Market and Trade Profile: Southeast Asia

Focus on Singapore, Malaysia, Indonesia, Thailand, and other Southeast Asian countries

March 2020

Overview

- This market profile provides topline statistics about visitors from Southeast Asia, and more details about VisitBritain's main markets in that area: Singapore, Malaysia, Thailand, Indonesia, and also the Philippines and Vietnam for some sections.
- **Chapter 1: Inbound market statistics** provides insights on key statistics about Southeast Asian travellers and who they are. It compares Britain with its competitive set as well as activities of Southeast Asian visitors in the UK.
- **Chapter 2: Experiences and perceptions** features details about what visitors from Southeast Asia are likely to do in the UK, how they felt during their visit and whether they would recommend others to travel there. Perceptions of Britain held by Southeast Asians are also highlighted.
- **Chapter 3: Understanding the market** profiles Southeast Asian consumer trends, booking patterns, how they plan travel and additional travel behaviour.
- **Chapter 4: Market access and travel trade** highlights how Southeast Asians travel to the UK, how suppliers can best cater to the market during their stay as well as offer insights on how to work with Southeast Asian travel trade. Additional ways of working with VisitBritain in Southeast Asia and useful research resources are also shared.

**Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam. Data on inbound visits to the UK from Southeast Asia aggregates these markets together unless otherwise stated.*

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Executive summary

1: Inbound market statistics

Chapter summary

Southeast Asia is a valuable source market for the UK's tourism. This region is diverse, though, and some of its differences can show up in visits to the UK. For example, around a fifth of visits from residents of Thailand and Singapore were made by British nationals coming back to the UK, which influences the journey purpose pattern.

Visitors from Southeast Asia stay longer than the all-market average, and boast relatively good regional spread. The summer months from July to September are still the most popular season, and London remains the most visited city.

The United Kingdom is overall the most visited country in Europe from Southeast Asia. However, despite good growth prospects for visits, the UK's share of total outbound visits is forecast to decrease slightly among our key competitors, as India's share is forecasted to increase significantly in the period to 2028. Visits from one Southeast Asian country to another accounted for more than 6 in 10 outbound visits from this region in 2018.

2018: £668m spent in the UK

Source: International Passenger Survey by ONS, Oxford Economics (outbound overnight trips)

2: Experiences and perceptions

Chapter summary

Going shopping is the most popular activity for Southeast Asian inbound visitors, with 74% shopping during their trip. Southeast Asian visitors are also more likely than the all market average to attend the theatre, a musical, opera or ballet, as well as visit literary, music, TV or film locations.

Singaporeans seek holiday destinations that offer good value for money, and provide fun and laughter. In contrast, Indonesians are most motivated by the opportunity to feel physically healthier and experience peace and quiet. Key areas of strength for Britain as a destination for these two markets are our historic sites and sporting events.

97% of visitors from Southeast Asia felt welcome during their trip, and 98% would recommend Britain to others. Singaporeans are most likely to feel satisfied with the UK's attractions when they visit, compared to other aspects of their trip.

Top activities done by Southeast Asians in the UK

Going shopping, dining in restaurants and visiting parks or gardens

Source: Arkenford 2013, International Passenger Survey by ONS

Note: for activities, only Indonesia, Malaysia, Philippines, Singapore and Thailand considered

3: Understanding the market

Chapter summary

The Southeast Asian travel market is indeed quite dynamic: this region has seen many transformations in the last few years, and its young population is very curious; ready to embrace new travel trends.

Previously strongly growing economies in Southeast Asia have been negatively hit by the US-China trade war in 2019. However, some countries in the region have been beneficiaries, with Vietnam and Cambodia enjoying increased exports to the US as investment moves away from China.

Key consumer trends in the region include studying in an English-speaking country, physical activity whilst on holiday, trying new, local food, and also new activities such as going on a cruise, travelling alone and going shopping. The latter is interesting as more and more women travel abroad from Southeast Asian countries to treat themselves, which adds to the existing luxury traveller segments but also constitutes a new trend in comparison to the family segment, who will prefer destinations that fit the family's values.

Recommendations and value for money are very important in the planning and decision process. Booking of accommodation and flights are often separate, with half of the flight bookings made only within two months of departures.

Consumers in Southeast Asia have between
12-26 days
off per year including public holidays

Source: Trip Advisor's Trip Barometer, Oxford Economics, Statista.com, The 'Journey of Me' 2017 study by Amadeus, Public Holidays, ForwardKeys 2019

4: Access and travel trade

Chapter summary

Most visits from Southeast Asia to the UK were made by plane in 2018 (89%, compared to 77% across all markets). In the same year, propensity to take the tunnel between the UK and Europe was similar to the all-market average (10% vs. 11% respectively).

Direct seat capacity from Southeast Asia to the UK has increased by 31% from 2014 to 2019, with the largest growth being seen from emerging source markets Indonesia, the Philippines and Vietnam. In 2018, there were 13 airports with direct routes to the UK in Southeast Asia.

Connecting routes are important for this region, suggesting that overall growth in connectivity may be significantly larger. In the last five years, the Gulf carriers have gained more importance and connecting routes through hubs in the UAE or Qatar have soared, providing more regional options for arrival in the UK.

The Southeast Asian travel trade landscape is still very fragmented, even within the main countries. The growing FIT segment and online players are progressively changing the trade landscape.

95%
of the direct seat capacity in 2018 between South East Asia and the UK is concentrated in London Heathrow

Source: Apex Rdc 2020, International Passenger Survey by ONS

Chapter 1:
Inbound market statistics

1.1: Key statistics

Inbound visits, spend and nights from Southeast Asia to the UK showed strong growth from 2008 to 2017, but all metrics dropped in 2018. However, the number of visits to the UK in the first three quarters of 2019 from this region improved on those in the same period in 2018, suggesting that this trend may rebound.

Considered all together as one source market, Southeast Asian countries would be in the top 10 most valuable inbound markets to the UK in 2018. These are valuable visitor markets, with spend per visit almost twice the all-market average in 2018.

Most Southeast Asians who visit the UK come for holidays (over 4-in-10 visits in 2016-2018), or for visiting friends and relatives (over 3-in-10 in the same period). Business visitors tend to spend more per night than visitors with any other journey purpose.

Visits to the UK from Southeast Asia tend to be well spread between April and December primarily. They are also more likely to explore around the UK than the all-market average, spending more time than the all-market average in Northern England and the East of England, although London is still the most visited city in the UK.

10th

most valuable inbound market for the UK (2018)*

Source: International Passenger Survey by ONS, Oxford Economics (outbound overnight trips)

**If considered as a single market (as standard, inbound rankings do not consider Southeast Asia as a single market)*

1.1 Key statistics: global context

Global context (2018)

Measure	Southeast Asia	Singapore	Malaysia	Thailand	Indonesia	Philippines	Vietnam
International tourism expenditure (US$bn)	n/a	25.3	12.2	12.4	8.0	10.3	5.7
Global rank for international tourism expenditure	n/a	13	27	26	34	28	45
Number of outbound overnight visits (m)	82.6	22.8	13.2	11.2	10.4	7.9	6.7
Most visited outbound destination overall	Malaysia	Malaysia	Thailand	Malaysia	Singapore	China	China
Most visited destination in Europe	United Kingdom	United Kingdom	United Kingdom	Switzerland	Netherlands	Spain	France

Source: UNWTO, Oxford Economics
Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam

1.1 Key statistics: 10 year trend

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend	+84%	+58%	+153%
2008	303	4,271	264
2009	355	5,936	438
2010	386	6,029	457
2011	407	6,304	486
2012	416	6,283	523
2013	473	6,269	683
2014	526	6,753	643
2015	564	7,402	786
2016	570	7,752	768
2017	636	8,736	782
2018	559	6,764	668
Share of UK total in 2018	1.5%	2.5%	2.9%

Source: International Passenger Survey by ONS
Data includes Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam

1.1 Key statistics: latest figures

Inbound travel to the UK overview

Measure	Southeast Asia*	Singapore	Malaysia	Thailand	Indonesia	Philippines **	Vietnam***
Visits (000s, 2018) • Rank out of UK top markets	559 • 17th*	178 • 35th	165 • 38th	93 • 49th	45 • 57th	45 • 58th	19 • >67
Nights (000s, 2018) • Rank out of UK top markets	6,764 • 13th*	1,668 • 39th	1,729 • 37th	1,689 • 38th	458 • 56th	784 • 50th	281 • >70
Spend (£m, 2018) • Rank out of UK top markets	668 • 10th*	219 • 28th	168 • 30th	147 • 34th	54 • 52nd	46 • 54th	14 • >70
Nights per visit (2018) • Overall • Holiday	• 12 • 9	• 9 • 8	• 10 • 8	• 18 • 9	• 10 • 8	• 18 • 13	• 15 • 14
Spend per night (2018) • Overall • Holiday	• £99 • £139	• £131 • £171	• £97 • £130	• £87 • £135	• £117 • £153	• £58 • £99	• £51 • £72
Spend per visit (2018) • Overall • Holiday	• £1,195 • £1,186	• £1,233 • £1,433	• £1,018 • £1,486	• £1,584 • £1,167	• £1,195 • £1,263	• £1,026 • £1,314	• £745 • £992

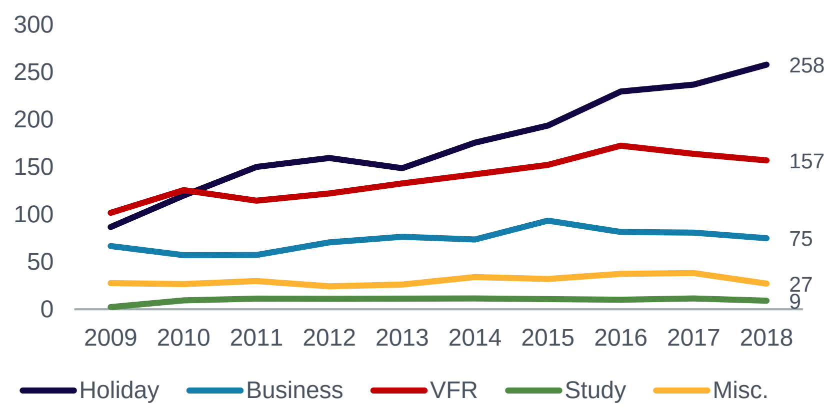
Source: International Passenger Survey by ONS
Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam
**If considered as a single market (as standard, inbound rankings do not consider Southeast Asia as a single market)*
***Treat with caution as sample is below 100 ***Treat with caution as sample is below 30*

1.1 Key statistics: journey purpose

Journey purpose (2016-2018)

Share of visits for…	Holiday	Business	VFR	Study	Misc.
Singapore	41%	22%	31%	1%	5%
Malaysia	50%	7%	33%	3%	7%
Thailand	44%	12%	33%	3%	7%
Indonesia	54%	12%	26%	2%	6%
Southeast Asia	**45%**	**14%**	**32%**	**2%**	**6%**
All markets	**39%**	**23%**	**31%**	**1%**	**6%**

Journey purpose trend (visits 000s)*



More visits to the UK from Southeast Asia are made for holidays than for any other purpose, and this pattern is consistent across the four key Southeast Asian markets. Overall, visiting friends and relatives is the second most frequent reason why Southeast Asian visitors came to the UK, followed by business visits in third.
Shares of holiday visits from Southeast Asia to the UK are higher than the all-market average, while there are proportionally fewer business visits from Southeast Asia than the global average.

