

ETC MARKET STUDY



**SOUTH-EAST ASIAN
OUTBOUND TRAVEL MARKET**

**EUROPEAN
TRAVEL
COMMISSION**

**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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FOREWORD

The Asia Pacific region has played a vital role in the recent expansion of global tourism, both as an inbound and outbound market. With nearly 25% (342 million) of global tourist arrivals and 37% (USD 502 million) of the world's international tourism expenditure, it is the fastest growing region in the world. Great socio-economic development, improved air connectivity, travel facilitation and infrastructure developments are some of the growth drivers of this market.

Europe remains the top long-haul destination for tourists from the Asia Pacific region, accounting for more than half (56%) of Asia's interregional travel and a share of 13% of overall Asian travel (in terms of tourist arrivals by destination). The whole European region has seen rising numbers of Asian travellers (+15% in 2017), while destinations in Western Europe still represent the largest share of arrivals in the region (41%). Asia and the Pacific, and specifically the South-East Asian market, is expected to continue growing as it has in recent years, indicating a great potential to make a significant contribution to European inbound travel flows in the coming years.

To capitalise on this opportunity, the European Travel Commission has commissioned the present study which investigates the potential of four key outbound markets in the South-East Asian region (Indonesia, Thailand, Malaysia and Singapore) with a focus on Europe as a tourism destination. In line with ETC's strategic goals, the report aims at providing insights into the South-East Asian travel market and identifying long-term attitudinal and behavioural emerging trends with respect to travel to Europe.

A better understanding of these markets will not only lay the foundations for the development of thematic products and experiences that align with the interests of travellers from these markets but will also shed light on specific target groups that present a suitable fit to Europe as a tourism destination and to ETC member countries' offer.

ETC trusts that this report will provide practical guidance and necessary intelligence for tourism destinations to design targeted and impactful marketing and promotion strategies for South East Asian consumers. Furthermore, a thematic approach will allow destinations to present Europe as a collection of signature travel experiences that connect with the interests of travellers from these markets.

Peter de Wilde

President

European Travel Commission (ETC)



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 1



INTRODUCTION





1. INTRODUCTION

1.1 SCOPE OF THE STUDY

Europe is the top long-haul destination for tourists from the Asia Pacific region, accounting for more than half (56%) of Asia's interregional travel and a share of 13% of overall Asian travel (in terms of tourist arrivals by destination).

Asia and the Pacific, and specifically the South-East Asian market, is expected to continue growing as it has in recent years, indicating a great potential to make a significant contribution to European inbound travel flows in the coming years. To capitalise on this opportunity, the European Travel Commission has commissioned the present study which investigates the South-East Asian market with a special focus on Europe as a tourism destination.

The aim of the study is to provide a thorough analysis investigating the potential of the South-East Asian outbound travel market, with a focus on four key markets: Indonesia, Thailand, Malaysia and Singapore. Results are intended to provide insights to design targeted and innovative marketing and promotion strategies and support the development of thematic products and experiences that align with the interests of travellers from these markets.

1.2 RESEARCH METHODOLOGY

Undertaken during the period March to July 2019, the study focussed on primary research in each of the four South-East Asian markets. The research involved online interviews and focus groups with consumers as well as interviews with the travel trade.

- Online consumer interviews (quantitative) were conducted among 1,000 respondents across Singapore (300), Malaysia (300), Indonesia (200) and Thailand (200).
- Online focus groups (4) were conducted, one in each travel source market.
- Travel trade interviews were undertaken with a total of 14 representatives in the four countries.

All respondents were local nationals and permanent residents of each country, had travelled internationally in the past 3 years for holiday purposes or planned to undertake international travel for a holiday within the next 3 years, were open to considering a holiday in Europe in the next 5 years and were the main or joint decision makers for holiday travel in their household. There was a balance of respondents who had visited (50%) and not visited (50%) Europe.

1.3 STRUCTURE OF THE REPORT

This report documents the findings of the study and is structured as follows:

- **Chapter 2:** Regional Profile – South-East Asia
- **Chapters 3-6:** Individual Country Insights – Singapore, Malaysia, Indonesia and Thailand
- **Chapter 7:** Conclusions and Recommendations
- **Chapter 8:** Annexes

CHAPTER 2



REGIONAL PROFILE: SOUTH-EAST ASIA

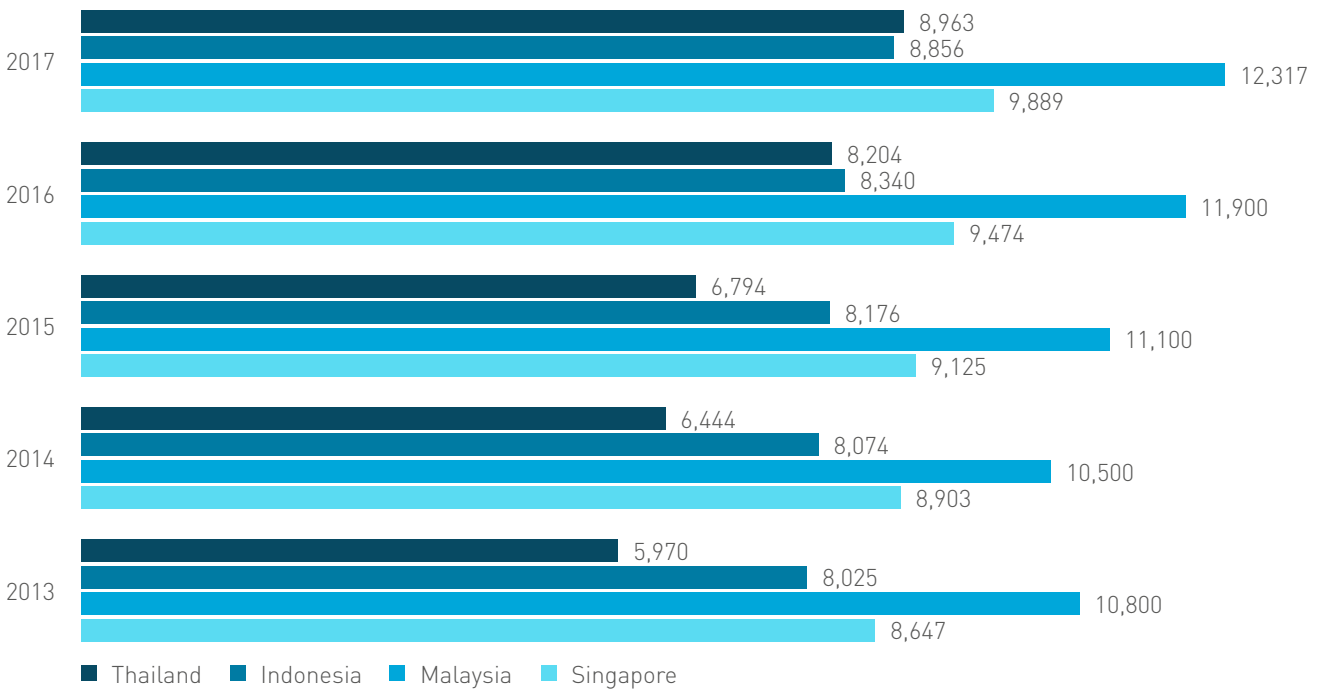


2. REGIONAL PROFILE: SOUTH-EAST ASIA

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 CAGR of 3.7% per annum. 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.

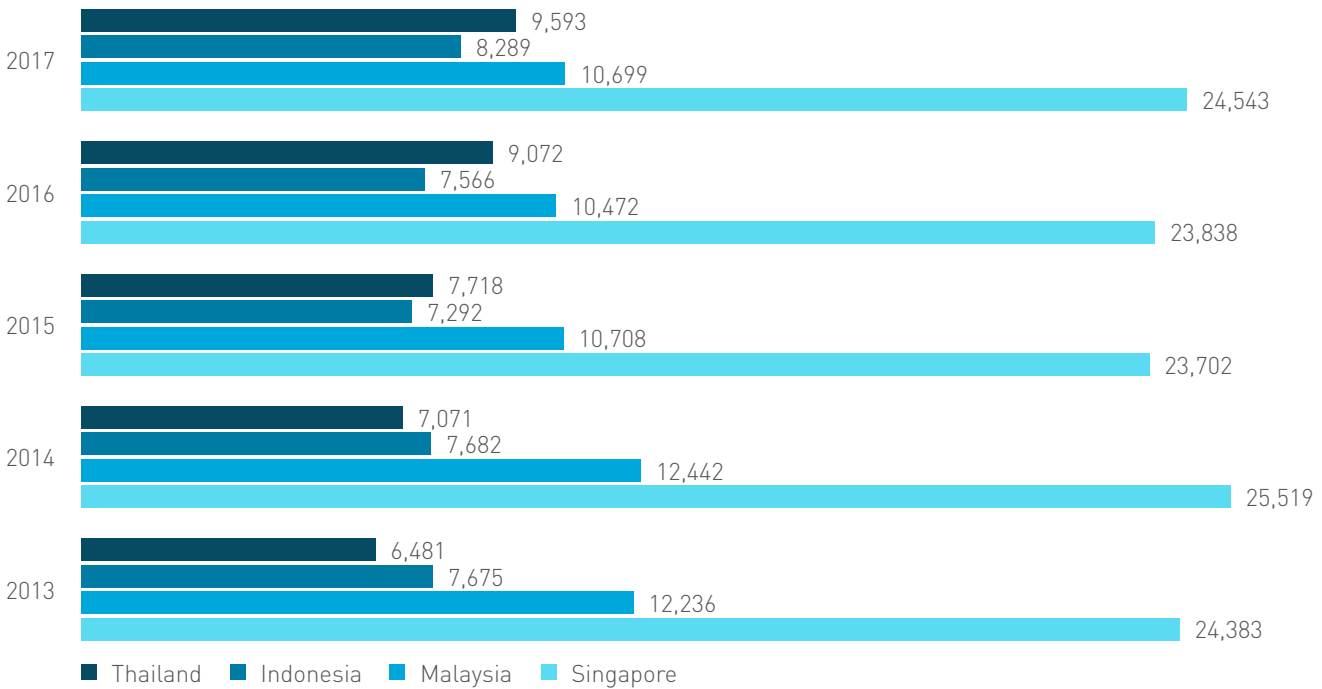
Figure 1 – Outbound departures (000)



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 2030.¹ 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 cumulative average growth rate (CAGR) ranging from 3.5% in Singapore and Malaysia, to 4.8% and 8.6% in Thailand and Indonesia respectively.²

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.³

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.

¹ World Tourism Organization (2011), Tourism Towards 2030 – Global Overview

² MasterCard Future of Outbound Travel in Asia Pacific (2016 to 2021) Report

³ 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.





2.3 CONSUMER INSIGHTS

Key highlights from the consumer research in the four South-East Asian outbound travel markets is presented in this section, with a focus on travel to Europe. Individual country reports are presented in the following chapters, which include analysis of travel to Europe and other world destinations.

2.3.1 Key motivations and barriers to visit Europe

Across all source markets in South-East Asia, Europe's scenic beauty and natural landscapes, weather, diversity of cultural and historical attractions, diversity of holiday experiences and activities and its status as a prestigious holiday destination are the top five drivers to visit Europe.

As the table below shows, other key motivating factors include shopping (high quality luxury shopping), ease of multi-country travel, ease of accessibility, etc. Shopping is more of a driver among Thai and Singaporean visitors than among Indonesians and Malaysians.

Satisfaction with (past) experience in Europe, desire to see more of Europe and to experience Europe in difference seasons are some of the additional drivers among repeat visitors to Europe.

Table 1 – Top ten motivations to visit Europe



	South-East Asia (n=1000)	Singapore (n=300)	Malaysia (n=300)	Indonesia (n=200)	Thailand (n=200)
Scenic beauty and natural landscapes	69%	67%	71%	68%	71%
To enjoy the weather in Europe	59%	55%	62%	54%	67%
Diversity of cultural & historical attractions	59%	53%	56%	64%	65%
Diversity of holiday experiences and activities	50%	48%	53%	51%	48%
Europe is a prestigious holiday destination	45%	38%	43%	57%	46%
Shopping for products/brands (luxury shopping)	35%	36%	32%	31%	41%
Overall, Europe is a value-for-money destination	27%	15%	18%	45%	39%
Can easily travel to many countries on single trip	25%	18%	24%	35%	30%
Ease of accessibility (well connected to Europe)	25%	21%	24%	27%	32%
Feeling of safety and security in Europe	21%	12%	18%	21%	38%

The cost of a European holiday is the primary barrier to travel to Europe. Need for advance planning and visa-related issues (among Thai and Indonesian travellers) are other factors, although for a fair proportion, the main reason has been a lack of opportunity to plan a trip to Europe thus far (all intend to travel to Europe in the next 3-5 years).



2.3.2 Travel experience

Most South-East Asian citizens have travelled within Asia for short and long holiday breaks. Other main regions include Australasia, North America and Europe (survey sample included 50% past visitors to Europe), with lesser travel experience in other world regions. By country, Singaporeans and Malaysians have greater travel experience compared to Indonesian and Thai citizens, a reflection of the power of their strong passports allowing visa free or visa on arrival access to 189 and 179 worldwide destinations, respectively.

Table 2 – Destination regions ever visited



	South-East Asia (n=1000)	Singapore (n=300)	Malaysia (n=300)	Indonesia (n=200)	Thailand (n=200)
Asia	92%	96%	89%	89%	92%
Europe	50%	50%	50%	50%	50%
Australasia	42%	52%	47%	44%	24%
North America	26%	32%	26%	20%	25%
Middle East	19%	15%	19%	28%	13%
Central and South America	8%	7%	11%	5%	9%
Africa	7%	8%	8%	6%	6%
Caribbean Islands	6%	7%	6%	4%	8%
Average number of regions ever visited	2.1	2.6	2.1	1.9	1.8

Specifically, in Europe, the most popular destinations among South-East Asian citizens are the classic holiday destinations in Northern, Western and Southern/Mediterranean Europe, with some variations by individual source markets. Overall, France, United Kingdom, Germany, Italy and Switzerland are the top five European destinations ever visited by South-East Asians.

Table 3 – Top fifteen European countries ever visited



	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
France	54%	53%	54%	57%	54%
United Kingdom	48%	54%	66%	38%	22%
Germany	41%	48%	40%	43%	32%
Italy	40%	47%	41%	38%	31%
Switzerland	38%	37%	39%	48%	30%
Holland	30%	25%	33%	47%	18%
Austria	27%	22%	29%	21%	38%
Spain	26%	29%	26%	24%	22%
Belgium	19%	18%	23%	22%	11%
Turkey	15%	14%	15%	23%	10%
Denmark	15%	17%	15%	10%	18%
Greece	12%	13%	11%	13%	10%
Sweden	11%	9%	13%	12%	12%



2.3.3 Travel behaviour in Europe

Key highlights from South-East Asian visitors' most recent visit to Europe in the past five years are presented below. Detailed travel behaviour and characteristics are presented in individual country reports.

• Purpose of travel

For most South-East Asian visitors, while leisure is the main purpose of travel to Europe, business travel also commands a fair share, indicating the potential for promoting bleisure (business + leisure) trips to this market segment.

Visiting friends and relatives (VFR) is another driver for travel as there is a significant South-East Asian diaspora in Europe. Travel for short study trips or student exchange programs is popular, especially among Thai and Indonesian travellers. A small but increasing percentage travel to attend global sporting events (mainly football) in destinations such as the United Kingdom, Spain and Germany. Travel for medical treatment is minimal as countries such as Singapore and Thailand boast of excellent medical facilities and are major players in the Asian medical tourism sector.

Table 4 – Purpose of travel to Europe



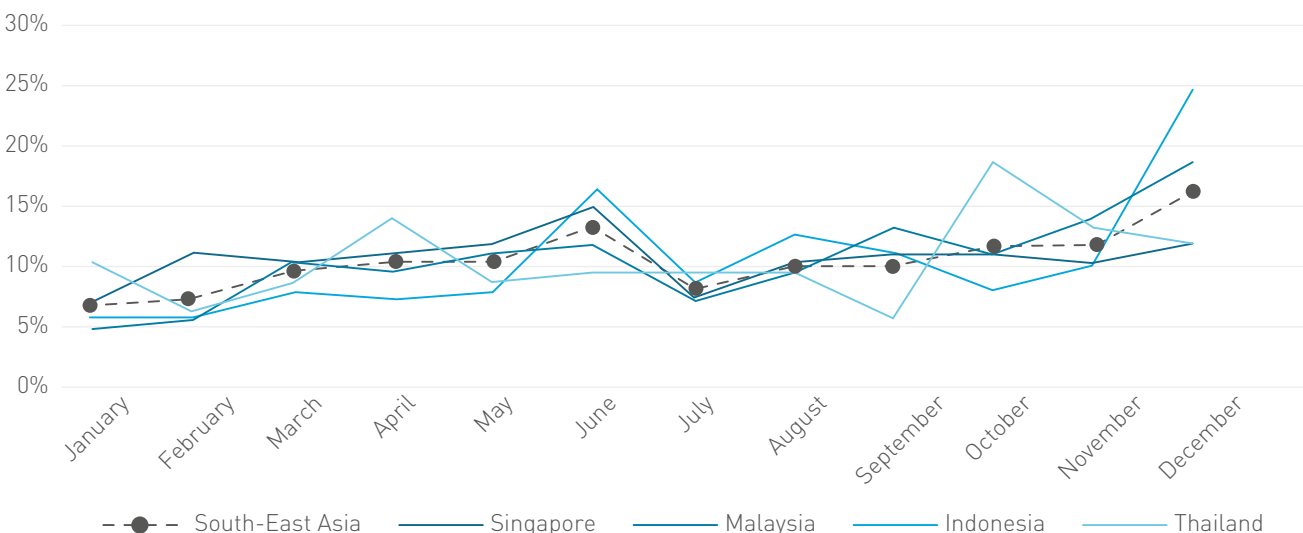
	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
Holiday trips	47%	45%	50%	48%	46%
Business trips	28%	33%	27%	28%	20%
Visiting friends & relatives (VFR)	13%	14%	13%	11%	14%
Health/medical trips	3%	2%	2%	4%	6%
Short study, sporting events, honeymoon, etc.	9%	6%	7%	9%	14%

• Seasonality

Travel to Europe is round-the-year, with a skew towards the summer and winter holiday periods. South-East Asian travellers are increasingly opting to spend winter holidays in Europe to experience the cold and to enjoy the festive season of Christmas.

Peak travel months vary by source market, coinciding with the school holiday calendar. For example, schools in Thailand end their academic year in mid-March, hence April is a peak month for family holidays, while in Indonesia, the school year finishes in mid-June with a break in December leading to a spike in travel in these months.

Figure 3 – Seasonality of travel to Europe



Base: all respondents been to Europe (n=500)



• Duration of holiday trip

Depending upon factors such as purpose of travel, number of days available and budget considerations, the duration of trip in Europe can range from three nights to over 20 nights. Overall, Europe attracts long stay visitors from South-East Asia, with an average stay of eight nights. There are some differences by source markets, with Malaysians spending above the average (9.9 nights) and Indonesians and Thai visitors spending below the average (7.1 and 6.7 nights respectively).

Table 5 – Duration of holiday trip to Europe 

	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
1-3 nights	14%	17%	7%	19%	17%
4-6 nights	34%	28%	29%	33%	53%
7-10 nights	31%	31%	33%	34%	22%
11-20 nights	18%	23%	25%	13%	7%
20+ nights	3%	1%	6%	1%	1%
Average number of nights	8.2	8.2	9.9	7.1	6.7

• Type of holiday

When visiting Europe, most South-East Asian visitors prefer city-based vacations. Europe also attracts these visitors for various other types of holidays such as adventure trips, shopping trips, touring and driving holidays, beach holidays/holidays by the sea, holidays in the countryside, etc., though interests vary by source market. VFR travel is popular as well, more among Singaporean and Thai visitors than among Malaysians and Indonesians.

Table 6 – Top ten types of holidays in Europe 

	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
City holiday	43%	39%	41%	45%	52%
Adventure trip	8%	8%	9%	11%	3%
Shopping trip	7%	9%	6%	9%	3%
Touring / driving holiday	7%	9%	9%	3%	6%
Visit to family and/or friends	7%	10%	5%	4%	8%
Beach holiday/holiday by the sea	5%	4%	5%	2%	7%
Holiday in the countryside	5%	8%	3%	5%	4%
Visit to leisure park/theme park	3%	4%	1%	6%	3%
Holiday in the mountains	3%	2%	5%	2%	2%
Snow/ski holiday	3%	3%	1%	5%	3%



• Holiday activities

South-East Asian visitors indulge in various activities on their European holidays such as sightseeing/excursion tours, shopping, tasting local food/gastronomy, visiting historical and cultural attractions, going to parks and gardens, museums and art galleries, etc., most of which are also the main reason for travel. A fairly large proportion (16%) also enjoys meeting friends and relatives living in Europe; as mentioned, this is the main driver for travel among 7% of visitors to Europe, especially among older travellers who visit their children studying in European universities.

Table 7 – Main holiday activities in Europe 

	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
Sightseeing/excursion tours	56%	48%	59%	61%	57%
Shopping	53%	49%	55%	60%	50%
Tasting local food/gastronomy	44%	42%	43%	53%	40%
Visiting historical and cultural attractions	44%	36%	49%	44%	49%
Going to museums and art galleries	32%	27%	39%	32%	30%
Going to parks and gardens	30%	25%	37%	34%	24%
Enjoying the nightlife	24%	21%	19%	25%	34%
Nature tour / eco tour	22%	15%	25%	17%	35%
Visit to entertainment/theme parks	21%	18%	17%	34%	20%
Touring / driving around the country	18%	17%	25%	10%	15%
Meeting friends and relatives	16%	15%	18%	12%	17%

• Travel companions

South-East Asia is a family-oriented market and most travellers go on holiday with their family members. Travelling with friends is common, especially among the youth. Some couples and young families also go to Europe in a group of family and friends, as group tours are financially advantageous.

Table 8 – Travel companions on holiday in Europe 


	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
Solo	8%	13%	8%	3%	7%
Family	60%	59%	55%	75%	53%
Friends	16%	18%	21%	7%	16%
Friends and family	14%	8%	14%	13%	22%
Tour group	2%	2%	2%	2%	2%

The most common travel party size is 3-4 persons (52% of all visitors), and a significant 30% travel in larger family and/or friends' groups from all source markets except Singapore, where a lower proportion (17%) travel in party size of 5 or more people. Nearly one in ten also travel solo in Europe, usually on a short study trip, adventure trip or to meet with family based in Europe. Female solo travellers are a small, but rising segment, especially from Singapore.



• Accommodation preferences

Where do visitors from South-East Asian countries stay when on holiday in Europe? One-half prefer to stay in premium accommodation and over one-fourth opt to stay in budget accommodation - a reflection of the younger and solo traveller profile among the visitors. 20% use furnished accommodation or stay with friends and relatives. Malaysians display a greater preference for serviced apartments/Airbnb accommodation than hotels as a significant proportion (35%) travel in large party sizes to Europe.

Table 9 – Accommodation preferences in Europe 

	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
5-star or 4-star hotel or resort	50%	53%	42%	57%	52%
3-star/budget hotel or hostel/ dormitory	29%	27%	31%	25%	31%
Serviced apartment/Airbnb or similar	13%	11%	19%	13%	7%
Stay with friends/relatives	7%	8%	7%	5%	10%
Other (cruise ship/yacht)	1%	2%	1%	0%	0%

• Travel booking

Four in ten South-East Asian travellers rely on the travel agent to book an all-inclusive travel package or to make individual bookings, even as a large proportion book direct or through an online travel agency (OTA). Use of OTAs for accommodation booking is more popular than for flight reservation for which direct booking channels are more preferred. Travel booking patterns vary somewhat by market, as displayed in the tables below.

Table 10 – Flights 

	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
Through travel agent	44%	46%	33%	55%	45%
Direct booking	32%	37%	47%	14%	19%
Through OTA	25%	17%	20%	31%	36%

Table 11 – Accommodation 

	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
Through travel agent	40%	43%	30%	51%	41%
Direct booking	17%	27%	17%	9%	12%
Through OTA	35%	21%	46%	35%	37%
Stay with friend and relatives (no booking)	8%	8%	7%	5%	10%



• Travel expenditure

The overall cost of a holiday depends on several factors such as the choice of destination, travel party size, duration of trip, type of holiday, type of accommodation, holiday activities, shopping, number of countries visited, etc. On their most recent trip to Europe, 65% of South-East Asian visitors spent up to US\$5,000, and 35% spent over US\$5,000, with the estimated average spend per person ranging from US\$1,330 in Indonesia to US\$1,800 in Singapore.

Based on the average number of nights spent on the most recent trip to Europe, it is estimated that average spend per person per night varied from US\$150 in Malaysia to US\$230 in Thailand. Compared to spend levels in other world destinations, a holiday in Europe is seen to cost more - one of the key barriers to holiday in Europe.

Table 12 – Travel expenditure in Europe 

	South-East Asia (n=500)	Singapore (n=150)	Malaysia (n=150)	Indonesia (n=100)	Thailand (n=100)
Up to US\$2,000	22%	22%	22%	23%	19%
US\$2,001-US\$5,000/-	43%	40%	44%	47%	42%
US\$5,001-US\$10,000/-	21%	25%	20%	18%	19%
US\$10,001-US\$20,000/-	9%	7%	8%	6%	17%
More than US\$20,000/-	5%	6%	6%	6%	3%
Average spend per person on most recent trip to Europe		US\$1,800	US\$1,500	US\$1,330	US\$1,550
Average spend per night on most recent trip to Europe		US\$220	US\$150	US\$185	US\$230

2.3.4 Awareness and knowledge of European regions

Most South-East Asians display high awareness of the different regions of Europe, except for Benelux and Baltic States; however, their level of knowledge about the regions varies. They are most knowledgeable (know a fair amount/know very well) about Western Europe and Central/Eastern Europe, followed by Southern/Mediterranean Europe and Northern Europe. This appears to be the most knowledgeable about European regions compared to their regional counterparts.

Table 13 – Knowledge level of European regions (know a fair amount/know very well) 

	South-East Asia (n=1000)	Singapore (n=300)	Malaysia (n=300)	Indonesia (n=200)	Thailand (n=200)
Northern Europe	30%	25%	30%	25%	45%
Western Europe	40%	31%	38%	42%	56%
Central / Eastern Europe	36%	30%	33%	29%	54%
Southern/Mediterranean Europe	31%	29%	26%	27%	45%
Scandinavia	27%	22%	25%	22%	42%
Benelux	14%	14%	10%	18%	17%
Baltic States	13%	13%	11%	14%	16%

Despite limited knowledge, one-half of the South-East Asians see Europe as a set of different regions. An equal proportion see Europe as a set of different countries and as a single tourism destination. This implies that promoting the different regions of Europe would merit consideration, especially among first-time visitors who are more likely to visit multiple destinations within a region or across regions. Raising awareness levels, especially of the lesser known regions and destinations, would be the first step in this direction.



2.3.5 Perceptions of individual European destinations

The qualitative focus group discussions (one in each source market) explored consumer perceptions of individual European destinations among South-East Asian citizens (potential first-time and repeat visitors to Europe). By and large, there was a general lack of awareness of several European countries (*never heard of it, just know the name*) and limited knowledge and familiarity, especially among those who have never been to Europe.

Image associations with individual European countries primarily centred on cities, food/gastronomy and sports, with some reference to visitor attractions, creative art, weather and economy. These tended to vary by level of travel experience in Europe and by source market. Examples highlighting spontaneous associations with a selection of European holiday destinations are presented in the individual country chapters.

Overall, European destinations are seen to have a distinctive culture, rich and varied history, beautiful nature and scenic landscapes, and a varied cuisine. The ability to undertake border-less, multi-country vacations in Europe is perceived to be an advantage, backed by an excellent tourism infrastructure. Travelling by rail is felt to be the most convenient way to see and appreciate the nature and beauty of the European countryside.

Compared to other world destinations, Europe stands out for its diversity, natural landscapes and greenery, history and culture, variety of cuisines and luxury shopping. The good weather (cool/cold) in Europe is also seen as a positive aspect, which is why the winter months are among the most popular times of the year when South-East Asians like to visit Europe.

2.3.6 Perception of Europe on interest-based travel themes

The study also sought to understand the potential for promoting passion-related thematic travel in Europe among the South-East Asian travel source markets. Three sets of questions related to eleven travel themes were systematically asked for this purpose:

1. Some people travel abroad to mainly fulfil their hobbies and interests. Which of the following travel themes, if any, would you say is a key driver for you personally to travel abroad?
2. Based on your perceptions or personal experience, which parts of the world best offer the following types of holiday experiences and activities (travel themes)?
3. Which of these travel themes, if any, would be a key driver for you personally to travel to Europe, either as a whole or to a specific European destination?

Analysis of responses shows that “slow” adventure, culture and history, nature, city life and local gastronomy are the top five travel themes that South-East Asians consider as ‘important to be able to experience it’ or as the ‘main reason for travel’. In terms of regional perceptions, Asia and Europe are felt to be best aligned to offer such interest-based holiday experiences.

Specifically, in Europe, South-East Asians identify with the same top five themes as the key drivers for travel across Europe (pan-European holiday) rather than with specific European destinations. Nonetheless, there are some who feel that such theme-based travels, especially ‘city life’, are best experienced in specific countries in Europe. Indonesians are more likely to visit individual European destinations for interest-based holiday experiences than their other South-East Asian counterparts.

Table 14 – Pan-European thematic travel 

	South-East Asia (n=1000)	Singapore (n=300)	Malaysia (n=300)	Indonesia (n=200)	Thailand (n=200)
“Slow” adventure	76%	84%	81%	59%	74%
Culture and history	75%	85%	76%	65%	72%
Nature	72%	87%	75%	54%	69%
City life	70%	80%	71%	58%	68%
Tasting local food/gastronomy	77%	86%	85%	60%	70%



2.3.7 Importance and perception of sustainable tourism

Nearly two-thirds of South-East Asian citizens claim to be aware of sustainable tourism as a concept. Among those aware, seven in ten say that sustainability would be important or very important in their travel decision making process.

Each of the various aspects of sustainability is considered important or very important by majority of the South-East Asians for whom sustainability is relevant, with conservation of the destination's natural environment rated as the most important.

Other factors such as destination supports local businesses, destination supports cultural projects, accommodations are certified with green/eco labels and visitor attractions/other services are eco-certified also receive high ratings.

Table 15 – Importance of aspects of sustainable tourism (important and very important)



	South-East Asia	Singapore	Malaysia	Indonesia	Thailand
Destination conserves its natural environment	96%	94%	97%	96%	97%
Destination supports local businesses	86%	83%	86%	87%	91%
Destination supports cultural projects	88%	82%	88%	94%	93%
Accommodations are certified with green/eco labels	84%	76%	86%	89%	91%
Visitor attractions and other services are eco-certified	86%	79%	84%	93%	94%

Base: All respondents who are aware of sustainability and consider it important/very important (n=450)

However, as learnt in the focus groups, despite rating sustainability and its various aspects as important or very important, South-East Asian travellers rarely consider it in their destination decision making process. While some, like the Singaporeans, lay the responsibility on destinations, claiming that none promote themselves as sustainable tourism destinations, others, like the Indonesians, believe that most outbound travellers give precedence to discovering new places and *'do not yet think about it (sustainability)'*.



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.

