Source: World Tourism Organization (2018), Compendium of Tourism Statistics dataset

### 2.1.1 Future trends and outlook

UNWTO's Tourism Towards 2030 report forecasts Asia and the Pacific outbound tourism to reach 541 million arrivals worldwide by 2030.<sup>1</sup> Based on historical travel trends, increasing household incomes, improved air connectivity and travel facilitation, it is anticipated that the South-East Asia sub-region will continue to make a significant contribution to international tourist departures from the region.

MasterCard International's 2016-2021 outbound travel forecast indicates positive trends for all four South-East Asian markets, with CAGR ranging from 3.5% in Singapore and Malaysia, to 4.8% and 8.6% in Thailand and Indonesia respectively.<sup>2</sup>

According to Tourism Economics' Understanding Growth Potential from Long-Haul Travel Markets report for the European Travel Commission, among long-haul destinations, Europe is, and will continue to be, the key beneficiary of this growth trend in the coming years.<sup>3</sup>

This study, that focuses on short term travel prospects (next five years' horizon), confirms that Europe is the top long-haul destination of choice for tourists from South-East Asia. This augurs well for European tourism destinations in the coming years.

<sup>1</sup> World Tourism Organization (2011), Tourism Towards 2030 – Global Overview

<sup>2</sup> MasterCard Future of Outbound Travel in Asia Pacific (2016 to 2021) Report

<sup>3</sup> Tourism Economics (2016), Understanding Growth Potential from Long-Haul Travel Markets – A Report for the European Travel Commission



## 2.2 TRAVEL TRADE INSIGHTS

### 2.2.1 Profile & behaviour of long-haul leisure travellers

According to the travel trade, long-haul leisure travellers from South-East Asia are mainly young couples and families, with some travelling solo or in a group (friends/friends and family). The age category of the travelling class is 21-54 years, with some older family members also forming the multi-generational travel party, especially in Indonesia and Malaysia. Solo travel is trending up, especially among financially independent working women, in countries such as Singapore and Malaysia.

South-East Asians undertake an average of 2-3 holidays overseas, with one long-haul trip typically lasting 10-21 days. The more affluent citizens travel more frequently and on longer holidays. Travel is round the year, with maximum travel during school holidays (summer and winter), which vary somewhat by source market. For example, winter holidays are usually more than a month long in Singapore and Malaysia, which leads to a spike in long-haul travel during the period end-November to end-December. In the shorter mid-term breaks and public holidays, travel is usually to domestic or regional destinations within South-East Asia or the rest of Asia-Pacific. Notably, Singaporeans are increasingly making use of long festive weekends to take an extended holiday overseas.

The travel party usually consists of 2-4 people but can be larger in Malaysia and Indonesia where multi-generational travel is more common. Most travel is on free independent travel (FIT) basis, with group travel primarily restricted to MICE, student groups and sporting vacations such as groups of friends travelling for the Australian Open tennis tournament, football championships or golfing holidays. Customized FIT travel is trending up and is evolving towards more interest-based and experiential holidays, especially among the more experienced international travellers.

In terms of accommodation, family travellers prefer four-star hotels across all markets, with a larger proportion of Singaporeans opting for five-star hotels, and some cost-conscious travellers (Malaysians and Thais) choosing to stay in budget accommodation. Across all markets, service apartments are preferred by larger family groups. This trend is likely to continue, even as online travel agencies (OTAs) and sharing economy platforms (Airbnb) are driving travellers to book direct.

Online travel agencies (OTAs) are being used more and more especially for accommodation bookings, with Expedia, booking.com and Agoda as the clear leaders. However, travel agents are still the main booking channel, especially by travellers seeking multi-country and customized tours. Malaysians, one of the most cost-conscious travellers in Asia, are increasingly using online booking channels as it reduces travel costs.

Most travel is city-based with sightseeing, culture and history, gastronomy and shopping as the key interests driving in-destination activities. Group travel (friends) is largely within Asia, even as a small but growing segment is travelling to long-haul destinations for interest-based holidays such as adventure and sports (golfing holidays, global sporting events).

A variety of holiday activities are undertaken by South-East Asian travellers such as sightseeing, dining out, local experiences, shopping, wine tours, attending performances/shows, etc. While Singaporeans are interested in historical and cultural attractions, and show a propensity for authentic experiences, other South-East Asian travellers enjoy city tours including food and drink, culture, parks, sightseeing and shopping. Younger travellers (millennials) are increasingly seeking experiential holidays - new places, cultural immersion and local 'insider' experiences.