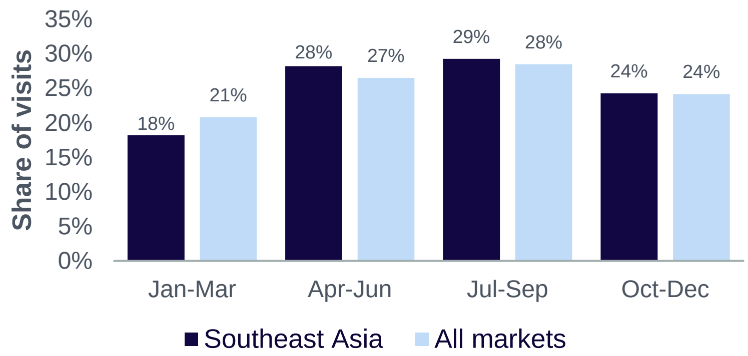
Overall, visits have increased over the last ten years for every main journey purpose, apart from business visits. However, holiday visits have grown the most in volume.
In 2011, holiday visits overtook visits to friends and relatives as the reason why most visits from Southeast Asia to the UK were made.
Visits from this region for business decreased slightly in 2016, and visits to visit friends and relatives decreased in 2017. Business visits have been challenged over the last ten years, with visits decreasing between 2009 and 2010, and then since 2015.

Source: International Passenger Survey by ONS

**Includes Indonesia, Malaysia, Singapore, Phillipines, Thailand. Otherwise, Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam*

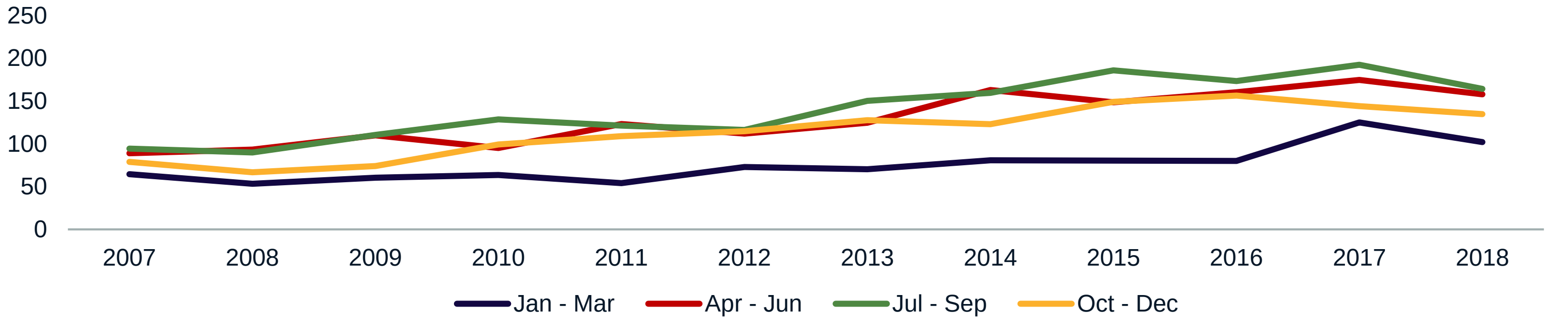
1.1 Key statistics: seasonality

Seasonality 2018



The summer season is the most popular time for Southeast Asian residents to visit the UK: in 2018, 29% of all visits from Southeast Asia took place between July and September.
The April-June season is also marginally more popular for these visitors than the all-market average, with 28% of visits in 2018 made in this quarter.
Looking at trends over the last 10 years, we can see the largest growth in popularity took place for April-June and July-September; however, visits in all seasons declined from 2017 to 2018. January-March has consistently been the least popular quarter, but saw a peak in 2017 after steady growth from 2011 onwards.

Seasonality trend (visits 000s)



Source: International Passenger Survey by ONS
Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam

1.1 Key statistics: length of stay and accommodation

Accommodation stayed

(2016-2018 average % share of nights spent in the UK)

	All markets	Singapore	Malaysia	Thailand
All staying visits	100%	100%	100%	100%
Hotel/guest house	29%	35%	24%	24%
Free guest with relatives or friends	44%	39%	35%	40%
Rented house/flat	8%	4%	5%	5%
Bed & Breakfast	3%	4%	3%	1%
Hostel/university/school	7%	16%	30%	7%
Paying guest family or friends house	2%	0%	0%	12%
Own home	2%	2%	1%	3%
Other	4%	0%	2%	9%

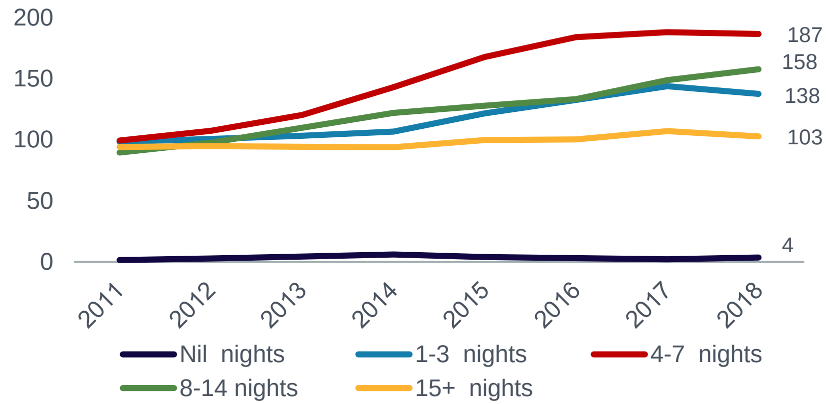
Visitors from Singapore, Malaysia and Thailand all spent more nights as a free guest with relatives or friends than in a hotel or a guest house in the UK in 2016-2018.

The latter type of accommodation is the second most common by share of nights spent there for Singapore and Thailand, and third for Malaysia.

Both Singapore and Malaysia over index on the all-market average for the number of nights spent in a hostel, university or school; this is particularly the case for Malaysia, with 30% of visitors staying in this type of accommodation.

Duration of stay trend

(visits 000s, average on 3 rolling years ending 2018)



Since 2010, there have been some changes to the pattern of length of stay of visits from South East Asia to the UK. Visits of 4 to 7 nights were the most popular in 2016-2018, and these types of visits almost doubled compared to 2011.

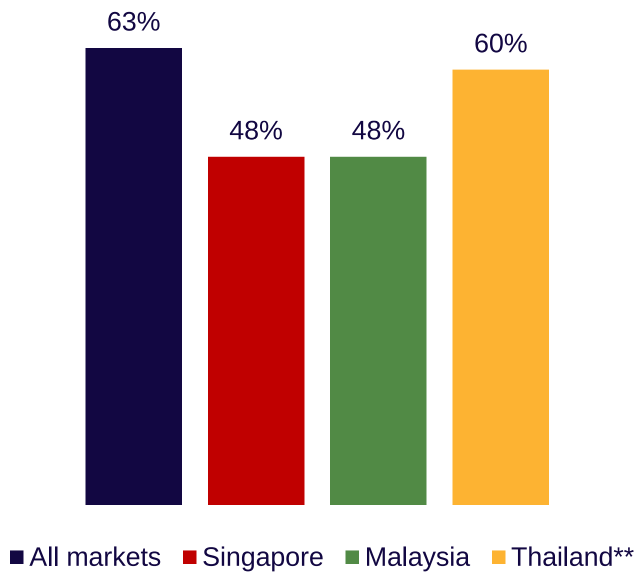
Volumes of visits of 1-3 nights and of 8-14 nights to the UK are usually similar; however, the popularity of 8-14 night stays drew ahead in 2016-2018, reaching 158,000 visits per year on average. Volumes of 15+ night stays have remained quite steady since 2011.