CHAPTER 3

INDIVIDUAL COUNTRY INSIGHTS: SINGAPORE

3. INDIVIDUAL COUNTRY INSIGHTS: SINGAPORE

3.1 COUNTRY PROFILE



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%

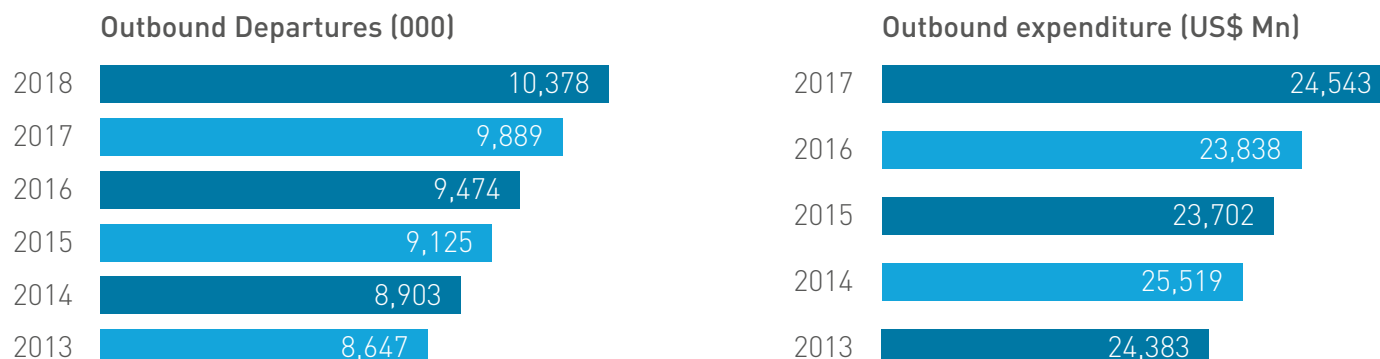
Sources:

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

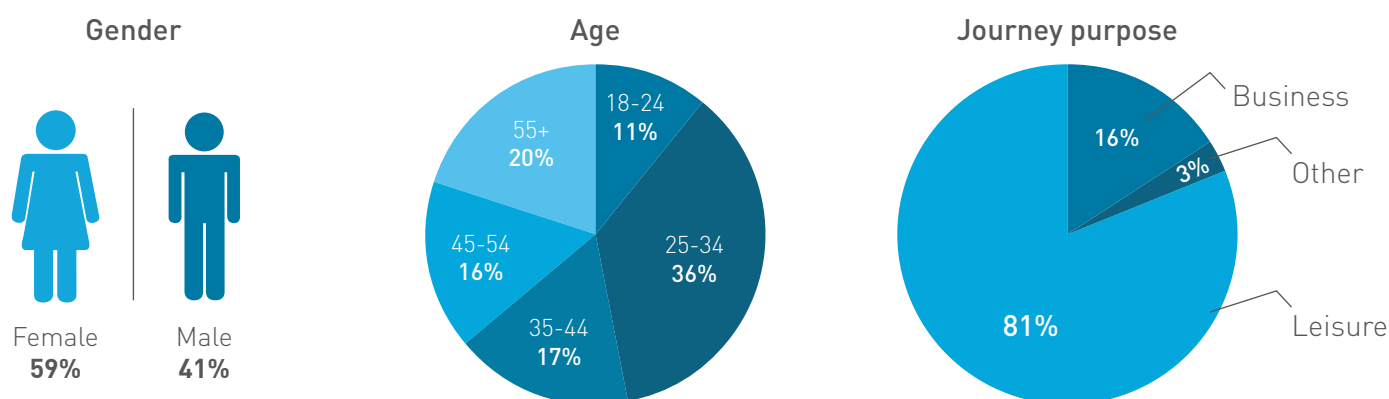
2. United Nations, Department of Economic and Social Affairs. Population Division (2017). Trends in International Migrant Stock: The 2017 revision (United Nations database, POP/DB/MIG/Stock/Rev.2017)

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)

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

Visa facilitation

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

Sources:

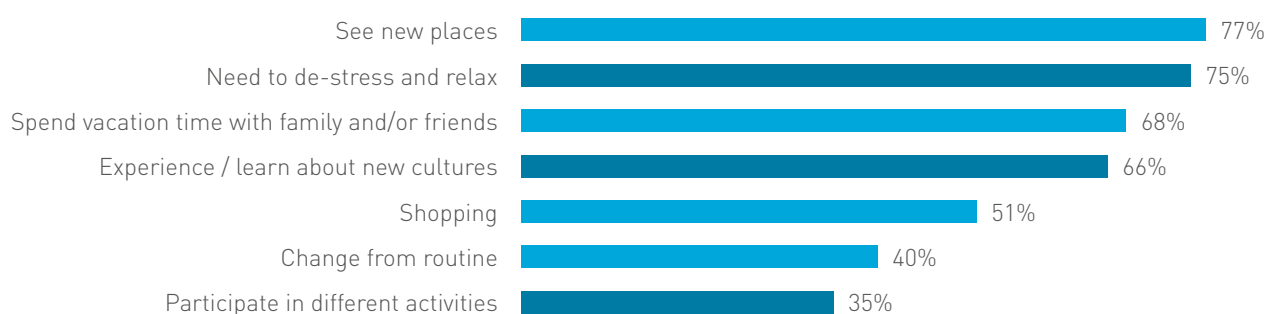
1. Amadeus Asia Pacific (2017), Journey of Me Insights APAC Report
2. World Tourism Organization (2018), Compendium of Tourism Statistics
3. Department of Statistics Singapore (2018), Air Passenger Departures by Region/Country of Disembarkation, Annual
4. Henley Passport Index 2019

3.3 CONSUMER INSIGHTS

3.3.1 Motivations to holiday abroad

Among the wealthiest citizens in South-East Asia, Singaporeans are increasingly travelling abroad, motivated by the desire to explore new places, learn about new cultures, indulge in diverse travel experiences and activities, and to shop for luxury products and brands. Driven by the need to de-stress and relax and to spend vacation time with family and friends, Singaporeans seek a change from the daily routine of life in Singapore, by travelling to overseas holiday destinations, near and far.

Figure 4 – Motivations to holiday abroad



Base: all respondents (n=300)

3.3.2 Motivations and barriers to holiday in Europe

Europe's scenic beauty and natural landscapes, weather, diversity of cultural and historical attractions, diversity of holiday experiences/activities and prestigious brand image are the top five drivers that draw Singaporeans, both first time and repeat visitors, to the continent's vast number of holiday destinations.

Among repeat visitors, satisfaction with past holiday experience coupled with the opportunity to experience Europe in different seasons and to discover more of Europe (different regions, countries and cities) are other motivating factors that bring six in ten Singaporeans back to Europe again and again. For some Singaporeans, ease of access, lack of visa requirement and good infrastructure for multi-country travel make Europe a value-for-money destination worth repeat visitation.

On the other hand, the cost of a European holiday (Europe is expensive) is the primary barrier to visiting Europe among both non-visitors and one-time visitors to Europe. For some, the opportunity to visit Europe had not yet arisen, while for others travel distance, need for advance planning and concerns about personal safety and security have been some of the main factors preventing them from visiting Europe.

Figure 5 – Motivations to holiday in Europe

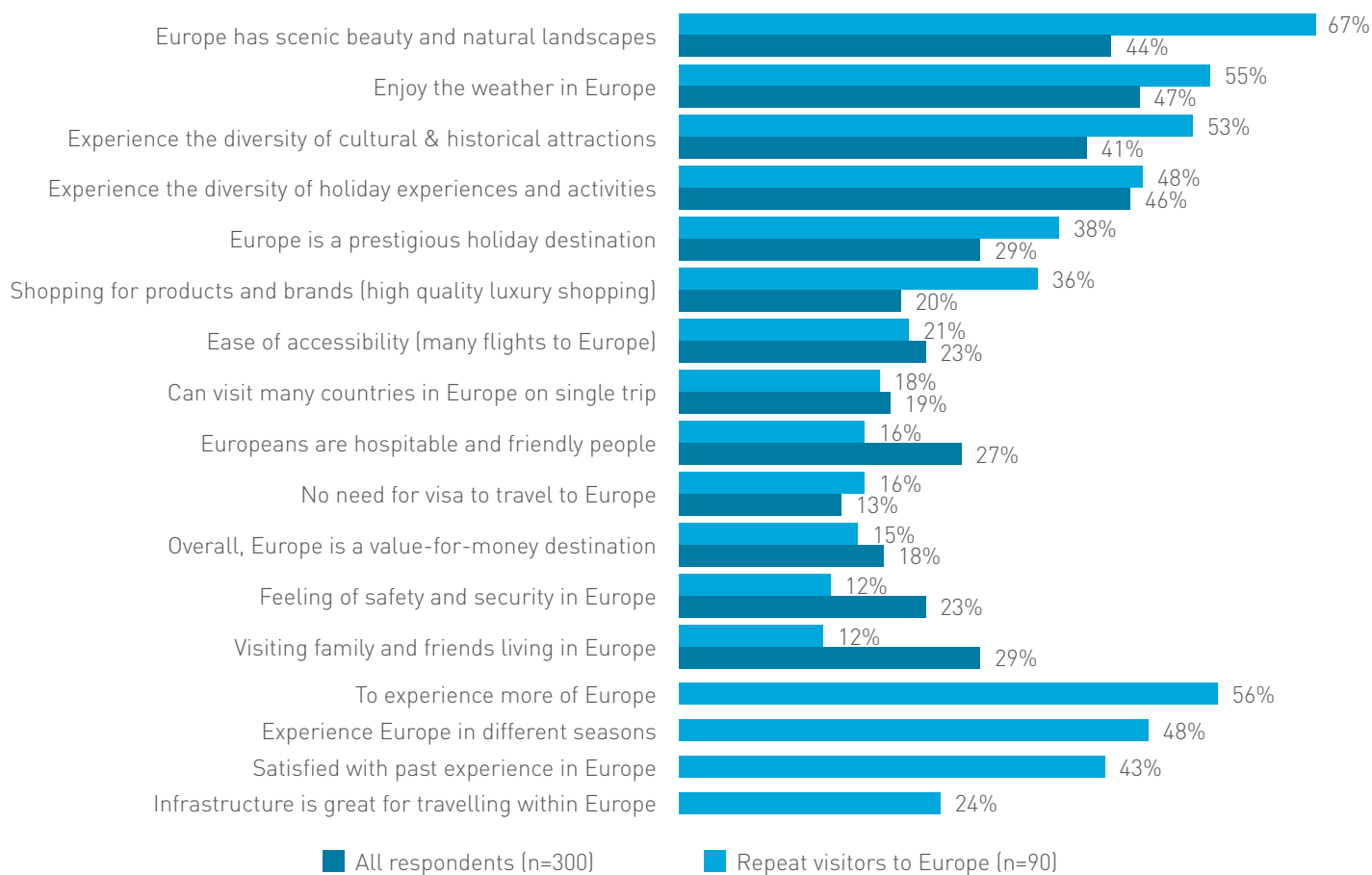
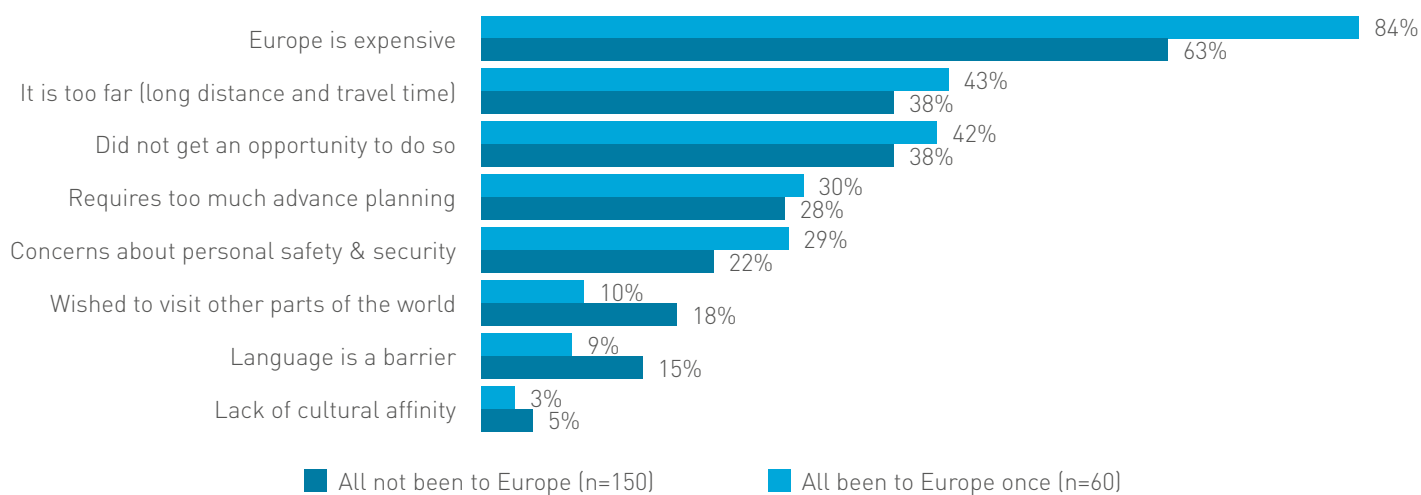


Figure 6 – Barriers to holiday in Europe



3.3.3 Travel experience – regions and countries

Armed with the second most powerful passport in the world, with visa-free or visa-on-arrival access to 189 destinations worldwide, Singapore citizens are among the most well-travelled globally. The consumer survey reveals that Singaporeans have been to an average of 2.6 destination regions worldwide, with geographical proximity making Asia the most popular tourism destination region.

As the table below shows, each destination region has been visited by a larger proportion of past visitors than non-visitors to Europe. Overall, past visitors have been to an average of 3.5 destination regions while non-visitors have been to 1.8 destination regions, indicating that those who have been to Europe have wider travel experience covering different parts of the world. From a competitive scenario point of view, Europe's key long-haul competitors appear to be Australasia and North America.

Table 16 – Destination regions ever visited 

	All respondents (n=300)	All been to Europe (n=150)	All not been to Europe (n=150)
Asia	96%	97%	95%
Australasia	52%	55%	50%
Europe	50%	100%	0%
North America	32%	44%	21%
Middle East	15%	22%	7%
Africa	8%	14%	2%
Caribbean Islands	7%	13%	1%
Central and South America	7%	13%	2%
Average number of regions ever visited	2.6	3.5	1.8

Singapore's experienced travellers have been to many countries around the world. The table below displays the top ten European destinations ever visited by Singaporeans, led by United Kingdom, France, Germany and Italy. Every other ETC member nation has also been visited, albeit in lower numbers (1% - 14%). Overall, past visitors have been to an average of five destinations in Europe.

Table 17 – Top ten European countries ever visited 

United Kingdom	54%	Spain	29%
France	53%	Holland	25%
Germany	48%	Austria	22%
Italy	47%	Belgium	18%
Switzerland	37%	Denmark	17%

Base: All respondents who have been to Europe (n=150)

In other parts of the world, eight Asian/Australasian destinations – Hong Kong, Taiwan, Japan, Australia, China, South Korea, Macau and New Zealand feature among the top ten destinations ever visited by Singaporeans, with United States and Canada making up the balance.

Table 18 – Top ten countries ever visited (excluding Europe) 

	All respondents (n=300)	All been to Europe (n=150)	All not been to Europe (n=150)
Hong Kong	65%	65%	65%
Taiwan	64%	59%	69%
Japan	52%	55%	50%
Australia	50%	51%	49%
China	48%	51%	45%
South Korea	42%	38%	45%
Macau	29%	27%	31%
United States	28%	36%	20%
New Zealand	16%	21%	11%
Canada	13%	21%	6%

Purpose of travel

In the last five years, Singaporeans made an average of 11 trips overseas. While leisure is the main purpose of travel, business travel also commands a fair share of outbound travel.

With the Singapore diaspora widely spread around the world, visiting friends and relatives (VFR) is also a key driver for outbound travel. Travel for medical treatment is minimal, given that Singapore boasts of excellent medical facilities, and is, in fact, a major player in the Asian medical tourism sector.

Notably, past visitors to Europe have made twice as many business trips overseas than non-visitors, indicating the potential for promoting bleisure (business + leisure) trips to this target segment.

Table 19 – Purpose of travel overseas 

	All respondents (n=300)	All been to Europe (n=150)	All not been to Europe (n=150)
Holiday trips	53%	45%	67%
Business trips	27%	33%	17%
Visiting friends & relatives	13%	14%	12%
Health/medical trips	1%	2%	0%
Visit of global sporting events, short study trips, etc.	5%	6%	4%
Average number of all trips in last five years	11.3	13.8	8.8
Average number of leisure trips in last five years	8.1	8.9	7.3

Further analysis shows that, in the last five years, past visitors to Europe made nearly twice as many trips to non-European destinations than to European destinations, reflecting the intense global nature of competition for Europe in this source market.

Table 20 – Average number of trips overseas 

	Trips to Europe	Trips to rest of world
Average number of all trips overseas in last five years	4.7	9.1
Average number of all leisure trips overseas in last five years	3.0	5.9

Base: all respondents who have been to Europe (n=150)

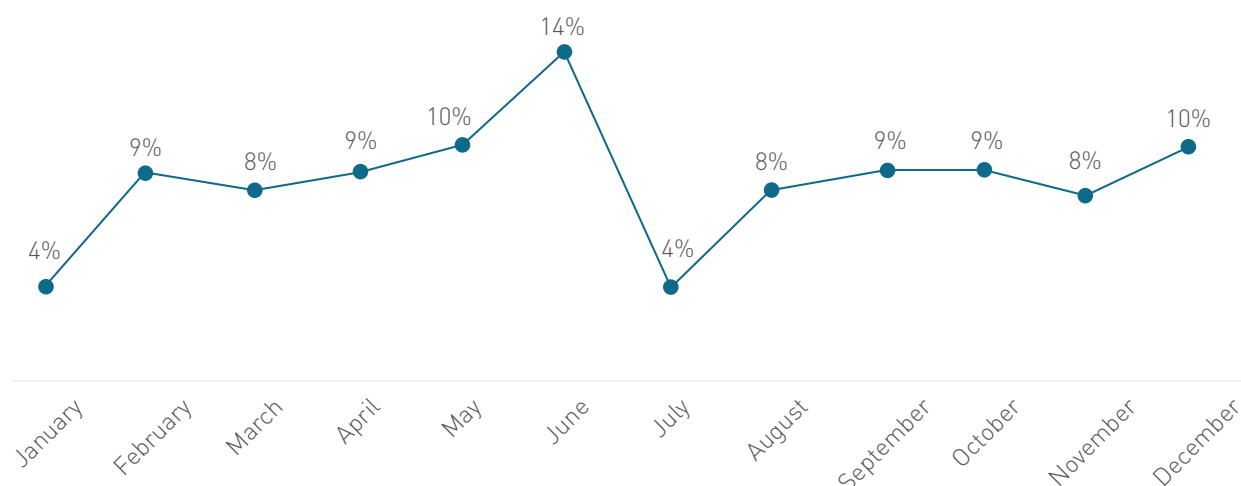
3.3.4 Travel behaviour — Europe vs other world destinations

Based on the characteristics of their most recent trip overseas, insights on Singaporean citizens' travel behaviour in Europe and other destinations is presented in this section.

3.3.4.1 Travel behaviour in Europe

Most Singapore citizens have been to Europe in the past five years (2014-2018), with 7% already having been to the continent in the current year (until April 2019) as well.

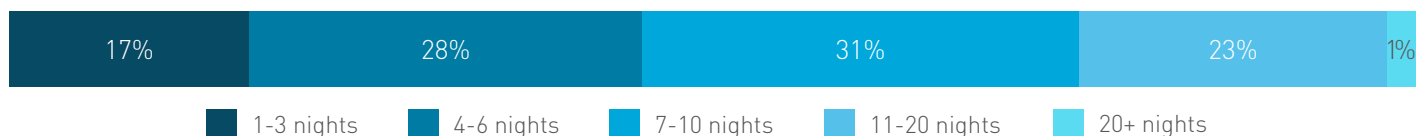
Seasonality (month of travel) of the most recent trip to Europe reveals that travel to Europe is round-the-year, with a skew towards the months of May-June and December, coinciding with summer holidays and winter break in Singapore. Singapore travellers are increasingly opting to spend winter holidays in Europe to experience the cold weather and to enjoy the festive season of Christmas.

Figure 7 – Seasonality of holiday trip to Europe 

Base: all respondents who have been to Europe (n=150)

On long-haul trips, Singaporeans generally tend to spend at least one week, noted also from data obtained from competitive destinations - United Kingdom, Australia and New Zealand. Depending upon the type of trip and the number of countries being visited, the average duration of trip in Europe is around eight nights. Overall, Europe attracts long stay visitors from Singapore, with one-third spending 7-10 nights and one-fourth spending 11 or more nights on their European holiday.

Figure 8 – Duration of holiday trip to Europe



Base: all respondents who have been to Europe (n=150)

Average number of nights spent in Europe: 8.2

One of the reasons for long stay is that trips to Europe often cover more than one country - on their most recent trip, over one-half of Singaporean visitors undertook a multi-country vacation in Europe, with 64% visiting two destinations and 36% visiting three or more destinations on the trip.

Among Singaporeans, the most popular European destinations are the traditional favourites - United Kingdom, France, Germany, Italy and Switzerland. In total, Singaporeans visited 34 European destinations on their recent trip, covering different regions of Europe, clearly signalling their readiness to explore new destinations such as Romania, Monaco and Georgia (albeit with minor share of total visitors).

Table 21 – Destinations visited on recent trip to Europe



United Kingdom	31%	Austria	11%	Croatia	3%
France	25%	Holland	6%	Finland	3%
Germany	23%	Belgium	5%	Sweden	3%
Italy	19%	Denmark	4%	Greece	3%
Switzerland	15%	Norway	4%	Portugal	3%
Spain	12%	Russia	4%	Other European countries *	21%

Base: all respondents who have been to Europe (n=150)

*Hungary, Iceland, Ireland, Slovenia, Czech Republic, Romania, Monaco, Georgia and 8 other destinations

When visiting Europe, four in ten Singaporeans prefer city-based vacations. VFR travel is popular as well and one in ten have been to Europe for this purpose. Europe also attracts Singaporeans for other types of holidays such as touring and driving holidays, shopping trips, adventure trips, holidays in the countryside, etc.

Table 22 – Type of holiday in Europe



City holiday	39%	Visit to leisure park/theme park	4%
Visit to family and/or friends	10%	Snow/ski holiday	3%
Shopping trip	9%	Holiday in the mountains	2%
Touring / driving holiday	9%	Cruise holiday	2%
Adventure trip	8%	Visit of a global sporting event	1%
Holiday in the countryside	8%	Religious/spiritual holiday	1%
Beach holiday/holiday by the sea	4%	Wedding, honeymoon or short study trip	2%

Base: all respondents who have been to Europe (n=150)

On their holidays in Europe, Singaporeans indulge in various activities such as shopping, gastronomy, sightseeing/excursion tours, going to parks and gardens, visiting historical sites, cultural attractions, museums and art galleries, etc., most of which are also the main reason for travel.

Table 23 – Holiday activities in Europe



	Participated in	Main reason for travel
Shopping	49%	13%
Sightseeing/excursion tours	48%	23%
Tasting local food/gastronomy	42%	3%
Visiting historical and cultural attractions	36%	11%
Going to museums and art galleries	27%	3%
Going to parks and gardens	25%	1%
Enjoying the nightlife	21%	5%
Visit to entertainment/theme parks	18%	4%
Sea and beach	17%	4%
Touring and driving around the country	17%	9%
Nature tour / eco tour	15%	3%
Meeting friends and relatives	15%	10%
Adventure activities	13%	3%
Enjoying theatre/musical performances	11%	1%
Visiting places of worship	9%	1%
Water sports	7%	3%

Base: all respondents who have been to Europe (n=150)

In terms of travel companions, majority travel with family. Travel with friends is common among the young, both males and females. Over one in ten also travel solo in Europe, and this trend is growing, especially among female travellers. According to global home-sharing platform Airbnb, the number of outbound solo Singaporean female travellers has more than doubled in the past few years.⁴ Some couples and young families also travel to Europe in a group of family and friends. The most common travel party size is 3-4 persons, with 17% travelling in larger family and/or friends' groups.

Table 24 – Travel companions and travel party size



Solo	13%	2 persons	23%
Family	59%	3-4 people	60%
Friends	18%	5-6 people	12%
Friends and family	8%	7 or more people	5%
Tour group	2%		

Base: all respondents who have been to Europe (n=150)

For accommodation, over one-half prefer to stay in premium hotels and another one-fourth opt to stay in budget accommodation, a reflection of the younger and solo traveller profile among the visitors (though some solo travellers opt for luxury vacations with stay in five-star accommodation). 19% use furnished accommodation (service apartment/Airbnb) or stay with friends and relatives.

⁴ www.businesstimes.com.sg/lifestyle/feature/travelling-alone-and-loving-it

Table 25 – Type of accommodation



5-star or 4-star hotel or resort	53%	Serviced apartment/Airbnb or similar	11%
3-star/budget hotel or hostel/dormitory	27%	Cruise ship/yacht	2%
Stay with friends/relatives	8%		

Base: all respondents who have been to Europe (n=150)

In terms of travel booking, over four in ten Singapore citizens rely on the travel agent for bookings, especially when they go on multi-country vacations. A large proportion also books direct or through an online travel agency (OTA), with use of the latter more favoured for accommodation booking than for flight reservation. The trend of online bookings is expected to grow in the coming years, as more services are made available to organise complex itineraries online (i.e. multi-country travel).

Table 26 – Flight and accommodation booking



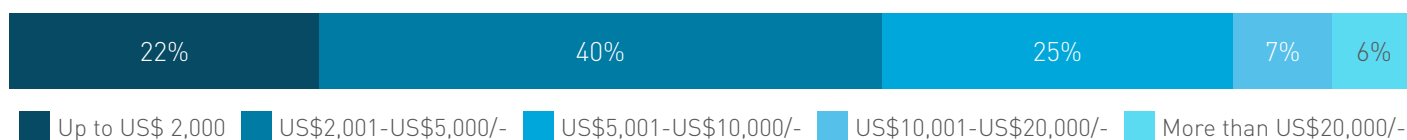
	Flights	Accommodation
All-inclusive travel package through travel agent	32%	32%
Individual bookings (not package) through travel agent	14%	11%
Direct with airline/hotel via website, mobile app, telephone or email	36%	27%
Online on websites such as Agoda, expedia.com, booking.com	17%	21%
Did not require booking (paid accommodation not used)	—	8%

Base: all respondents who have been to Europe (n=150)

Travel expenditure depends on several factors such as the destination visited, trip duration, travel party size, etc. On their most recent holiday in Europe, 62% of Singapore visitors spent up to US\$5,000 and 38% spent more than US\$5,000 (total trip expenditure), with an average spend estimated at approximately US\$1,800 per person. It appears that a holiday in Europe is more expensive than in other world destinations (see next section), one of the key barriers to holiday in the continent.

Based on the average duration of the trip, it is estimated that Singaporeans spent an average of US\$220 per night (per person) on their most recent holiday in Europe.

Figure 9 – Total travel expenditure in Europe



Base: all respondents who have been to Europe (n=150)

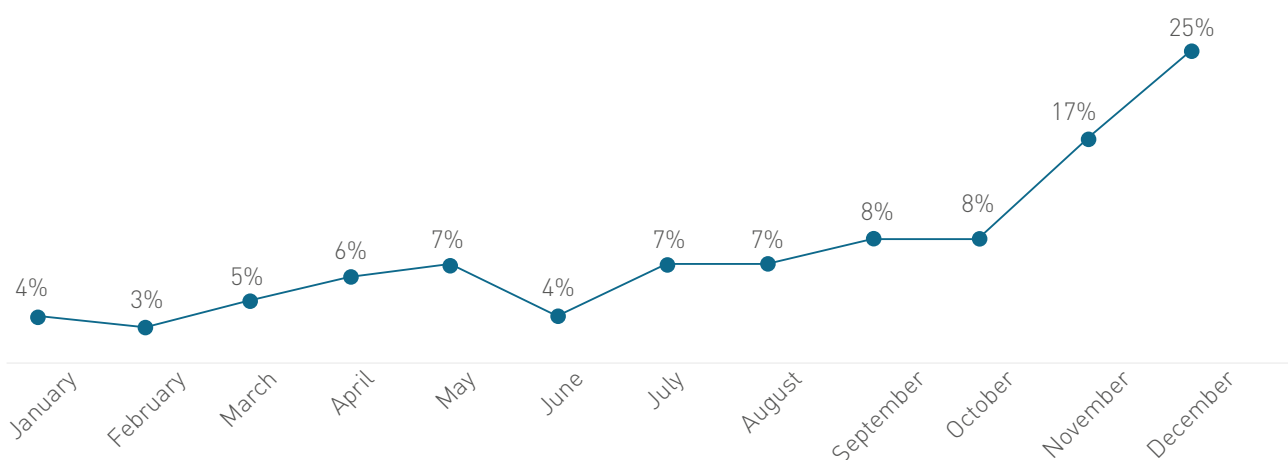
Average spend per person on trip to Europe: US\$1,800; average spend per night: US\$220

3.3.4.2 Travel behaviour in other world destinations

Non-visitors to Europe travel abroad regularly to destinations in other parts of the world. Due to the geographical proximity of several Asian destinations, many Singaporeans (including those who have been to Europe) tend to take short trips within the region with greater frequency.

Seasonality pattern for the most recent trip overseas in the last five years (2014-2018) reveals that the second half of the year accounts for 70% of all outbound travel to non-European destinations, with travel peaking during November and December. This implies that competition for Europe is greater in the winter months, compared to the summer months of May and June, when Singaporeans want to avoid the heat, humidity and monsoon rain in Asian destinations.

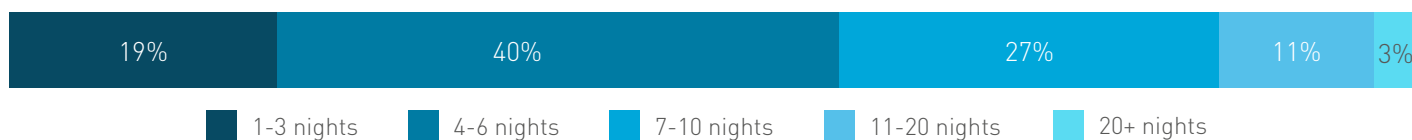
Figure 10 – Seasonality of holiday trip overseas



Base: all respondents who have been to non-European destinations on recent trip (n=257)

On an average, Singaporeans spend one week in non-European destinations, marginally lower than the Europe average (8.2 nights). Trips to long-haul destinations in Australasia and the Americas are typically longer compared to trips in Asia, Africa or the Middle East. Overall, six in ten outbound travellers go on holiday for up to 6 nights, 27% for 7-10 nights and 14% for 11 or more nights.

Figure 11 – Duration of holiday trip overseas



Base: all respondents who have been to non-European destinations on recent trip (n=257)

Average number of nights spent overseas (non-European destinations): 7.1

Singaporean visitors to non-European destinations usually spend their time in a single destination, whereas multi-country travel is seen to be more common in Europe, in part due to the ease of intra-regional travel in the continent. On the most recent trip, just 13% visited more than one country, mainly in Australasia and North East Asia, but also in combination with a South-East Asian destination. The most popular destinations were Australia, Japan, Hong Kong, China, Taiwan, South Korea and USA.

Table 27 – Destinations visited on recent trip overseas



Australia	21%	South Korea	8%	Macao	2%
Japan	16%	United States	5%	New Zealand	2%
Hong Kong	13%	Brazil	2%	United Arab Emirates	2%
China	12%	Canada	2%	Other countries*	13%
Taiwan	12%	India	2%		

Base: all respondents who have been to non-European destinations on recent trip (n=257)

*Maldives, Morocco, Sri Lanka, Saudi Arabia

As in Europe, city-based vacations are most preferred by Singaporeans in other destinations as well. Interestingly though, twice as many Singaporeans who visit non-European destinations choose to go for beach holidays and visits to leisure/theme parks than those who go to Europe, in large part due to the proximity and favourable cost of holiday when travelling with family, especially small children. Overall, city holiday, shopping trip, VFR travel, visit to leisure/theme park and adventure trip feature among the top five holiday types among Singapore outbound travellers.

Table 28 – Type of holidays overseas



City holiday	32%	Snow/ski holiday	2%
Shopping trip	12%	Holiday in the mountains	2%
Visit to family and/or friends	9%	Visit of a global sporting event	2%
Visit to leisure park/theme park	9%	Cruise holiday	1%
Adventure trip	8%	Spa/wellness trip	1%
Touring / driving holiday	7%	Religious/Spiritual holiday	1%
Beach holiday/holiday by the sea	7%	Wedding, honeymoon, gastronomy, study trip	5%
Holiday in the countryside	2%		

Base: all respondents who have been to non-European destinations on recent trip (n=257)

Singaporeans indulge in similar activities on holiday whether in Europe or other parts of the world, with the top five activities being shopping, gastronomy, sightseeing/excursion tours, going to parks and gardens and visiting historical and cultural attractions. The key difference is in some of the main reasons for travel, such as gastronomy and visit to theme parks/leisure parks that drive travel to non-European destinations much more than to Europe, signalling that Europe could perhaps work on promoting such types of holiday activities to the Singaporean outbound traveller.

Table 29 – Holiday activities overseas



	Participated in	Main reason for travel
Shopping	49%	13%
Sightseeing/excursion tours	48%	23%
Tasting local food/gastronomy	42%	3%
Visiting historical and cultural attractions	36%	11%
Going to museums and art galleries	27%	3%
Going to parks and gardens	25%	1%
Enjoying the nightlife	21%	5%
Visit to entertainment/theme parks	18%	4%
Sea and beach	17%	4%
Touring and driving around the country	17%	9%
Nature tour / eco tour	15%	3%
Meeting friends and relatives	15%	10%
Adventure activities	13%	3%
Enjoying theatre/musical performances	11%	1%
Visiting places of worship	9%	1%
Water sports	7%	3%

Base: all respondents who have been to non-European destinations on recent trip (n=257)

In terms of travel companions and travel party size, the trend is similar to Europe. Most Singaporeans travel with family in other world destinations as well, followed by travel with friends or travelling solo. The most common travel party size is 3-4 persons. Interestingly though, the proportion of travellers going on holiday with spouse/partner to non-European destinations is higher than to Europe, probably a function of quick getaway trips on long weekends and public holidays to closer home destinations.

Table 30 – Travel companions and travel part size



Travelled alone (solo)	9%	2 persons	33%
Travelled with family	61%	3-4 people	44%
Travelled with friends	20%	5-6 people	15%
Travelled with friends and family	9%	7 or more people	7%
Travelled with a tour group	1%		

Base: all respondents who have been to non-European destinations on recent trip (n=257)

Equally, there is no difference in the type of accommodation that Singaporeans stay in on trips to Europe and other parts of the world. Preference is for superior hotels, followed by budget accommodation and furnished apartments. Some (7%) stay with family and/or friends or in their own home overseas.

Table 31 – Type of accommodation



5-star or 4-star hotel or resort	53%	Serviced apartment/Airbnb or similar	17%
3-star/budget hotel or hostel/dormitory	23%	Stay with friends/relatives or own home	7%

Base: all respondents who have been to non-European destinations on recent trip (n=257)

In terms of travel booking, one in four Singaporeans use the services of a travel agent to book an all-inclusive travel package or to make individual bookings, with a larger majority relying on direct bookings or through an online travel agency (OTA). As in the case of trips to Europe, trips to non-European destinations follow a similar pattern, with more use of OTAs for accommodation bookings than for flights, the latter mainly being booked through direct booking channels.

Table 32 – Flight and accommodation booking



	Flights	Accommodation
All-inclusive travel package through travel agent	18%	17%
Individual bookings (not package) through travel agent	8%	7%
Direct with airline/hotel on website or mobile app	47%	22%
Direct with airline/hotel on telephone or by email	7%	5%
Online on websites such as Agoda, expedia.com, booking.com	20%	41%
Did not require booking (paid accommodation not used)	—	7%

Base: all respondents who have been to non-European destinations on recent trip (n=257)

While acknowledging that travel expenditure depends on various factors such as destination, trip duration, travel companions, etc, it is noted that there is a significant difference in the overall cost of holiday in non-European destinations versus a holiday in Europe.