### 2.2.2 Destination trends

According to the travel trade, intra-regional travel, supported by rising connectivity through low-cost carriers, constitutes 80%-85% of outbound travel among South-East Asians. Maximum long-haul travel is to Europe (50%-60% share), followed by North America (10%-15% share). Other regions such as the Middle East and Africa have lower interest currently but can be expected to grow in the future.

In Singapore, destination choices vary, with Singaporeans aiming to tick one or more destinations on their bucket list each time they travel overseas. Traditional holiday destinations in Europe such as United Kingdom, France, Germany, Italy and Switzerland continue to be most popular, but more mature travellers are moving beyond the main cities to the French Riviera, Tuscany, etc. Emerging destinations include Russia, Greece and Finland. Australia, New Zealand and Japan are key competitor destinations, with demand for the latter rising due to direct flights between Singapore and different cities in Japan such as Okinawa, Osaka, Hiroshima, Nagoya and Fukuoka (besides Tokyo). Travel to the United States and Canada is stable, though well below the demand levels witnessed in some European destinations.

In Malaysia, the preferences of overseas travellers have undergone noticeable change over the years. While Western European countries and United Kingdom are top favourites, Central/Eastern European destinations are evincing interest among Malaysians seeking affordable travel options. Demand for Turkey and the Balkans is also seen to be rising, in some part due to their Muslim-friendly environment (Turkey, Bosnia and Herzegovina, Bulgaria). There is a growing preference for off-the-beaten-track destinations and experiences among seasoned Malaysian outbound travellers. For example, Moscow – Kazan coach tours are growing in popularity, as are tours to see the Northern Lights in Finland or Ireland. Demand for North America (United States) is also picking up, driven by Asian carriers offering low airfares.

For Indonesians, the evergreen destinations in Europe are United Kingdom, France, Italy, Germany, Switzerland, Holland and Turkey. Of late, United Kingdom is seeing decline due to the longer visa processing time as the passport is now sent to the Philippines for stamping. Interest in Central/Eastern Europe is rising, as Indonesians look to explore new, affordable destinations. Japan and Australia are well-established tourism destinations in the Indonesian outbound travel market. Though more expensive than Europe, Australian visas are easier to obtain, and flight costs are lower. Australia is also a popular VFR (visiting friends and relatives) destination, as many Indonesian youth study in Australian colleges and universities. Travel to the Middle East is mainly for religious pilgrimage tours.

In Thailand, Europe commands the largest share of long-haul travel, with the traditional Western European destinations most popular. Russia is also gaining popularity as Thai citizens have visa-free access to the country. A shift towards more affordable travel options in Europe is expected in the future. Demand for Japan has skyrocketed in the past five years, attributed to the visa-free policy for Thai citizens (since 2013) and better air connectivity by full-service airlines and low-cost carriers. Demand for Australia and New Zealand is also on the rise.

Looking at future trends, in terms of sheer numbers, Asia will continue to welcome 3-4 times the number of travellers that visit long-haul inter-regional destinations, due to proximity, accessibility, lower cost and familiarity. Inter-regional travel demand is expected to grow the fastest to Europe compared to other world regions. Within Europe, the fastest growth will be to new destinations, especially in Central and Eastern Europe, the key driver being affordability. Among repeat visitors, demand for alternative destinations to the traditionally popular hotspots of London and Paris will be accelerated, as visitors move beyond the main cities to smaller towns and the rural countryside for relaxation and local, immersive experiences.

Above all, South-East Asian travellers are mostly city enthusiasts, culture and history explorers (sightseeing and excursions oriented), fashion shoppers and gastronomy lovers. Travel itineraries that incorporate these interests are expected to appeal to both first-time and repeat visitors to Europe.



### 2.2.3 Marketing of Europe to travellers

Europe is an aspiration destination for South-East Asian consumers. It is easy for the travel trade to sell Europe, especially the traditional tourism hotspots like France, Italy, Germany, Austria and Switzerland. The major advantage of Europe compared to other international destinations is seen to be the ease of borderless multi-country travel within the continent.

The travel trade believes that there is tremendous opportunity to grow travel to Europe, not only to the main tourism destinations in Western Europe, but also to destinations in other regions. The challenge is to improve awareness and knowledge among both the travel trade and the consumers about the rest of Europe. This requires consistent and dedicated effort by the national tourism organizations (NTOs) to educate the trade and to target consumers through media, marketing and promotional campaigns.