Source: International Passenger Survey by ONS

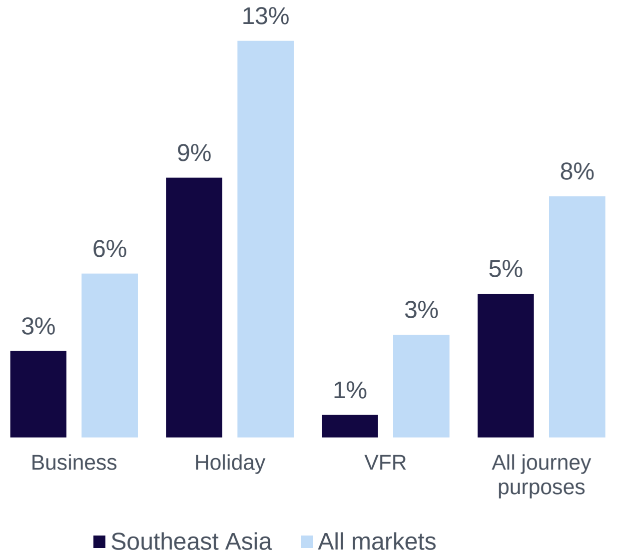
Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam

1.1 Key statistics: repeat holiday visits and package tours

Proportion of overnight holiday visitors to the UK that have visited the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour (2016-2018)***



*International Passenger Survey by ONS; *Excluding British nationals, 2015 data*
Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam
****See definition of package holiday in appendix*

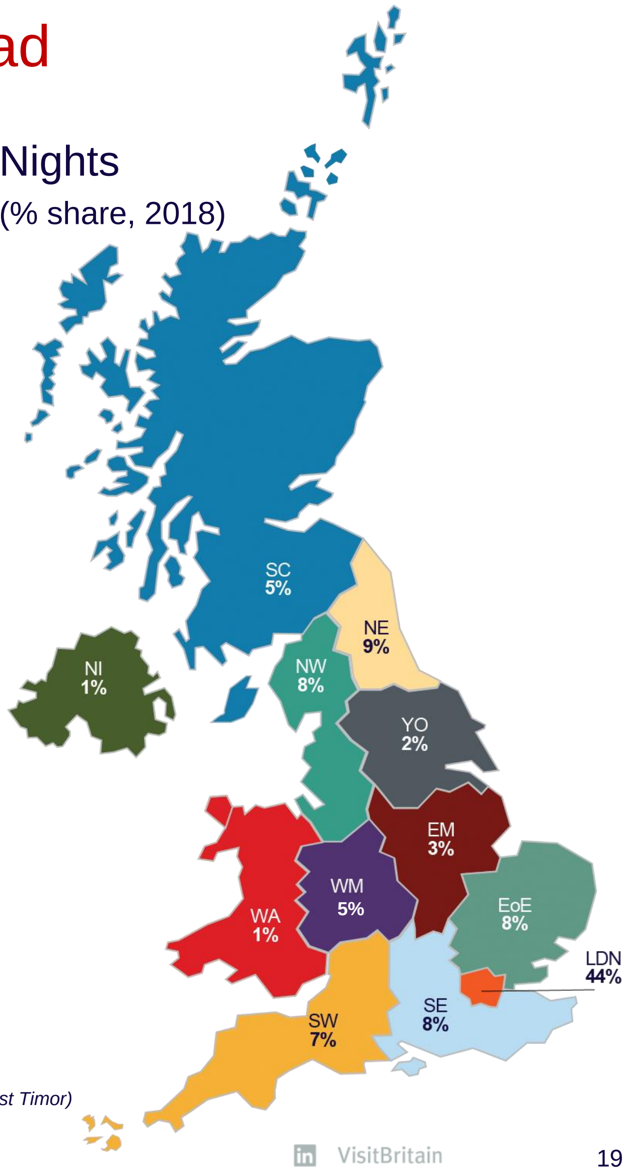
1.2 Getting around Britain: regional spread

Visits to the UK (2018)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	**6,764**	**559**	**668**
Scotland (SC)	333	58	48
Wales (WA)	86	13	11
Northern Ireland (NI)	55	3	3
London (LDN)	2,967	392	401
North East (NE)	620	17	35
North West (NW)	555	48	31
Yorkshire (YO)	111	12	6
West Midlands (WM)	323	38	35
East Midlands (EM)	186	15	8
East of England (EoE)	543	30	14
South West (SW)	451	36	40
South East (SE)	553	59	45
Nil nights (Nil)	N/A	5	3

Nights

(% share, 2018)



Source: International Passenger Survey by ONS. Visits data for nations and regions includes overnight stays, not day trips.

Data includes Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam

1.2 Getting around Britain: regional spread and top towns and cities

Top towns and cities visited (2013-2018)

Town	Average yearly overnight visits (000s)
London	446
Edinburgh	40
Manchester	36
Glasgow	16
Birmingham	15

Regional spread 2016-2018

Share of nights…	Scotland	Wales	London	Rest of England	Northern Ireland
Singapore	14%	1%	46%	38%	<1%
Malaysia	8%	3%	36%	52%	1%
Thailand	8%	11%	25%	56%	<1%
Indonesia	8%	1%	40%	50%	0%
Southeast Asia	**9%**	**4%**	**38%**	**49%**	**<1%**
All markets	**8%**	**2%**	**41%**	**47%**	**1%**

Almost 1-in-2 nights spent by Southeast Asian visitors in the UK on average in 2016-2018 was spent in regional England (outside of London), which slightly over indexes compared to the all-market average (49% vs. 47%).

However, London is still the most visited city for Southeast Asians. Other popular cities include Edinburgh, Manchester, Glasgow and Birmingham.

Overall in 2016-2018, visitors from Southeast Asia spend more nights on average in Northern England and the West Midlands than the all-market average, but fewer in the South East.

Visitors from Southeast Asia are more likely to go to British villages and countryside than to the coast and beaches whilst in the UK.

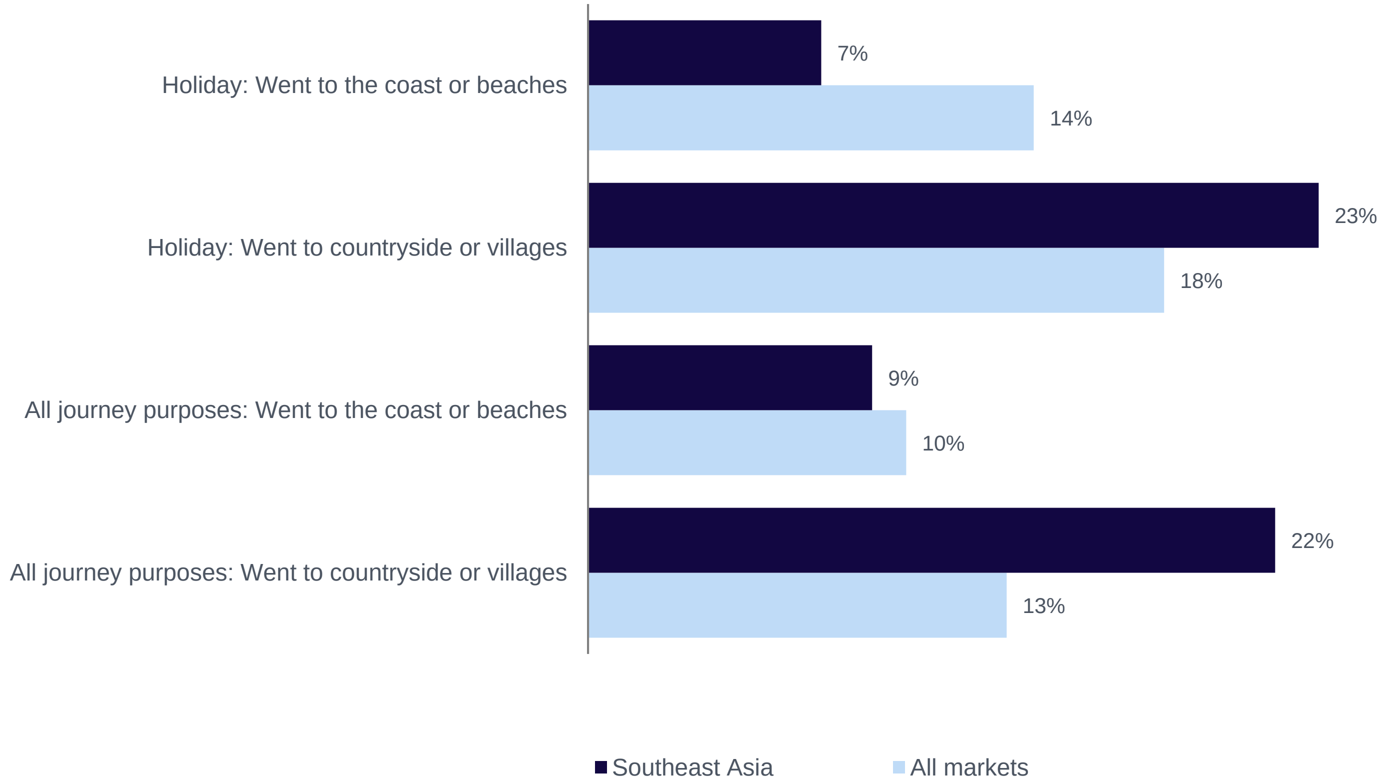
They are also more likely than the all-market average to use most modes of transport while in the UK: they are more likely to use taxis and public transport options within a city, or trains to go outside a city. They are less likely to come to the UK with their own vehicle compared to the all-market average.

*Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors; *To be defined as a package, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.*

Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam

1.2 Getting around Britain: visits to coast, countryside and villages

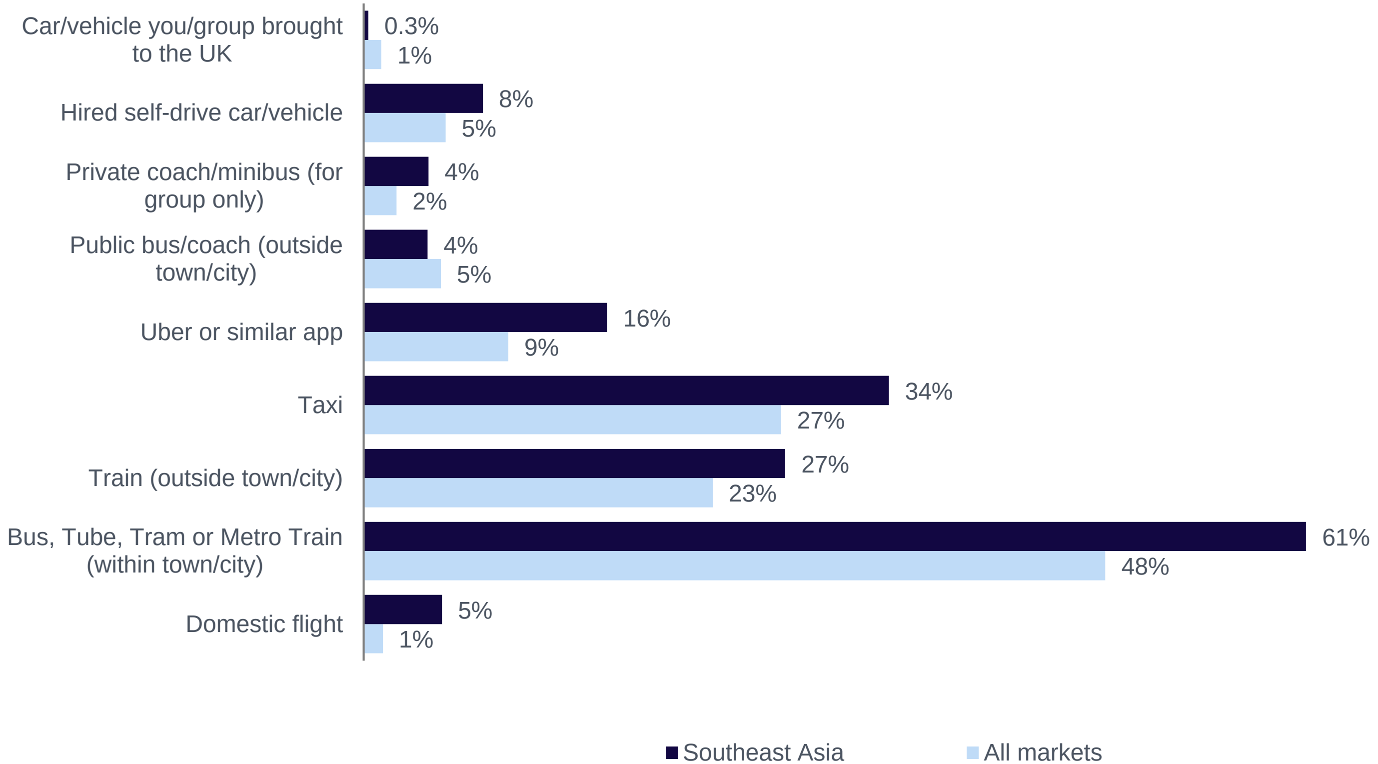
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016
Note: Southeast Asia includes Indonesia, Malaysia, Philippines, Singapore, Thailand

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport



Source: International Passenger Survey by ONS, 2013; Southeast Asia includes Indonesia, Malaysia, the Philippines, Singapore, and Thailand.

1.3 Visitor demographics

Visitor characteristics

Slightly more visits from Southeast Asia to the UK are made by men than women (56% vs. 43% respectively in 2018). This pattern also holds true for holiday and business visits.

45% of Southeast Asian visitors in 2018 were between 25 and 44 years old.

Looking at the age group trend, there has been little growth in the 0-15 cohort over the last several years. This hints at fewer families visiting the UK from Southeast Asia, as a proportion of all visits. The 65+ age group grew the most in percentage terms from 2007 to 2018: retirees therefore account for a bigger share of visits to the UK than before.

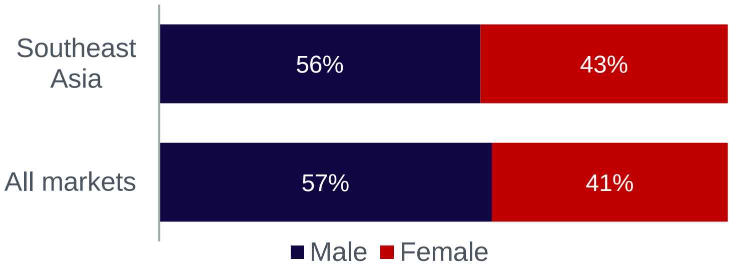
32%

of visits from six key Southeast Asian markets come from Singapore

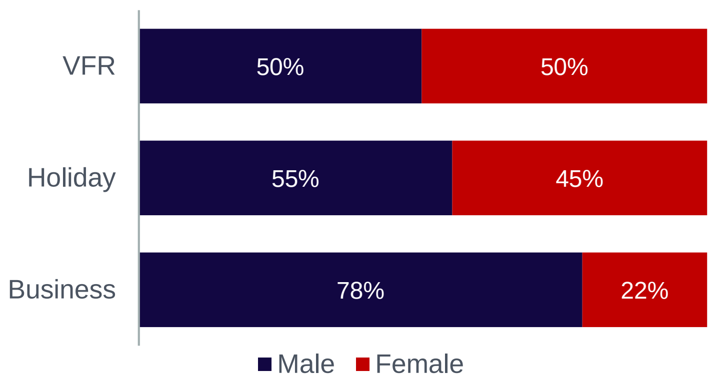
Source: International Passenger Survey by ONS

1.3 Visitor demographics: gender and age groups

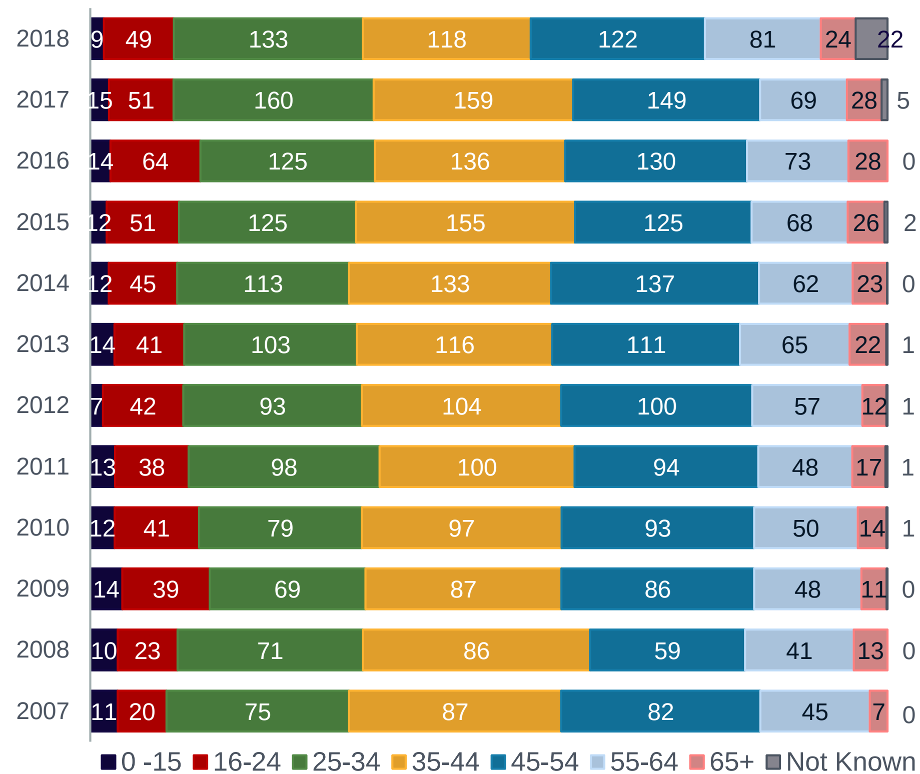
Gender ratio of visits (2018)



Gender ratio of visits from Southeast Asia by journey purpose (2018)*



Age group trend (visits in 000s)



Source: International Passenger Survey by ONS
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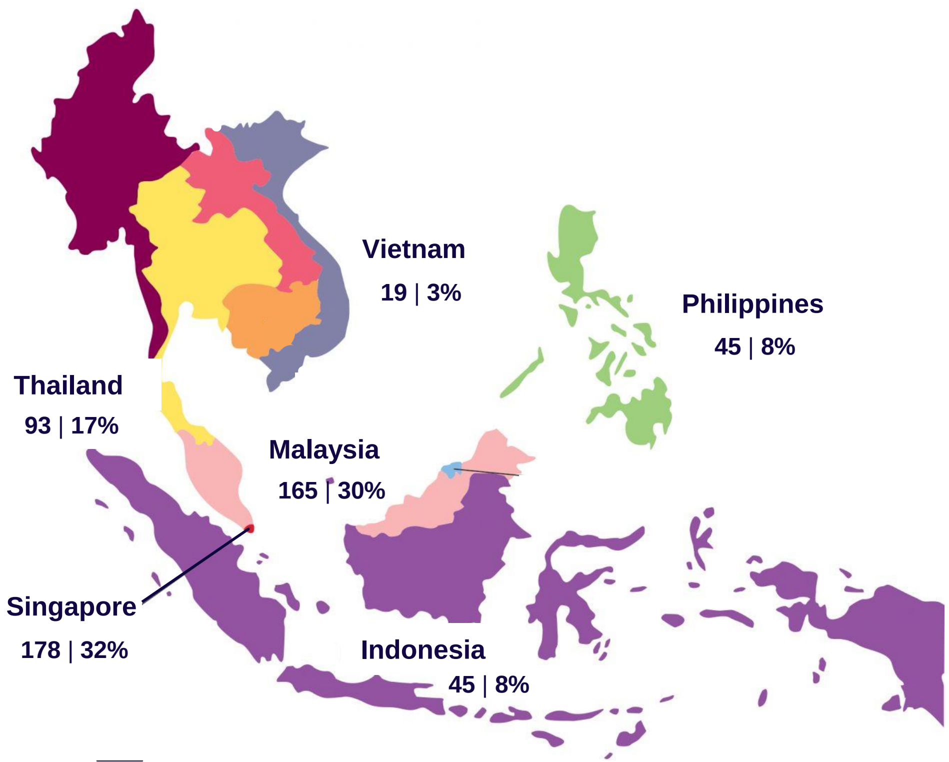
1.3 Visitor demographics: origin



Visits in 000s | Percentage of UK visits within these six countries

Source: International Passenger Survey by ONS (2018)

Visits to the UK

Most visits from Southeast Asia come from Singapore, closely followed by Malaysia, at 33% and 30% respectively.

Thailand is the next largest source of UK visits from Southeast Asia, with 93,000 visits coming from this market in 2018.

Of the major Southeast Asian countries, Indonesia, the Philippines and Vietnam yield the lowest number of UK visits, at less than 1 in 10 each.