On their most recent trip overseas, 81% of Singapore travellers spent up to US\$5,000 and 19% spent more than US\$5,000 (total trip expenditure), with average spend estimated at approximately US\$1,120 per person (compared to a much higher figure of US\$1,800 per person in Europe). Despite the higher cost, competitive holiday packages for Europe (for example, to destinations in Eastern/Central Europe) can help improve Europe's perception as a value-for-money holiday destination.

Figure 12 – Total travel expenditure overseas



Base: all respondents who have been to non-European destinations on recent trip (n=257)

Average spend per person on trip overseas (non-European destinations): US\$1,120;
average spend per night: US\$158

3.3.5 Sources of information for holiday planning

The Internet (websites, social media, search engines) and friends and family are the predominant sources for information used by most Singapore outbound travellers. Over one-fourth also rely on holiday brochures and travel guides, while 23% turn to travel agents and tour operators for information and advice. Some also use travel magazines, travel programs on television, country tourist offices and travel fairs and exhibitions as resources for travel planning and research.

Mention must be made of the National Association of Travel Agents Singapore (NATAS) which organises Singapore's largest and most successful consumer travel fair twice a year. NATAS Travel and NATAS Holidays attract more than 110,000 visitors annually, looking for travel information, inspiration and deals.

Table 33 – Information sources used for holiday planning



Internet (websites, social media, search engines)	68%	Travel magazines	17%
Friends & family	61%	Travel channels/programs on television	11%
Holiday brochures & travel guides	28%	Travel fairs & exhibitions	9%
Travel agents & tour operators	23%	Country tourist offices	7%

Base: all respondents (n=300)

Specifically, among users of the Internet, social media, travel review websites, travel booking websites, travel comparison websites and search engines are the main online information sources used by Singaporeans. Other online sources of information are displayed in the table below. Most of this information is accessed from laptops and mobile phones.

Table 34 – Online information sources used



Social media	49%	Travel agent/tour operator websites	18%
Travel review sites	47%	Travel bloggers, influencers	17%
Travel booking and comparison websites	40%	Independent travel advice websites	13%
Search Engines	37%	National Tourist Board websites	11%

Base: all respondents (n=300)

3.3.6 Key drivers impacting travel habits and behaviour

Qualitative response (focus group discussion) to the question on key drivers impacting change in consumer travel habits and behaviour shows that family life cycle stage is a major determinant of the travel choices Singapore citizens make, influencing where they go, for how long, with whom, what they do, where they stay, etc. Equally, the role of factors such as travel companions, personal financial status and travel technology in driving consumer travel behaviour is significant and can be appreciated from the verbatim comments below.

"I have recently started working and earning. So now I travel more frequently – 3-4 times a year, including short trips, compared to only 1-2 times a year previously. As my spending power has increased, my choice of destinations is different now. I go for longer trips and flights, to further away (long-haul) destinations." – Male, 26 years, single

"I was married and have kids now, so choices have changed. We look for family friendly destinations, we choose trips which can entertain them." – Female, 32 years, married with children

"My children are 9 years and 11 years old. Earlier, our holidays were kids centric – theme parks, beach holidays; as they are older now, we walk more, we go for adventure holidays like skiing and hiking trips." – Female, 37 years, married with children

“When kids were small, it was cheaper to travel with them. Lower air fares, same room... now, they are teenagers, so travel has become more expensive for us as a family. Also, they want to be involved in decision making – in terms of destination, activities, etc. So, it’s quite challenging! We must be budget conscious as well, so we choose destinations, hotels and activities accordingly.” – Male, 41 years, married with children

Advances in travel technology have transformed the way travel planning and booking is done. Most Singaporeans use online sources for information gathering, planning and booking their holidays. With increasing competition, Singaporeans resort to price comparison online. They look for holiday offers and promotions from airlines, online travel agencies and tour operators.

“Before, I mostly used travel agents to do my bookings and all. But now it’s the Internet which I’m using for all purposes. I can do price comparison online and decide better. And it’s cheaper than booking through the travel agent.” – Male, 26 years, single

“Now we do everything ourselves on the Internet. We search for deals, do price comparison online. There are plenty of promotions online.” – Female, 35 years, married with children

“We do a lot of shopping ahead online. Also, we get promotions by airlines for ticket bookings and so we take advantage of that.” – Male, 44 years, married

The effect of social media on travel behaviour is also acknowledged, with Singapore outbound travellers attributing the popularity of online reviews, video and photo sharing, influencer blogging, etc. changing the way they do online research and planning. Innovation in technology is anticipated to influence future travel behaviour, with most Singaporeans believing that will have a positive impact.

“More people will visit and showcase lesser known places online, and we will get to know and learn about them. This will be good for the destination, and it will influence me to go there and discover such hidden gems.” – Female, 41 years, married with children

“I am curious about virtual reality - it interests me. I can look at destinations and experience them before going there”. – Female, 37 years, married with children

Looking into the future, Singaporeans expect to travel more, and to more long-haul destinations. All anticipate trips to Europe as ‘there’s so much to see and do in Europe’.

3.3.7 Knowledge and perception of Europe and European destinations

3.3.7.1 Awareness and knowledge of European regions

On being asked about their level of awareness and knowledge of different European regions, most Singaporeans display high awareness of the different European regions, except for Benelux and Baltic States. However, the level of knowledge of the different regions varied, with Singaporeans claiming to be most knowledgeable about Western Europe and Central/Eastern Europe. Understandably, past visitors are more familiar with Europe’s various regions than those who have yet to visit Europe.

Table 35 – Awareness and knowledge of European regions 

	Never heard of it	Heard of it only (don’t know anything)	Know a little	Know a fair amount	Know very well
Northern Europe	6%	26%	43%	21%	4%
Western Europe	4%	22%	42%	25%	6%
Central / Eastern Europe	4%	25%	41%	24%	6%
Southern/Mediterranean Europe	5%	28%	37%	25%	4%
Scandinavia	11%	29%	38%	19%	3%
Benelux	48%	22%	16%	12%	2%
Baltic States	37%	29%	21%	10%	3%

Base: all respondents (n=300)

Despite limited knowledge, over one-half (54%) of Singapore citizens see Europe as a set of different regions. 27% see it as a set of different countries and 19% see it as a single tourism destination. Thus, promoting Europe with regional multi-destination itineraries would likely work well with potential visitors from this source market.

Qualitative response (focus group discussion) confirms that, by and large, Singaporeans see Europe as a set of different regions, though there is clear preference for specific (popular) destinations across Europe. Northern and Western Europe are perceived to be more developed as tourism destinations and more expensive compared to other regions like Eastern and Central Europe.

Covering multiple destinations by region is considered to be more practical due to ease and cost of travel, even as some Singaporeans indicated that they would visit individual countries in more than one region on their next trip to Europe.

Europe is best done by regions. It is more practical and convenient. When I go to Europe, I will begin with Western Europe, then Eastern and Central Europe. – Male, 28 years, single

“For me, it depends on the countries I am interested in visiting. On my next trip, I will first visit Austria and Germany in Western Europe and then from Germany go to Central European countries – Czech Republic, Poland and Hungary.”
– Male, 44 years, married

3.3.7.2 Perceptions of individual European destinations

The qualitative focus group discussion explored consumer perceptions of individual European destinations. Of the 39 European destinations on the list (including ETC member nations), Singaporeans displayed lack of awareness of several European countries (*never heard of it, hearing about it for the first time*), the majority of which were from the Benelux and Baltic regions. Even among destinations that they were aware of, the level of familiarity was rather limited, especially among those who had never been to Europe.

Image associations with individual countries primarily centred on cities, food and sports, with some reference to visitor attractions, creative art, weather and economy. Examples below highlight the spontaneous associations with a selection of European holiday destinations. Most other countries elicited minimal (or zero) response.

Austria – concerts, music, snow, cold weather

Belgium – diamonds, chocolates

France – Paris, Eiffel tower, wine, shopping, food, romance

Germany – Berlin, beer, sausages, cars

Greece – Santorini, beaches, culture

Holland – Amsterdam, windmills

Italy – Venice, Rome, Florence, Milan, pasta, football

Norway – Oslo, northern lights, fish, salmon, rock music

Portugal – world cup, soccer/football, Ronaldo

Romania – kings, queen, gymnastics

Spain – Barcelona, Madrid, Valencia, tapas, football

Sweden – Scandinavian country, Ikea, Swedish meatballs

Switzerland – Zurich, Geneva, Bern, Lausanne, Lucerne, Jungfrau, mountains, watches, chocolate

Turkey – history, culture, Turkish food, kebabs

United Kingdom – London, Newcastle, Liverpool, Beatles, Big Ben, London Eye, castles, soccer

Overall, European destinations are seen to be unique in that they have a distinctive culture, rich and varied history, beautiful nature and scenic landscapes, and a varied cuisine. The ability to undertake multi-country vacations in Europe is perceived to be an advantage, with travel by public transport as the most convenient way to see and appreciate the nature and beauty of the European countryside.

“Europe has a very rich culture. Every country is different, with its own distinct culture and history.” – Female, 42 years, married with children

“Europe is such a big continent. From North to South, East to West, there’s so much to see and do, and such a mix of culture, food and scenery.” – Male, 28 years, single

“If you see the countries in Europe, the mix of old with the modern sights is beautiful. For me, I would say nature is my top choice for Europe as its unique feature.” – Female, 37 years, married

On the negative side, Europe is seen as expensive, especially unaffordable for backpackers. Amusement parks (perception is that there are limited options) and language issues in some parts of Europe are also identified as areas where the continent is seen to be underperforming.

“I think for backpacking, its pricier to go through Europe. Asia is better, more affordable.” – Male, 26 years, single

“I would say it is the language issue. In several parts of Europe, you can’t really converse well.” – Male, 41 years, married with children

“I think Europe is underperforming in amusement – leisure parks. America, Japan and even Singapore itself, and other parts of Asia – there are many options.” – Male, 26 years, single

3.3.7.3 Perception of Europe versus competitor regions on interest-based travel themes

Perception of Europe versus competitor regions on interest-based travel themes was sought through a set of questions related to eleven travel themes (questions displayed in Chapter 2). Analysis of responses shows that “slow” adventure, culture and history, nature, city life and local gastronomy are the top five travel themes that Singapore citizens consider as ‘important to be able to experience it’ or as the ‘main reason for travel’. Most of these have already found mention in the type of holiday and/or type of activities undertaken by Singaporean travellers on their recent trip abroad (to Europe and other parts of the world).

In terms of regional perceptions, Asia and Europe are felt to be best aligned to offer such interest-based holiday experiences, with North America a distant third on city life, gastronomy and ‘slow’ adventure. Africa features in third place on the theme of nature and the Middle East on culture and history. Thus, while competition for Europe appears to be from the Asia region overall, in the long-haul space, Australasia and North America can be considered as the key competitor regions from a marketing and promotion perspective.

Focussing specifically on thematic travel to Europe, Singaporeans identify with the same top five themes as the key drivers for travel across Europe (pan-European holiday) rather than with specific European destinations. Nonetheless, there were some who felt that such theme-based travels, especially ‘city life’, are best experienced in specific countries in Europe.

Table 36 – Travel themes as key drivers to holiday abroad



	Not important at all	Would like the opportunity to experience it but not essential	Important to be able to experience it	Main reason for travel
Adventure	20%	38%	28%	13%
“Slow” adventure	7%	28%	48%	17%
Culture and history	4%	32%	43%	21%
Nature	5%	28%	42%	26%
City life	4%	25%	46%	26%
Spa and wellness	19%	41%	28%	12%
Tasting local food/gastronomy	2%	18%	42%	38%
Beach and sea	12%	38%	36%	14%
Amusement and theme parks	13%	34%	38%	15%
Global sporting events	45%	30%	20%	6%
Media-related activities and interests	30%	40%	23%	7%

Base: all respondents (n=300)

Table 37 – Perception of Europe versus competitor regions on top five travel themes



	Asia	Africa	Middle East	Europe	North America	South America
“Slow” adventure	57%	16%	12%	47%	21%	16%
Culture and history	60%	18%	21%	60%	19%	17%
Nature	55%	35%	16%	48%	28%	24%
City life	65%	8%	14%	58%	37%	16%
Tasting local food/gastronomy	75%	16%	20%	55%	28%	24%

Base: all respondents (n=300)

Table 38 – Travel theme as key driver for holiday in Europe



	Across Europe (pan-Europe)	Specific destination in Europe
“Slow” adventure	84%	16%
Culture and history	85%	15%
Nature	87%	13%
City life	80%	20%
Tasting local food/gastronomy	86%	14%

Base: all respondents who associate a specific travel theme with Europe

The questions on interest-based travel themes were further explored in the qualitative focus group discussion. While these choices (in the online survey) were ratified by participants in the focus group, probing further, it became apparent that travelling and the type of holiday and holiday activities undertaken is a function of life stage and lifestyle. Also, a combination of different activities and experiences on a single trip is quite common among Singapore travellers.

"I like to travel for two reasons - one is nature and the other is adventure sports. I like to do sports like sky-diving and bungee jumping." — Male, 26, single

"For me, it's all about sightseeing, museums, art exhibitions, food, life of locals, night markets, scenery...I also enjoy action sports/adventure - skydiving, hiking." — Male, 28, single

"When I go overseas, I'll try to look for nature trails to hike and to walk around, which in Singapore I also do, although not on a regular basis." — Female, 42, married

"For me, travelling is about tasting the local food and experiencing the local life. When I went to London on an exchange program, I stayed with a local host who cooked for me. It was a very authentic experience for me." — Male, 28, single

An important observation in the focus group was that young families (with small children) tend to focus on kid-centric travel activities and experiences which centre on city life, beach and sea, and amusement and theme parks. In contrast, families with older children enjoy more adventurous activities, nature, gastronomy and culture and history.

"After having kids, our priorities have shifted towards activities that can entertain them. I tried hiking with my daughters once, but it was difficult. So, we started going for indoor playgrounds, theme parks, zoo, and the beach." — Female, 37, married with children

Regional perceptions were predominantly in favour of Asia, the region that Singaporeans are most familiar with, and have the widest travel experience in. Perceptions of Europe mirror the findings from the online survey, with city life, nature and culture and history selected as the top three themes for travel to Europe.

3.3.8 Importance and perception of luxury travel

By international standards, Singapore citizens are wealthy with a high per capita GDP. How important is luxury tourism to them and what is their perception of luxury travel? Europe being a strong contender for luxury tourism, the study sought to better understand its marketing potential in Singapore. Hence responses were sought to the question: *In general, how important will luxury experiences and services be (or already are) for you on your travels abroad?*

Survey results show that luxury is considered important or very important by over one-half (55%) of Singaporean travellers on their travels abroad, with 32% claiming it was neither important nor unimportant. For 13%, it was unimportant.

However, upon probing further during the focus group discussion, it appears that few Singaporeans opt for a 'luxury' vacation (although they do indulge in luxury brands shopping), defined by them as an ultra-expensive city holiday, with luxury suites, concierge service, Michelin star restaurant dining, premium brands shopping, etc.

"For me luxury holiday means a city holiday in Europe. I will be treated like a king, stay in a 5-star luxury hotel suite, be chauffeured around, not having to think about food or where to go." — Male, 41 years, married

"To me luxury trip means going in business class, staying in a 5-star hotel, going to exclusive places and having fun, and shopping, with no worries about money or costs. I would go to Iceland or Switzerland, spend 2-3 weeks there." — Male, 26, single

"Luxury is - enjoying every day with my spouse, being chauffeured around, drinking wine, eating good food, buying things that I would not usually buy like expensive shoes, designer clothes and bags." — Female, 37, married with children

"I associate luxury with France, doing shopping and eating at the Michelin star restaurants with my family and staying there for two weeks, as money will not be a constraint." — Female, 42, married

Europe is most associated with a luxury holiday, with 'Nordic' countries, Norway, Iceland, France, Germany and Switzerland variously mentioned as desirable luxury vacation destinations.

3.3.9 Importance and perception of sustainable tourism

Although Singapore citizens are aware of sustainability in general, only 58% claim to be aware of sustainable tourism as a concept. Among those aware, 75% say that sustainability would be important or very important in their travel decision making process, encompassing various aspects such as destination conserves its natural environment, destination supports local businesses, destination supports cultural projects, accommodations are certified with green/eco labels and visitor attractions and other services are eco-certified.

Table 39 – Importance of aspects of sustainability in travel decision making



	Very important	Important
Destination conserves its natural environment	42%	52%
Destination supports local businesses	34%	49%
Destination supports cultural projects	33%	49%
Accommodations are certified with green/eco labels	34%	42%
Visitor attractions and other services are eco-certified	35%	44%

Base: all respondents aware and who rated sustainability as important or very important (n=131)

However, as learnt in the focus group, despite rating sustainability and its various aspects as important, Singaporeans rarely consider it in their travel decision making process. They lay the responsibility on destinations, claiming that none of them promote themselves as sustainable tourism destinations. As such, they are not aware of what different destinations do and have to offer in terms of sustainable tourism.

“It (sustainability) doesn’t really affect or influence our travel decision. Reason is, we don’t know what different countries do regarding sustainable tourism.” – Male, 41 years, married

“Don’t see what a country does, so never thought of it. It would make a difference if they talk about it (sustainable tourism).” – Female, 37 years, married

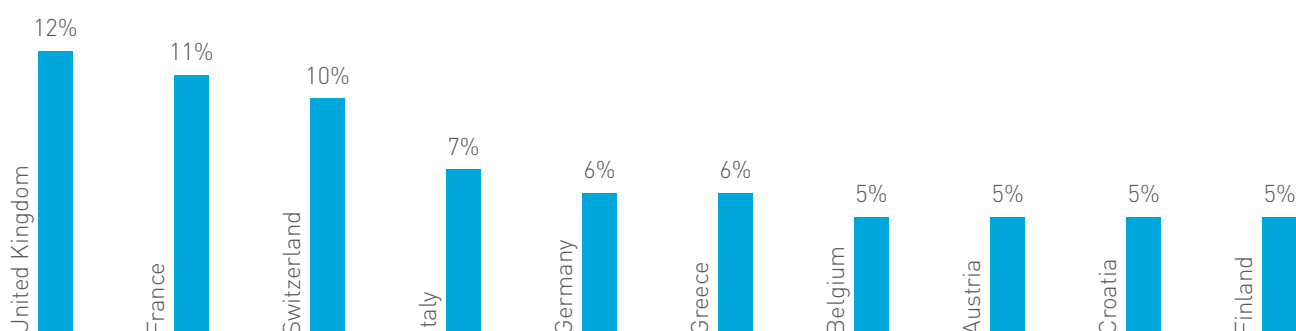
3.3.10 Future travel destinations

3.3.10.1 European destinations likely to visit

Singapore citizens mentioned 31 countries across different European regions that they would be most desirous of visiting (first choice) over the next five years, an indicator of their willingness to explore Europe, beyond the classic holiday destinations. The top ten European countries eliciting maximum interest were Western European, Northern European and Southern/Mediterranean European destinations, as displayed in the chart below.

Greece has grown in popularity due to direct flight connectivity on budget airlines, while Croatia’s emergence as a top choice can be attributed to the Croatian city Dubrovnik being a filming location for the hit television series Game of Thrones. Finland featuring as a desirable future destination is perhaps the result of some joint promotion projects undertaken by Visit Finland together with the Finnish embassy in Singapore.

Figure 13 – Top ten European destinations most likely to visit



Base: all respondents (n=300)

Singapore citizens were further asked to select other European countries (besides their first choice) that they might consider visiting in the next five years. Overall, Western European, Mediterranean and Northern European destinations evinced maximum interest, with Scandinavian destinations also being considered as likely choices by some Singaporeans.

The table below demonstrates the top 20 European countries Singapore citizens are likely to visit in the next five years (first choice country plus other countries). As can be noted, Spain, Iceland, Holland and Sweden now make it to the top ten list, which implies that interest is wide and varied, and Singaporeans may likely visit Europe multiple times in the next five years and/or visit multiple destinations on a trip to Europe.

Table 40 – Top twenty European destinations likely to visit



France	38%	Holland	23%	Austria	14%
United Kingdom	38%	Finland	22%	Croatia	14%
Switzerland	35%	Sweden	19%	Ireland	13%
Italy	32%	Greece	19%	Turkey	13%
Germany	31%	Belgium	17%	Russia	12%
Spain	26%	Norway	17%	Czech Republic	10%
Iceland	24%	Denmark	17%		

Base: all respondents (n=300)

3.3.10.2 Other world destinations likely to visit

Singapore citizens were also asked about other world destinations they are likely to consider visiting for a holiday in the next five years. Not surprising, most of the top ten destinations are in Asia. As earlier noted, competition in the long-haul space for Europe is likely to be from Australasia and North America, which feature in the top ten list, as displayed below.

Table 41 – Top ten other world destinations likely to visit



Japan	48%	Hong Kong	20%
Australia	37%	Maldives	19%
Taiwan	29%	China	18%
New Zealand	28%	United States	16%
South Korea	28%	Canada	14%

Base: all respondents (n=300)

A woman in traditional Malaysian attire, including a beaded headdress, stands in a tea plantation. The background shows rolling hills under a soft, golden light.

CHAPTER 4

**INDIVIDUAL COUNTRY INSIGHTS:
MALAYSIA**

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:

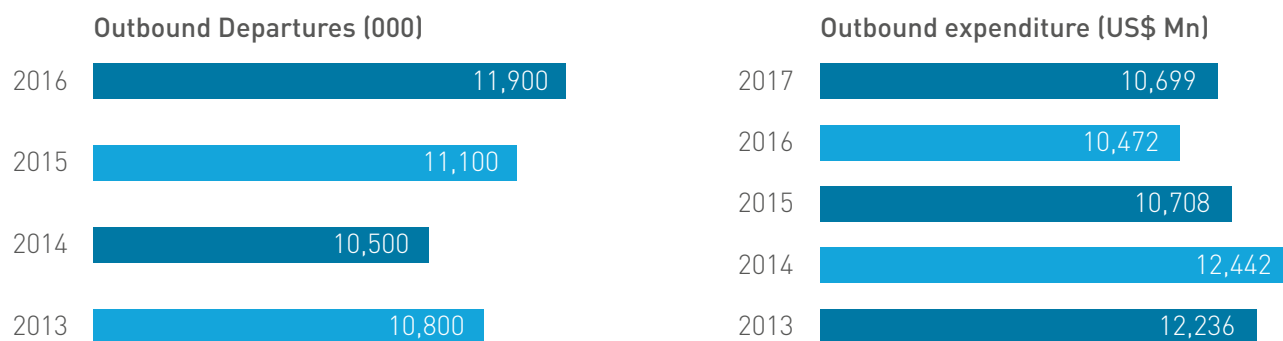
1. International Monetary Fund, World Economic Outlook Database, October 2018

2. Department of Statistics, Malaysia; www.dosm.gov.my

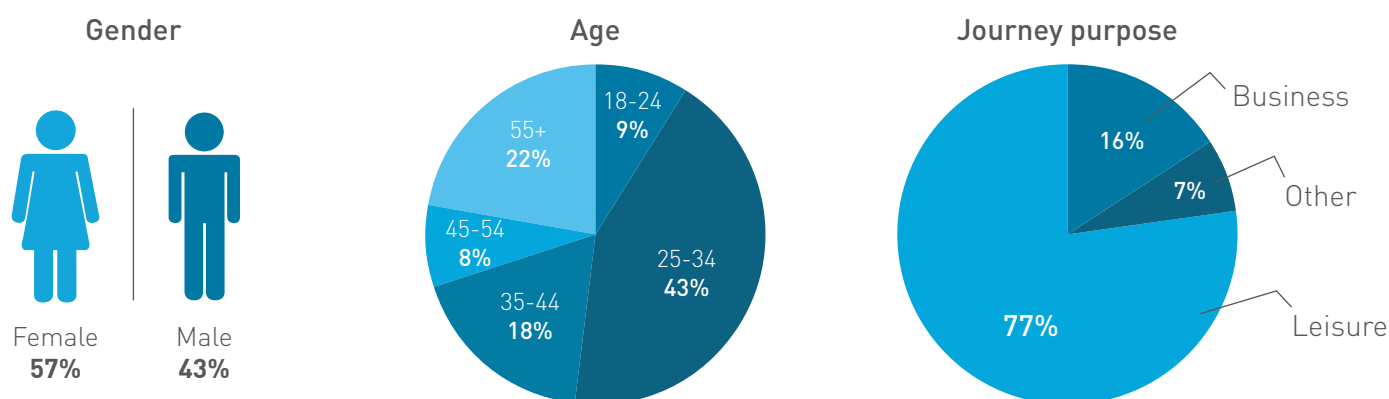
3. United Nations, Department of Economic and Social Affairs. Population Division (2017). Trends in International Migrant Stock: The 2017 revision

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:

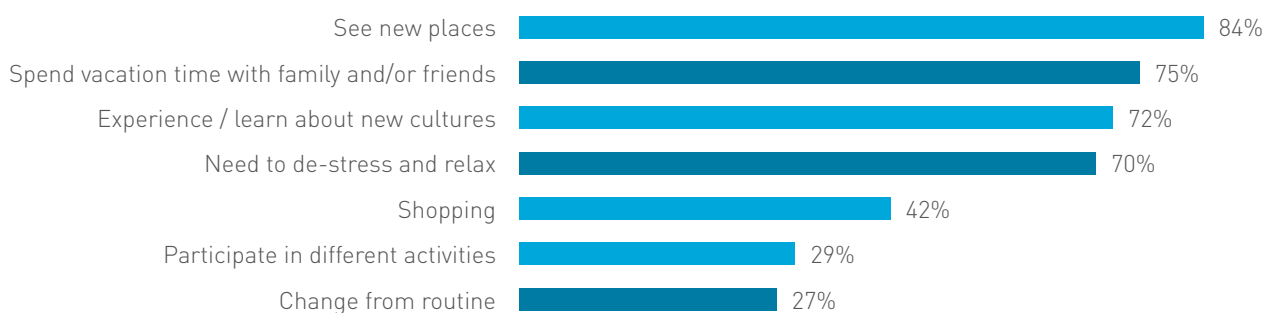
1. Amadeus Asia Pacific (2017), Journey of Me Insights APAC Report
2. World Tourism Organization (2018), Compendium of Tourism Statistics
3. Malaysia Airports Holdings Berhad (2018), Airports Statistics 2018
4. Henley Passport Index 2019

4.3 CONSUMER INSIGHTS

4.3.1 Motivations to holiday abroad

Being an emerging market, Malaysia outbound travel is understandably about discovering new places and gaining exposure to new cultures. Family-oriented Malaysians desire to travel abroad mainly in the company of their family, with a view to spend quality time together relaxing, participating in different activities, shopping, etc. Travelling overseas is seen as a welcome break from the stresses of daily urban life.

Figure 14 – Motivations to holiday abroad



Base: All respondents (N=300)

4.3.2 Motivations and barriers to holiday in Europe

Malaysian citizens mention the same top five drivers to holiday in Europe as the Singaporeans, namely: Europe's scenic beauty and natural landscapes, the weather, diversity of cultural and historical attractions, diversity of holiday experiences and activities, and the prestige associated with visiting Europe.

Three in ten Malaysians have been to Europe multiple times, and they cite similar motivations for visiting Europe as non-visitors. Additional drivers for repeat visitation include the desire to experience more of Europe, experience Europe in different seasons and satisfaction with previous travel to Europe. Malaysians also appreciate the excellent infrastructure for travelling within Europe. VFR travel is also a strong motivation to revisit Europe, indicating that Malaysians having family/friends living in Europe are more likely to visit Europe again, compared to those who do not.

In contrast, non-visitors and one-time visitors cite cost of a European holiday as the main barrier to visiting Europe. As such, they have not yet had an opportunity to visit Europe but have been travelling to other parts of the world. Like the Singaporeans, some Malaysians also feel that long-haul travel requires too much advance planning or that personal safety and security is a concern that has prevented them from visiting Europe. For some, language and cultural barriers also act as deterrents to visit Europe.

Figure 15 – Motivations to holiday in Europe 

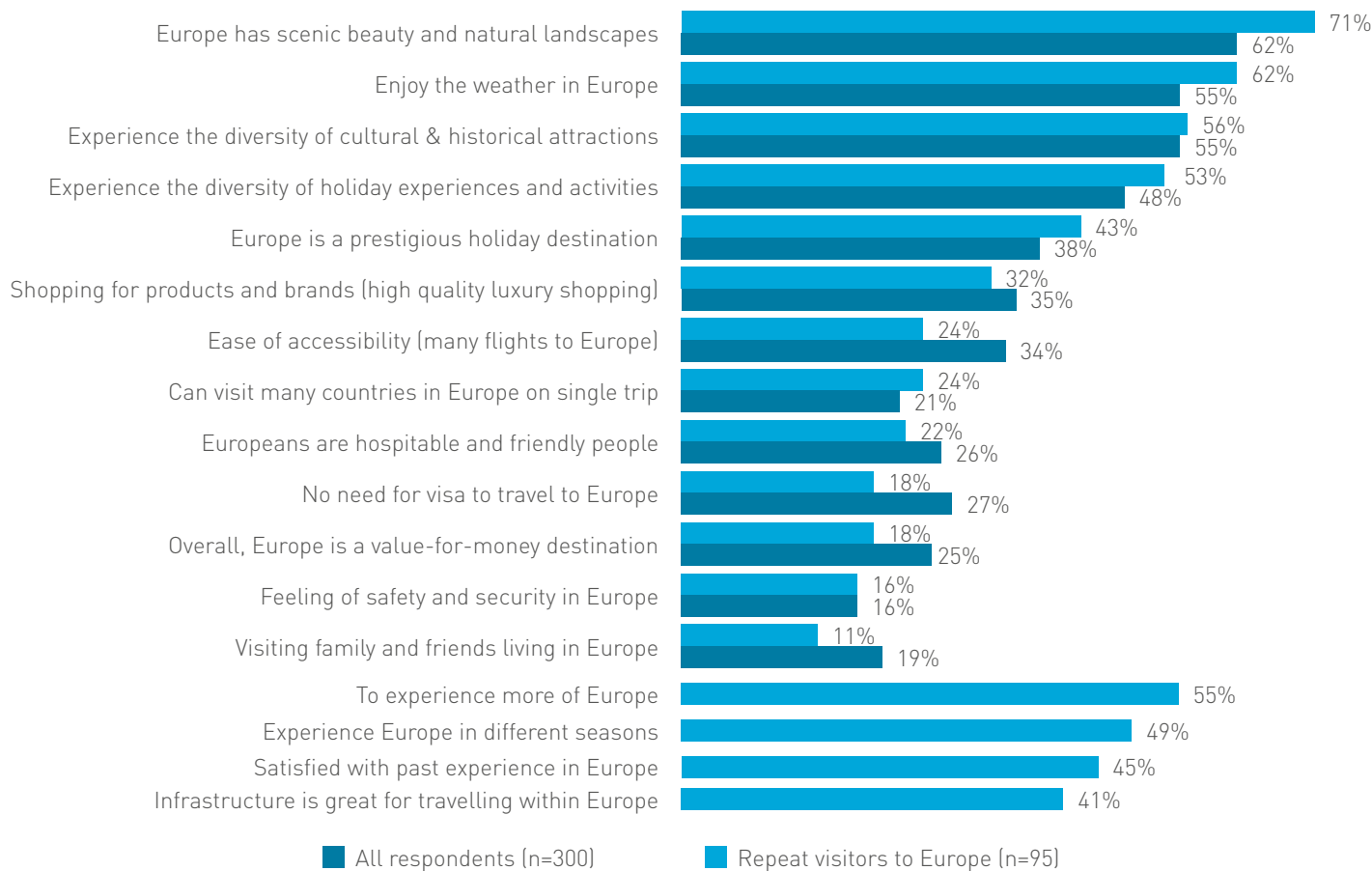

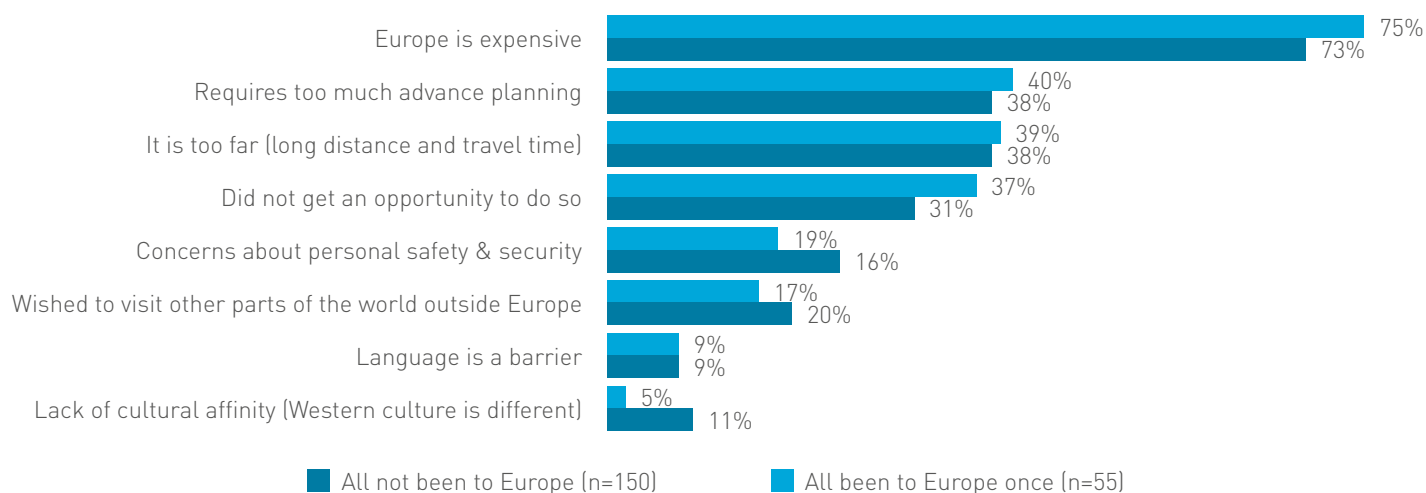


Figure 16 – Barriers to holiday in Europe 



4.3.3 Travel experience – regions and countries

Malaysian citizens have visa-free or visa-on-arrival access to 179 countries and territories, ranking the Malaysian passport the 12th most accepted in the world. This has fuelled the demand for international long-haul travel, especially among the middle- and upper-income households, many of whom are first-time travellers to destinations outside the South-East Asia region.