The travel trade cites the example of the Finnish Tourism Board, whose participation in ITB Singapore and promotional campaigns in partnership with Finnair, are leading to good growth from South-East Asia to Finland and other Nordic countries.

The increasing use of online booking channels by consumers is affecting the traditional travel agency business and the trade feels the need for constant innovation in the type of holidays, travel itineraries and holiday experiences they offer to their customers. The trade also looks to continually add new destinations to their portfolio, that would appeal to both the budget-conscious and the affluent, seasoned travellers.

The larger travel agencies are proactive in offering online services and run several advertising and consumer promotions during the holiday seasons. They are also active on social media.

Finally, most travel trade professionals believe that ongoing educational and promotional support from European NTOs would be beneficial to grow the overall outbound market to Europe from South-East Asia.





## KEY VARIATIONS BETWEEN THE FOUR SOUTH-EAST ASIAN MARKETS

The research shows that the four South-East Asian markets are quite similar in terms of travel habits and behaviour. However, some key variations are noted, as follows:

- Singaporeans and Malaysians have wider travel experience compared to Thai and Indonesian citizens, by virtue of having visa-free or visa on arrival access to nearly 200 destinations worldwide.
- Business travel to Europe is most prevalent among Singaporeans, while travel for short study or student exchange programs to Europe is most popular among Thai citizens.
- Visiting friends and relatives (VFR) travel is more popular among Singaporean and Thai visitors to Europe, than among Malaysian and Indonesian visitors.
- Thai visitors are least likely to go on an adventure trip to Europe, but most likely to go on nature tours when in Europe.
- Holiday in the countryside is most popular among Singaporean visitors to Europe, while holiday in the mountains is most appealing to Malaysian visitors. Indonesians are most attracted to snow/ski holidays in Europe compared to their regional counterparts.
- Peak travel months vary by market, coinciding with the school calendar year. The most recent trip to Europe indicates maximum travel to Europe in June from Singapore, December from Malaysia and Indonesia, and October from Thailand.
- Indonesians are most likely to visit entertainment/theme parks while on holiday in Europe, while Thai visitors are most likely to enjoy the nightlife, compared to their regional counterparts.
- A larger proportion of Singaporeans travel solo to Europe compared to visitors from other regional markets. Travelling with friends is least common among Indonesians.
- Compared to their regional counterparts, a much larger proportion of Malaysians prefer serviced apartments for accommodation in Europe. They are also least likely to book through a travel agent.
- Travel expenditure in Europe is much higher among Singaporean and Thai visitors compared to Indonesian and Malaysian visitors.
- Thais are most knowledgeable about European regions compared to their regional counterparts.
- Indonesians are more likely to visit individual European destinations for interest-based holiday experiences than their other South-East Asian counterparts.



## 3. INDIVIDUAL COUNTRY INSIGHTS: SINGAPORE

### 3.1 COUNTRY PROFILE






## SINGAPORE

Capital: Singapore

**Location:** Off the southern tip of Peninsular Malaysia in South-East Asia



**Population**  
6 million



**GDP**  
US\$556 billion



**GDP per capita**  
US\$98,255


#### Population Characteristics



Citizens:	62%
Non-citizens:	38%
Males:	45%
Females:	55%
0-14 years:	11%
15-64 years:	55%
65 years and over:	34%