Other Southeast Asian countries (Brunei, Cambodia, Myanmar and Laos) were the source of 14,000 visits to the UK in 2018, accounting for 2% of all UK visits across this region when combined.

1.4 The UK and its competitors

Market size, share and growth potential

A large proportion of outbound trips from Southeast Asian countries are within Southeast Asia. This pattern is forecast to be maintained in the next few years.*

Other popular destinations include China, other Northeast Asian countries, India and the Gulf destinations (mainly Saudi Arabia and the UAE).

The UK is forecasted to lose some share in Southeast Asian overnight visits among key competitors up to 2023. This pattern is also seen for the US. India is the only of the selected competitors that is predicted to see significant growth in visits over the same period, with forecasted growth of 6 percentage points within the competitor set.

Looking ahead to 2023, visits from Singapore and Malaysia to the UK are forecasted to grow the most from this region, at 26% and 24% growth respectively.

Southeast Asian travellers are more than two times more likely than the all-market average to come to the UK as part of a multi-country trip.

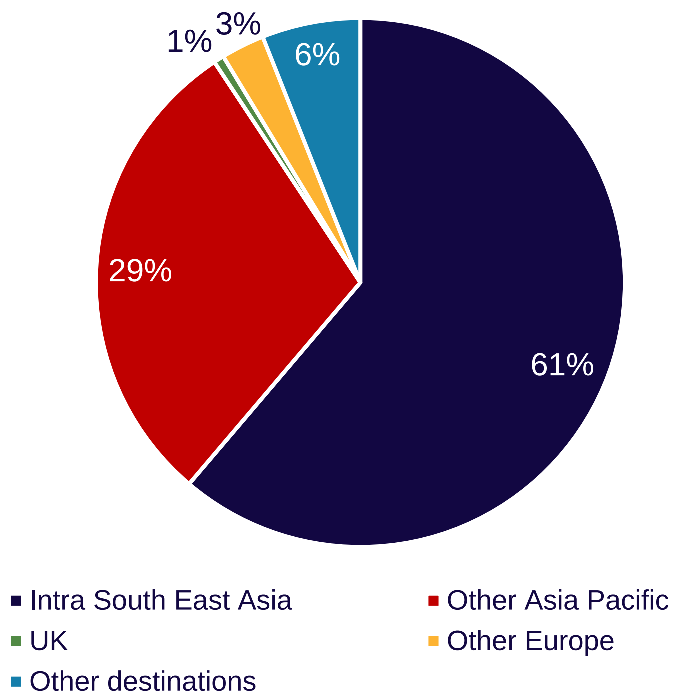
Britain ranks 1st

among SE Asia outbound destinations by volume of overnight stays in Europe

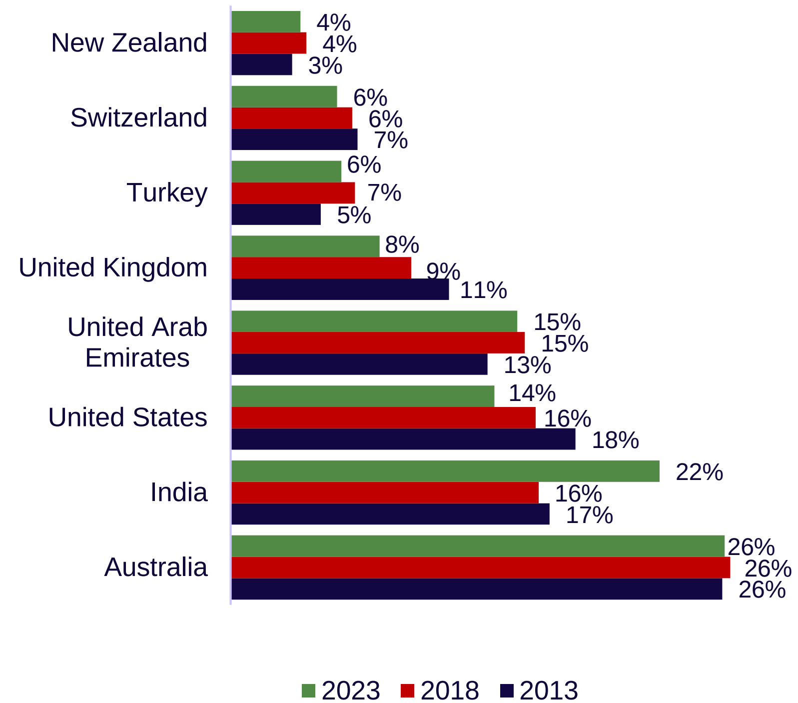
Source: Oxford Economics, Southeast Asia includes Brunei, Cambodia, Indonesia, Lao, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
**Note: these forecasts do not take the potential impact of COVID-19 on inbound tourism from the region into account*

1.4 The UK and its competitors

Britain's market share of total Southeast Asian outbound overnight visits compared to other destinations (2018)



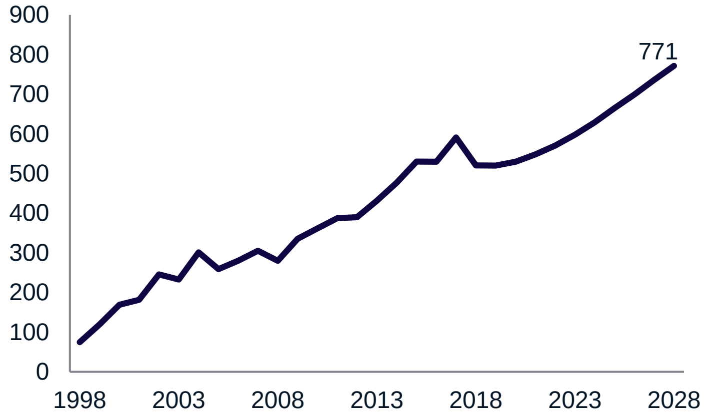
Britain's market share of total Southeast Asian outbound visits among competitor set



Source: Oxford Economics, based on overnight visits
Southeast Asia refers to Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam

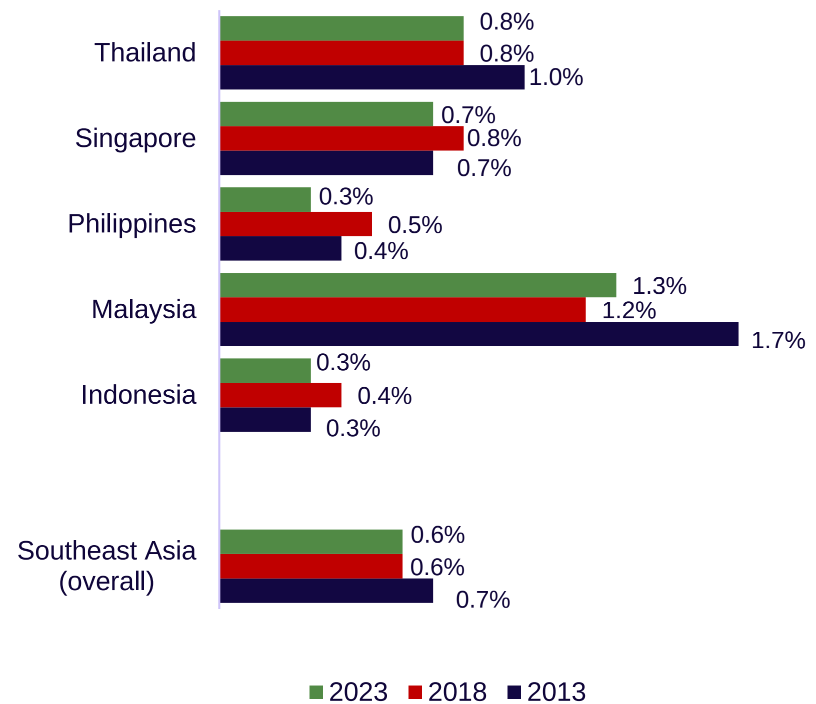
1.4 The UK and its and competitors

Historic and potential visits to the UK (000s)*



Note: these forecasts do not take the potential impact of COVID-19 into account. As of March 3rd 2020, COVID-19 cases are present in Cambodia, Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam. The future effect of this on UK inbound tourism from the region is unknown at present.

Historic and potential visits to the UK by market in share of total outbound visits (%)



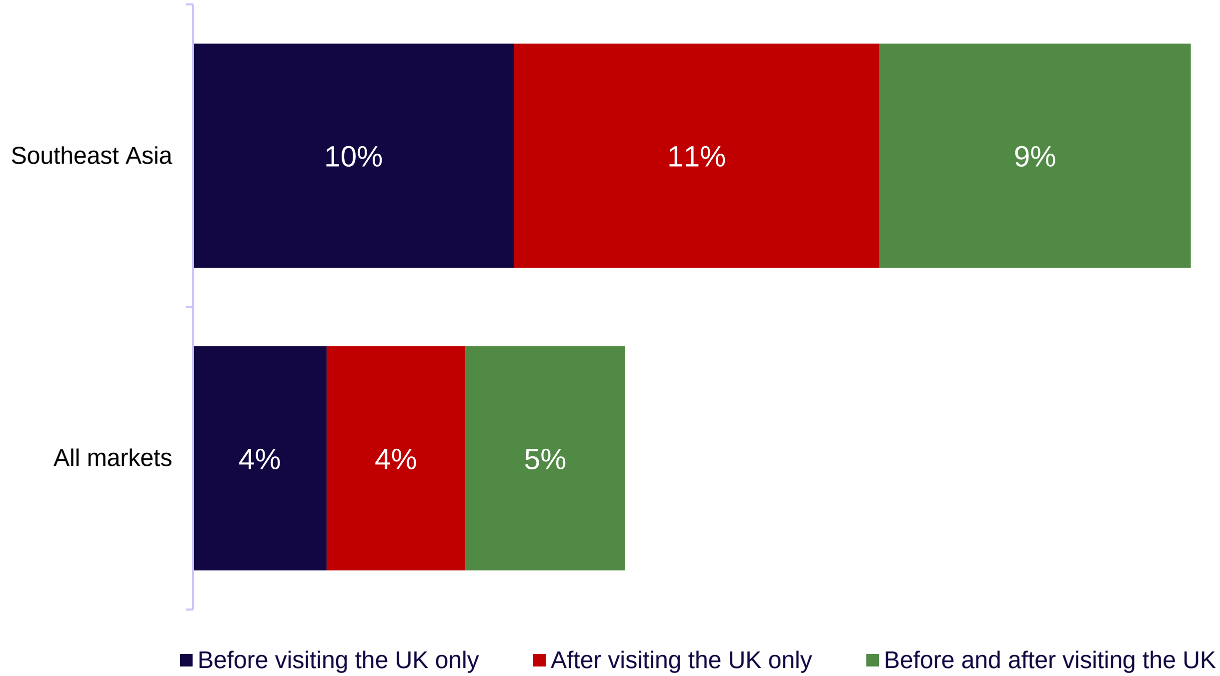
Source: Oxford Economics, based on overnight visits