As the consumer survey was conducted amongst visitors and non-visitors to Europe (50:50), one-half of the Malaysians have been to Europe. While Asia is the most popular tourism destination region, Australasia is as popular as Europe, with almost one-half of the Malaysian citizens claiming to have ever visited the region. Over one-fourth have also been to North America and one-fifth have visited the Middle East.

The table below shows that all destination regions, except for Asia, have been visited by a larger proportion of past visitors to Europe than by those who have never been to Europe. Overall, past visitors have been to an average of 2.5 destination regions while non-visitors have been to 1.6 destination regions worldwide. One of the main reasons is that visitors to Europe tend to be more affluent compared to the average Malaysian outbound traveller and have greater financial capability to pursue their aspirations of visiting the 'must-see' global destinations on their bucket list.

Table 42 – Destination regions ever visited 

	All respondents (n=300)	All been to Europe (n=150)	All not been to Europe (n=150)
Asia	89%	89%	89%
Europe	50%	100%	0%
Australasia	47%	59%	34%
North America	26%	36%	15%
Middle East	19%	30%	8%
Central and South America	11%	15%	7%
Africa	8%	13%	4%
Caribbean Islands	6%	7%	5%
Average number of regions ever visited	2.1	2.5	1.6

Past visitors to Europe have been to an average of six European countries, higher than the average number of destinations (five) for Singaporeans. The presence of a large Malaysian diaspora and student population in Europe probably plays a role in drawing a higher proportion of Malaysian visitors to Europe.

Out of the 39 European countries listed in the survey, Malaysians indicate they have been to all, albeit with nearly one-third of the destinations receiving under 5% of Malaysian visitors. The table below lists the top ten countries ever visited by Malaysians, led by United Kingdom, France, Italy and Germany.

Table 43 – Top ten European countries ever visited 

United Kingdom	66%	Holland	33%
France	54%	Austria	29%
Italy	41%	Spain	26%
Germany	40%	Belgium	23%
Switzerland	39%	Turkey	15%

Base: all respondents who have ever been to Europe (n=150)

In other parts of the world, nine of the top ten destinations ever visited by Malaysians are Asian/Australasian destinations, led by Hong Kong, China, Taiwan, Japan and Australia. The only other long-haul destination to make it to the top ten table is United States. Notably, apart from Taiwan, all other destinations have been visited more by past visitors to Europe than non-visitors.

Taiwan's rising popularity among Malaysian travellers is due to the big effort made by the destination to improve the Muslim travel environment in the country. Many hotels, restaurants and Taiwanese products are halal certified, a strong consideration for the predominantly Muslim population in Malaysia. In addition, many travel deals and affordable travel packages are offered during consumer travel fairs and exhibitions to promote Taiwan in Malaysia.

Table 44 – Top ten countries ever visited (excluding Europe) 

	All respondents (n=300)	All been to Europe (n=150)	All not been to Europe (n=150)
Hong Kong	52%	61%	43%
China	51%	62%	41%
Taiwan	47%	45%	48%
Japan	46%	61%	31%
Australia	44%	55%	33%
South Korea	35%	43%	27%
Macau	33%	42%	25%
United States	20%	33%	7%
New Zealand	17%	27%	7%
India	11%	13%	8%
United Arab Emirates	11%	19%	2%

Purpose of travel

Malaysian nationals travel abroad for leisure and business purposes. The last five years have seen an average of 12 overseas trips being made by Malaysians, with leisure trips (holiday trips, visiting friends and relatives (VFR), other purposes) accounting for 73% share.

VFR travel is a key purpose of travel around the world, including in Europe, where a sizeable Malaysian diaspora resides. Business trips account for 25% share while travel for health/medical treatment is minimal at 2% share.

Compared to non-Europe visitors, past visitors to Europe travel more frequently, as is evident from the higher average for all types of trips as well as leisure trips only, in the last five years. The incidence of business trips (27%) to Europe lends itself to promotion of bleisure (business + leisure) tourism in Malaysia, as in the case of Singapore.

Table 45 – Purpose of travel overseas



	All respondents (n=300)	All been to Europe (n=150)	All not been to Europe (n=150)
Holiday trips	53%	50%	56%
Business trips	25%	27%	22%
Visiting friends & relatives	13%	13%	13%
Health/medical trips	2%	2%	3%
Visit of global sporting events, short study trips, etc.	7%	7%	7%
Average number of all types of trips in last five years	11.8	14.9	8.7
Average number of leisure trips in last five years	8.6	10.5	6.6

Based on the last five years trip data, further analysis reveals that past visitors to Europe travel much more frequently to non-European destinations than to European destinations. Notwithstanding the fact that this travel is mainly to regional destinations in Asia/Australasia, it is important to acknowledge that it does represent a challenge for European destinations targeting repeat visitors from Malaysia.

Table 46 – Average number of trips among past visitors to Europe



	Trips to Europe	Trips to rest of world
Average number of all types of trips in last five years	5.3	9.6
Average number of leisure trips in last five years	3.7	6.8

4.3.4 Travel behaviour — Europe vs other world destinations

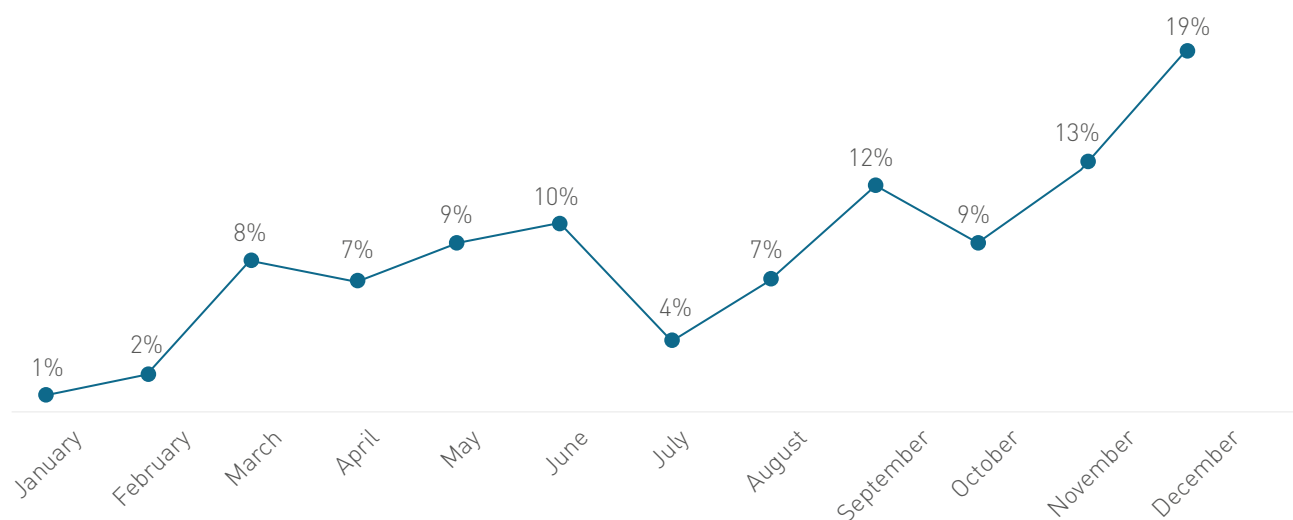
Based on the characteristics of their most recent trip overseas, insights on Malaysians' travel behaviour in Europe and other destinations is presented in this section.

4.3.4.1 Travel behaviour in Europe

Past visitors indicate that they have been to Europe at least once during the last five years (2014-2018), with another 8% having been there as recently as April 2019 (survey year).

Seasonality pattern, based on the most recent trip to Europe in the last five years, reveals that September, November and December are the peak travel months for travel to the continent, though travel is seen throughout the year. As with Singaporeans, the attraction of a white Christmas coupled with month-long school holidays appears to be the main motivation for Malaysians to take a winter break in Europe. May and June are the other popular months (mid-year school holidays lasting two weeks) for a European holiday among family travellers.

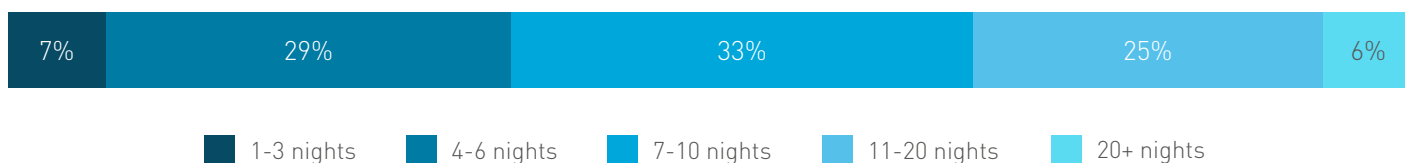
Figure 17 – Seasonality of holiday trip to Europe



Base: all respondents who have been to Europe (n=150)

Malaysians spend an average of 10 nights in Europe, generally staying longer if visiting more than one country on the same trip or if visiting family.

Figure 18 – Duration of holiday trip in Europe



Base: all respondents who have been to Europe (n=150)

Average number of nights spent in Europe: 9.9

Given the long distance and costs involved, many Malaysians consider it more economical to visit multiple countries on their European holiday. On their most recent trip, over one-half undertook a multi-country vacation, with 70% visiting two or three destinations and 30% visiting four or more destinations in Europe.

By far, the most popular European destination among Malaysians is United Kingdom, visited by one-third of visitors on their recent trip to Europe. This is followed by Western European and Mediterranean destinations which, along with Czech Republic, make up the top ten European destinations visited by Malaysians. Croatia, ranked in the top ten, is becoming a popular choice among Malaysians, due to its rich Islamic history and Muslim-friendly tourism infrastructure.⁵

⁵ www.salaamgateway.com/en/story/muslimfriendly_tourism_growing_in_croatias_10_billion_travel_market-SALAAM08052016071933/

In total, Malaysian repeat visitors went to 24 countries in different regions of Europe on their recent holiday trip, a reflection of their desire to discover 'more' of Europe.

Table 47 – Destinations visited on recent trip in Europe



United Kingdom	33%	Turkey	4%	Spain	2%
France	10%	Holland	3%	Greece	1%
Switzerland	10%	Croatia	3%	Sweden	1%
Austria	7%	Czech Republic	2%	Other European countries *	6%
Italy	7%	Denmark	2%		
Germany	6%	Norway	2%		

Base: all respondents who have been to Europe (n=150)

*Belgium, Bulgaria, Cyprus, Estonia, Iceland, Luxembourg, Poland, Russia and Serbia

Like their regional counterparts, Malaysian visitors to Europe predominantly prefer city-based holidays. Other types of holidays that most attract them to Europe are touring and driving holidays, adventure trips, shopping trips, beach holidays, etc. VFR travel brings 5% of Malaysians to Europe (mainly United Kingdom), mostly repeat visitors wanting to spend time with family and friends.

A holiday in the mountains is a major attraction for Malaysians visiting destinations like Switzerland and Austria. Travelling for a global sporting event is popular among the Malaysian youth, especially when the football season is on.

Table 48 – Type of holiday in Europe



City holiday	41%	Holiday in the mountains	5%
Touring / driving holiday	9%	Holiday in the countryside	3%
Adventure trip	9%	Visit to leisure park/theme park	1%
Shopping trip	6%	Snow/ski holiday	1%
Beach holiday/holiday by the sea	5%	Spa/wellness trip	1%
Visit to family and/or friends	5%	Visit for health/medical treatment	1%
Visit of a global sporting event	5%	Wedding, honeymoon, short study, religious trip	8%

Base: all respondents who have been to Europe (n=150)

Malaysians participate in a variety of activities when they travel abroad. In Europe, the main activities indulged in are shopping, sightseeing/excursion tours, tasting local food/gastronomy, visiting historical sites and cultural attractions, going to parks and gardens, museums and art galleries, and several more. Some of these such as sightseeing/excursion tours, shopping and visiting historical and cultural attractions are also the main reason for travel to Europe.

Table 49 – Holiday activities in Europe



	Participated in	Main reason for travel
Sightseeing/excursion tours	59%	28%
Shopping	55%	13%
Visiting historical and cultural attractions	49%	11%
Tasting local food/gastronomy	43%	5%
Going to museums and art galleries	39%	1%
Going to parks and gardens	37%	1%
Touring / driving around the country	25%	7%
Nature tour / eco tour	25%	6%
Enjoying the nightlife	19%	1%
Meeting friends and relatives	18%	5%
Visit to entertainment/theme parks	17%	2%
Visiting places of worship	13%	1%
Adventure activities	11%	2%
Enjoying theatre/musical performances	11%	0%
Sea and beach	8%	2%
Attending a global sporting event	6%	5%

Base: all respondents who have been to Europe (n=150)

Malaysians are family-oriented people and prefer to go on holidays with their family members. A small proportion (8%) also travels solo, mainly for short study trips and adventure trips. Travelling with friends is quite common among the youth, while holiday travel in a group with family and friends is usually undertaken by couples and young families.

Europe attracts a fair mix of different travel party sizes, ranging from two (couples) to over seven people. Notably, large family travel groups (7 or more people) are a significant proportion (13%) of all Malaysian visitors to Europe – catering to their specific needs would be a key value addition that tourism service providers should take cognizance of.

Table 50 – Travel companions and travel party size



Travelled alone (solo)	8%	2 persons	20%
Travelled with family	55%	3-4 people	45%
Travelled with friends	21%	5-6 people	22%
Travelled with friends and family	14%	7 or more people	13%
Travelled with a tour group	2%		

Base: all respondents who have been to Europe (n=150)

Many Malaysian families prefer to stay in premium hotels or service apartments when on holiday in Europe. About one-third of Malaysian visitors in Europe stay in budget accommodation and 7% opt to stay with friends and relatives. Importantly, Malaysian visitors' substantial uptake of accommodation through a sharing economy platform like Airbnb (15%) is a positive indicator for Europe from an affordability perspective (and more competitive as a value-for-money destination).

Table 51 – Type of accommodation



5-star or 4-star hotel or resort	42%	Stay with friends/relatives	7%
3-star/budget hotel or hostel/dormitory	32%	Serviced apartment/house	4%
Airbnb or similar	15%		

Base: all respondents who have been to Europe (n=150)

In terms of travel booking, one-third of Malaysian travellers to Europe prefer to book an all-inclusive travel package or to make individual bookings through a travel agent. However, a larger proportion book direct or through an online travel agent (OTA). Use of OTAs is preferred for accommodation booking while direct booking channels (website or mobile app) are preferred for flight reservations, a similar usage pattern as that of Singapore outbound travellers to Europe.

Table 52 – Flight and accommodation booking



	Flights	Accommodation
All-inclusive travel package through travel agent	23%	23%
Individual bookings (not package) through travel agent	10%	7%
Direct with airline/hotel on website or mobile app	43%	11%
Direct with airline/hotel on telephone or by email	4%	5%
Online on websites such as expedia.com, booking.com	20%	46%
Did not require booking (paid accommodation not used)	—	7%

Base: all respondents who have been to Europe (n=150)

Several factors such as the choice of destination, travel party size, duration of trip, type of holiday, type of accommodation, etc. determine the overall cost of a holiday. On their most recent trip in Europe, two-thirds of Malaysian visitors spent up to US\$5,000 and one-third spent more than US\$5,000 (total trip expenditure), with an average spend estimated at approximately US\$1,500 per person. This is in line with spend levels in the United Kingdom, but it is substantially higher (and therefore less competitive) compared to a similar holiday in a non-European destination. (see next section).

Taking into account the average duration of the most recent trip to Europe (10 nights), it is estimated that per person expenditure was approximately US\$150 per night.

Figure 19 – Total travel expenditure in Europe



Base: all respondents who have been to Europe (n=150)

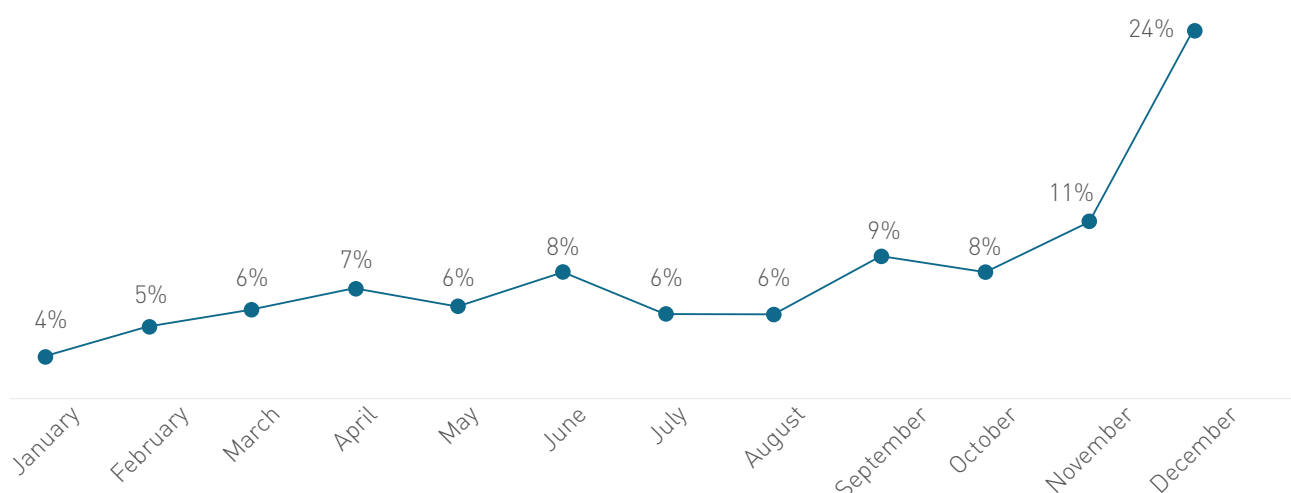
Average spend per person on trip to Europe: US\$1,500; average spend per person per night: US\$150

4.3.4.2 Travel behaviour in other (non-European) destinations

Malaysian outbound travellers to global destinations (other than Europe) travel far and wide, though the majority stay within the wider Asia region. Various factors such as geographical proximity, ease of access through budget airlines, cultural affinity and cost of holiday play a role in their decision to spend vacation time within the region.

The first four months of 2019 have seen 22% of Malaysian citizens take a holiday break overseas. This is in line with the seasonality pattern for the year, as is evident from the figures below, which reflect when the most recent trip was taken in the five-year period 2014-2018. Clearly, outbound travel from Malaysia is round-the-year, with a peak in the last two months of the year, as with trips to Europe (noted earlier). For Europe, this means that the winter offer especially needs to (consistently) highlight the uniqueness of the European winter festival spirit compared to other world destinations.

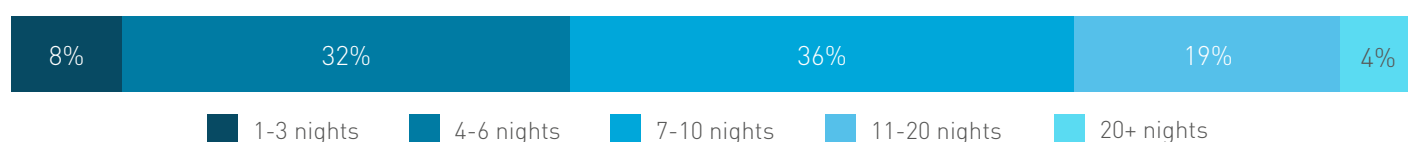
Figure 20 – Seasonality of holiday trip overseas 



Base: all respondents who have been to non-European destinations on recent trip, excluding in 2019 (n=194)

Given that much of the travel is to destinations within Asia, Malaysians spend an average of about seven nights in non-European destinations, significantly lower than the average duration of trips to Europe (10 nights). Overall, 40% of outbound travellers go on holiday for up to 6 nights, 36% for 7-10 nights and 23% for 11 or more nights in non-European destinations.

Figure 21 – Duration of holiday trip overseas 



Base: all respondents who have been to non-European destinations on recent trip (n=251)

Average number of nights spent overseas (non-European destinations): 6.6

Compared to Europe where over one-half of the Malaysians undertake multi-country vacations, only 16% of visitors spend time in multiple countries on their vacation trip in other world destinations.

On their recent trip overseas, 81% of the Malaysian travellers visited ten main destinations in North-East Asia, Australasia, North America and the Middle East, led by Australia, Taiwan, Japan, China and Hong Kong. The rest (19%) visited destinations across the world such as Brazil, Canada, Egypt, Jordan and United Arab Emirates.

Table 53 – Destinations visited on recent trip overseas



Australia	16%	New Zealand	4%
Taiwan	15%	India	2%
Japan	14%	United States	2%
China	11%	Saudi Arabia	2%
Hong Kong	8%	Other countries*	19%
South Korea	7%		

Base: all respondents who have been to non-European destinations on recent trip (n=251)

* Egypt, Jordan, Macau, Maldives, South Africa, Brazil, Canada, Mauritius, South Africa, United Arab Emirates

With few exceptions, there is little difference in the type of holidays that Malaysians prefer to undertake in Europe and in other parts of the world. The top five types of holidays that they most indulge in are city holidays (most popular), shopping trips, touring and driving holidays, beach holidays/holidays by the sea and adventure trips. Notably, visit to leisure parks/theme parks are more popular in non-European destinations, perhaps due to limited awareness of such attractions in Europe or the associated costs.

Table 54 – Type of holiday overseas



City holiday	35%	Visit to family and/or friends	5%
Shopping trip	9%	Religious/spiritual holiday	4%
Touring / driving holiday	9%	Snow/ski holiday	2%
Beach holiday/holiday by the sea	8%	Holiday in the mountains	1%
Adventure trip	8%	Visit of a global sporting event	1%
Visit to leisure park/theme park	7%	Honeymoon, sports competition, photography	3%
Holiday in the countryside	6%		

Base: all respondents who have been to non-European destinations on recent trip (n=251)

Malaysians participate in similar activities whether they travel to Europe or to other parts of the world. The top five activities are shopping, gastronomy/dining out, sightseeing/excursion tours, visiting historical sites and cultural attractions, and going to parks and gardens.

The key difference is in some of the main reasons for travel, such as visits to theme parks/leisure parks, and sea/beach activities that draw Malaysian travellers to non-European destinations much more than to Europe. These differences are also observed in Singapore, highlighting perhaps that the travel trade in South-East Asia does not actively promote such activities in Europe.

Table 55 – Holiday activities in Europe



	Participated in	Main reason for travel
Shopping	65%	11%
Tasting local food/gastronomy	55%	10%
Sightseeing/excursion tours	54%	21%
Going to parks and gardens	42%	2%
Visiting historical and cultural attractions	41%	7%
Enjoying the nightlife	29%	1%
Visit to entertainment/theme parks	28%	6%
Sea and beach	25%	7%
Going to museums and art galleries	25%	0%
Nature tour / eco tour	24%	5%
Touring / driving around the country	22%	2%
Meeting friends and relatives	17%	5%
Visiting places of worship	17%	2%
Adventure activities (rafting, mountain climbing etc)	14%	4%
Enjoying theatre/musical performances	12%	1%
Going for spa and beauty treatments	10%	0%

Base: all respondents who have been to non-European destinations on recent trip (n=251)

In terms of travel companions and travel party size, the trend is similar with Europe, the key difference being that the proportion of large family travel groups (7 or more people) to non-European destinations is higher than to Europe. Nonetheless, the choice of accommodation does not vary between trips to European and to non-European destinations, with most Malaysian travellers preferring to stay in hotels of varying standards, based on availability and budget considerations.

Table 56 – Travel companions and travel party size



Travelled alone (solo)	5%	2 persons	23%
Travelled with family	62%	3-4 people	37%
Travelled with friends	21%	5-6 people	23%
Travelled with friends and family	10%	7 or more people	17%
Travelled with a tour group	2%		

Base: all respondents who have been to non-European destinations on recent trip (n=251)

Table 57 – Type of accommodation



5-star or 4-star hotel or resort	45%	Stay with friends/relatives	6%
3-star/budget hotel or hostel/dormitory	32%	Serviced apartment/house	3%
Airbnb or similar	14%		

Base: all respondents who have been to non-European destinations on recent trip (n=251)

In terms of travel booking, a similar usage pattern is observed as for trips to Europe. One-third of Malaysian travellers book through a travel agent, while a larger proportion book direct or through an online travel agent (OTA), the latter used more for accommodation booking than for flight reservations.

Table 58 – Flight and accommodation booking 

	Flights	Accommodation
All-inclusive travel package through travel agent	26%	26%
Individual bookings (not package) through travel agent	6%	6%
Direct with airline/hotel on website or mobile app	49%	14%
Direct with airline/hotel on telephone or by email	5%	3%
Online on websites such as expedia.com, booking.com	14%	45%
Did not require booking (paid accommodation not used)	—	6%

Base: all respondents who have been to non-European destinations on recent trip (n=251)

As observed in other source markets, there is a significant difference in the overall cost of holiday in non-European destinations compared to the cost of a holiday in Europe for Malaysians. On their most recent holiday trip, 84% of Malaysian travellers claim to have spent up to US\$5,000 and 16% spent over US\$5,000 (total trip expenditure), with an average spend estimated at approximately US\$790 per person (compared to US\$1,500 in Europe).

Based on the average duration (6.6 nights) of the most recent trip overseas, it is estimated that per night expenditure by Malaysians in non-European destinations was approximately US\$120 per person, compared to US\$150 per person in Europe. This ratifies perceptions that Europe is more expensive - one of the key barriers to holiday in Europe.

Figure 22 – Total travel expenditure overseas (non-European destinations) 



Base: all respondents who have been to non-European destinations on recent trip (n=251)

Average spend per person on trip overseas (non-European destinations): US\$790;
average spend per person per night: US\$120

4.3.5 Sources of information for holiday planning

Like their regional counterparts, Malaysians use the Internet and friends and family as the primary information sources for travel planning and research. One-third also use traditional media – travel magazines and television channels, and holiday brochures and travel guides, while over one-fourth turn to travel agents and tour operators, especially when planning to visit a new holiday destination.

Table 59 – Information sources used for holiday planning 

Friends & family	60%	Travel magazines	20%
Internet - websites, social media, etc	81%	Travel channels/programs on television	15%
Travel agents & tour operators	28%	Country tourist offices	13%
Holiday brochures & travel guides	35%	Travel fairs & exhibitions	17%

Base: all respondents (n=300)

Among users of the Internet, social media, travel review websites, search engines, travel booking websites and travel comparison websites are the main online information sources used by Malaysian travellers. Notably, a much larger proportion of Malaysians than Singaporeans use social media and travel review websites, and these are also key influencers in travel planning and decision making.

Travel agent and tour operator websites, travel bloggers/ influencers, independent travel advice and national tourist board websites are also used by some. Most of this information is accessed via mobile phones and laptops, with some usage of tablets as well.

Table 60 – Online information sources used 

Social media	64%	Travel agent/tour operator websites	26%
Travel review sites	53%	Travel bloggers, influencers	25%
Search engines	39%	Independent travel advice websites	20%
Travel booking and comparison websites	35%	National Tourist Board websites	12%

Base: all respondents (n=300)

4.3.6 Key drivers impacting travel habits and behaviour

Like the qualitative responses from Singapore citizens, Malaysians also verbalized that family life cycle stage and personal financial situation are key determinants of the travel choices they make. The role of technology in travel behaviour is also identified as a major factor in holiday inspiration, planning and booking.

“I used to travel with my cousins in a group. Since they are now married, I travel alone. I make my own decisions regarding where to go and what to do.” — Male, 31 years, single

“Five years ago, I would go with friends and now I prefer to go with family. When you are single, you go with friends - of course you want experience, but you don't go very far because of limited budget. Now, I have another financial source - I mean my husband, so we can share cost and go further and to more places.” — Female, 32 years, married with children

“Five years ago, I just travelled with my company. They would send us overseas for three days and two nights. So, my colleagues and I would take one or two days extra for a holiday. However, now I do not rely on my company only as I can afford to travel on my own. I do my own research and planning.”

“Five to ten years ago I travelled with the friends more. After marriage, I travel more with wife. And family. We like to go for city breaks and relaxing holidays.” — Male, 32 years, married with child

Malaysians use online sources for travel inspiration, itinerary planning and bookings. In particular, social media, travel bloggers and online promotions are a major influencer in travel choices. Interestingly, Malaysians follow local as well as international vloggers for travel-related information.

“I would say even 5-6 years ago, there was information available online, but we would go ask friends, collect information and then decide where to go. But now information online is so wide and easily available, we can rely on it. And also book online.” — Male, 35 years, married with children

“Social media, bloggers and online promotions - I would say they affect us 100% in travel decision making.” — Female, 35 years, married with children

“All people watch Vlogs. I can say DeathbyVlog, Kara and Nate, and there is another one Beer for Breakfast. These three people give a lot of information as they keep on travelling, that's what they do.” — Male, 32 years, married with child

“Of course, we get influenced by the bloggers or influencers who have been to many places and advertise in social media. So, we get the information, but we are the main decision maker to decide where we want to go.” — Female, 35 years, married with children

“For me, the inspirational one is Nas daily (www.nasdaily.com). And recently I have begun following Will Smith who is travelling a lot and has created a travel show.” – Male, 28 years, single

Looking into the future, Malaysians expect to travel more to Europe, as ‘there are more promotions now which makes it more affordable’. Past visitors also feel that ‘once you have been to Europe, you want to go again – see more, experience more’.

4.3.7 Knowledge and perception of Europe and European destinations

4.3.7.1 Awareness and knowledge of European regions

On being asked about their level of awareness and knowledge of different European regions, most Malaysians indicate that they are aware of the different European regions, with lowest level of awareness of Benelux and Baltic States. 14% of the Malaysians are also not aware of Scandinavia with another 30% claiming they had heard of it but did not know anything about the region.

The level of knowledge of the different regions varies, with Malaysians claiming to be most knowledgeable about Western Europe and Central/Eastern Europe, followed by Northern Europe and Southern/Mediterranean Europe. Familiarity with Central/Eastern Europe, in part, reflects the growing desire and interest among Malaysians to explore ‘affordable’ destinations in Europe.

Table 61 – Awareness and knowledge of European regions



	Never heard of it	Heard of it only (don't know anything)	Know a little	Know a fair amount	Know very well
Northern Europe	4%	17%	49%	25%	4%
Western Europe	4%	15%	43%	31%	7%
Central / Eastern Europe	4%	16%	47%	25%	8%
Southern/Mediterranean Europe	4%	21%	48%	19%	7%
Scandinavia	14%	30%	31%	18%	7%
Benelux	42%	25%	23%	7%	3%
Baltic States	36%	25%	28%	8%	2%

Base: all respondents (n=300)

Overall, over one-half of the Malaysians see Europe as a set of different regions, which means that regional marketing and promotion of Europe could be a cost-effective method to target them. The focus group discussion among potential visitors to Europe reveals that regional travel is perceived to be more convenient due to availability of public transportation options and possibility to manage the trip within the limited time available for the holiday.

At the same time, 26% see Europe as a set of different countries, which can be marketed for multi-destination holidays in Europe. These tend to be popular tourism destinations and specific cities (Paris, Berlin, Rome, Barcelona, etc) that Malaysians most aspire to visit. Although some may spend time in a single city, others would typically consider two or more cities in neighbouring countries on their trip to Europe.

4.3.7.2 Perceptions of individual European destinations

In the qualitative focus group discussion, consumer perceptions of individual European destinations were explored. Similar results were observed in Malaysia as in the case of Singapore. Malaysians displayed lack of awareness and familiarity with several European countries. As a result, image perceptions were mainly limited to the more well-known, traditional holiday destinations in Europe.

By and large, associations with individual countries primarily centred on cities, natural landscapes, food and sports, with some reference to visitor attractions and sightseeing objects. Examples below highlight the spontaneous associations with a selection of European holiday destinations.

Austria – mountains, nature, snow

Belgium – diamonds, chocolates

Croatia – city life, history, sea, beach, football, Islamic history

Denmark – city culture, badminton, football

France – Paris, Eiffel tower, shopping, fashion, romance (honeymoon)

Germany – Berlin, engineering, automobiles, historical places

Greece – Athens, Santorini, sea views, beaches, culture, historical places, great weather

Holland – canals, biking, windmills

Italy – Venice, Rome, Italian food, history, nature, football

Ireland – countryside, beer, night life

Portugal – history and culture, churches, wine, football, Ronaldo

Romania – romantic place, food, nice environment

Spain – Barcelona, Madrid, historical places, churches, Real Madrid, football

Sweden – Scandinavian country, Ikea, cold country, nature, food (meatballs)

Switzerland – Zurich, Geneva, Lausanne, nature, cable cars, mountains, watches, expensive

Turkey – Istanbul, culture, history, museum, Turkish food, where Asia meets Europe

United Kingdom – London, city life, shopping, architecture, Big Ben, London Eye, London Bridge

Overall, in what way would you say Europe is unique when compared to other destination regions? The answers to this question reveal that, for Malaysians, Europe stands out for its diversity, natural landscapes and greenery, history and culture, variety of cuisines and luxury shopping. The cool/cold weather in Europe is also seen as a positive aspect, which is one of the reasons for a spike in travel to Europe in the winter months.