**Languages**  
Malay, Mandarin,  
Tamil and English




**Religion**  
Buddhists: **33%**; Christians: **19%**;  
Unaffiliated: **18%**; Muslims: **14%**



**Currency**  
Singapore Dollar  
(SGD)



**Exchange rate**  
1 USD = **1.35 SGD**;  
1 EUR = **1.53 SGD** (as on June 26, 2019)



**Literacy**  
97%



**Migrants**  
(overseas communities)  
**327,043; 19% in Europe**



**Internet penetration**  
84%

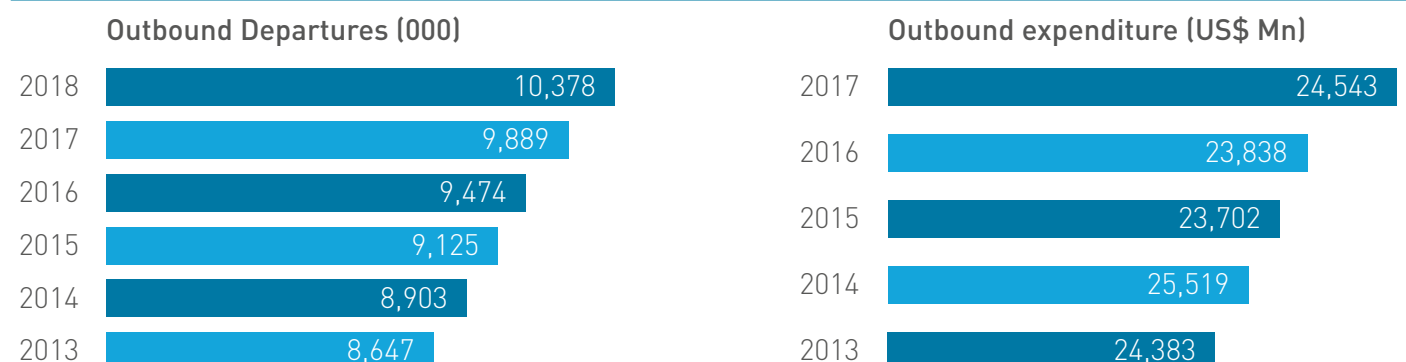
#### Sources:

1. International Monetary Fund, World Economic Outlook Database, October 2018

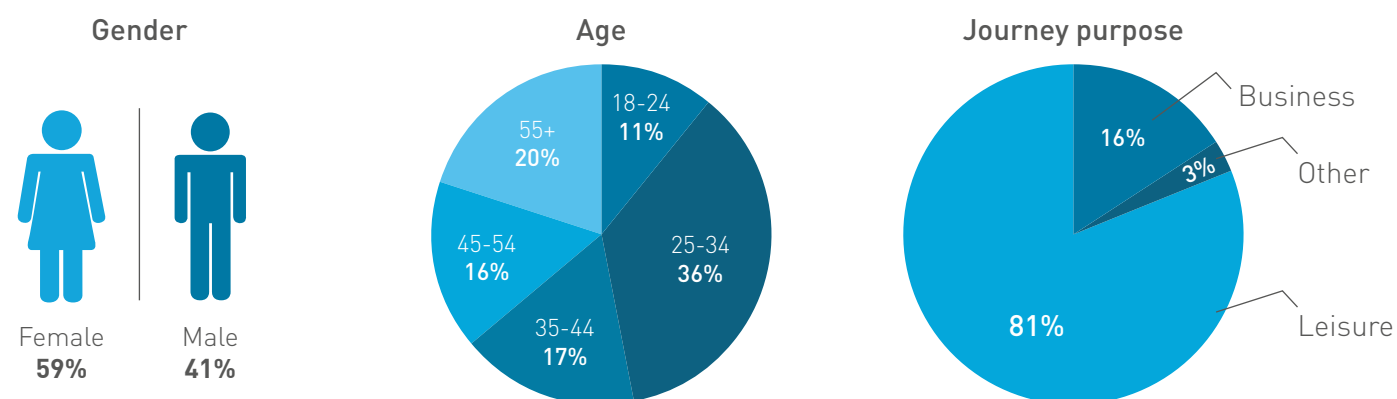
2. United Nations, Department of Economic and Social Affairs. Population Division (2017). Trends in International Migrant Stock: The 2017 revision [United Nations database, POP/DB/MIG/Stock/Rev.2017]

## 3.2 TRAVEL MARKET OVERVIEW

### Key statistics



### Visitor profile



### Connectivity

#### Departing passengers (2018)



World – 32.2 Mn  
Europe – 2.5 Mn

- Departure airport: **Singapore Changi Airport**
- Connections to 19 cities in Europe

#### Arrivals in top 10 long-haul destinations (2017)

<b>Australia</b>	<b>432,970</b>	<b>New Zealand</b>	<b>58,544</b>
<b>Japan</b>	<b>404,132</b>	<b>Canada</b>	<b>36,633</b>
<b>United Kingdom</b>	<b>228,578</b>	<b>Finland</b>	<b>32,571</b>
<b>United States of America</b>	<b>148,107</b>	<b>Italy</b>	<b>23,043</b>
<b>Switzerland</b>	<b>70,412</b>	<b>Turkey</b>	<b>17,325</b>

### Visa facilitation

Visa-free or visa-on-arrival access to 189 countries and territories, including European destinations. Visa required for Russian Federation.