**Note: includes Indonesia, Malaysia, Philippines, Singapore, and Thailand. Otherwise, data includes Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor Leste (East Timor) and Vietnam*

1.4 The UK and its competitors

Propensity for Southeast Asian travellers to visit the UK as part of a multi-country trip

% visits which included at least a night in another country…



Source: International Passenger Survey by ONS, 2016
Note: Southeast Asia includes Indonesia, Malaysia, Philippines, Singapore & Thailand

Chapter 2:
Experiences and perceptions

2.1 Inbound activities

Among visitors from Southeast Asian countries, going shopping is the most popular activity when they are in the UK, followed by dining in restaurants, visiting parks or gardens and visiting castles or historic houses. Sightseeing famous monuments/buildings also features in visits from this area to the UK.
Southeast Asian visitors are more likely than the all-market average to attend the theatre, a musical, opera or ballet, as well as visit literary, music, TV or film locations.
In contrast, Southeast Asian visitors are less likely than the all-market average to take part in sports activities or walk along the coast or in the countryside.

Top 10 activities for Southeast Asian visitors during their visit to the UK

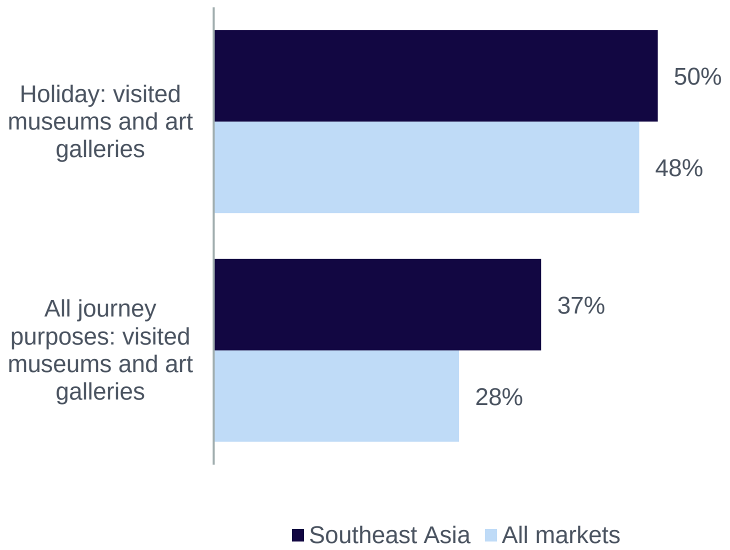
1. Going shopping
2. Dining in restaurants
3. Visiting parks or gardens
4. Visiting castles or historic houses
5. Sightseeing famous monuments/buildings
6. Visiting museums or art galleries
7. Going to the pub
8. Socialising with the locals
9. Visiting religious buildings
10. Walking in the countryside

For more information on activities, please consult our <u>activities page</u>.

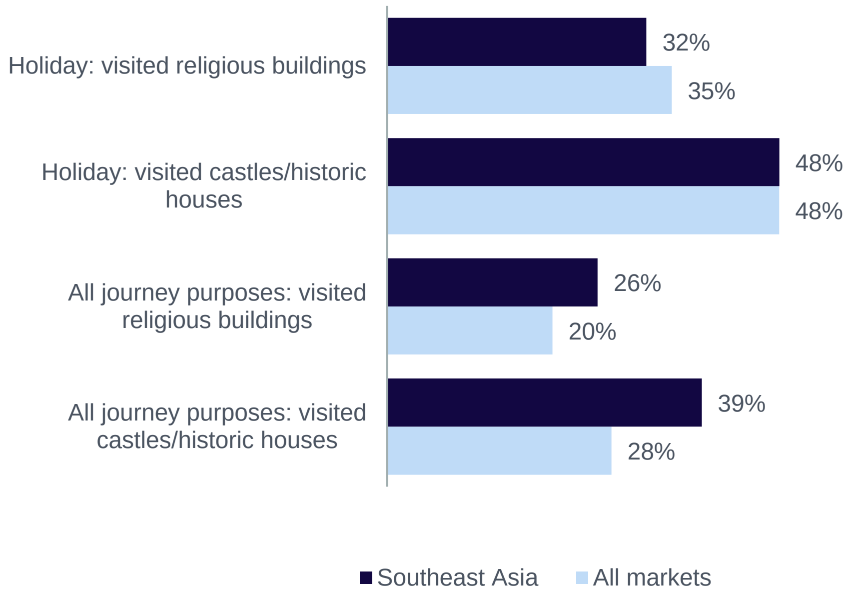
Source: International Passenger Survey by ONS, rankings based on 2007-2017 data, only Indonesia, Malaysia, Philippines, Singapore and Thailand considered

2.1 Inbound activities

Propensity to visit museums and art galleries



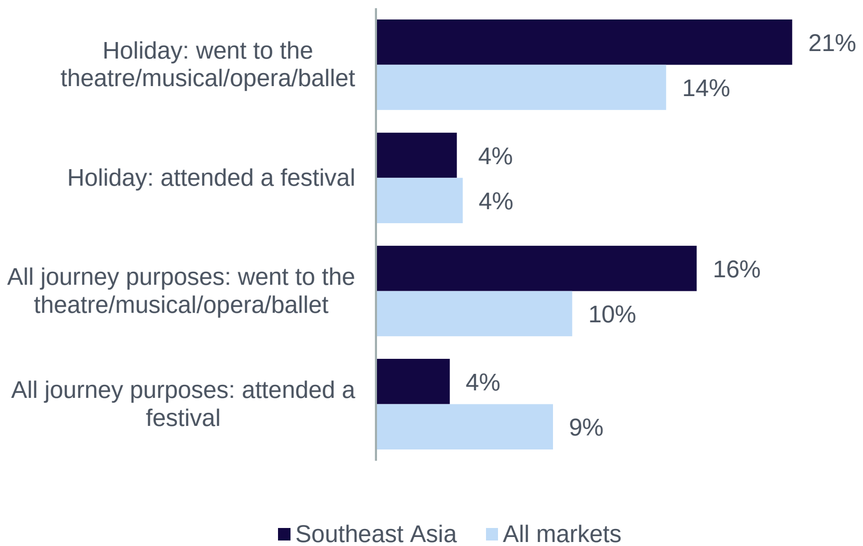
Propensity to visit built heritage sites



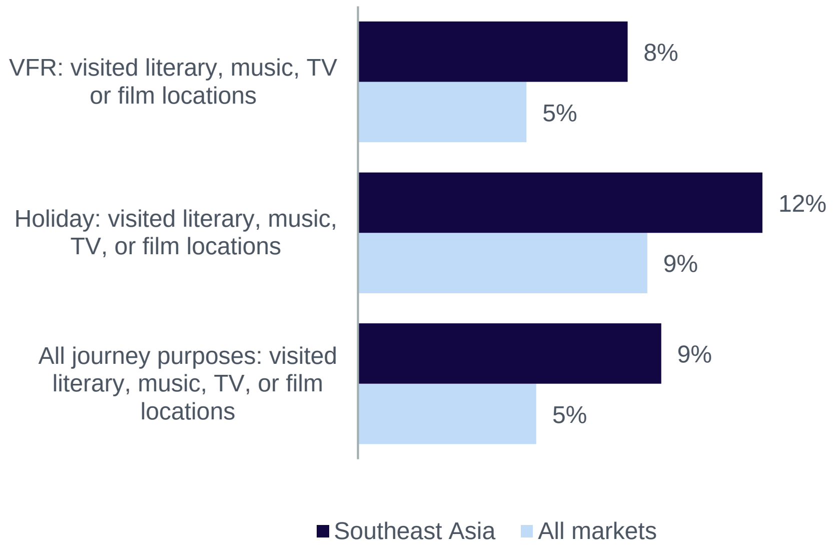
Source: International Passenger Survey by ONS, 2016
Note: Southeast Asia includes Indonesia, Malaysia, Philippines, Singapore, Thailand

2.1 Inbound activities

Propensity to attend the performing arts



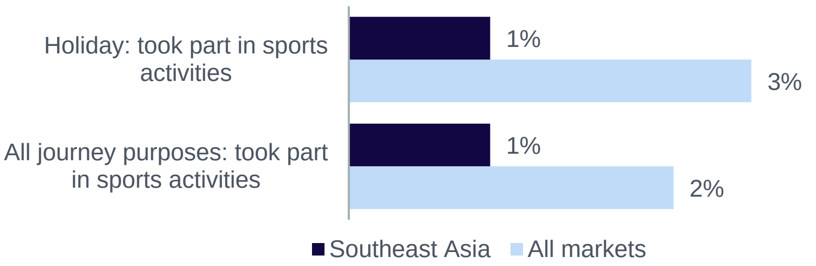
Propensity to visit literary, music, TV or film locations