Malaysians are attracted to the contrast in the European lifestyle compared to their own, opining that the 'western' lifestyle is different and 'cool' and they are keen to experience it.

"In Europe, they have beautiful nature and so much greenery. And there is a balance between nature and the concrete city. The weather is good, and you can just walk around, it's a good feeling. So, you feel very different and that one week is very different from your normal life. That is very satisfying." – Male, 35, married

"For me, Europe is unique because of its western style, cold weather and many historical buildings. The life there is calm and peaceful. Even in the cities, there are open spaces, greenery, less crowds, not like our cities." – Male, 32, married

In terms of the areas where Europe is seen to be underperforming compared to other destination regions, Malaysians perceive the strong Euro currency that makes Europe a more expensive holiday destination as the main issue.

4.3.7.3 Perception of Europe versus competitor regions on interest-based travel themes

As mentioned earlier, three questions were asked in connection with interest-based or passion-related travel themes with a view to understanding the potential for promoting Europe on this basis, in the South-East Asian travel source markets (refer Chapter 2 for the specific questions).

Malaysian travellers, like their regional counterparts, selected "slow" adventure, culture and history, nature, city life and local gastronomy as the top five travel themes of importance and interest. One or more of these are already the key drivers for outbound travel as noted earlier in the characteristics of the recent trips undertaken by Malaysian travellers to overseas destinations.

Table 62 – Travel themes as key driver to holiday abroad



	Not important at all	Would like the opportunity to experience it but not essential	Important to be able to experience it	Main reason for travel
Adventure	23%	40%	26%	11%
“Slow” adventure	6%	26%	47%	21%
Culture and history	3%	20%	47%	30%
Nature	6%	22%	46%	26%
City life	5%	20%	55%	20%
Spa and wellness	24%	42%	26%	8%
Tasting local food/gastronomy	5%	16%	43%	36%
Beach and sea	8%	36%	39%	18%
Amusement and theme parks	8%	40%	39%	13%
Global sporting events	36%	30%	26%	8%
Media-related activities and interests	23%	37%	34%	7%

Base: all respondents (n=300)

Regional perceptions show that Asia and Europe are most associated with the top five interest-based travel themes (Europe the most with city life and culture and history), with North America a distant third on city life and ‘slow’ adventure. Africa features in third place on the theme of nature and the Middle East on culture and history and gastronomy.

As these findings are consistent with the results from the other source markets, the same learning can be applied for Malaysia, namely, that in the long-haul space, Australasia and North America may be considered as the key competitor regions for Europe, from a marketing and promotion perspective. At a destination level, Japan is also a strong contender.

Table 63 – Perception of Europe versus competitor regions on top five travel themes



	Asia	Africa	Middle East	Europe	North America	South America
“Slow” adventure	65%	13%	10%	56%	16%	13%
Culture and history	65%	15%	27%	68%	16%	14%
Nature	63%	33%	17%	51%	21%	18%
City life	63%	6%	16%	68%	36%	19%
Tasting local food/gastronomy	72%	13%	27%	62%	26%	21%

Base: all respondents (n=300)

Asked to select the travel themes that would be a key driver for a holiday in Europe, most Malaysian travellers indicate the same top five themes (as noted above) for travel across Europe (pan-European holiday). Given that multi-country vacations are popular in Europe, promoting pan-European travel themes (by region or across regions) in the Malaysian source market may be worth exploring.

Table 64 – Travel theme as key driver for holiday in Europe



	Across Europe (pan-Europe)	Specific destination in Europe
“Slow” adventure	81%	19%
Culture and history	76%	24%
Nature	75%	25%
City life	71%	29%
Tasting local food/gastronomy	85%	15%

Base: all respondents who associate a specific travel theme with Europe

The questions on interest-based travel themes were further explored in the qualitative focus group discussion. In addition to the above themes, adventure (camping, outdoor adventurous activities such as climbing, sky diving) and beach and sea (scuba diving/snorkelling etc) travel themes also spiked interest among Malaysian travellers. However, combining different activities/experiences such as city life, culture and history and gastronomy is typically the norm among Malaysian travellers (as among other travellers), especially when visiting a new destination.

“A country can offer you all the above (travel experiences), even a single city can. For example, in Thailand, if you go to Krabi, it’s more beach and nature. If you go to Phuket, it’s for beach, snorkelling and diving or Bangkok for more of city life and food. So, Thailand fulfils many different interests and it is good to have different experiences on a holiday.” – Male, 35, married with children

“My interest is in sightseeing and historical trips, new experiences and adventures. Like in Australia, you can travel by train to experience nature and scenic landscapes on the way. Then there are the museums and other places for the historical part. In the cities, there’s great food and shopping too.” – Female, 35, married with one child

“When I travel abroad, I want to see the best the country has to offer. So, sightseeing historical places, tasting local food, and the natural scenery. When I went to London, of course there is the Tower of London, London Bridge, museums and many other places, but also lovely gardens and parks. I also saw the lavender flower fields close to the city. Very nice experience.” – Female, 36, married with children

As far as regional perceptions are concerned, even though Asia and Europe are most associated with the main interest-based travel themes, the participants in the focus group reiterated that every region and country offers fulfilment of different interests and passions, and that the key driver for them would be consideration of their ‘bucket list’ of destinations that they wish to visit.

Nonetheless, it was agreed that travel for specific adventure experiences and sports/sporting events would be key drivers for visits to specific destinations, for example Switzerland for skiing or Spain and UK for football.

“I am crazy about football. It is my dream to go visiting cities and the stadium together. That is, experience city life and stadium together.” – Male, 28, single

“My husband is a fan of Real Madrid so that’s why we went to Spain. Whenever we go to a European country, we must visit the stadium. It’s a must, like in Barcelona.” – Female, 35, married with children

4.3.8 Importance and perception of luxury travel

In the consumer survey, when responses were sought to the question: *In general, how important will luxury experiences and services be (or already are) for you on your travels abroad?*, an equal proportion (41%) of Malaysian respondents stated that luxury is important (important/very important) to them as those who expressed neutrality (neither important nor unimportant). Nearly two in ten considered luxury experiences and services as unimportant (unimportant/very unimportant).

In the focus group discussion, Malaysians opined that luxury travel for them would be reserved for 'special occasions' like a honeymoon or a landmark birthday celebration, unless 'you are very rich or affluent'. All the trappings of a luxury lifestyle are associated with luxury travel – first class travel, expensive accommodation, VIP service, luxury cars, designer brands shopping, dining in five-star restaurants, etc.

"For me, luxury is all about VIP services - presidential suite in luxury hotel, dining in the best restaurants in the city, luxury shopping, having a personal concierge taking care of you." – Male, 32, married with one child

"Luxury holiday to me means being treated like a privileged customer. I would travel in first class, stay in a super luxury resort, drive in a Ferrari, buy the latest collection of designer clothes, have VIP tickets to exclusive events." – Female, 36, married with children

Monte Carlo, London, Paris and Dubai were mentioned as the most desirable luxury vacation destinations by the Malaysians.

4.3.9 Importance and perception of sustainable tourism

As observed in other travel source markets, not all Malaysian citizens are aware of the concept of sustainable tourism. Of the 63% of Malaysians who claim to be aware, 73% say that sustainability would be important or very important in their travel decision making process, encompassing its various aspects. In terms of importance of the different aspects of sustainability in travel decision making, Malaysians rate a destination's record in conserving its natural environment as the most relevant, followed by support for its cultural projects.

Table 65 – Importance of aspects of sustainability in travel decision making



	Very important	Important
Destination conserves its natural environment	53%	44%
Destination supports local businesses	31%	55%
Destination supports cultural projects	35%	54%
Accommodations are certified with green/eco labels	32%	53%
Visitor attractions and other services are eco-certified	27%	57%

Base: all respondents aware and who rated sustainability as important or very important (n=139)

Nonetheless, the focus group revealed that, despite rating sustainability and its various aspects as important, Malaysians rarely consider it in their travel decision making process.

"We are living in a country where we don't get to learn about other cultures. So, for sure travelling to other countries, we need to learn about their cultures, their people, how they live there, etc. So, when we travel, we learn something new. Sustainability is not something I think of." – Female, 28, married

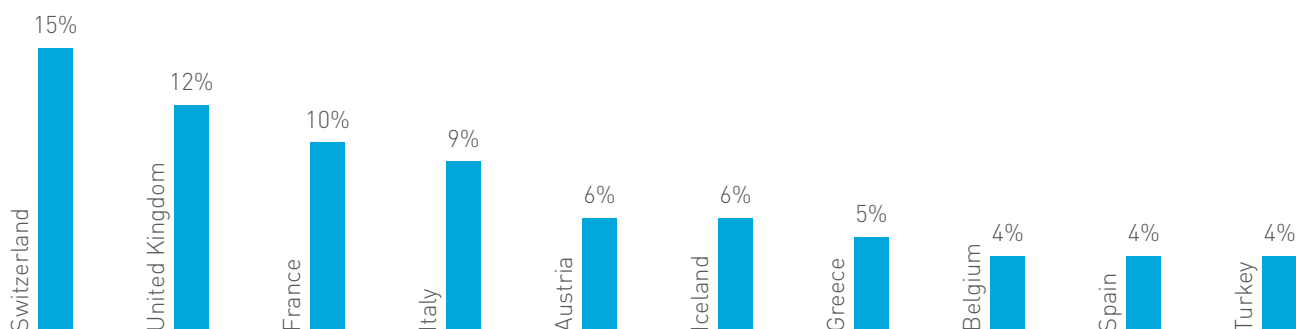
Interestingly, countries with 'more' nature and green spaces are seen to score high on sustainability perceptions among Malaysians. In general, Europe is most associated with sustainability, not only from the natural environment perspective but also from the technology perspective wherein European nations are perceived to be making good use of technology to address environmental issues.

4.3.10 Future travel destinations

4.3.10.1 European destinations likely to visit

Malaysian citizens mentioned 31 countries, across different regions of Europe, that they would most likely consider visiting as their 'first choice' holiday destination over the next five years. As the figure overleaf shows, a mix of Northern, Western and Mediterranean European destinations feature in the top ten destinations list for Malaysian future visitors to Europe. Interest is also expressed for visiting destinations such as Bosnia and Herzegovina, Portugal and Romania, as Malaysians look for greater affordability when compared to the classic holiday destinations in Europe.

Figure 23 – Top ten European destinations most likely to visit



Base: all respondents (n=300)

Malaysian citizens might also consider visiting other European destinations in the next five years. The table below demonstrates the top 20 European countries they would consider visiting (first choice country plus other countries). As can be noted, apart from Western, Northern and Mediterranean European destinations, a number of Scandinavian and Central/Eastern Europe destinations also figure in the list, which implies that interest is wide and varied, and Malaysians, like their regional counterparts, may likely visit Europe multiple times in the next five years and/or visit multiple destinations on a single trip to Europe.

Table 66 – Top twenty European destinations likely to visit



Switzerland	48%	Iceland	27%	Norway	21%
United Kingdom	42%	Greece	26%	Belgium	20%
Italy	40%	Sweden	25%	Portugal	18%
France	38%	Holland	23%	Ireland	18%
Germany	34%	Austria	22%	Russia	14%
Spain	32%	Finland	22%	Croatia	13%
Turkey	28%	Denmark	21%		

Base: all respondents (n=300)

4.3.10.2 Other world destinations likely to visit

Malaysian citizens were also asked which other world destinations they are likely to consider visiting for a holiday in the next five years. Not surprisingly, majority of the top ten destinations are in Asia. Given that there are limited direct flight connections between Malaysia and Europe, and travel times are comparatively much longer compared to several other world destinations, competition is likely to be intense in the coming years.

Table 67 – Top ten other world destinations likely to visit



Japan	41%	China	21%
New Zealand	33%	Maldives	20%
Australia	31%	United States	18%
South Korea	27%	Hong Kong	15%
Taiwan	22%	Canada	14%

Base: all respondents (n=300)

CHAPTER 5

INDIVIDUAL COUNTRY INSIGHTS: INDONESIA

5. INDIVIDUAL COUNTRY INSIGHTS: INDONESIA

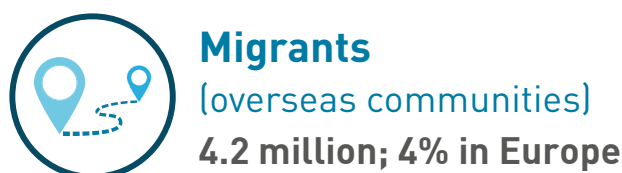
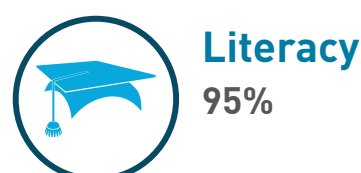
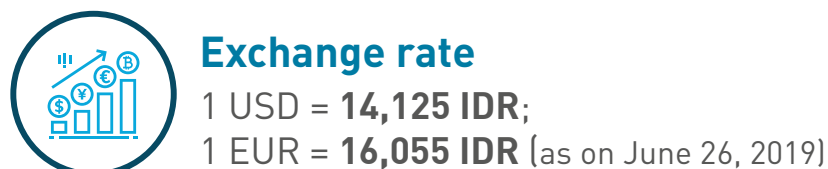
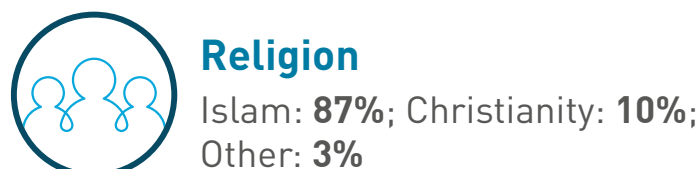
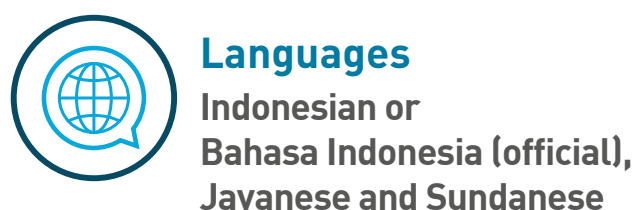
5.1 COUNTRY PROFILE



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



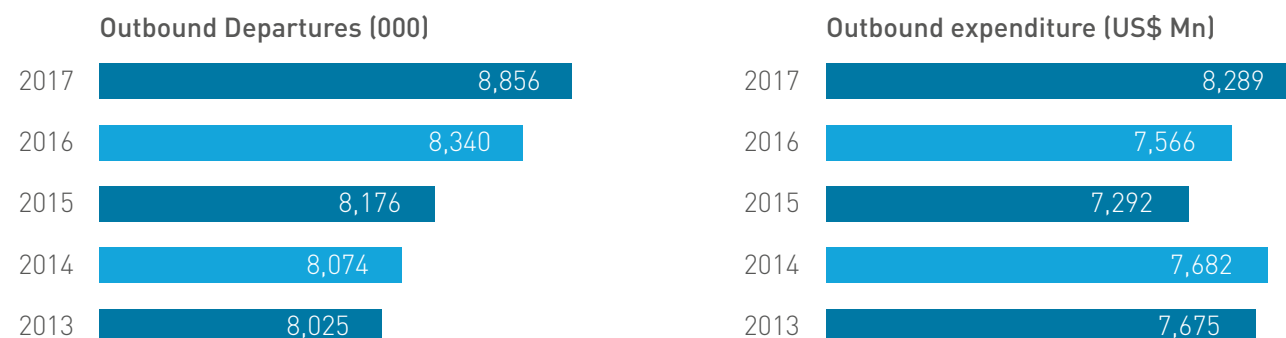
Sources:

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

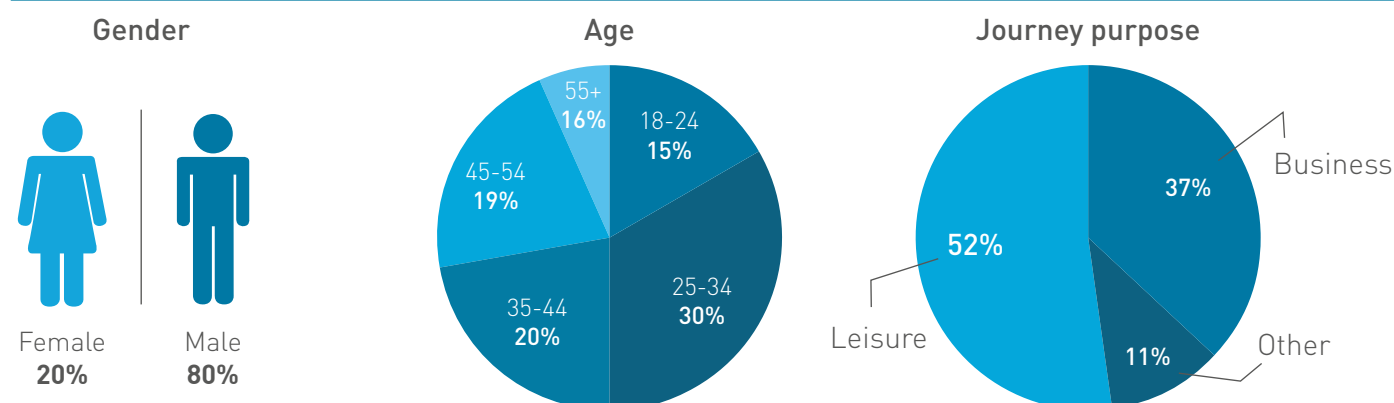
2. United Nations, Department of Economic and Social Affairs. Population Division (2017). Trends in International Migrant Stock: The 2017 revision (United Nations database, POP/DB/MIG/Stock/Rev.2017)

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:

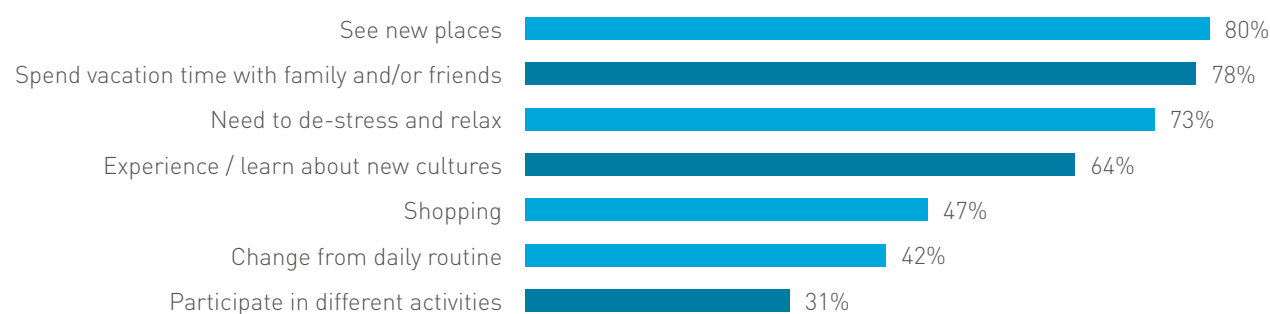
1. Amadeus Asia Pacific (2017), Journey of Me Insights APAC Report
2. World Tourism Organization (2018), Compendium of Tourism Statistics
3. PT Angkasa Pura II, Indonesia's Airport Company (2018), Annual Report Laporan Tahunan
4. Henley Passport Index 2019

5.3 CONSUMER INSIGHTS

5.3.1 Motivations to holiday abroad

Like citizens of other South-East Asian countries, Indonesians are motivated to travel abroad on holiday for several reasons, with the top three drivers being: the desire to see new places, desire to spend vacation time with family/friends and the need to de-stress and relax.

Figure 24 – Motivations to holiday abroad 



Base: All respondents (N=200)

5.3.2 Motivations and barriers to holiday in Europe

Indonesia's citizens mention similar motivations and barriers to holiday in Europe as their regional counterparts. The top five drivers to holiday in Europe are: Europe's scenic beauty and natural landscapes, diversity of cultural and historical attractions, the prestige associated with visiting Europe, enjoying the weather in Europe and diversity of holiday experiences and activities.

Satisfied with their previous experience, repeat visitors wish to experience more of Europe (different regions/countries/cities) and travel at different times of the year to experience the different seasons. They also appreciate the excellent infrastructure for travelling within Europe.

On the other hand, cost of holiday is rated as the main barrier to holiday in Europe. Visa related issues, distance, language barriers and concerns about personal safety and security are other factors that have prevented some Indonesian citizens from visiting Europe. Notably, the desire to visit other parts of the world is among the top three factors stated by one-time visitors for not having been to Europe again – likely driven by a combination of some of the above factors.

Figure 25 – Motivations to holiday in Europe 

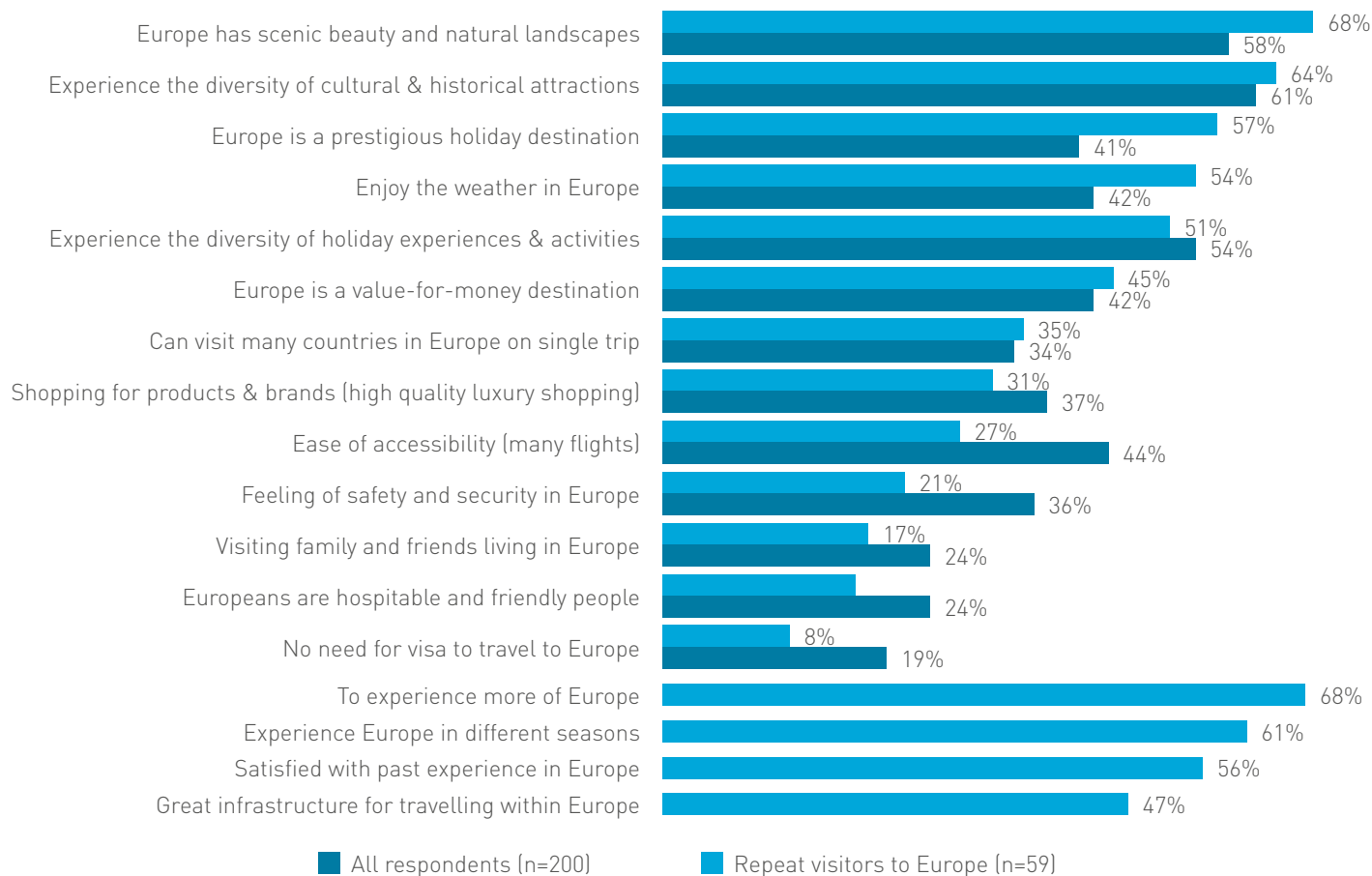
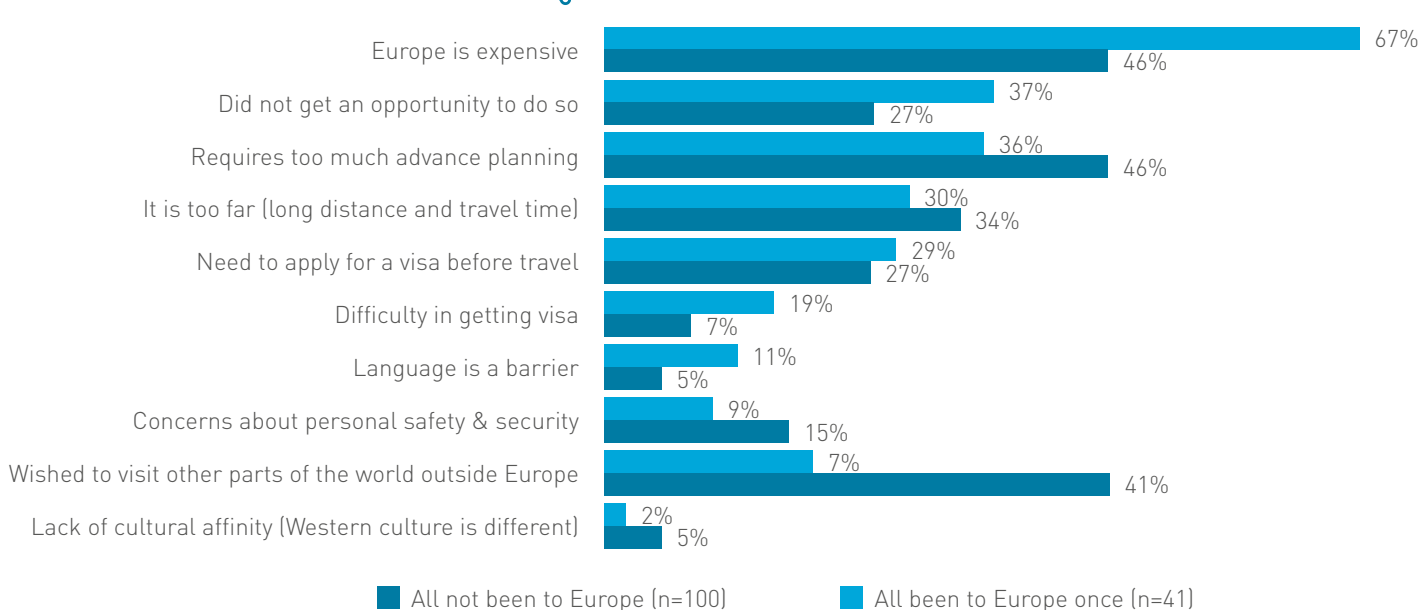


Figure 26 – Barriers to holiday in Europe 



5.3.3 Travel experience – regions and countries

The Indonesian outbound travel market is considered one of the fastest-growing emerging markets in Southeast Asia. However, most Indonesians usually travel within Asia for short and long holiday breaks. As mentioned earlier, one-half of the respondents included in this survey were those who had been to Europe. As a result, the incidence of travel to other world regions and destinations is in relation to Europe.

As expected, most Indonesians travel on holiday to intraregional destinations in Asia and 44% have also been to Australasia. One-half have been to Europe (as recruited for the survey), and a lesser proportion to the Middle East (28%), North America (20%) and other destination regions.

As displayed in the table below, each destination region has been visited by a larger proportion of past visitors to Europe than non-visitors (not been to Europe), suggesting that the former are more widely travelled globally than the latter. In the long-haul destination space, Europe's competition is likely to come from Australasia, Middle East and North America, both among potential first-time visitors as well as repeat visitors to Europe.

Table 68 – Destination regions ever visited



	All respondents (n=200)	All been to Europe (n=100)	All not been to Europe (n=100)
Asia	89%	90%	88%
Europe	50%	100%	0%
Australasia	44%	63%	24%
Middle East	28%	38%	18%
North America	20%	32%	8%
Africa	6%	9%	2%
Central and South America	5%	8%	2%
Caribbean Islands	4%	6%	2%
Average number of regions ever visited	1.9	2.4	1.4

In Europe, Indonesians have been to almost all the ETC member countries. The top ten countries ever visited are the same as the ones Malaysians have been to. Mention should be made of Holland which has high visitation due to the large Indonesian diaspora in the country. Indonesia (an erstwhile Dutch colony) gained independence from the Netherlands in 1945.

Similarly, over the years, Switzerland has maintained very good bilateral relations with Indonesia, and it is one of the largest European investors in Indonesia. As a result, travel between the two countries has been increasing steadily, especially in recent years as Switzerland Tourism is represented in Indonesia through its embassy in Jakarta.

Table 69 – Top ten European countries ever visited



France	57%	Italy	38%
Switzerland	48%	Spain	24%
Holland	47%	Turkey	23%
Germany	43%	Belgium	22%
United Kingdom	38%	Austria	21%

Base: All respondents been to Europe (N=100)

In other parts of the world, eight of the top ten destinations ever visited by Indonesians are Asian destinations, led by Japan, Hong Kong, Australia, China and South Korea. The other two long-haul destinations to make it to the top ten are United States and Saudi Arabia, the latter mainly for religious tourism.

Japan's rise is a direct result of the relaxation of visas for Indonesian nationals in 2014. The falling value of the Japanese yen has been another factor. Indonesians are particularly attracted to the cherry blossom or sakura tours, heavily promoted by the travel trade in Indonesia. China and South Korea's popularity has also increased for such tours among Indonesians. Additionally, South Korea is popular thanks to K-pop and Korea Tourism Organization's (savvy) branding of the country in Indonesia.⁶

Notably, all destinations have been visited more by those who have been to Europe than by those who have never been to Europe, signifying that past visitors have wider travel experience globally, both in terms of destination regions as well as countries.

Table 70 – Top twelve countries ever visited (excluding Europe) 

	All respondents (n=200)	All been to Europe (n=100)	All not been to Europe (n=100)
Japan	46%	66%	25%
Hong Kong	44%	57%	30%
Australia	42%	60%	23%
China	29%	39%	19%
South Korea	23%	28%	17%
Saudi Arabia	18%	22%	13%
Taiwan	17%	20%	13%
United States	14%	23%	4%
New Zealand	12%	19%	4%
Macau	11%	16%	6%
Canada	8%	15%	1%
United Arab Emirates	8%	10%	5%

Purpose of travel

Indonesian nationals travel abroad for leisure and business purposes. The last five years have seen an average of nearly 10 overseas trips being made by Indonesians, with leisure trips (holiday trips, visiting friends and relatives, visit of sporting event, weddings and honeymoon, short study trips and exchange programs) accounting for 70% share. Business trips and travel for health/medical treatment account for 25% and 4% of all overseas trips, respectively.

⁶ www.ttgasia.com/2019/03/19/blossoming-indonesian-demand-for-sakura-tours-beyond-japan/

Table 71 – Purpose of travel overseas



	All respondents (n=200)	All been to Europe (n=100)	All not been to Europe (n=100)
Holiday trips	52%	48%	63%
Business trips	25%	28%	20%
Visiting friends & relatives (VFR)	10%	11%	9%
Health/medical trips	4%	4%	3%
Short study, sporting events, etc	8%	9%	5%
Average number of all overseas trips in last five years	9.6	13.6	5.6
Average number of leisure trips in last five years	6.8	9.2	4.3

Further analysis shows that, on an average, past visitors to Europe make a significantly larger number of trips to non-European destinations than to European destinations, reflecting the preference for, and cost advantage of, a holiday in closer home destinations in Asia.

Table 72 – Average number of trips overseas among past visitors to Europe



	Trips to Europe	Trips to rest of world
Average number of all overseas trips in last five years	5.4	8.1
Average number of leisure trips in last five years	3.8	5.5

Base: all respondents who have been to Europe (n=100)

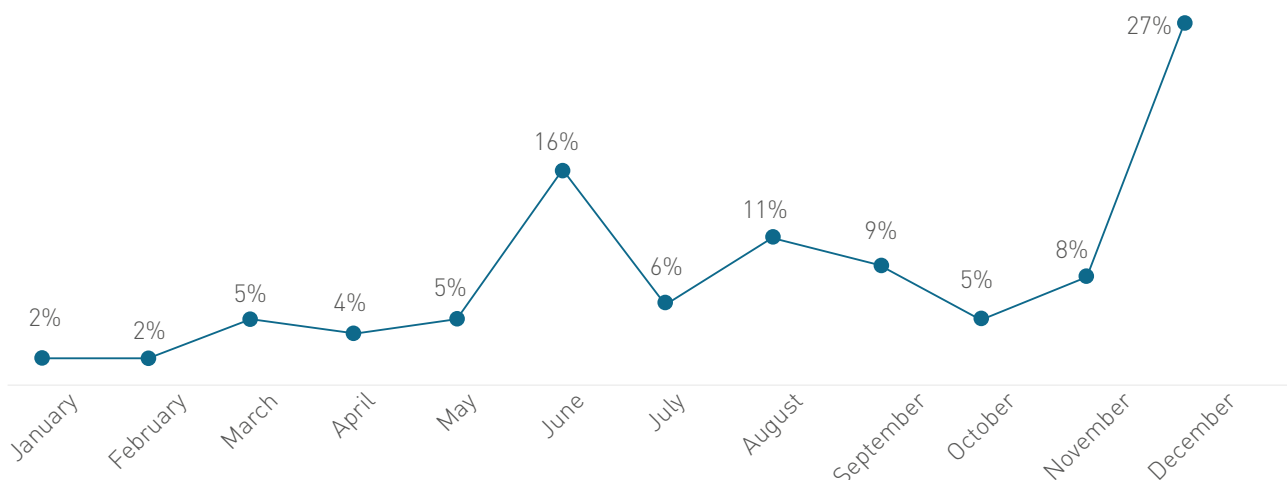
5.3.4 Travel behaviour - Europe vs other world destinations

5.3.4.1 Travel behaviour in Europe

Past visitors to Europe have been on holiday to several destinations in Europe in the past five years (2014-2018), with 15% having been there in the first four months of the current year (January-April 2019) as well.