#### Sources:

1. Amadeus Asia Pacific (2017), Journey of Me Insights APAC Report
2. World Tourism Organization (2018), Compendium of Tourism Statistics
3. Department of Statistics Singapore (2018), Air Passenger Departures by Region/Country of Disembarkation, Annual
4. Henley Passport Index 2019

## 4. INDIVIDUAL COUNTRY INSIGHTS: MALAYSIA

### 4.1 COUNTRY PROFILE






## MALAYSIA

**Capital:** Kuala Lumpur


**Location:** In Southeast Asia, shares land borders with Thailand, Brunei and Indonesia.



**Population**  
32 million



**GDP**  
US\$1,000 billion



**GDP per capita**  
US\$30,815

### Population Characteristics



Citizens:	92%
Non-citizens:	8%
Males:	52%
Females:	48%
0-14 years:	24%
15-64 years:	70%
65 years and over:	6%
Median age:	28.6 years



**Languages**  
Malay (official), English, Tamil and Chinese (Cantonese)



**Religion**  
Islam: 61%; Buddhism: 20%; Christianity: 9%; Hinduism: 6%



**Currency**  
Malaysian Ringgit (MYR)



**Exchange rate**  
1 USD = 4.13 MYR;  
1 EUR = 4.69 MYR (as on June 26, 2019)



**Literacy**  
94%



**Migrants**  
(overseas communities)  
1.9 million; 5% in Europe



**Internet penetration**  
80%

#### Sources:

1. International Monetary Fund, World Economic Outlook Database, October 2018

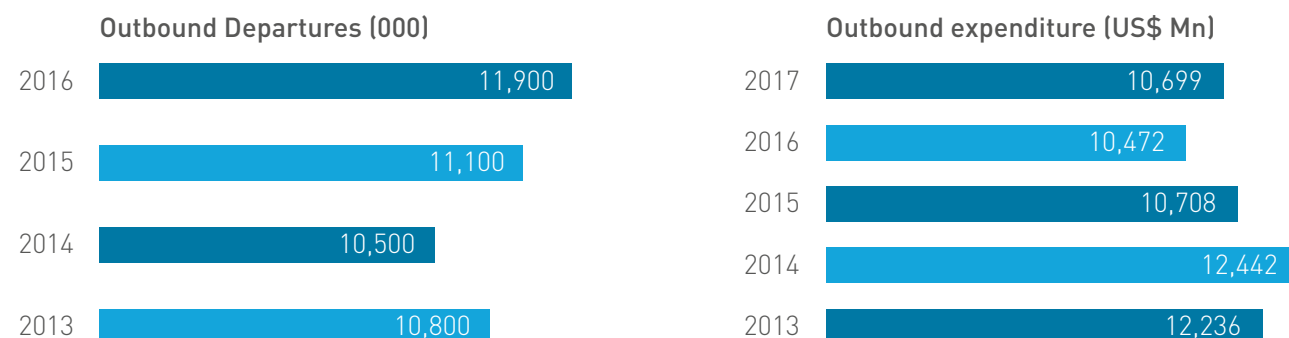
2. Department of Statistics, Malaysia; [www.dosm.gov.my](http://www.dosm.gov.my)

3. United Nations, Department of Economic and Social Affairs. Population Division (2017). Trends in International Migrant Stock: The 2017 revision