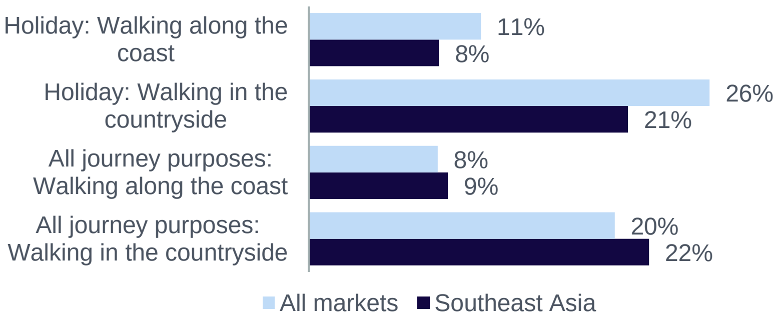
Source: International Passenger Survey by ONS, 2017 (live music, visiting literary, music, TV or film loations), 2016 (other performing arts)
Note: Southeast Asia includes Indonesia, Malaysia, Philippines, Singapore, Thailand

2.1 Inbound activities

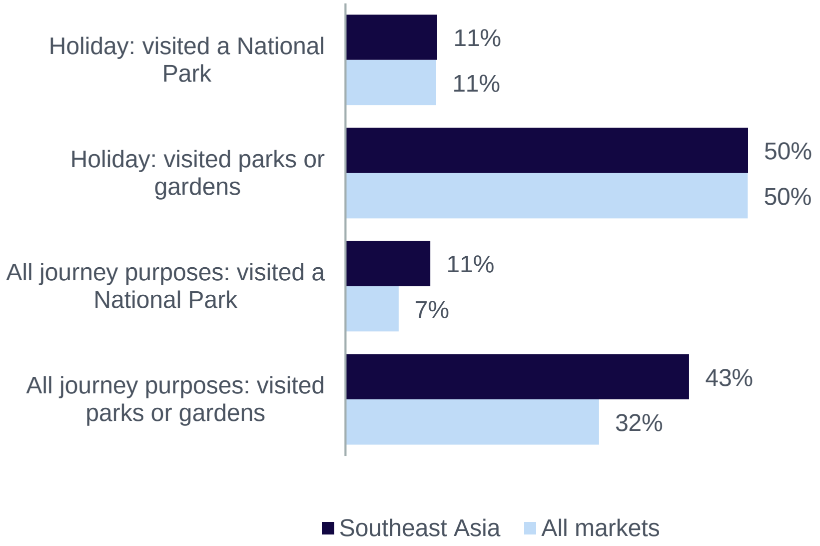
Propensity to take part in sports activities



Propensity to walk in the countryside or walk along the coast



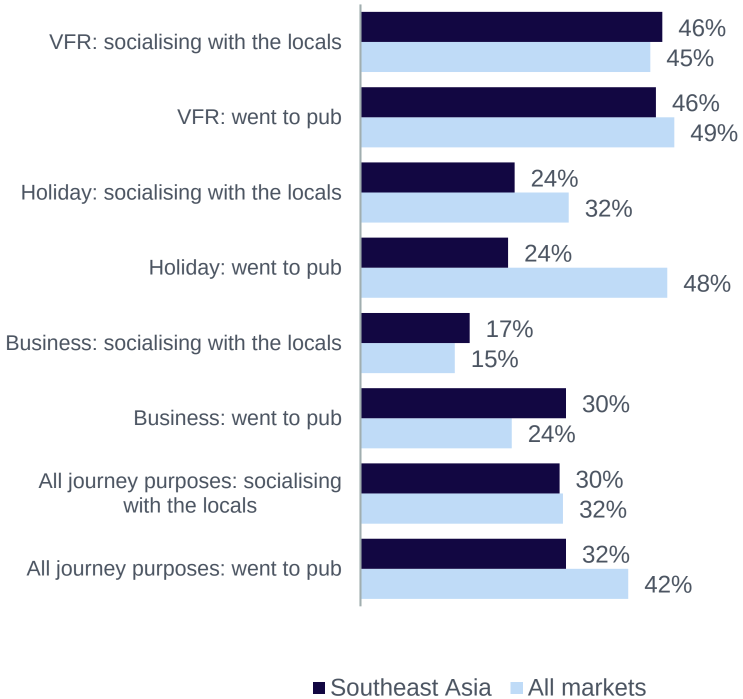
Propensity to visit a park/garden or a national park



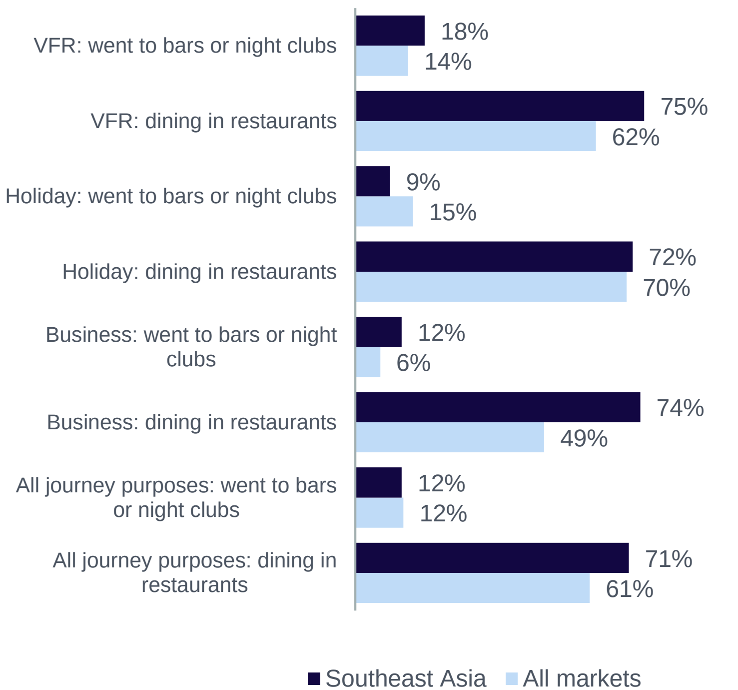
Source: International Passenger Survey by ONS, 2016 (visiting a park/garden and visiting a national park), 2011 (sports activities), 2007 (walking in the countryside)
Note: Southeast Asia includes Indonesia, Malaysia, Philippines, Singapore, Thailand

2.1 Inbound activities

Propensity to go to a pub, and socialise with the locals



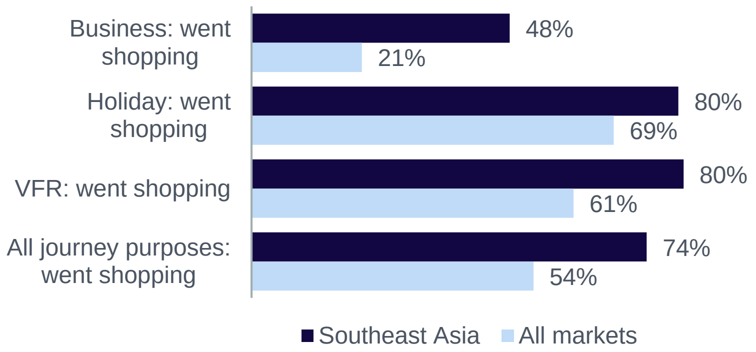
Propensity to go dining in restaurants, or to go to bars or night clubs



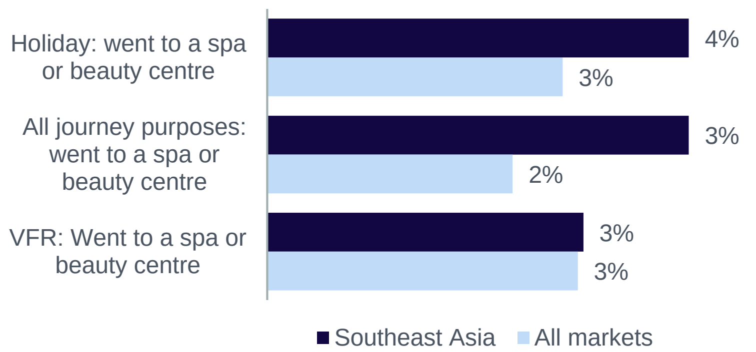
Source: International Passenger Survey by ONS, 2008 (dining in restaurants), 2017 (other activities)
Note: Southeast Asia includes Malaysia, Singapore, Thailand

2.1 Inbound activities

Propensity to go shopping



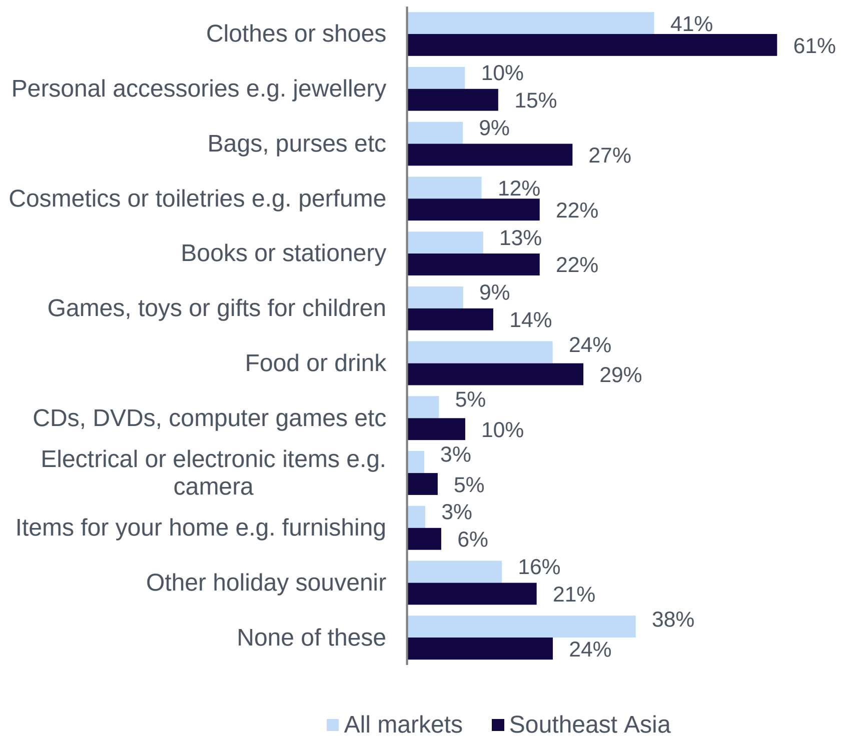
Propensity to go to a spa or beauty centre