Based on the seasonality of the most recent trip undertaken in the last five years, it is observed that nearly two-thirds of Indonesians travel to Europe in the second half of the year, with December being the peak travel month. In the first half of the year, travel peaks in June to coincide with summer holidays. Travel also coincides with national holidays, particularly at the end of Ramadan, which moves forward by 10 days each year (Lebaran period), which is a major national holiday.

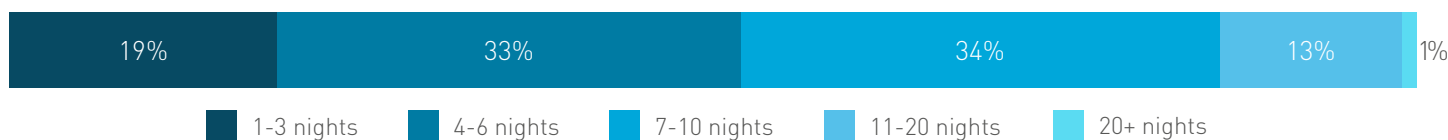
Figure 27 – Seasonality of holiday trip to Europe



Base: all respondents who have been to Europe (n=100)

The average number of nights spent by Indonesians in Europe is one week (7.1 nights). Nearly one-half of the visitors spend 11 or more nights in Europe, mainly those who visit more than one destination on the same trip. It should be noted that most travel packages offered by local travel agents in Indonesia are of a minimum of seven nights duration covering multiple destinations in Europe.

Figure 28 – Duration of holiday trip to Europe



Base: all respondents who have been to Europe (n=100)

Average number of nights spent in Europe: 7.1

On their most recent trip to Europe, over one-half of the Indonesian visitors visited at least two destinations in Europe, the top five destinations being France, Switzerland, Italy, Germany and United Kingdom. The table below displays the main destinations visited, which included Western, Northern, Southern/Mediterranean and Scandinavian countries. Motivated by the desire to explore new value-for-money destinations, Indonesians visited a total of 32 destinations across different European regions on their most recent trip.

Table 73 – Destinations visited on recent trip to Europe



France	30%	Greece	7%
Switzerland	27%	Sweden	7%
Italy	26%	Denmark	5%
Germany	22%	Finland	5%
United Kingdom	20%	Turkey	5%
Holland	18%	Luxembourg	4%
Belgium	13%	Norway	4%
Austria	9%	Russia	4%
Spain	9%	Other European countries *	27%

Base: all respondents who have been to Europe (n=100)

* Ireland, Monaco, Portugal, Slovak Republic, Bulgaria, Czech Republic and 9 other destinations

Indonesians, by far, go on city holidays to Europe (like their regional counterparts). Some also enjoy other types of holidays such as adventure trips, shopping trips, visits to leisure parks, snow/ski vacations, etc. The top ten types of holidays preferred by Indonesian visitors to Europe are displayed in the table below.

Table 74 – Type of holiday in Europe



City holiday	45%	Snow/ski holiday	5%
Adventure trip	11%	Visit to family and/or friends	4%
Shopping trip	9%	Holiday in the mountains	4%
Visit to leisure park/theme park	6%	Touring / driving holiday	3%
Holiday in the countryside	5%	Visit of a global sporting event	2%

Base: all respondents who have been to Europe (n=100)

Equally, Indonesian visitors undertake similar activities in Europe as their regional counterparts, such as sightseeing/excursion tours, shopping, tasting local food/gastronomy, visiting historical and cultural attractions, etc, most of which are also the main reason for travel. Notably, a much larger proportion of Indonesian visitors to Europe go to entertainment/theme parks than visitors from other South-East Asian markets.

Table 75 – Holiday activities in Europe



	Participated in	Main reason for travel
Sightseeing/excursion tours	61%	39%
Shopping	60%	10%
Tasting local food/gastronomy	53%	5%
Visiting historical and cultural attractions	44%	15%
Visit to entertainment/theme parks	34%	4%
Going to parks and gardens	34%	2%
Going to museums and art galleries	32%	1%
Enjoying the nightlife	25%	1%
Sea and beach	23%	3%
Adventure activities	19%	5%
Nature tour / eco tour	17%	3%
Visiting places of worship	17%	2%
Enjoying theatre/musical performances	15%	0%
Meeting friends and relatives	12%	4%
Touring / driving around the country	10%	0%
Attending a global sporting event	8%	3%

Base: all respondents who have been to Europe (n=100)

In terms of travel companions, most Indonesians travel with family. Solo travellers are a minor proportion (3%). While 3-4 persons is the largest travel party size, larger group size (5 or more people) is also a fairly significant number at 32%, with multigenerational families and groups of friends travelling together.

Table 76 – Travel companions and travel party size



Solo	3%	2 persons	14%
Family	75%	3-4 people	54%
Friends	7%	5-6 people	20%
Friends and family	13%	7 or more people	12%
Tour group	2%		

Base: all respondents who have been to Europe (n=100)

Nearly six in ten Indonesian travellers prefer to stay in superior hotels while one-fourth stay in budget accommodation (hotel, hostel or dormitory). 13% use furnished accommodation (service apartment/Airbnb) and 5% stay with friends and relatives. Though Indonesians are price-conscious travellers, they tend not to compromise on accommodation on their long-haul trips, especially when travelling with family.

Table 77 – Type of accommodation



5-star or 4-star hotel or resort	57%	Serviced apartment/Airbnb or similar	13%
3-star/budget hotel or hostel/dormitory	25%	Stay with friends/relatives or own home	5%

Base: all respondents who have been to Europe (n=100)

Over one-half of the Indonesian travellers opt to use the services of a travel agent to book an all-inclusive travel package or to make individual bookings. Most others book through an online travel agency (OTA), even though a few prefer to book direct. 5% stay with friends and relatives.

Table 78 – Flight and accommodation booking



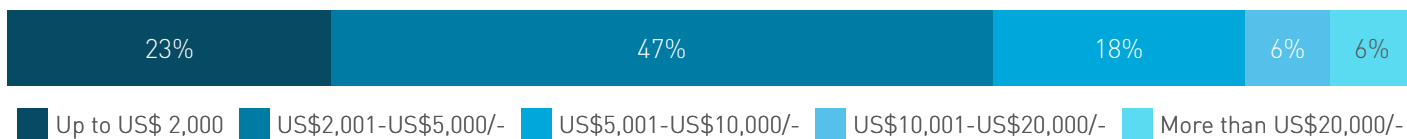
	Flights	Accommodation
All-inclusive travel package through travel agent	45%	45%
Individual bookings (not package) through travel agent	10%	6%
Direct with airline on website or mobile app	14%	9%
Online on websites such as Agoda, expedia.com, booking.com	31%	35%
Did not require booking (paid accommodation not used)	—	5%

Base: all respondents who have been to Europe (n=100)

In terms of total travel expenditure on the European holiday, 70% of the Indonesian visitors claim to have spent up to US\$5,000 on their most recent trip, while 30% claim to have spent over US\$5,000, indicating higher expenditure patterns in Europe compared to other world destinations (see next section). The average spend per person on the trip is estimated at US\$1,330.

Based on the average duration of the most recent trip to Europe (7.1 nights), it is estimated that per person expenditure was approximately US\$185 per night.

Figure 29 – Total travel expenditure in Europe 



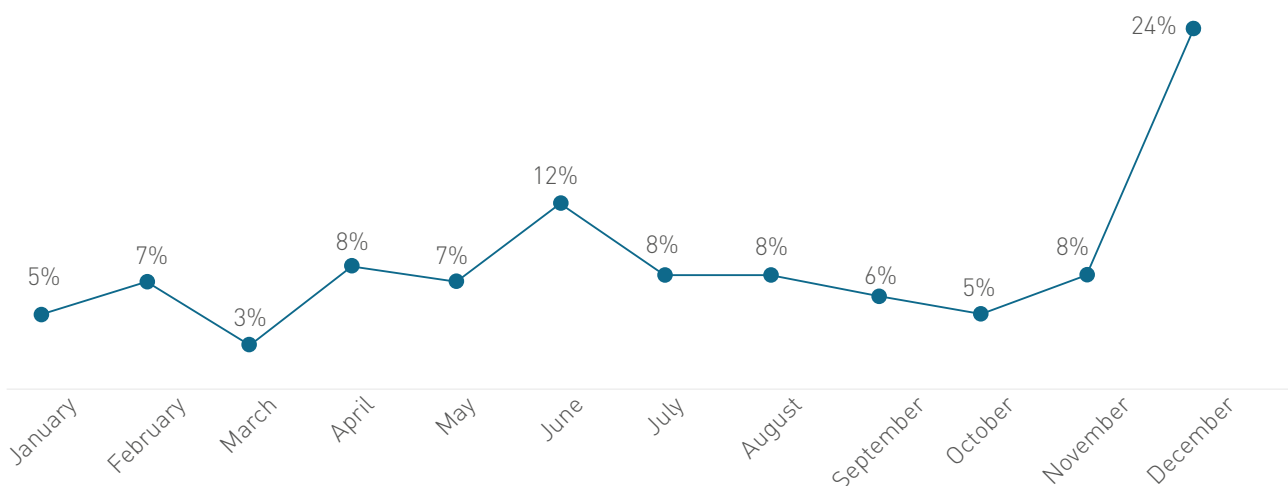
Base: all respondents who have been to Europe (n=100)

Average spend per person on trip to Europe: US\$1,330; average spend per person per night: US\$185

5.3.4.2 Travel behaviour in other (non-European) destinations

For trips to non-European destinations, travel is round-the-year, with the peak period being December, same as for trips to Europe. June is the other month when Indonesians prefer to travel, to tie in with summer holidays. As mentioned earlier, travel also coincides with national holidays, when most Indonesians use the opportunity to take short trips, mainly to neighbouring destinations or within the wider Asian region. The Chinese New Year which is also a holiday in Indonesia is another occasion when travel takes place.

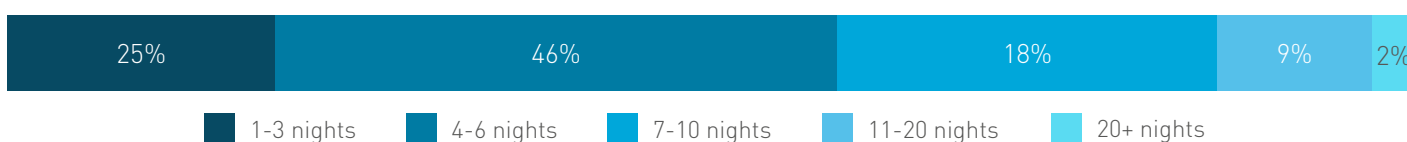
Figure 30 – Seasonality of holiday trip 



Base: all respondents who have been to non-European destinations on recent trip (n=158)

Trips to non-European destinations tend to be shorter compared to trips to Europe. On an average, Indonesians spend 6.2 nights in non-European destinations on their most recent trip abroad, with more nights in long-haul destinations such as United States, Australia, New Zealand, etc.

Figure 31 – Duration of holiday trip overseas (non-European destinations) 



Base: all respondents who have been to non-European destinations on recent trip (n=158)

Average number of nights spent overseas (non-European destinations): 6.2

Asia (61%) and Australasia (16%) are the main destination regions visited by Indonesian travellers on their most recent trip overseas, with Australia, Japan, Taiwan, China and Hong Kong featuring as the most visited countries.

Unlike in Europe, most travellers to other (non-Europe) destinations visit a single country on their holiday trip. Though proportions vary, this trend is also noted among other South-East Asian travellers, reinforcing the positive perception (and competitive strength) of Europe as a multi-country vacation destination.

Table 79 – Destinations visited on recent trip overseas



Japan	23%	South Korea	6%	Palestine	2%
Australia	16%	United States	4%	New Zealand	2%
Hong Kong	15%	Taiwan	4%	United Arab Emirates	2%
China	6%	Macau	3%	Other countries*	16%
Saudi Arabia	9%	Canada	2%		

Base: all respondents who have been to non-European destinations on recent trip (n=158)

*Bahamas, Egypt, Fiji, Jordan, Qatar and 11 other destinations

Like their regional counterparts, Indonesians also prefer to go on city holidays, whether to Europe or to other parts of the world. Adventure trips, shopping trips and visits to leisure park/theme park are other popular types of holidays. Religious/spiritual holidays are undertaken mainly to Saudi Arabia.

Table 80 – Top ten types of holiday overseas



City holiday	39%	Beach holiday/holiday by the sea	5%
Adventure trip	11%	Visit to friends and relatives	4%
Shopping trip	9%	Snow/ski holiday	3%
Visit to leisure park/theme park	9%	Holiday in the mountains	2%
Religious/spiritual holiday	7%	Holiday in the countryside	2%

Base: all respondents who have been to non-European destinations on recent trip (n=158)

Equally, Indonesians indulge in similar activities on holiday whether in Europe or in other parts of the world, with the top five activities being sightseeing/excursion tours, shopping, gastronomy, visits to historical and cultural attractions and to theme parks/leisure parks. The key difference is in some of the main reasons for travel, such as VFR travel and visits to places of worship that drive travel to non-European destinations much more than to Europe.

Table 81 – Main holiday activities overseas



	Participated in	Main reason for travel
Sightseeing/excursion tours	67%	32%
Shopping	66%	11%
Tasting local food/gastronomy	50%	3%
Visiting historical and cultural attractions	47%	13%
Visit to entertainment/theme parks	40%	6%
Going to parks and gardens	35%	1%
Enjoying the nightlife	27%	0%
Visiting places of worship	22%	7%
Sea and beach	20%	2%
Going to museums and art galleries	20%	3%
Nature tour / eco tour	15%	2%
Meeting friends and relatives	14%	6%
Adventure activities	13%	3%
Enjoying theatre/musical performances	11%	1%
Touring / driving around the country	10%	1%

Base: all respondents who have been to non-European destinations on recent trip (n=158)

In terms of travel companions and travel party size, the pattern is the same as for travel to Europe. Over two-thirds of Indonesians travel with family to destinations in different parts of the world and another 15% travel with friends or in a mixed group of family and friends. Solo trips and travelling with a tour group form a minor proportion. One-third travel in large groups of 5 or more people, while two-thirds travel as couples or as a group of 3-4 family members.

Table 82 – Travel companions and travel part size



Solo	4%		
Family	68%		
Friends	15%		
Friends and family	10%		
Tour group	3%		
		2 persons	15%
		3-4 people	53%
		5-6 people	16%
		7 or more people	16%

Base: all respondents who have been to non-European destinations on recent trip (n=158)

Compared to trips to Europe, a larger proportion of Indonesians use budget accommodation and a lower proportion use superior hotels and furnished accommodation when travelling to non-European destinations. Some stay with family and/or friends as well.

Table 83 – Type of accommodation



5-star or 4-star hotel or resort	50%	Serviced apartment/Airbnb or similar	8%
3-star/budget hotel or hostel/dormitory	36%	Stay with friends/relatives	6%

Base: all respondents who have been to non-European destinations on recent trip (n=158)

In terms of travel booking, four in ten Indonesians use the services of a travel agent, mainly to book an all-inclusive travel package, with an almost equal proportion making bookings through an online travel agency (OTA). As in the case of trips to Europe, some trips are also booked through direct booking channels for both flights and accommodation.

Table 84 – Flight and accommodation booking 

	Flights	Accommodation
All-inclusive travel package through travel agent	39%	39%
Individual bookings (not package) through travel agent	13%	11%
Direct with airline/hotel on website or mobile app	9%	7%
Direct with airline/hotel on telephone or by email	2%	1%
Online on websites such as Agoda, expedia.com, booking.com	36%	36%
Did not require booking (paid accommodation not used)	—	6%

Base: all respondents who have been to non-European destinations on recent trip (n=158)

Even as it is understood that travel expenditure depends on factors such as destination, travel companions and travel party size, duration of trip, etc, there is significant difference in the overall cost of holiday in non-European destinations versus a holiday in Europe. Average spend on the most recent holiday trip overseas (non-European destination) is estimated at approximately US\$820 per person, compared to a much higher figure of US\$1,330 per person in Europe.

Based on the average duration (6.2 nights) of the most recent trip overseas, it is estimated that per night expenditure by Indonesians in non-European destinations was approximately US\$130 per person, compared to US\$185 per person in Europe.

Figure 32 – Total travel expenditure overseas (non-European destinations) 



Base: all respondents who have been to non-European destinations on recent trip (n=158)

Average spend per person on trip overseas (non-European destinations): US\$820;
average spend per person per night: US\$130

As the Indonesian rupiah has weakened against major currencies, Indonesians have been flocking to travel fairs such as the Kompas Travel Fair held in Jakarta, to find the best deals and various options of travel packages and discounts.⁷ They also look for competitively priced flights and hotels online.

5.3.5 Sources of information for holiday planning

The Internet and friends and family are the predominant sources for information used by most Indonesian outbound travellers. One in four also relies on travel agents and tour operators and refer to holiday brochures and travel guides for information and advice. These and other resources used for travel planning and research are shown in the table overleaf. As mentioned earlier, travel fairs and exhibitions attract Indonesians looking for travel information and cheap travel deals.

⁷ www.straitstimes.com/asia/se-asia/unfazed-by-weak-rupiah-indonesians-throng-travel-fairs-for-overseas-holidays

Table 85 – Information sources used for holiday planning



Internet (websites, social media, search engines)	82%	Travel magazines	24%
Friends & family	65%	Travel channels/programs on television	21%
Travel agents & tour operators	45%	Travel fairs & exhibitions	21%
Holiday brochures & travel guides	40%	Country tourist offices	13%

Base: all respondents (n=200)

Specifically, among users of the Internet, social media, travel review websites, travel agent and tour operator websites and search engines are the main online information sources. Other online sources are indicated in the table below. Most of this information is accessed from laptops and mobile phones.

Table 86 – Online information sources used



Social media	60%	Travel booking and comparison websites	37%
Travel review sites	50%	Travel bloggers, influencers	25%
Travel agent/tour operator websites	40%	Independent travel advice websites	7%
Search engines	39%	National Tourist Board websites	6%

Base: all respondents (n=200)

5.3.6 Key drivers impacting travel habits and behaviour

Responses from the focus group discussion indicate that for Indonesians, like their regional counterparts, family life cycle stage and personal financial status are key factors impacting travel habits and behaviour. Cost of living and currency fluctuations affect travel budgets which in turn impacts choice of destination, duration of holiday and type of holiday. On the other hand, the ability to search for travel offers and make bookings online helps to control costs. Key influencing factors include social media, online blogs, review websites, etc.

"I have been abroad every year, even in 2017 and 2018. It has become more expensive than 5 years ago. 5 years ago, the cost of living was not as expensive as today. So, instead of going maybe 3 times a year, I now travel 1-2 times only." — Male, 42 years, married with child

"Earlier, my parents paid for travel. Now, my husband and I pay the travel expenses." — Female, 32 years, married with child

"When my children were small, they could skip school but now I have to wait for the semester break because they are older. So, we go on family holidays when they have vacation." — Female, 38 years, married with children

"I browse a lot. The difference is that now it is much easier to visit websites and book by myself. Saves cost and I can see exactly what I am getting." — Female, 28 years, single

"I go to Air Asia, Tiket dot com, Traveloka. I compare prices and book. Before, it was through the agent." — Male, 31 years, married

"If I go to a country I have visited, I plan and book everything myself now. If not, I still prefer to go with travel agent and get information from him or someone I know, either family or friends." — Male, 32 years, single

"Before I used to meet friends and family, heard their stories about the beautiful places they had been to. I also referred to magazines. Now, less so. Now it's from social media – Instagram, Facebook." — Female, 44 years, married with children

"I watch YouTube, Syahrini's vlog like while she was in honeymoon to Bora-Bora, or Luna Maya's vlog to Malibu, or Raffi Ahmed's while in Melbourne. There are many, also going to Europe." Female, 32 years, married with child

Looking into the future, Indonesians believe that visas will become easier to get, and there will be many more destinations that will be targeting travellers from different countries using online media. They also felt that, in the near future, advanced technology like artificial intelligence (AI) could be used for promoting and showcasing exciting new places and travel experiences.

5.3.7 Knowledge and perception of Europe and European destinations

5.3.7.1 Awareness and knowledge of European regions

Like their regional counterparts, most Indonesians are aware of the different European regions, albeit with lower awareness of Scandinavia, Benelux and Baltic States. On the other hand, the level of knowledge of the different regions is quite limited, and lower than among other South-East Asians likely due to lesser travel experience in Europe.

Overall, Indonesians claim to be most knowledgeable about Western Europe and Central/Eastern Europe, followed by Southern/Mediterranean Europe and Northern Europe. Understandably, past visitors to Europe are more familiar with its various regions than those who have yet to visit Europe.

Table 87 – Awareness and knowledge of European regions



	Never heard of it	Heard of it only (don't know anything)	Know a little	Know a fair amount	Know very well
Northern Europe	6%	14%	57%	20%	5%
Western Europe	4%	12%	43%	32%	10%
Central / Eastern Europe	4%	18%	51%	24%	5%
Southern/Mediterranean Europe	6%	18%	50%	20%	7%
Scandinavia	7%	26%	46%	18%	5%
Benelux	25%	27%	31%	13%	5%
Baltic States	12%	31%	43%	11%	3%

Base: all respondents (n=200)

Overall perception of Europe is that of a set of different regions as indicated by 55% of Indonesians. 26% see it as a set of different countries and 20% see it as a single tourism destination.

5.3.7.2 Perceptions of individual European destinations

The qualitative focus group discussion explored consumer perceptions of individual European destinations. Of the 39 European destinations on the list (including ETC member nations), Indonesians displayed lack of awareness and limited knowledge of several European countries.

Image associations with individual countries primarily centred on cities, food and sports, with some reference to visitor attractions, nature/landscape and weather. Examples below highlight the spontaneous associations with a selection of European holiday destinations.

Austria – snow, cold weather

Belgium – beer, chocolates

Cyprus – beach, sea, old cities

Denmark – developed country, chocolates, biscuits

France – Paris, Eiffel tower, shopping, food, romance

Germany – cars, famous cities, inventions

Greece – Santorini, beaches, history

Holland – Amsterdam, old town, Tulip festival, nature

Hungary – culture, historical buildings

Iceland – Aurora, mountains, snow

Italy – fashion, churches, Vatican, Italian food

Norway – northern lights, Thor, Avengers, natural landscape

Portugal – soccer, football clubs, Ronaldo

Spain – Barcelona, Madrid, football, arts

Switzerland – Zurich, Geneva, mountains, snow, chocolate

Turkey – history, culture, local food, hot air balloons

United Kingdom – London, Queen Elizabeth, Big Ben, London Eye, shopping

Europe's uniqueness is understood to be its long history and culture, that is well preserved and well maintained. Indonesians also appreciate that Europe is home to some of the most famous fashion brands in the world. Nature and landscape, and 'beautiful cities' are other top performing attributes of Europe.

"Europe has lots of old buildings that are still maintained well, so I would be interested to study about the history. In many other countries, historical places aren't always well preserved, maybe due to lack of funds." – Male, 42 years, married with child

"In my opinion, every single country has its own uniqueness. For me, Europe is not only about cultural, historical places but also fashion. Shopping for famous Europe brands is a key attraction." – Female, 28 years, single

The main areas where Europe is seen to be underperforming are affordability and language issues (in some European destinations).

5.3.7.3 Perception of Europe on interest-based travel themes

As in other regional countries, Indonesians were asked questions related to different travel themes to understand the potential for promoting passion-related thematic travel in Europe among the South-East Asian travel source markets.

Analysis of responses shows that, like other South-East Asians, Indonesians also consider "slow" adventure, culture and history, nature, city life and local gastronomy as the top five travel themes of importance and interest. Equally, they also consider Asia and Europe to be best aligned to offer such interest-based holiday experiences, with North America a distant third on city life. Africa features in third place on the theme of nature and the Middle East on 'slow' adventure, gastronomy and culture and history.

For Europe, Indonesians identify the same top five themes as the key drivers for travel across Europe (pan-European holiday). Nonetheless, there were some who felt that such theme-based travels, especially 'city life', are best experienced in specific countries in Europe. This opinion is expressed by a larger proportion of Indonesians compared to their regional counterparts.

Table 88 – Travel themes as key drivers to holiday abroad



	Not important at all	Would like the opportunity to experience it but not essential	Important to be able to experience it	Main reason for travel
Adventure	16%	42%	30%	13%
“Slow” adventure	5%	20%	54%	22%
Culture and history	2%	18%	48%	33%
Nature	4%	17%	46%	34%
City life	3%	11%	50%	37%
Spa and wellness	23%	45%	27%	6%
Tasting local food/gastronomy	4%	9%	48%	40%
Beach and sea	7%	25%	51%	18%
Amusement and theme parks	5%	23%	48%	26%
Global sporting events	21%	36%	31%	13%
Media-related activities and interests	16%	33%	41%	11%

Base: all respondents (n=200)

Table 89 – Perceptions of Europe versus competitor regions on top five travel themes



	Asia	Africa	Middle East	Europe	North America	South America
“Slow” adventure	66%	11%	21%	56%	11%	7%
Culture and history	64%	12%	35%	67%	13%	10%
Nature	62%	37%	18%	46%	17%	16%
City life	52%	7%	15%	77%	33%	13%
Tasting local food/gastronomy	77%	12%	30%	68%	25%	18%

Base: all respondents (n=200)

Table 90 – Travel theme as key driver for holiday in Europe



	Across Europe (pan-Europe)	Specific destination in Europe
“Slow” adventure	59%	41%
Culture and history	65%	35%
Nature	54%	46%
City life	58%	42%
Tasting local food/gastronomy	60%	40%

Base: all respondents who associate a specific travel theme with Europe

Further exploration of interest-based travel themes in the focus group discussion reveals that Indonesians believe that a combination of different activities and experiences can be had in each country and across regions. As such, while one aspect might be a more prominent motivator, other aspects would also form part of the travel experience whether in a single destination or multiple destinations.

"If I am travelling, I would aim for authentic culinary experience. For instance, I normally go to the traditional market where I would get the original food which is authentic from the area I am visiting. Obviously, that's not the only thing I would go for, as I would do sightseeing, shopping etc." – Male, 32, single

"In my case, I like soccer and that makes me want to watch the game in a soccer stadium. That is why I like Italy - my favourite soccer club is there in Milan, so it would be city, food and soccer." – Male, 31, married

"Travel is my passion. I would like to go to every city and country in the world, and discover their historical places, and authentic food." – Female, 38, married

5.3.8 Importance and perception of luxury travel

Survey results show that luxury tourism is considered important or very important by nearly one-half (44%) of Indonesian travellers. However, as observed in the focus group discussion, this is more aspirational/wishful rather than actual practice at present.

Few Indonesians indicated that they have ever been on a 'luxury' vacation, which is defined as an expensive city holiday, with five-star hotel accommodation, Michelin star restaurant dining, premium brands shopping, etc.

"Luxury travel means an expensive, five-star holiday in a city like London or Paris." - Female, 46, married with children

"Luxury means expensive, exclusive. Maybe cruise holiday. Gourmet dining, shopping for brands." - Female, 38, married with child

Europe is most associated with a luxury holiday, with France, Italy, Switzerland and London variously mentioned as desirable luxury vacation destinations.

5.3.9 Importance and perception of sustainable tourism

Six in ten Indonesians claim to be aware of sustainable tourism as a concept. Among those aware, 68% say that sustainability would be important or very important to them, especially aspects such as conservation of the destination's natural environment and support of cultural projects.

Table 91 – Importance of aspects of sustainability in travel decision making



	Very important	Important
Destination conserves its natural environment	63%	33%
Destination supports local businesses	45%	41%
Destination supports cultural projects	51%	43%
Accommodations are certified with green/eco labels	44%	45%
Visitor attractions and other services are eco-certified	52%	40%

Base: all respondents aware and who rated sustainability as important or very important (n=82)

However, few Indonesians consider sustainability in their travel decision making process presently, either because they are unaware of the countries that offer sustainable travel options or because their focus is more on 'discovering new places and seeing the world'.

"I think Indonesians will not think about it. Not for the first time at least. They want to see the world and visit new countries and places." – Female, 32, married

"If a country is eco-friendly, maybe I will select it. But no country markets itself like that to travellers." – Female, 28, single

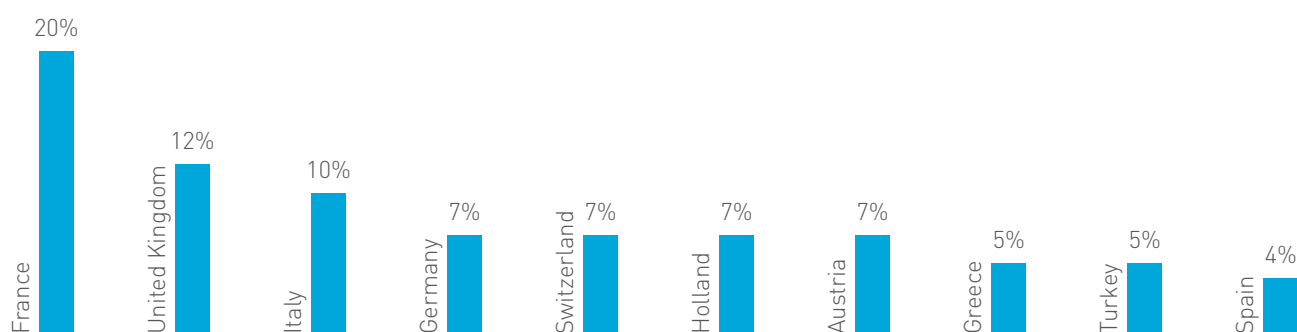
"Japan is the most sustainable, eco-friendly country, and so clean. They don't have many trash cans; the garbage bins are separate for different trash. This kind of thing impresses me. However, I doubt people will choose Japan solely for this reason." – Male, 32, single

5.3.10 Future travel destinations

5.3.10.1 European destinations likely to visit

Like their regional counterparts, Indonesians mentioned several countries across different regions of Europe that they would be most desirous of visiting (first choice) over the next five years, with the classic holiday destinations in Northern, Western and Mediterranean Europe continuing to elicit maximum interest among potential visitors to Europe.

Figure 33 – Top ten destinations most likely to visit



Base: all respondents (n=200)

When combined with other European countries that Indonesians might also consider visiting (first choice country plus other countries) over the next five years, destinations across all regions of Europe found mention. This implies that there is strong potential for multi-destination visits to Europe from the Indonesian source market in the coming years. Displayed below are the top 20 European countries that Indonesians would be most likely to consider visiting in the next five years.

Table 92 – Top twenty European destinations likely to visit



France	51%	Greece	22%	Finland	13%
United Kingdom	49%	Turkey	21%	Portugal	10%
Germany	43%	Austria	19%	Ireland	8%
Italy	43%	Russia	18%	Norway	8%
Holland	41%	Sweden	18%	Luxembourg	7%
Switzerland	37%	Denmark	17%	Monaco	7%
Spain	36%	Belgium	13%		

Base: all respondents (n=200)

5.3.10.2 Other world destinations likely to visit

Indonesian citizens were also asked which other world destinations they were likely to consider visiting for a holiday in the next five years. Interestingly, a mix of Asian, Australasian, Middle Eastern and North American destinations featured in the top ten list for a future holiday. Additionally, Saudi Arabia was mentioned by 16% of Indonesians, largely for religious tourism.