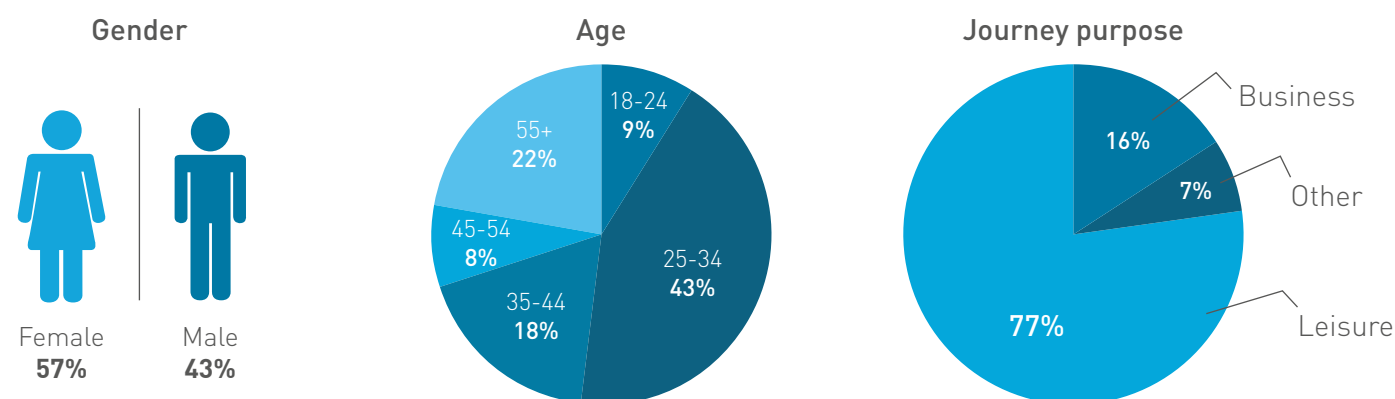


## 4.2 TRAVEL MARKET OVERVIEW

### Key statistics



### Visitor profile



### Connectivity

#### Departing passengers (2018)



World – 24.3 Mn  
Europe – 0.5 Mn

- Departure airport: **Kuala Lumpur International Airport and other airports**
- Connections to 6 cities in Europe

#### Arrivals in top 10 long-haul destinations (2017)

Japan	439,538	New Zealand	53,840
Australia	396,760	Italy	45,476
United Kingdom	179,274	Switzerland	39,495
United States of America	81,353	Bosnia and Herzegovina	14,212
Turkey	61,166	Canada	13,767

\*Excluding destinations in Middle East, Asia (exception: Japan) and Africa

### Visa facilitation

Visa-free or visa-on-arrival access to 179 countries and territories, including European destinations. Visa required for Russian Federation and Serbia.

Sources:

1. Amadeus Asia Pacific (2017), Journey of Me Insights APAC Report
2. World Tourism Organization (2018), Compendium of Tourism Statistics
3. Malaysia Airports Holdings Berhad (2018), Airports Statistics 2018
4. Henley Passport Index 2019

## 5. INDIVIDUAL COUNTRY INSIGHTS: INDONESIA

### 5.1 COUNTRY PROFILE



**Population**  
265 million



**GDP**  
US\$3,495 billion



**GDP per capita**  
US\$13,176

### Population Characteristics



Citizens: **99+%**

Non-citizens: **<1%**

Males: **50%**

Females: **50%**

0-14 years: **27%**

15-64 years: **67%**

65 years and over: **6%**

Median age: **30.2 years**



**Languages**  
Indonesian or  
Bahasa Indonesia (official),  
Javanese and Sundanese



**Religion**  
Islam: **87%**; Christianity: **10%**;  
Other: **3%**



**Currency**  
Indonesian rupiah  
(IDR)



**Exchange rate**  
1 USD = **14,125 IDR**;  
1 EUR = **16,055 IDR** (as on June 26, 2019)



**Literacy**  
**95%**



**Migrants**  
(overseas communities)  
**4.2 million; 4% in Europe**



**Internet penetration**  
**56%**

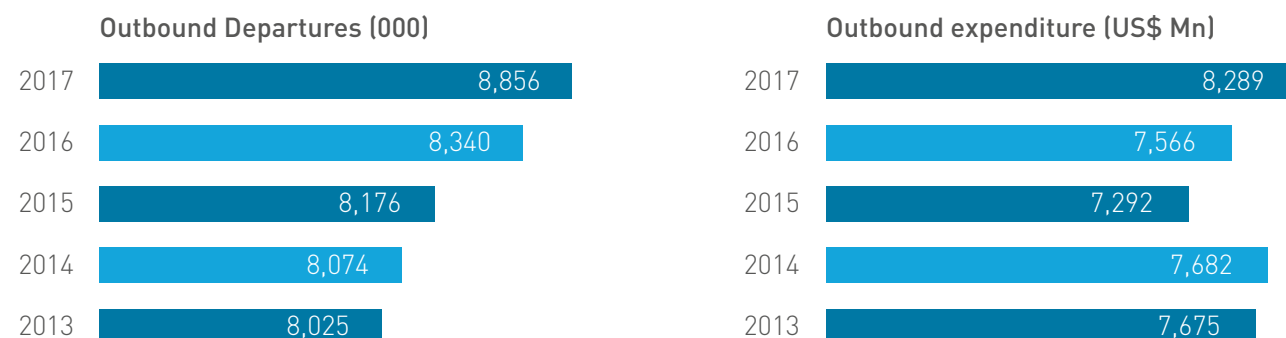
#### Sources:

1. International Monetary Fund, World Economic Outlook Database, October 2018

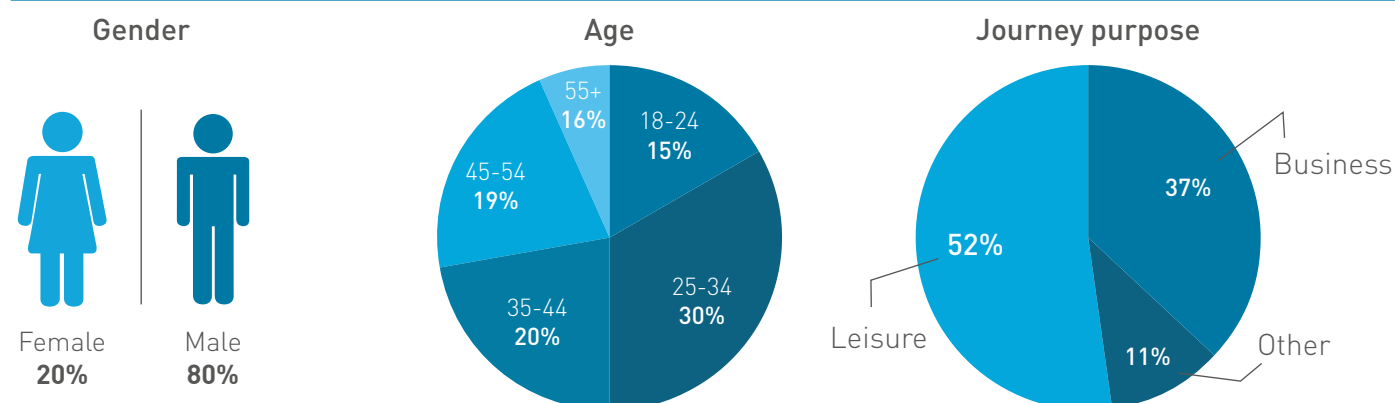
2. United Nations, Department of Economic and Social Affairs, Population Division (2017). Trends in International Migrant Stock: The 2017 revision (United Nations database, POP/DB/MIG/Stock/Rev.2017)

## 5.2 TRAVEL MARKET OVERVIEW

### Key statistics



### Visitor profile



### Connectivity

#### Passenger movements (2018)\*



International – 19.6 Mn  
Domestic – 91.8 Mn

- Departure airport: **Soekarno–Hatta International Airport, Jakarta**
- Connections to 3 cities in Europe

\*Arrivals and departures (only departures data not available)

#### Arrivals in top 10 long-haul destinations (2017)

Saudi Arabia	1,427,056	Netherlands	58,000
Japan	352,330	Switzerland	52,240
Australia	192,770	United Kingdom	45,614
United States of America	106,579	India	43,973
Turkey	85,031	Italy	42,243

### Visa facilitation

Visa-free or visa-on-arrival access to 71 countries and territories. Visa required for all European countries, except Armenia, Azerbaijan, Georgia, Serbia, Turkey and Ukraine (visa-free access or e-Visas).

#### Sources:

1. Amadeus Asia Pacific (2017), Journey of Me Insights APAC Report
2. World Tourism Organization (2018), Compendium of Tourism Statistics
3. PT Angkasa Pura II, Indonesia's Airport Company (2018), Annual Report Laporan Tahunan
4. Henley Passport Index 2019



## 6. INDIVIDUAL COUNTRY INSIGHTS: THAILAND

### 6.1 COUNTRY PROFILE





## THAILAND

**Capital:** Bangkok


**Location:** Southeast Asia, between the Indian and Pacific oceans



**Population**  
69 million



**GDP**  
US\$1,323 billion




**GDP per capita**  
US\$19,126

### Population Characteristics



Citizens:	96%
Non-citizens:	4%
Males:	49%
Females:	51%
0-14 years:	17%
15-64 years:	73%
65 years and over:	10%
Median age:	38.3 years