Table 93 – Top ten other world destinations likely to visit



Japan	52%	Hong Kong	12%
Australia	31%	Maldives	10%
United Arab Emirates	11%	China	17%
New Zealand	27%	United States	18%
Korea	31%	Canada	13%

Base: all respondents (n=200)

CHAPTER 6

**INDIVIDUAL COUNTRY INSIGHTS:
THAILAND**

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%

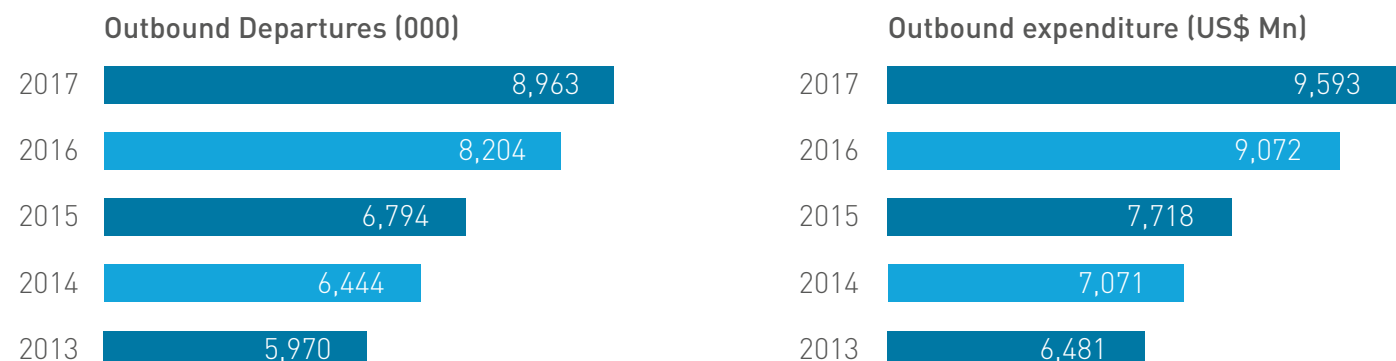
Sources:

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

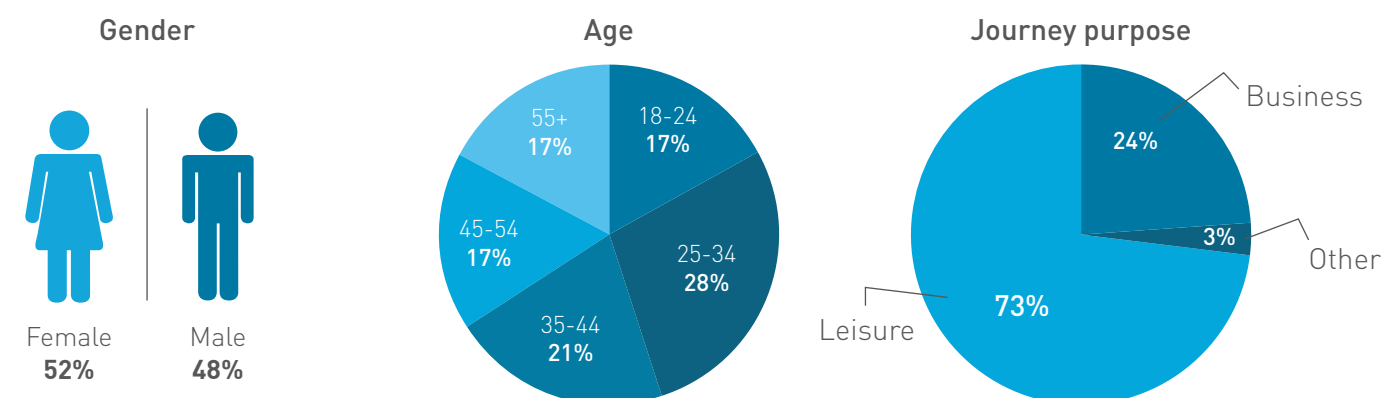
2. United Nations, Department of Economic and Social Affairs. Population Division (2017). Trends in International Migrant Stock: The 2017 revision (United Nations database, POP/DB/MIG/Stock/Rev.2017)

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:

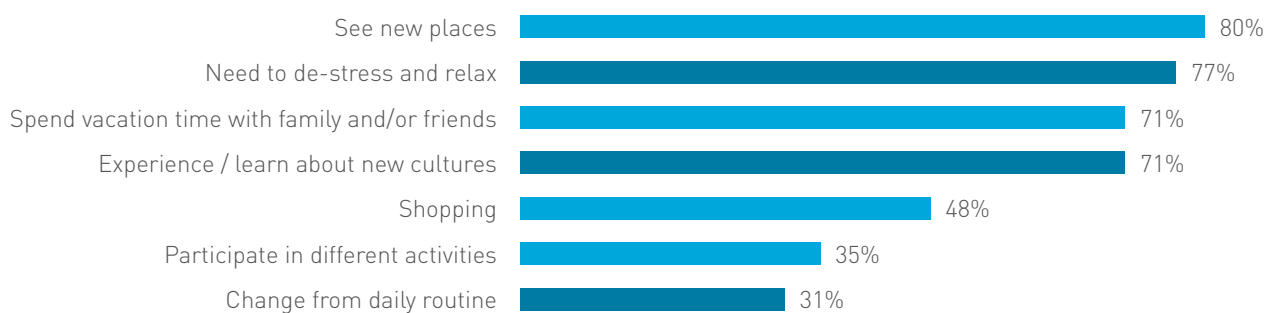
1. Amadeus Asia Pacific (2017), Journey of Me Insights APAC Report
2. World Tourism Organization (2018), Compendium of Tourism Statistics
3. Airports of Thailand plc (2018), Air Traffic Report 2018
4. Henley Passport Index 2019

6.3 CONSUMER INSIGHTS

6.3.1 Motivations to holiday abroad

Like their regional counterparts, Thai international travellers desire to travel the world and discover new places, feel the need to de-stress and relax, spend vacation time with family/friends and experience/learn about new cultures.

Figure 34 – Motivations to holiday abroad



Base: All respondents (N=200)

6.3.2 Motivations and barriers to holiday in Europe

Thai citizens mention similar motivations to holiday in Europe as their counterparts in other South-East Asian markets. The top five drivers are Europe's scenic beauty and natural landscapes, enjoying the weather in Europe, diversity of cultural and historical attractions, diversity of holiday experiences and activities and the prestige associated with visiting Europe.

By demonstrating international travel experience, especially by travelling to western countries, Thais, like citizens of many other countries in the developing world, seek to enhance their own social status at home. This is also the reason why they choose to cover multiple countries in Europe (*'been to so many different countries'*), displaying a preference for the traditional, 'well-known' destinations.

Prestige is also a major driver for repeat visitation, although the inclination is to visit 'new' countries and cities, adding to the wider travel experience.

On the other hand, the main drawbacks to visiting Europe are related to travel expenses, visa related issues, distance and time required for advance planning. These are also the reasons why Thai tourists (as other Asian tourists) try to cover as many countries as possible on a single trip to Europe.

Figure 35 – Motivations to holiday in Europe

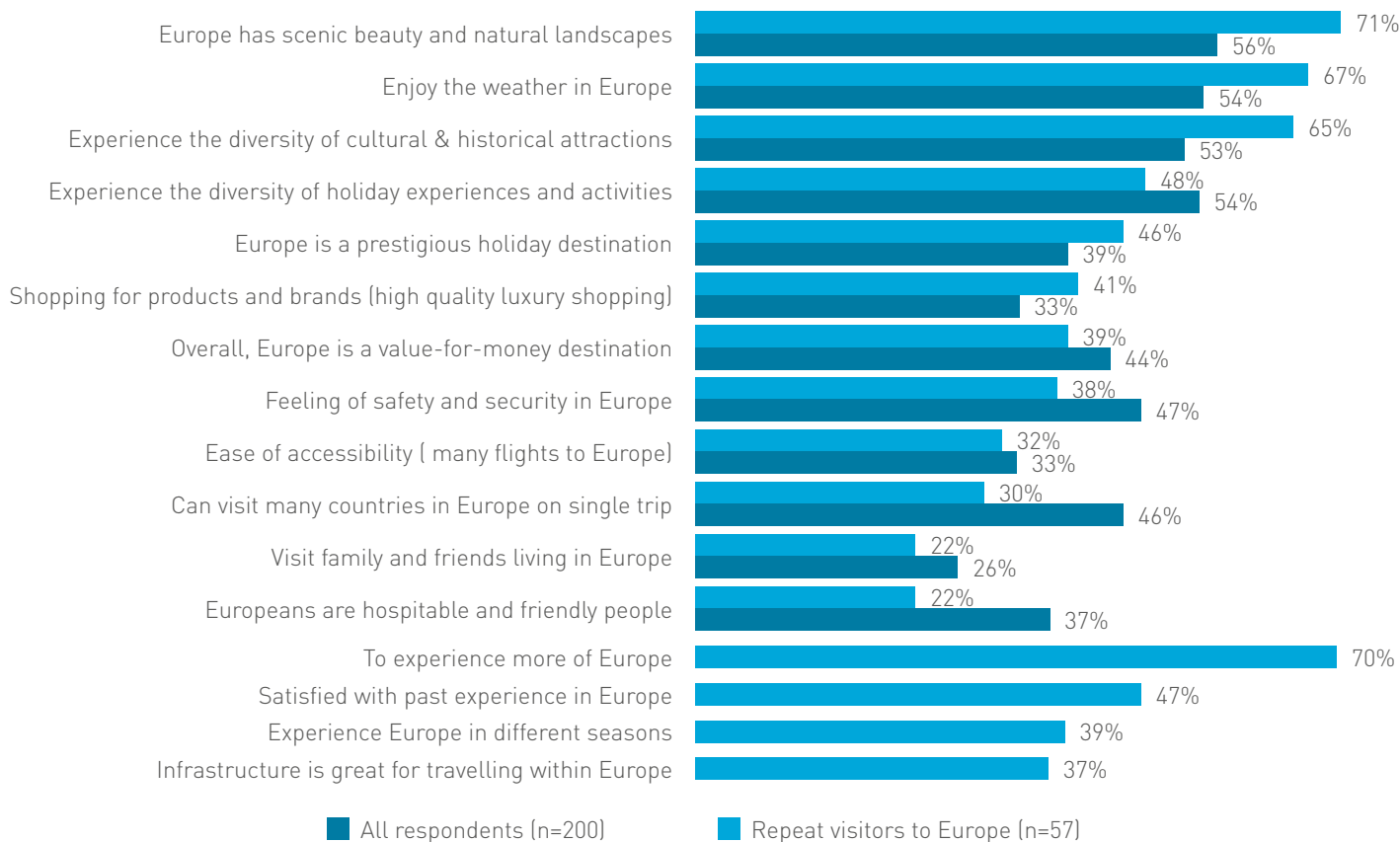
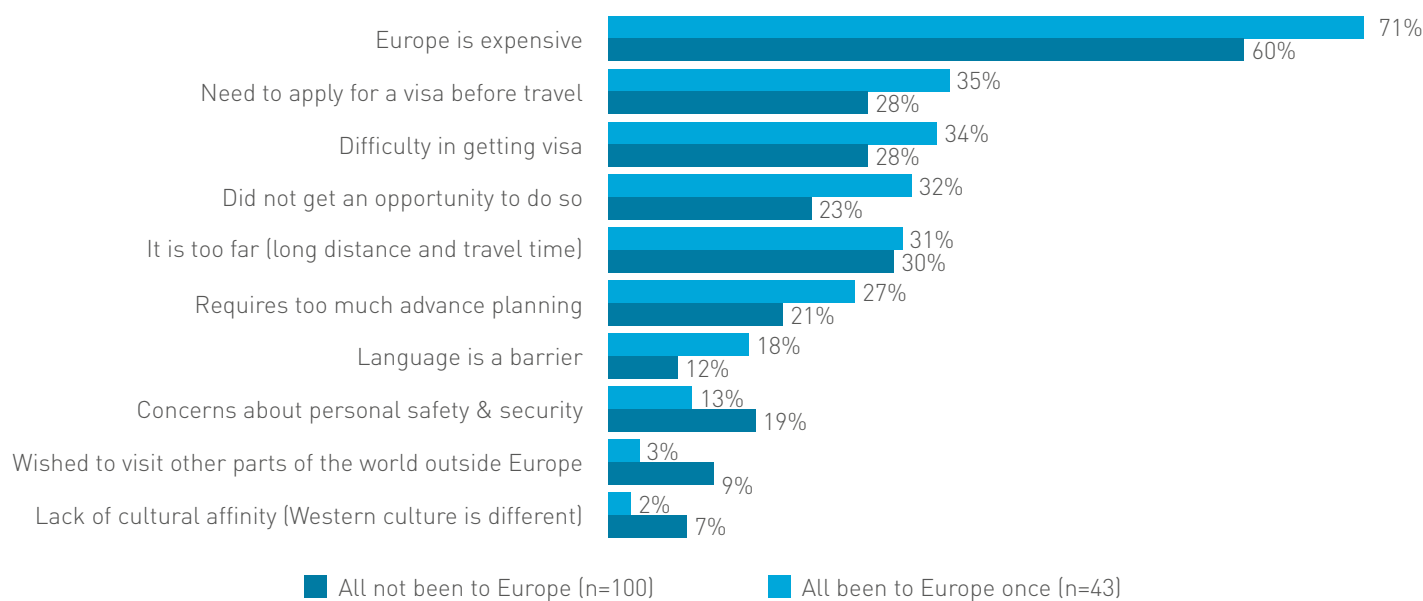


Figure 36 – Barriers to holiday in Europe



6.3.3 Travel experience – regions and countries

As mentioned earlier, one-half of the consumer sample for the survey was constituted of past visitors to Europe. Hence, the incidence of travel to other world regions is in relation to Europe.

Most Thais travel to intraregional destinations in Asia. One-half have been to Europe, and one-fourth to North America and Australasia. Other destination regions have been visited by fewer Thai citizens. Except for Asia, all destination regions attract a higher proportion of past visitors to Europe than those who have never been to Europe, indicating their wider travel experience around the world. North America and Australasia appear to be main long-haul competitor regions for Europe in the Thailand source market, among potential repeat visitors as well as first-time visitors to the continent.

Table 94 – Destination regions ever visited



	All respondents (n=200)	All been to Europe (n=100)	All not been to Europe (n=100)
Asia	92%	88%	95%
Europe	50%	100%	0%
North America	25%	36%	13%
Australasia	24%	33%	15%
Middle East	13%	20%	5%
Central and South America	9%	15%	3%
Caribbean Islands	8%	15%	0%
Africa	6%	10%	1%
Average number of regions ever visited	1.8	2.2	1.3

In Europe, Thai citizens claim to have been to all the ETC member countries as well as popular destinations France and United Kingdom. Though in different proportions, the top ten countries ever visited are the same as the ones visited by citizens of other South-East Asian source markets, with France, Austria, Germany, Italy and Switzerland as the top five favourites.

Table 95 – Top ten European countries ever visited



France	54%	Spain	22%
Austria	38%	United Kingdom	22%
Germany	32%	Denmark	18%
Italy	31%	Holland	18%
Switzerland	30%	Sweden	12%

Base: all respondents who have been to Europe (n=100)

According to the travel trade, Europe is high on the agenda with the United Kingdom, Germany and France leading recent booking trends, but apparently there are concerns about security (due to recent incidents of terrorism), high costs (due to currency movements) and stringent visa regulations (detailed documentation requirements, travel insurance, proof of travel, etc).

In other parts of the world, the top five destinations ever visited by the Thais are Asian destinations - Japan, Hong Kong, China, South Korea and Taiwan. The only non-Asian destination to make it in the top ten is United States.

It should be noted that Japan has been attracting more Thai tourists since 2013, when it waived visa requirements for Thais. An expansion in the number of direct flights and cost-friendly packages have also helped spur travel to Japan.⁸ It is expected to continue its leading position among Thai travellers who are drawn by the mix of traditional and modern cultural attractions, the food and overall cleanliness of the tourist destination.⁹ European destinations must recognize the potentially increasing competition from Japan.

Table 96 – Main countries ever visited (excluding Europe) 

	All respondents (n=200)	All been to Europe (n=100)	All not been to Europe (n=100)
Japan	69%	76%	62%
Hong Kong	50%	57%	42%
China	44%	59%	29%
South Korea	40%	42%	37%
Taiwan	32%	38%	26%
Australia	29%	42%	15%
United States	18%	25%	11%
Macau	16%	22%	10%
New Zealand	12%	17%	6%
Maldives	9%	17%	1%
Canada	8%	16%	0%
Egypt	6%	11%	0%
India	6%	10%	1%
Brazil	5%	10%	0%
United Arab Emirates	5%	8%	2%

Purpose of travel

In the last five years, Thai nationals made an average of 12 trips overseas, not counting the trips made within the South-East Asia region. While leisure is the main purpose of travel overseas, business travel also commands a fair share of outbound travel.

For one in ten Thai nationals, visiting friends and relatives (VFR) is a key driver for outbound travel. A marginally lower proportion also travels overseas for health/medical treatment, even though Thailand is a major medical tourism destination.

Past visitors to Europe have made an average of 17 overseas trips in the last five years, with leisure accounting for over 70% of all trips. In contrast, non-visitors to Europe have made an average of about 6 trips overseas, with leisure trips accounting for a lion's share at 83%.

⁸ <https://thaiembdc.org/2019/04/15/thais-becoming-outbound-tourists-in-greater-numbers/>

⁹ www.thepuketnews.com/outbound-thai-tourism-on-the-rise-57383.php#TzvT3AAHThk7u3Eb.99

Table 97 – Purpose of travel overseas



	All respondents (n=200)	All been to Europe (n=100)	All not been to Europe (n=100)
Holiday trips	51%	46%	75%
Business trips	18%	20%	17%
Visiting friends & relatives	12%	14%	6%
Health/medical trips	9%	6%	0%
Global sporting events, short study trips, etc.	10%	14%	2%
Average number of all trips	11.8	16.9	5.8
Average number of leisure trips	8.6	12.4	4.8

Further analysis shows that, in the last five years, past visitors to Europe made more trips to non-European destinations than to European destinations, with geographical proximity, cost and accessibility among the key influencing factors.

Table 98 – Average number of trips overseas among past visitors to Europe



	Trips to Europe	Trips to rest of world
Average number of all overseas trips in the last five years	7.7	9.2
Average number of leisure trips in the last five years	5.6	6.8

Base: all respondents who have been to Europe (n=100)


6.3.4 Travel behaviour - Europe vs other world destinations

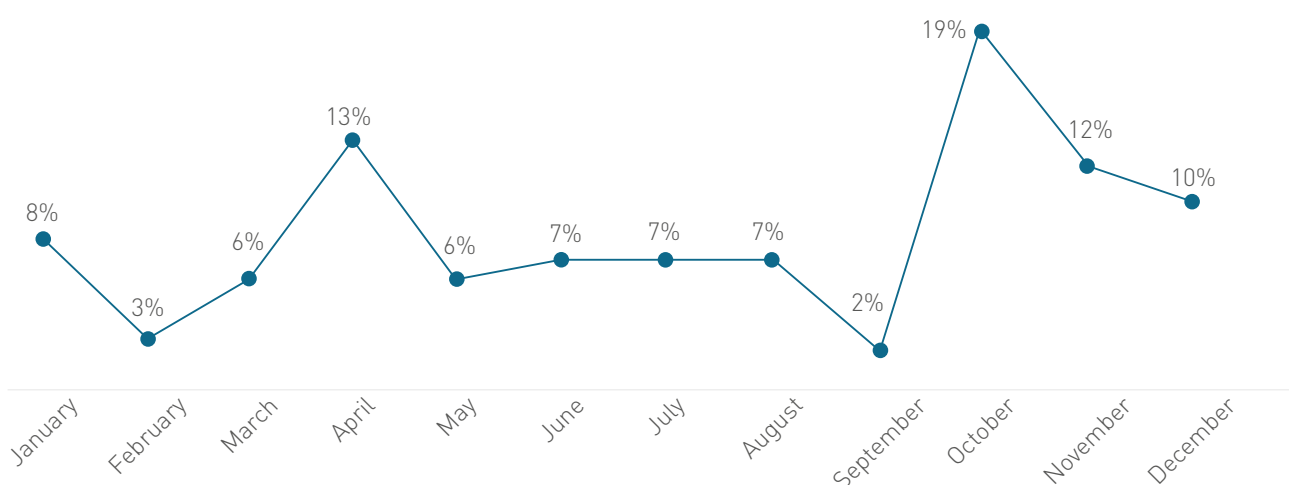
Based on the characteristics of their most recent trip overseas in the last five years, insights on Thai citizens' travel behaviour in Europe and other destinations is presented in this section.

6.3.4.1 Travel behaviour in Europe

Most visitors have been to Europe in the past five years (2014-2018), with 11% already having been to the continent in the current year (until April 2019) as well.


Based on the seasonality of the most recent trip made overseas in the last five years, travel to Europe from Thailand is seen to be round-the-year, with peak visitation in the last quarter of the year. April and October are the key travel months to Europe, tied in with school holidays in Thailand.

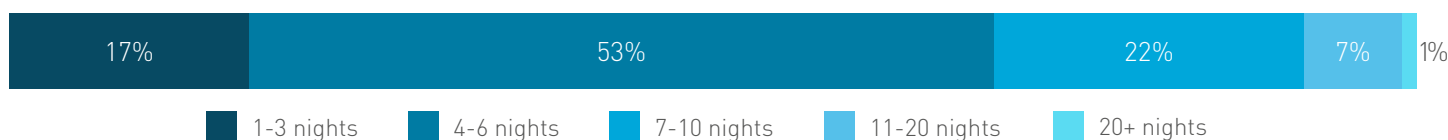
Figure 37 – Seasonality of holiday trip to Europe 



Base: all respondents who have been to Europe (n=100)

In terms of trip duration, Thai visitors spend an average of 6.7 nights in Europe. On their most recent trip, while over one-half spent 4-6 nights, 22% spent 7-10 nights and 8% spent 11 or more nights in Europe. Notably, multi-destination travel in Europe is popular, with 45% of visitors claiming to have been to two or more countries on their most recent holiday in Europe.

Figure 38 – Duration of holiday trip in Europe 



Base: all respondents who have been to Europe (n=100)

Average number of nights spent in Europe: 6.7

The top five European destinations visited on the most recent trip were France, Austria, Germany, Italy and Switzerland (main destination plus other countries visited on trip). Interestingly, all 39 countries (on the list of countries for the survey) across different regions of Europe appear to have been visited by Thai visitors, though countries such as Georgia, Latvia, Lithuania, Luxembourg and Slovenia were mentioned by just 1% of the respondents.

Table 99 – Destinations visited on recent trip to Europe 

France	35%	Belgium	11%	Hungary	5%
Austria	27%	Denmark	11%	Russia	5%
Germany	20%	Holland	7%	Bosnia and Herzegovina	4%
Italy	17%	Spain	7%	Croatia	4%
Switzerland	13%	Norway	6%	Finland	4%
United Kingdom	13%	Greece	5%	Other European countries *	47%

Base: all respondents who have been to Europe (n=100)

*Monaco, Bulgaria, Czech Republic, Ireland, Montenegro and 17 other destinations

When visiting Europe, over one-half of the Thai visitors prefer city-based vacations (as other South-East Asian travellers). VFR travel is popular as well and 8% have been to Europe for this purpose. Europe also attracts Thai visitors for beach holidays, touring and driving holidays, holidays in the countryside, shopping trips, etc.

Table 100 – Type of holiday in Europe



City holiday	52%	Adventure trip	3%
Visit to family and/or friends	8%	Visit to leisure park/theme park	3%
Beach holiday/holiday by the sea	7%	Holiday in the mountains	2%
Touring / driving holiday	6%	Cruise holiday	1%
Holiday in the countryside	4%	Visit of a global sporting event	1%
Shopping trip	3%	Other (wedding, honeymoon)	2%
Snow/ski holiday	3%		

Base: all respondents who have been to Europe (n=100)

On their holidays in Europe, Thai visitors indulge in various activities namely, sightseeing/excursion tours, visiting historical sites, cultural attractions, shopping, tasting local food/gastronomy, nature/eco tour, museums and art galleries, most of which are also the main reason for travel.

Table 101 – Holiday activities in Europe



	Participated in	Main reason for travel
Sightseeing/excursion tours	57%	23%
Shopping	50%	10%
Visiting historical and cultural attractions	49%	18%
Tasting local food/gastronomy	40%	4%
Nature tour / eco tour	35%	10%
Enjoying the nightlife	34%	2%
Going to museums and art galleries	30%	4%
Going to parks and gardens	24%	1%
Visit to entertainment/theme parks	20%	2%
Meeting friends and relatives	17%	8%
Sea and beach	16%	2%
Touring / driving around the country	15%	4%
Enjoying theatre/musical performances	14%	0%
Adventure activities (rafting, mountain climbing etc)	13%	3%
Visiting places of worship	11%	1%

Base: all respondents who have been to Europe (n=100)

Like their regional counterparts, the majority of Thai travellers to Europe go on holiday with family. Solo trips are a small proportion, mainly undertaken by young Thais. Travelling with friends and in mixed groups with family and friends is also quite common, as group travel is seen to be more cost-effective. While one-half travel in groups of 3-4 persons, another 30% travel in groups of 5-6 people and 7% travel in even larger groups to Europe. 14% travel as couples or with a friend/partner.

Table 102 – Travel companions and travel part size



Alone (solo)	7%		
Family	53%	2 persons	14%
Friends	16%	3-4 people	49%
Friends and family	22%	5-6 people	30%
Tour group	2%	7 or more people	7%

Base: all respondents who have been to Europe (n=100)

In terms of accommodation, over one-half prefer to stay in premium hotels/resorts (five-star or four-star) and another one-third opt to stay in budget accommodation (hotel, hostel or dormitory). 17% use furnished accommodation (service apartment/Airbnb) or stay with friends and relatives.

Table 103 – Type of accommodation



5-star or 4-star hotel or resort	52%	Stay with friends/relatives	10%
3-star/budget hotel or hostel/dormitory	31%	Serviced apartment/Airbnb or similar	7%

Base: all respondents who have been to Europe (n=100)

Despite the increasing use of the internet as a key resource for holiday planning, many Thai nationals continue to rely on the travel agent for travel bookings and purchase. On their most recent holiday trip to Europe, four in ten Thais used a travel agent to book an all-inclusive, customized travel package or to make individual bookings.

Another 19% made their flight bookings directly with the airline via the website, mobile app, phone or email; a lesser proportion (12%) used these channels to make accommodation reservations.

Notably, use of online travel agencies (OTAs) among Thai travellers has increased over the past few years, with over one-third having used them to make flight bookings and accommodation reservations for their most recent holiday trip to Europe.

Table 104 – Flight and accommodation booking



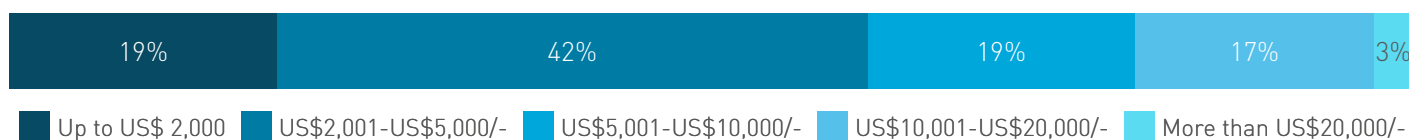
	Flights	Accommodation
All-inclusive travel package through travel agent	32%	32%
Individual bookings (not package) through travel agent	13%	9%
Direct with airline on website or mobile app	14%	9%
Direct with airline on telephone or by email	5%	3%
Online on websites such as Agoda, expedia.com, booking.com	36%	37%
Did not require booking	—	10%

Base: all respondents who have been to Europe (n=100)

In terms of holiday expenses, 61% of Thai visitors claim to have spent up to US\$5,000 and 31% claim to have spent more than US\$5,000 (total trip expenditure) on their most recent trip to Europe, with the average spend per person estimated at US\$1,550. Shopping for high quality products and brands is a major expense, adding to the overall cost of holiday for Thai visitors.

Based on the average duration of the most recent trip to Europe (6.7 nights), it is estimated that per person expenditure was approximately US\$230 per night.

Figure 39 – Total travel expenditure in Europe 



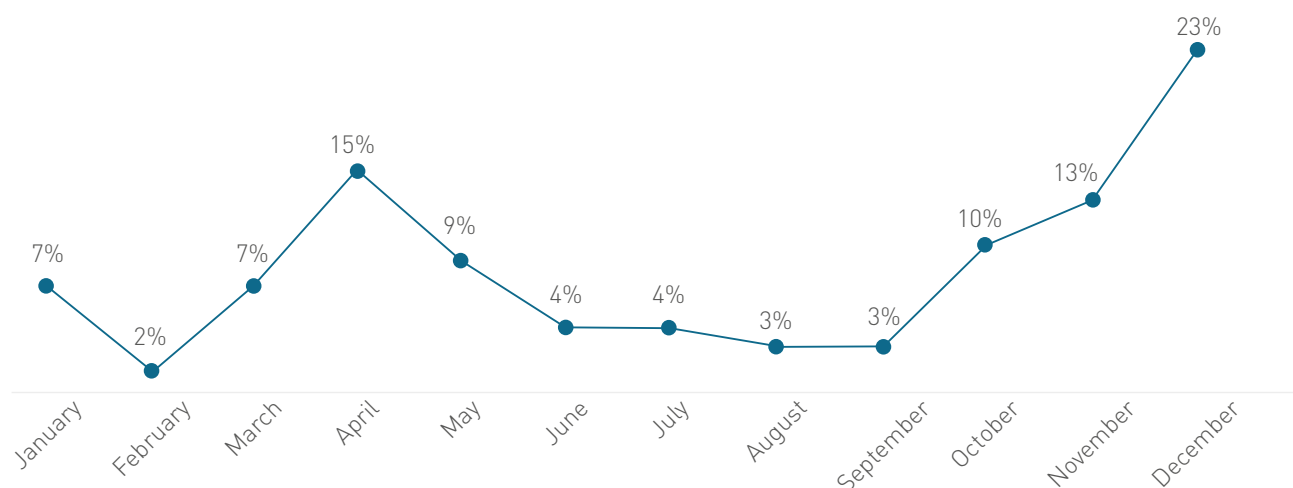
Base: all respondents who have been to Europe (n=100)

Average spend per person on trip to Europe: US\$1,550; average spend per person per night: US\$230

6.3.4.2 Travel behaviour in other (non-European) destinations

Based on the seasonality of the most recent trip overseas in the last five years, it is noted that the last quarter of the year accounts for 46% of all outbound travel from Thailand to non-European destinations, with travel peaking in December. The other peak period is April-May when it is school holiday time in Thailand.

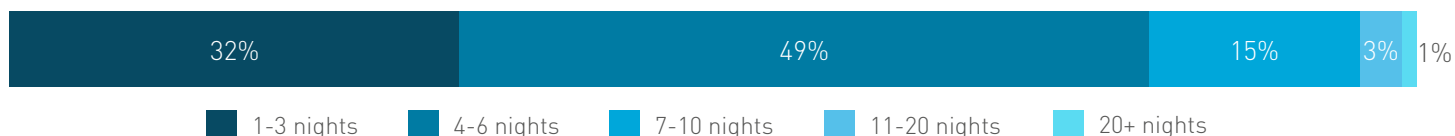
Figure 40 – Seasonality of holiday trip overseas 



Base: all respondents who have been to non-European destinations on recent trip (n=175)

Trips to non-European destinations tend to be shorter compared to trips to Europe. On an average, Thai travellers spend five nights in non-European destinations, lower than the Europe average (6.7 nights). Understandably, trips to long-haul destinations in Australasia and the Americas are typically longer compared to trips to other destinations in Asia, Africa or the Middle East. Overall, eight in ten Thai travellers go on holiday for up to 6 nights, 15% for 7-10 nights and 4% for 11 or more nights.

Figure 41 – Duration of trip overseas (non-European destinations)



Base: all respondents who have been to non-European destinations on recent trip (n=175)

Average number of nights spent overseas (non-European destinations): 4.9

Unlike in Europe, Thai visitors to other world destinations usually spend their time in a single destination. On the most recent trip, just 11% visited more than one country, mainly in Australasia and North East Asia, but also in combination with a South-East Asian destination.

On their most recent trip overseas, Thai travellers visited a mix of Asian, Australasian, North American and Middle Eastern countries, led by Japan, South Korea, Hong Kong, China and Taiwan. As stated earlier, Japan's popularity has soared since the visa waiver for Thai citizens in 2013.

Table 105 – Destinations visited on recent trip overseas



Japan	48%	United States	5%	Maldives	1%
South Korea	15%	Australia	4%	Bahamas	1%
Hong Kong	11%	Canada	2%	Egypt	1%
China	10%	Macau	2%	Other countries*	17%
Taiwan	5%	Kuwait	1%		

Base: all respondents who have been to non-European destinations on recent trip (n=175)

*Iran, Jordan, Lebanon, New Zealand, Oman, Qatar, United Arab Emirates

As in Europe, city-based vacations are most preferred by Thai travellers in other destinations as well. Interestingly though, thrice as many Thais who visit non-European destinations opt for visits to leisure/theme parks than those who go to Europe, in large part due to proximity and favourable costs when travelling with children (primarily within Asia). Overall, city holiday, visit to leisure/theme park, holiday in the countryside, shopping trip and touring/driving holiday feature among the top five holiday types among Thai outbound travellers.

Table 106 – Type of holiday overseas



City holiday	45%	Snow/ski holiday	4%
Visit to leisure park/theme park	10%	Beach holiday/holiday by the sea	4%
Holiday in the countryside	7%	Visit to family and/or friends	2%
Shopping trip	7%	Spa/wellness trip	2%
Touring / driving holiday	6%	Religious/spiritual holiday	2%
Holiday in the mountains	5%	Wedding, honeymoon, short study trip	2%
Adventure trip	4%		

Base: all respondents who have been to non-European destinations on recent trip (n=175)

Thai visitors to non-European destinations indulge in similar activities as those who holiday in Europe, though the top five activities vary somewhat. For example, a larger proportion of visitors to non-European destinations participate in nightlife activities and visits to entertainment/theme parks compared to those who travel to Europe; the latter is also one of the main reasons for travel to non-European destinations.

On the other hand, visiting historical and cultural attractions is much more of a motivation for travel to Europe than to other world destinations. European destinations could perhaps consider promoting holiday activities such as visits to leisure/theme parks in the Thailand travel source market.

Table 107 – Holiday activities overseas



	Participated in	Main reason for travel
Shopping	71%	13%
Sightseeing/excursion tours	59%	21%
Tasting local food/gastronomy	51%	6%
Enjoying the nightlife	49%	2%
Visit to entertainment/theme parks	47%	16%
Visiting historical and cultural attractions	45%	9%
Nature tour / eco tour	38%	8%
Visiting places of worship	32%	2%
Going to parks and gardens	26%	0%
Touring / driving around the country	21%	5%
Going to museums and art galleries	21%	1%
Sea and beach	20%	4%
Meeting friends and relatives	10%	3%
Adventure activities	10%	2%
Enjoying theatre/musical performances	9%	0%
Going for spa and beauty treatments	7%	0%
Water sports	6%	1%
Attending a global sporting event	3%	1%
Nothing specific, just holiday with various activities	0%	6%

Base: all respondents who have been to non-European destinations on recent trip (n=175)

In terms of travel companions and travel party size, the trend is similar with Europe, that is, travelling with family as well as with other companions or solo. Although the most common travel party size is 3-4 persons (48%), larger group sizes are also a significant proportion (36%) due to the cost advantage associated with group travel.

Table 108 – Travel companions and travel party size



Alone (solo)	8%	2 persons	16%
Family	58%	3-4 people	48%
Friends	17%	5-6 people	22%
Friends and family	14%	7 or more people	14%
Tour group	3%		

Base: all respondents who have been to non-European destinations on recent trip (n=175)

Notably, a larger proportion of Thai visitors to non-European destinations prefer to stay in budget accommodation (and less in premium hotels) compared to those who travel to Europe. This may be a function of larger travel party sizes, availability of accommodation and/or travel budgets.

Table 109 – Type of accommodation 

5-star or 4-star hotel or resort	47%	Serviced apartment/Airbnb or similar	8%
3-star/budget hotel or hostel/dormitory	41%	Stay with friends/relatives or own home	4%

Base: all respondents who have been to non-European destinations on recent trip (n=175)

In terms of travel booking, one in four Thai travellers use the services of a travel agent to make bookings, with a larger majority relying on direct bookings or through an online travel agency (OTA). Travel bookings to non-European destinations follow a similar pattern as for Europe, with more use of OTAs for accommodation bookings than for flights, the latter being booked more through direct booking channels.

Table 110 – Flight and accommodation booking 

	Flights	Accommodation
All-inclusive travel package through travel agent	27%	27%
Individual bookings (not package) through travel agent	11%	7%
Direct with airline/hotel on website or mobile app	26%	9%
Direct with airline/hotel on telephone or by email	5%	5%
Online on websites such as Agoda, expedia.com, booking.com	31%	49%
Did not require booking (paid accommodation not used)	—	4%

Base: all respondents who have been to non-European destinations on recent trip (n=175)

There is a significant difference in the overall cost of holiday in non-European destinations versus a holiday in Europe. On their most recent trip overseas, over eight in ten Thai travellers claim to have spent up to US\$5,000, and just 12% claim to have spent over US\$5,000, with the average spend estimated at approximately US\$812 per person, compared to a much higher figure of US\$1,550 per person in Europe. Equally, per night expenditure in non-European destinations is estimated at approximately US\$162 per person, much lower compared to US\$230 per person in Europe.

Given the higher cost of a European holiday, one of the key barriers to travel to Europe, promotion of competitive holiday packages for Europe, perhaps in shoulder seasons, may be worth considering as not only would that provide better deals for the Thais (and citizens of other regional source markets) but also attract tourists to Europe in the less busy seasons.

Figure 42 – Total travel expenditure overseas (non-European destinations) 



Base: all respondents who have been to non-European destinations on recent trip (n=175)

Average spend per person on trip overseas (non-European destinations): US\$812;
average spend per night: US\$162

6.3.5 Sources of information for holiday planning

The Internet and friends and family are the key sources of information used by most Thai outbound travellers. A significant 40% also rely on travel agents and tour operators as information sources when planning their holiday. These and other information sources used as resources for inspiration, research and holiday planning are presented in the table below.

Table 111 – Information sources used for holiday planning 

Internet (websites, social media, search engines)	80%	Holiday brochures & travel guides	29%
Friends & family	53%	Travel channels/programs on television	29%
Travel agents & tour operators	40%	Travel fairs & exhibitions	25%
Travel magazines	36%	Country tourist offices	25%

Base: all respondents (n=200)

Users of the Internet rely on several online information sources such as social media, travel booking websites, travel comparison websites, travel review websites, travel agent and tour operator websites, etc. Most of this information is accessed from laptops and mobile phones, although nearly 50% also use tablets.

Table 112 – Online information sources used 

Social media	75%	Search engines	33%
Travel booking and comparison websites	41%	Travel bloggers, influencers	28%
Travel review sites	40%	Independent travel advice websites	16%
Travel agent/tour operator websites	37%	National Tourist Board websites	16%

Base: all respondents (n=200)

6.3.6 Key drivers impacting travel habits and behaviour

Like their regional counterparts, Thai citizens too indicate that changes in family life cycle stage and personal financial situation are the key determinants of the travel choices they make. Additionally, travel technology has changed the way they research and book travel. Verbatim comments presented below highlight the factors that have and are impacting travel habits and behaviour of the Thai citizens.

“5 years ago, I was a fresh graduate. I didn’t have experience or lots of money, so I chose to travel economically opting for adventure trips (backpacking). But nowadays I can afford to travel better and to more places for different types of holidays.” — Female, 27 years, married

“In the past, I travelled alone but nowadays I travel with my friends. I stay overnight at Airbnb instead of the hostel as before. Moreover, everything has changed because I get more information on the internet by searching reviews from bloggers.” — Female, 28 years, single

“5 years ago, I worked so hard that I didn’t have enough time to travel. But I have enough time now so I can go everywhere and anywhere I want. I get a lot of information, especially from my friends who are local people. Travel is not only about the experience of the place for me but also interacting with local people.” — Male, 35 years, married with children

“In my case, I have travelled quite a lot. In the past, I liked to go to the big cities, but now I prefer to go up-country or to small cities, to relax and to see a different side of the country.” — Female, 31 years, married

“I like to search for the reviews from bloggers on the Internet and information of the country I would like to visit. I didn’t use too much of the Internet in the past but social media is useful nowadays.” — Male, 43 years, single

"I still use the internet as before. The difference is it gives me more choices now to choose the promotion that matches with my budget." — Male, 29 years, married

Social media and travel bloggers/influencers play a key role in travel inspiration and destination decision making among Thai citizens.

"I get a lot of inspiration from bloggers on YouTube. There are many bloggers in various styles and a lot of reviews." — Female, 27 years, married

"I believe in reviews and bloggers. Moreover, it's about the promotions of the airlines too. That's important for me to make the decision." — Male, 35 years, married with children

Looking into the future, Thai citizens anticipate that technology will play a positive role in customization of information and offers to individual travellers and expect costs will be more competitive due to increasing competition. They also believe that travel to Europe will grow from Thailand, especially with low cost airlines flying to different destinations in Europe and availability of sharing economy accommodation options.

"I believe that the future travel landscape will change in a good way because of technology. Improved technology will help us to organize the travel plan better, and because of the competition between the travel agencies, the prices will be cheaper, I think." — Female, 28 years, single

"People will travel to Europe more because of the variety of accommodations from Airbnb to five-star hotels." Male, 43 years, single

"I think there will be more tourists going to Europe because of the value for money and transportation options, especially low-cost airlines." — Female, 31 years, married

6.3.7 Knowledge and perception of Europe and European destinations

6.3.7.1 Awareness and knowledge of European regions

Most Thais appear to be aware of the different regions of European, albeit with lower awareness of Benelux and Baltic States. Like their regional counterparts, they seem to be most familiar with Western Europe and Central/Eastern Europe, followed by Northern and Southern/Mediterranean Europe. Notably, Thais are more knowledgeable about European regions compared to citizens of other South-East Asian countries.

Table 113 – Awareness and knowledge of European regions 

	Never heard of it	Heard of it only (don't know anything)	Know a little	Know a fair amount	Know very well
Northern Europe	2%	17%	37%	32%	13%
Western Europe	3%	11%	31%	40%	16%
Central / Eastern Europe	2%	12%	33%	39%	16%
Southern/Mediterranean Europe	2%	11%	43%	32%	13%
Scandinavia	1%	15%	43%	30%	12%
Benelux	25%	28%	31%	13%	4%
Baltic States	22%	33%	30%	12%	4%

Base: all respondents (n=200)

Compared to other South-East Asian citizens, more Thais see Europe as a single tourism destination (44%). While 39% see it as a set of different regions, 18% associate it with a set of different countries. Thus, it would seem that promoting Europe as a single tourism destination, offering pan-European holiday experiences, would work well in this market.

6.3.7.2 Perceptions of individual European destinations

The qualitative focus group discussion explored consumer perceptions of individual European destinations. Compared to their regional counterparts, Thai citizens appeared to be aware of a larger number of countries and also displayed somewhat greater knowledge.

Examples below highlight the spontaneous associations with 26 individual European destinations, centred mainly on nature and landscape, history and culture, food and sports, with some reference to visitor attractions and sightseeing objects.

Austria – palace, lake, Hallstatt

Belgium – beer, chocolates, good and clean cities, Dinner in the Sky

Bosnia and Herzegovina – sea, mountains, nature, history

Bulgaria – nature, mountains, lake, traditional costumes

Croatia – sea, luxury cruises, football

Czech Republic – nature, castles, architecture, culture

Denmark – royal palace, beautiful views, milk, green spaces

Finland – northern lights, snow, nature

France – Paris, Eiffel tower, Notre-Dame, Louvre museum, fashion, perfumes, Louis Vuitton

Germany – Berlin, beer, German pork hocks, football

Greece – Santorini, beaches, scuba diving, history and culture

Holland – Amsterdam, natural places, windmills, cycling, canals, flowers, tulips

Hungary – Budapest, lakes, architecture, castles

Iceland – cold, northern lights, snow, ice cave

Ireland – nature and landscape, cold

Italy – Venice, Rome, Leaning Tower of Pisa, football, architecture, fashion, food, Colosseum

Monaco – sea, casino, royal family, luxury cruise, wealthy country, rich and famous go there

Norway – Oslo, nature, beautiful country, hiking, waterfalls, midnight sun

Portugal – history, ancient architecture, history, football team

Romania – palace, Dracula

Russia – Moscow, Red Square, architecture, history

Spain – Barcelona, Madrid, football, cathedrals, castles, food, culture

Sweden – Scandinavian country, Ikea, nature, subway, old city

Switzerland – nature, snow, landscape, lakes, mountains, cable cars, watch brands

Turkey – Istanbul, hot air balloons, history, culture, Turkish ice cream

United Kingdom – London, royal family, Big Ben, Tower of London, London Eye, castles, Buckingham palace, football

The verbatim comments below indicate the perceptions of Thai citizens on Europe's unique and distinctiveness characteristics.

"I think tourist attraction and architecture in Europe are different from other regions. And there are also unique stories about their places." – Female, 27 years, married

"In my opinion, Europe has many developed countries than in other regions, and they have great transportation infrastructure and management." – Female, 28 years, single

"I believe that there are three factors. First is nice weather. Second is nature that is wonderful. The last one is language because there are many languages even though it's the same continent." – Male, 29 years, married

"Europe has developed countries that have a great quality of life. Even if the population must pay high taxes, they get a lot of support from the government. And the weather is very nice. Seeing the contrast with the life in Thailand and rest of Asia is the main attraction for me." – Female, 30 years, married

“Europe has a mix of expensive and not so expensive countries. By my own experience, I think about England. Everything is expensive. And then I think about Turkey - this country is not that expensive compared to another country in Europe. As tourists, we have a choice.” – Male, 35 years, married with children

6.3.7.3 Perception of Europe versus other regions on interest-based travel themes

As in other countries, Thai citizens were also queried on their interest in passion-related thematic travel in Europe and their perceptions of Europe versus other world regions for offering different types of holiday experiences and activities (travel themes). Specific questions are detailed in Chapter 2.

Like their regional counterparts, Thai citizens also identify “slow” adventure, culture and history, nature, city life and local gastronomy as the top five travel themes that they would consider as ‘important to be able to experience it’ or as the ‘main reason for travel’.

They too consider Asia and Europe as the best aligned regions to offer such interest-based holiday experiences, with Europe rated as the most suited for experiencing city life. North America features as a distant third on city life, culture and history, gastronomy and ‘slow’ adventure, while Africa features in third place on the theme of nature. Thus, while the main competition for Europe appears to be from the Asia region overall, in the long-haul space, North America appears to be the key competitor region from a marketing and promotion perspective. Africa’s connection is primarily with wildlife and safaris.

Thai citizens consider the same top five themes as the key drivers for travel to Europe, predominantly for Pan-European experiences, although some believed that themes such as ‘city life’ and nature are best experienced in specific countries in Europe.

Table 114 – Travel themes as key drivers to holiday abroad



	Not important at all	Would like the opportunity to experience it but not essential	Important to be able to experience it	Main reason for travel
Adventure	14%	39%	29%	19%
“Slow” adventure	2%	23%	48%	28%
Culture and history	2%	9%	51%	39%
Nature	2%	11%	41%	47%
City life	1%	15%	46%	39%
Spa and wellness	12%	36%	33%	20%
Tasting local food/gastronomy	1%	10%	36%	53%
Beach and sea	6%	24%	43%	27%
Amusement and theme parks	3%	23%	45%	30%
Global sporting events	14%	34%	32%	21%
Media-related activities and interests	9%	25%	39%	29%

Base: all respondents (n=200)

Table 115 – Perception of Europe versus competitor regions on top five travel themes



	Asia	Africa	Middle East	Europe	North America	South America
“Slow” adventure	78%	11%	12%	56%	16%	12%
Culture and history	77%	15%	20%	71%	22%	17%
Nature	76%	28%	14%	49%	20%	20%
City life	70%	10%	15%	77%	30%	15%
Tasting local food/gastronomy	81%	11%	19%	66%	22%	15%

Base: all respondents (n=200)

Table 116 – Travel theme as key driver for holiday in Europe



	Across Europe (pan-Europe)	Specific destination in Europe
“Slow” adventure	74%	26%
Culture and history	72%	28%
Nature	69%	31%
City life	68%	32%
Tasting local food/gastronomy	70%	30%

Base: all respondents who associate a specific travel theme with Europe

The questions on interest-based travel themes were further explored in the qualitative focus group discussion. While these choices (in the online survey) were ratified by participants in the focus group, probing further, it became apparent that a combination of different activities and experiences on a single trip is more attractive to Thai travellers.

“I am interested in city life and tasting local food. Moreover, I’m interested in adventure and slow adventure like hiking.” – Female, 27, married

“I am interested in culture and history. I want to visit Turkey because I want to learn about history and tradition there. I also love the city life and nature. And in Turkey, there are a lot of good natural resources.” – Male, 43, married

“My friends and I love shopping. Moreover, I want to go to a country where there is the sea. It’s not for scuba diving or other water sports, but because of my love for seafood. Each country has different dishes and styles of seafood. As an example, some people go to Korea to eat live squid.” – Male, 29, married

“I would like to go to Germany partly because of city life. But if I go to the south like Munich, it’s more about nature. So, I can get different experiences in one country.” – Female, 28, single

“I’ve planned to go to France and Italy because I love to taste local food over there, especially the original pizza. I think that it might be different from Thailand.” – Male, 35, married with children

Regional perceptions were predominantly in favour of Europe, which is seen as the ‘most interesting area as it has city life and up-country local life, wonderful culture and history’.

“For me, it is Europe and I’ll go there at the end of this year. There is everything there that I like such as shopping, food, landscape, history and multiculturalism. Moreover, the weather is good, not too cold and not too hot.” – Female, 27, married

6.3.8 Importance and perception of luxury travel

In the online survey, 44% of the Thai travellers acknowledged that luxury travel is important to them. In the focus group discussion, Thais defined luxury travel as a city holiday, with 'everything expensive and brand name stuff', luxury hotels and restaurants, high fashion shopping, etc.

They most associate Europe with a luxury holiday, with Scandinavian countries, France, Greece, United Kingdom and Switzerland variously mentioned as desirable luxury vacation destinations.

"I think about England or Europe because there is a lot of brand name stuff there." – Female, 27, married

"If it mentions luxury travel, Greece comes into my mind. I think about cruise travel." – Female, 28, single

"For me, it would be luxury restaurant and hotel, and brand name shopping." – Male, 35, married

6.3.9 Importance and perception of sustainable tourism

An impressive 75% of Thais are aware of the concept of sustainability. Among those aware, 65% say that sustainability would be important or very important in their travel decision making process, encompassing various aspects of sustainability, as displayed below.

Table 117 – Importance of aspects of sustainability in travel decision making



	Very important	Important
Destination conserves its natural environment	52%	45%
Destination supports local businesses	38%	53%
Destination supports cultural projects	38%	55%
Accommodations are certified with green/eco labels	45%	46%
Visitor attractions and other services are eco-certified	53%	41%

Base: all respondents aware and who rated sustainability as important or very important (n=98)

In the focus group, Thai citizens reiterated their interest in sustainable tourism, though few currently select a destination based on these criteria, stating that it is still a 'new' trend.

"It seems to me that environmentally friendly tourism is a new trend. It makes the tourists feel like they can contribute to conserving the environment." – Female, 28, single

"I agree with this kind of tourism because it makes tourists see how important environment conservation is." – Male, 43, married

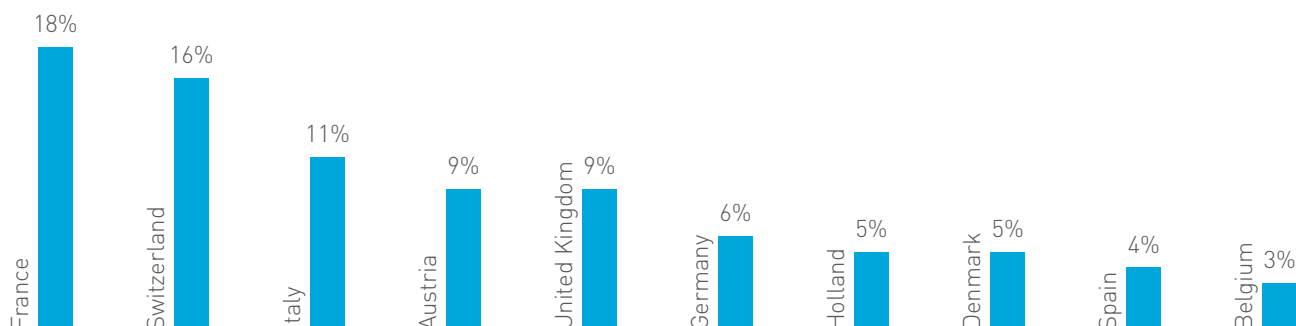
"When I travel, I bring cloth bags with me to carry my stuff. Nowadays, in Thailand, there are many campaigns about this, and I agree with this very much." – Male, 29, married

6.3.10 Future travel destinations

6.3.10.1 European destinations likely to visit

Thai citizens mentioned 24 European countries across different regions of Europe that they would be most desirous of visiting over the next five years. The top ten European countries eliciting maximum interest were the classic holiday destinations in Western, Northern and Southern/Mediterranean regions, led by France, Switzerland, Italy, Austria and United Kingdom.

Figure 43 – Top ten European destinations most likely to visit 



Base: all respondents (n=200)

Thai citizens were further asked to select other European countries that they might consider visiting in the next five years. The table below demonstrates the top 20 European countries that Thai citizens are likely to visit (first choice country plus other countries), indicating multiple visits and/or multi-country travel to Europe in the coming years. This provides a good opportunity to promote theme-based itineraries across Europe/European regions in the Thai market.

Table 118 – Top twenty European destinations likely to visit 

France	56%	Finland	23%	Russia	13%
Switzerland	50%	Denmark	22%	Portugal	13%
Italy	43%	Holland	21%	Greece	12%
United Kingdom	38%	Norway	21%	Turkey	12%
Austria	36%	Belgium	20%	Ireland	11%
Germany	33%	Sweden	18%	Hungary	10%
Spain	25%	Iceland	16%		

Base: all respondents (n=200)

6.3.10.2 Other world destinations likely to visit

Thai citizens were also asked about other destinations (non-European) they would consider visiting for a holiday in the next five years. As the table below depicts, a mix of Asian/Australasian and American destinations feature in the top ten list, indicating the global nature of competition for tourism destinations worldwide. Though competition in the long-haul space for Europe is likely to be from Australasia and North America, Japan can be considered a strong contender as well.

Table 119 – Top ten other world destinations likely to visit 

Japan	56%	Hong Kong	23%	South Korea	17%
Australia	28%	New Zealand	21%	Taiwan	15%
Maldives	25%	China	20%	Canada	12%
United States	24%				

Base: all respondents (n=200)

CHAPTER 7



CONCLUSIONS AND RECOMMENDATIONS



7. CONCLUSIONS AND RECOMMENDATIONS

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 similar across the four South-East Asian markets under examination – Singapore, Malaysia, Indonesia and Thailand, albeit with some variations, as highlighted in Chapter 2 (Regional Profile: South-East Asia) of this report.

The findings of the study reveal that, within long-haul destinations, Europe is the most aspirational destination for South-East Asian consumers. Across the four South-East Asian source markets, consumers perceive Europe as a destination that offers scenic beauty and natural landscapes, good weather, diversity of cultural and historical attractions, and diversity of holiday experiences and activities. This is what drives travel to Europe among both first-time and repeat visitors to Europe.

Europe's image as a prestigious holiday destination is 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, prioritize 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 Europe among non-visitors. Limited air connectivity (direct flights), especially from Malaysia and Indonesia to European destinations, 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.

Taking into consideration South-East Asian consumers' motivations and barriers to visit Europe, travel experiences and perceptions of Europe, interest in passion-related or interest-based travel, etc, Europe's key strengths, weaknesses, opportunities and threats, from a tourism destination marketing perspective, are presented below.

Europe - SWOT Analysis

Strengths	Opportunities
<ul style="list-style-type: none"> • Scenic beauty and natural landscapes • Good weather • Diversity of cultural and historical attractions • Diversity of holiday experiences and activities • Prestigious holiday destination • High quality luxury shopping • Well-developed tourism infrastructure • Ease of multi-country travel 	<ul style="list-style-type: none"> • Pan-European interest-based travel <ul style="list-style-type: none"> - slow adventure, culture and history, nature, city life and local gastronomy • Mono-destination immersive travel experiences • Seasonal festivals, events and experiences <ul style="list-style-type: none"> - Northern lights, Christmas, sports events • Solo travel experiences <ul style="list-style-type: none"> - backpacking, adventure, luxury (women)
Weaknesses	Threats
<ul style="list-style-type: none"> • High cost of holiday • Safety and security concerns • Language barriers • Air connectivity and visa related issues 	<ul style="list-style-type: none"> • Increasing global competition • Fluctuations in currency exchange rates • Increase in cost of travel • Economic downturn



RECOMMENDATIONS

Outbound travel forecasts indicate positive trends for all four South-East Asian markets.¹⁰ Already a key beneficiary of long-haul travel from South-East Asia, Europe has the opportunity to further consolidate its leadership position and increase inbound tourism flows from the region, in the coming years. Some recommendations to promote specific tourism products, travel themes/itineraries and tourism activities among South-East Asian consumers are as follows:

1. Tourism products, themes and activities

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

First-time visitors are likely to undertake a **multi-destination trip**, with traditional Western European destinations as the top choices on their first trip to the continent. **Repeat visitors** are likely to visit a **combination of new destinations** (new regions, new countries), based on their overall level of travel experience in Europe. A combination of city life, culture/history, nature and local gastronomy would appeal to both these visitor segments.

What needs to be done: promotion of **Pan-European multi-destination itineraries** (regions and countries) that give due consideration to different interests, with a focus on city-based holidays. For regions that lack sufficient awareness in the South-East Asian markets, this would be a good opportunity to showcase their tourism assets along identified themes.

- **Mono-destination immersive travel experiences**

Experienced repeat visitors are the most likely prospects for mono-destination travel to Europe. The motivation would be to explore the country more in-depth, with a greater desire for immersive travel experiences. Slow adventure, incorporating local interactions and culturally authentic experiences, and local culinary experiences (local gastronomy, cooking classes, wine and cheese tours, farm visits, etc) would be a draw among young couples and families.

What needs to be done: 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. Increasing popularity of the winter Christmas festivities in Europe, Northern Lights in Scandinavia or the Cherry Blossom Festival in Japan is a strong indicator of potential future opportunities to promote European regions and destinations for seasonal events and festivities among the South-East Asians.

What needs to be done: Develop and promote the annual calendar of events highlighting unique experiences in regions and destinations across Europe. This can include art and culture, music and entertainment, global sporting events, nature and landscape, food festivals, etc.

- **Solo travel experiences**

Solo travellers are the best prospects for backpacking and adventure trips. Even as the majority travel within the Asia-Pacific region, there is a growing desire, especially among the young and single, working individuals, to explore further afield. Budget-friendly destinations (for example: Central/Eastern Europe countries) would benefit from targeting this consumer segment.

There is also a growing segment of **luxury solo travellers**, especially financially independent working women in Singapore and Malaysia, who can be targeted for luxury European holidays and experiences.

What needs to be done: Promote budget-friendly backpacking and adventure trips targeting the young solo traveller across the South-East Asian market. Promote luxury solo trips especially targeted towards women in Singapore and Malaysia.

¹⁰ MasterCard Future of Outbound Travel in Asia Pacific (2016 to 2021) Report



2. Marketing, trade and PR activities

Apart from Italy (in Thailand), France (in Singapore and Indonesia), Germany (in Singapore) and Spain (in Singapore), none of the other European NTOs have on-the-ground presence in the South-East Asian markets. Nonetheless, some of the other European NTOs do undertake promotional activities in one or more South-East Asian countries such as press tours, trade workshops, familiarization trips and online campaigns, though on a sporadic basis. Few have also begun to participate in the region's main trade shows and fairs.

In order to promote the identified tourism 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. A listing of travel trade events (in each country) is provided in Annexure 2 – these may also be considered by individual European destinations.

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 8

Aerial view of terraced rice fields with a paperclip icon.



ANNEXES

Aerial view of terraced rice fields with a thatched hut.



8. ANNEXES

8.1 ANNEX 1: NTOS WITH OFFICES IN SOUTH-EAST ASIAN COUNTRIES

	Singapore	Malaysia	Indonesia	Thailand
Australia	✓	✓	✓	✓
China	✓			
France	✓		✓	
Germany	✓		Managed through Singapore office	
India	✓		Managed through Singapore office	
Italy				✓
Japan	✓	✓	✓	✓
South Korea	✓	✓	✓	✓
Poland	Managed through HQ in cooperation with Poland Embassy and LOT Polish Airlines			
Spain	✓		Managed through Singapore office	
Taiwan	✓	✓		✓
United States	✓			
Great Britain	Managed through APMEA region office in Dubai, United Arab Emirates			

Press tours, B-to-B Workshops, co-marketing with airlines, trade familiarization trips, roadshows and online campaigns are some of the promotional activities undertaken by the various NTOs in the South-East Asian region.

Some NTOs also participate in local/regional travel trade shows and fairs (list of trade shows and fairs in Annexure 2).

8.2 ANNEX 2: TRAVEL TRADE SHOWS AND FAIRS IN SOUTH-EAST ASIAN COUNTRIES

Singapore
ITB Asia – B2B trade show and convention for the travel industry. Annually held in October. www.itb-asia.com
Digital Travel APAC – annual fair held with a focus on eCommerce, digital marketing and customer experience strategies for growth. Held in April. https://digitaltravelapac.wbresearch.com
NATAS (National Association of Travel Agents Singapore) – exhibition introduces new exotic destinations. Held bi-annually in February and August. http://natastravelfair.travel
ILTM – Asia Pacific’s leading luxury travel show. Held annually in May. www.iltm.com/asiapacific
Malaysia
Malaysian International Travel Mart (MITM) organized by the Malaysian Chinese Tourism Association (MCTA). Held annually in August. www.mitmtravelfair.com
National MATTFAIR organized by the Malaysian Association of Tour & Travel Agents (MATTFA) Held bi-annually in March and September in Kuala Lumpur. Local versions held through the year in different cities. www.mattfair.org.my
Indonesia
Asita Jakarta Travel Mart (AJTM) – B2B travel fair for domestic, inbound and outbound tourism Held annually in September in Jakarta. www.ajtm.asitajakarta.org
Thailand
Thailand International Travel Fair (TITF) organized by the Thai Travel Services Association Held bi-annually in February and August. www.titf-ttaa.com



8.3 ANNEX 3: MEDIA LANDSCAPE IN SOUTH-EAST ASIAN COUNTRIES

8.3.1 Traditional media

Singapore

Newspapers: Singapore Press Holdings – The Straits Times, Business Times; MediaCorp – Today

Radio: MediaCorp – more than a dozen stations including English-language news and talk station 938Live, music stations and Chinese, Malay and Indian services; Singapore Press Holdings – English-language One FM and Kiss 92, Mandarin station UFM

Television: MediaCorp – entertainment-based Channel 5 and Channel 8, Malay channel Suria, Mandarin-language Channel U and Channel NewsAsia (news)

Malaysia

Newspapers: Media Prima – Harian Metro, Berita Harian, the New Straits Times; Malaysian Chinese Association – The Star; Sun Media Corporation – The Sun Daily

Radio: Radio Televisyen Malaysia (RTM) – 36 local and national radio stations; Astro Radio – Era, Melody, Sinar; Media Prima – One FM, Hot FM

Television: RTM – TV1, TV2; Astro TV; Media Prima – TV3, TV9, 8TV; Sun TV

Indonesia

Newspapers: Kompas Gramedia – Kompas Daily; Jawa Pos – Jawa Pos; Mahaka Media – Republika; BeritaSatu Media Holdings – Suara Pembaruan, The Jakarta Post (English)

Radio: Radio Republik Indonesia (RRI) – state owned network of local, regional and national radio stations

Television: Televisi Republik Indonesia (TVRI) (state-owned network) – CTI, SCTV, Indosiar, ANTV, and Trans TV; Media Nusantara Citra (MNC) – RCTI, MNCTV, GTV, iNews; Trans Corp – Trans TV, Trans 7; Emtek – SCTV, Indosiar, O Channel

Thailand

Newspapers: Thai Rath; Daily News; Bangkok Post Public Company – Bangkok Post (English); Nation Multimedia Group – The Nation (digital only from June 2019)

Radio: National Broadcasting Services of Thailand – Radio Thailand (public);

Television: Bangkok Broadcasting & Television Company – Channel 7; BEC Tero – Channel 3;

8.3.2 Digital media

Singapore

Internet usage

Users – 4.9 million;
Penetration – 84%

Social media

Penetration: 79%
YouTube: 87%; Facebook: 82%;
Instagram: 59%; and Twitter: 34%

Social messaging

WhatsApp: 86%
FB Messenger: 52%
WeChat: 33%

Malaysia

Internet usage

Users – 25.8 million;
Penetration – 80%

Social media

Penetration: 78%
YouTube: 93%; Facebook: 91%;
Instagram: 70%; and Twitter: 44%

Social messaging

WhatsApp: 91%
FB Messenger: 64%
WeChat: 47%

Indonesia

Internet usage

Users – 150 million;
Penetration – 56%

Social media

Penetration: 56%
YouTube: 88%; Facebook: 81%;
Instagram: 80%; and Twitter: 52%

Social messaging

WhatsApp: 83%
Line: 59%
FB Messenger: 47%

Thailand

Internet usage

Users – 57 million;
Penetration – 82%

Social media

Penetration: 74%
Facebook: 93%; YouTube: 91%;
Instagram: 65%; and Twitter: 52%

Social messaging

Line: 84%
FB Messenger: 72%
Skype: 27%



8.4 ANNEX 4: TRAVEL TRADE IN SOUTH-EAST ASIAN COUNTRIES

Singapore	<ul style="list-style-type: none"> • Retail travel agencies: 800+ registered with Singapore Tourism Board • Wholesalers and large agents: ASA Holidays, Chan Brothers, CTC Travel, Dynasty Travel, Ramesh Travel, SA Tours and Holiday Tours & Travel • OTAs and metasearch engines: Agoda, Booking.com, Chan Brothers, CheapTickets.sg, Expedia, Flight Centre, Skyscanner, Tripzilla
Malaysia	<ul style="list-style-type: none"> • Retail travel agencies: 2,300 registered with MATTA and MITM • Wholesalers and large agents: Airlink Travel, Apple Vacations, Forever Travel, Golden Deluxe, Golden Tourworld, Malaysian Harmony, Parlo Tours, PNL Travel, Reliance Travel, Holiday Tours & Travel and Sedunia Travel • OTAs: 12Fly, Agoda, AirAsiaGo.com, Booking.com, Expedia, Hotels.com, Traveloka, PYOtravel.com, Holidaytoursonline.com, Seduniatravel.com, Trivago
Indonesia	<ul style="list-style-type: none"> • Retail travel agencies: 7,000+ members of Indonesia Travel Agent Association • Wholesalers and large agents: Avia Tour, Antavaya, Bayu Buana Travel Services, Celindo Tour (Surabaya), Dwidaya Tour, Panorama Tours, TX Travel, Golden Rama Tour and Travel Centre • OTAs: Booking.com, Agoda, Expedia, Nusatrip, Traveloka.com and Tiket.com
Thailand	<ul style="list-style-type: none"> • Retail travel agencies: ~800 registered with Thai Travel Agents Association • Wholesalers and large agents: Thai Travel Center, G.M. Tour & Travel Co, KBS Travel, Pacific Horizon Travel, Citrin Tours, Miki Travel • OTAs: Traveloka, Agoda, Expedia, Booking.com, Hotels.com and Skyscanner

Following is the list of the travel trade contacted for the survey:

Fayyaz Travels	Singapore	www.fayyaztravels.com
Mustafa Air Travel	Singapore	www.mustafa.com.sg/mmstours
Ramesh Travel	Singapore	www.rameshtravel.com
M.S Star Travel Agencies	Malaysia	www.starttravel.com.my
Reliance Travel	Malaysia	www.reliancetravel.net.my
Golden Tourworld Travel	Malaysia	http://gtt.com.my/
Holiday Tours & Travel	Malaysia	www.holidaytours.com.my
Multi Holiday Travel	Indonesia	www.multipoliday.net
Discover the World	Indonesia	www.discovertheworld.com
G2 Travel	Indonesia	www.g2-travel.com
MD Tours and Travel	Thailand	www.mdtours.com
Miki Travel Solutions	Thailand	www.miki.co.uk/thailand
Holiday Tours & Travel	Thailand	http://holidaytours-thailand.net



8.5 ANNEX 5: SOURCES

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