**Languages**  
Thai Central Thai (official), Lao




**Religion**  
Buddhism



**Currency**  
Thai Baht (THB)



**Exchange rate**  
1 USD = 30.7 THB;  
1 EUR = 34.9 THB (as on June 26, 2019)



**Literacy**  
93%



**Migrants**  
(overseas communities)  
902,928; 31% in Europe  
(Sweden, UK, Germany maximum)



**Internet penetration**  
82%

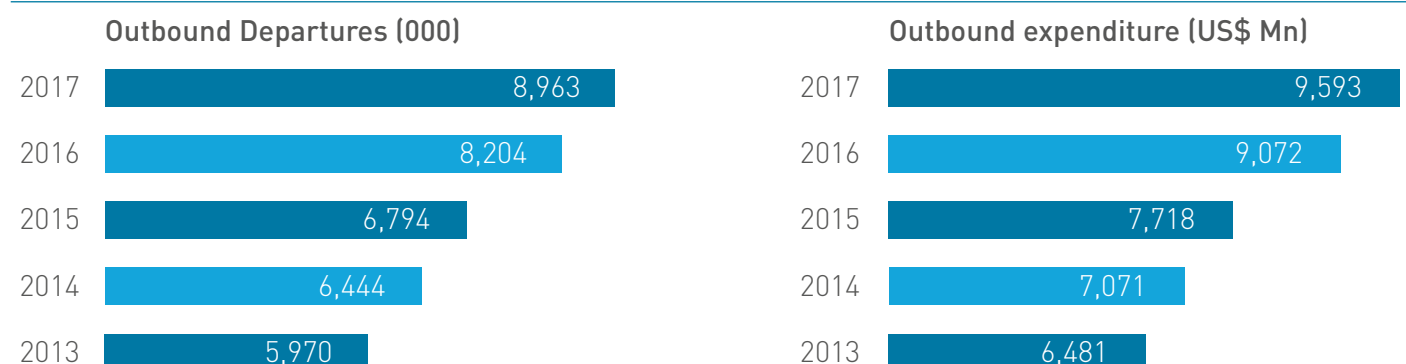
#### Sources:

1. International Monetary Fund, World Economic Outlook Database, October 2018

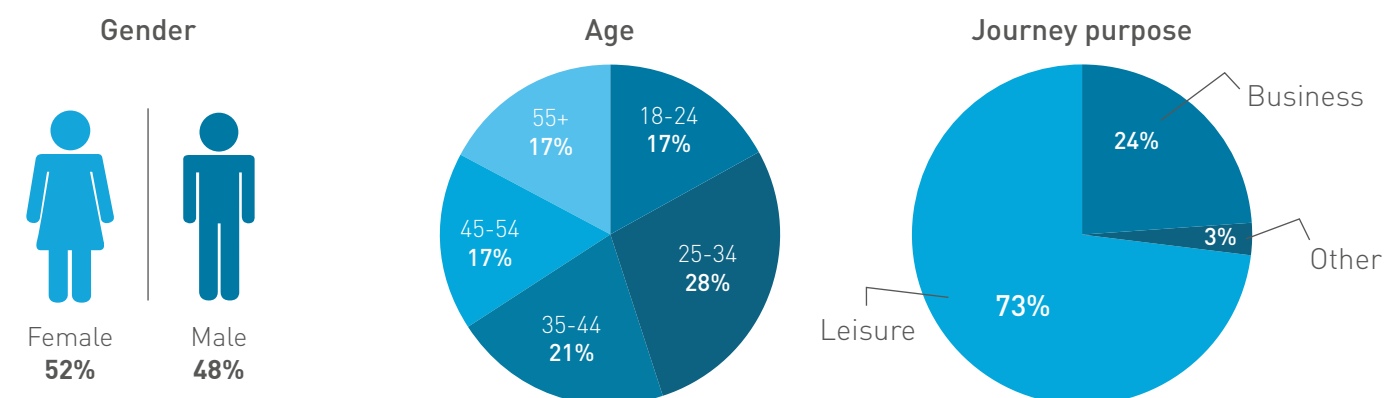
2. United Nations, Department of Economic and Social Affairs. Population Division (2017). Trends in International Migrant Stock: The 2017 revision [United Nations database, POP/DB/MIG/Stock/Rev.2017]

## 6.2 TRAVEL MARKET OVERVIEW

### Key statistics



### Visitor profile



### Connectivity

#### Departing passengers (2018)



World – 25.4 Mn  
Europe – 3.2 Mn

- Departure airport: **Suvarnabhumi Airport Bangkok**
- Connections to 20 cities in Europe

#### Arrivals in top 10 long-haul destinations (2017)

Japan	987,221	United Kingdom	93,563
Switzerland	143,449	Russian Federation	44,518
India	140,087	Italy	33,711
United States of America	102,509	Turkey	30,721
Australia	97,860	New Zealand	27,616

\*Excluding destinations in Middle East, Asia (exception: Japan) and Africa

### Visa facilitation

Visa-free or visa-on-arrival access to 75 countries and territories. Visa required for all European countries, except Armenia, Azerbaijan, Georgia, Russian Federation, Turkey and Ukraine (visa-free access or e-Visas).

Sources:

1. Amadeus Asia Pacific (2017), Journey of Me Insights APAC Report
2. World Tourism Organization (2018), Compendium of Tourism Statistics
3. Airports of Thailand plc (2018), Air Traffic Report 2018
4. Henley Passport Index 2019