Source: International Passenger Survey by ONS, 2017

Note: Southeast Asia includes Malaysia, singapore, Thailand

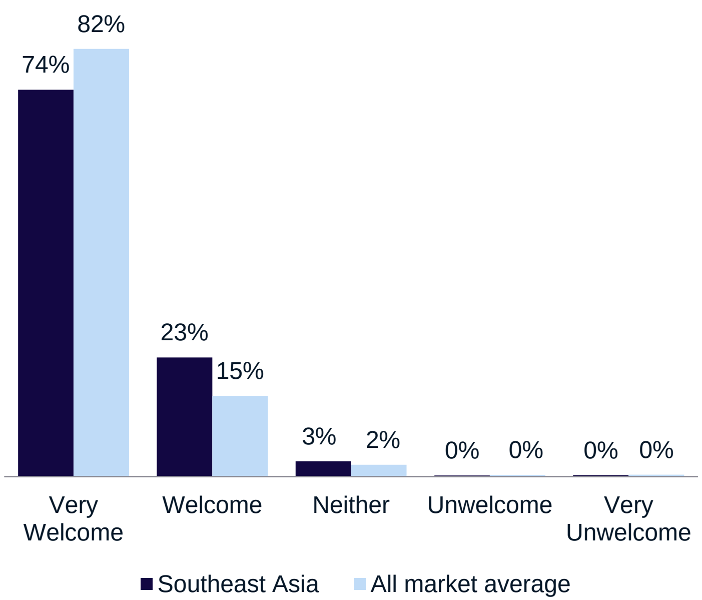
Propensity to purchase selected items



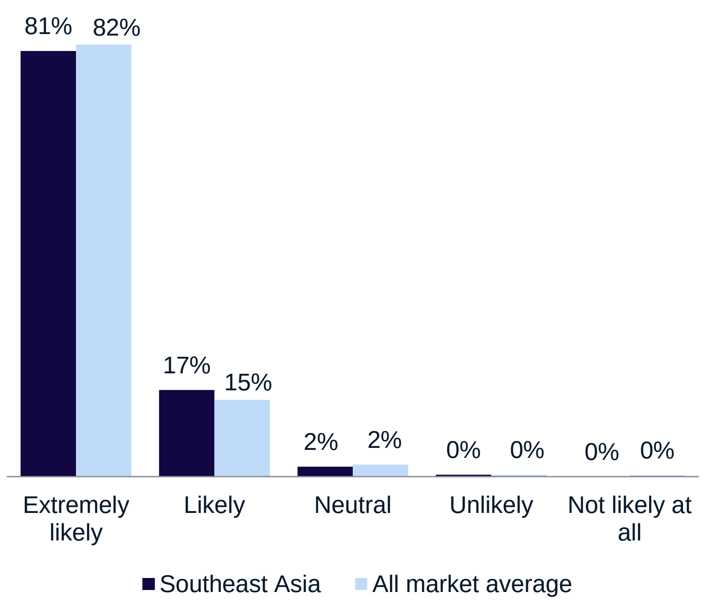
Source: International Passenger Survey by ONS, 2013

2.2 Welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Leisure visitors from Southeast Asia are less likely than the all-market average to feel 'very welcome' in Britain, however 74% did feel this way. They are more likely than the all-market average to feel 'welcome'.
Southeast Asian visitors are similarly likely to recommend Britain to friends and family after their trip compared to other global markets, with 98% likely to do so.

Source: IPS 2017

Note: Southeast Asia includes Indonesia, Malaysia, Philippines, Singapore, Thailand

2.3 Perceptions of Britain

Overall, the travel trade reports that perceptions of Britain in Southeast Asia are favourable.

Looking at Singapore and Indonesia, though, we can see some differences between what they expect from a holiday trip and their perceptions of Britain compared to other destinations.

For example, Singaporeans would prefer destinations that offer good value for money, and provide fun and laughter, while Indonesians rank higher their need to feel physically healthier, and for peace and quiet in a holiday destination. Australia ranks quite well in each case, compared to Britain.

However, both markets rank Britain highly for the possibility to watch some sporting events live while visiting. Both clearly have a higher interest in the Premier League football matches than in other top European football leagues.

Singapore in particular ranks the UK highly for the historic and iconic sites they might be able to visit there.

Areas of strength for Britain:
historic sites and sports events

Source: Arkenford 2013, Statista.com from YouGov 2014

2.3 Perceptions of Britain: Singapore

Holiday wants and % saying destination is best place for…

Importance	Attribute (20 most important)	UK	France	Italy	Australia	US	Germany
5.87	Offers good value for money	14%	17%	17%	28%	22%	12%
5.84	Have fun and laughter	14%	12%	9%	31%	26%	8%
5.81	Enjoy the beauty of the landscape	39%	42%	45%	50%	33%	30%
5.75	See world famous sites and places	46%	48%	51%	28%	37%	31%
5.70	Enjoy peace & quiet	21%	24%	23%	42%	14%	20%
5.70	Enjoy local specialities (food and drink)	12%	39%	34%	18%	18%	19%
5.66	Explore the place	28%	33%	32%	37%	27%	20%
5.66	Easy to get around by public transport	31%	21%	17%	26%	28%	18%
5.66	The people are friendly and welcoming	21%	18%	20%	29%	25%	14%
5.66	It offers unique holiday experiences	31%	36%	37%	37%	33%	27%
5.64	Do something the children would really enjoy	27%	23%	20%	53%	50%	17%
5.64	Provides a wide range of holiday experiences	29%	30%	29%	41%	43%	22%
5.63	Experience things that are new to me	18%	28%	29%	27%	25%	23%
5.60	Chill/ slow down to a different pace of life	15%	24%	23%	39%	17%	12%
5.56	Broaden my mind/ Stimulate my thinking	28%	29%	31%	31%	31%	27%
5.51	Experience activities/places with a wow factor	26%	27%	24%	32%	28%	20%
5.48	Do what I want when I want spontaneously	9%	6%	18%	23%	25%	11%
5.48	A good place to visit at any time of year	20%	22%	21%	31%	25%	15%
5.46	Have dedicated time with my other half	34%	46%	42%	39%	29%	26%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of Britain: Singapore

Holiday wants and % saying destination is best place for…

Importance	Attributes (20 least important)	UK	France	Italy	Australia	US	Germany
5.44	Feel connected to nature	28%	27%	33%	55%	33%	22%
5.44	Be physically healthier	22%	21%	23%	34%	17%	18%
5.41	Enjoy high quality food and drink (gourmet food)	21%	55%	43%	30%	30%	22%
5.39	Soak up the atmosphere	39%	35%	44%	45%	24%	23%
5.24	Good shopping	20%	30%	30%	27%	46%	12%
5.19	Visit a place with a lot of history/historic sites	53%	49%	51%	25%	30%	39%
5.15	Feel special or spoilt	17%	36%	26%	27%	20%	17%
5.15	Revisit places of nostalgic importance to me	22%	27%	22%	21%	22%	16%
4.86	Meet the locals	12%	19%	37%	30%	30%	7%
4.83	Get off the beaten track	19%	29%	19%	40%	25%	11%
4.76	Do something environmentally sustainable/ green	9%	19%	17%	44%	9%	24%
4.75	Experience adrenalin filled adventures	5%	18%	13%	49%	41%	17%
4.73	Get some sun	23%	25%	26%	52%	38%	12%
4.62	Fashionable destination	28%	51%	45%	22%	39%	18%
4.53	Meet and have fun with other tourists	10%	31%	32%	48%	54%	15%
4.52	To participate in an active pastime or sport	29%	24%	21%	38%	27%	26%
4.51	Visit places important to my family's history	22%	27%	27%	27%	23%	21%
4.45	Go somewhere that provided lots of laid on entertainment/nightlife	32%	29%	33%	33%	46%	25%
4.26	Do something useful like volunteering to help on a project	16%	35%	18%	23%	33%	28%
4.18	Party	32%	25%	14%	47%	33%	24%
3.87	Watch a sporting event	41%	14%	22%	21%	28%	23%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of Britain: Indonesia

Holiday wants and % saying destination is best place for…

Importance	Attributes (20 most important)	UK	France	Italy	Australia	US	Germany
6.35	Be physically healthier	32%	41%	37%	45%	29%	32%
6.34	Enjoy peace & quiet	24%	39%	43%	40%	16%	21%
6.32	Enjoy the beauty of the landscape	37%	46%	45%	61%	30%	23%
6.31	See world famous sites and places	50%	70%	59%	42%	49%	43%
6.29	Broaden my mind/ Stimulate my thinking	43%	60%	53%	45%	45%	44%
6.26	The people are friendly and welcoming	36%	44%	42%	43%	28%	27%
6.24	Have dedicated time with my other half	37%	74%	63%	47%	34%	34%
6.23	It offers unique holiday experiences	44%	61%	60%	50%	40%	38%
6.21	Experience activities/places with a wow factor	29%	63%	53%	42%	30%	29%
6.21	Enjoy local specialities (food and drink)	28%	59%	68%	34%	25%	32%
6.20	Experience things that are new to me	30%	52%	41%	40%	47%	28%
6.15	Provides a wide range of holiday experiences	42%	58%	57%	50%	47%	38%
6.13	A good place to visit at any time of year	33%	53%	48%	51%	38%	27%
6.10	Have fun and laughter	33%	45%	31%	41%	36%	28%
6.10	Feel connected to nature	24%	25%	21%	65%	16%	19%
6.06	Explore the place	30%	46%	49%	46%	26%	27%
6.06	Do something the children would really enjoy	35%	41%	39%	58%	48%	30%
6.01	Chill/ slow down to a different pace of life	29%	47%	37%	37%	25%	23%
5.99	Easy to get around by public transport	47%	52%	46%	47%	50%	44%
5.93	Revisit places of nostalgic importance to me	26%	49%	45%	35%	21%	26%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of Britain: Indonesia

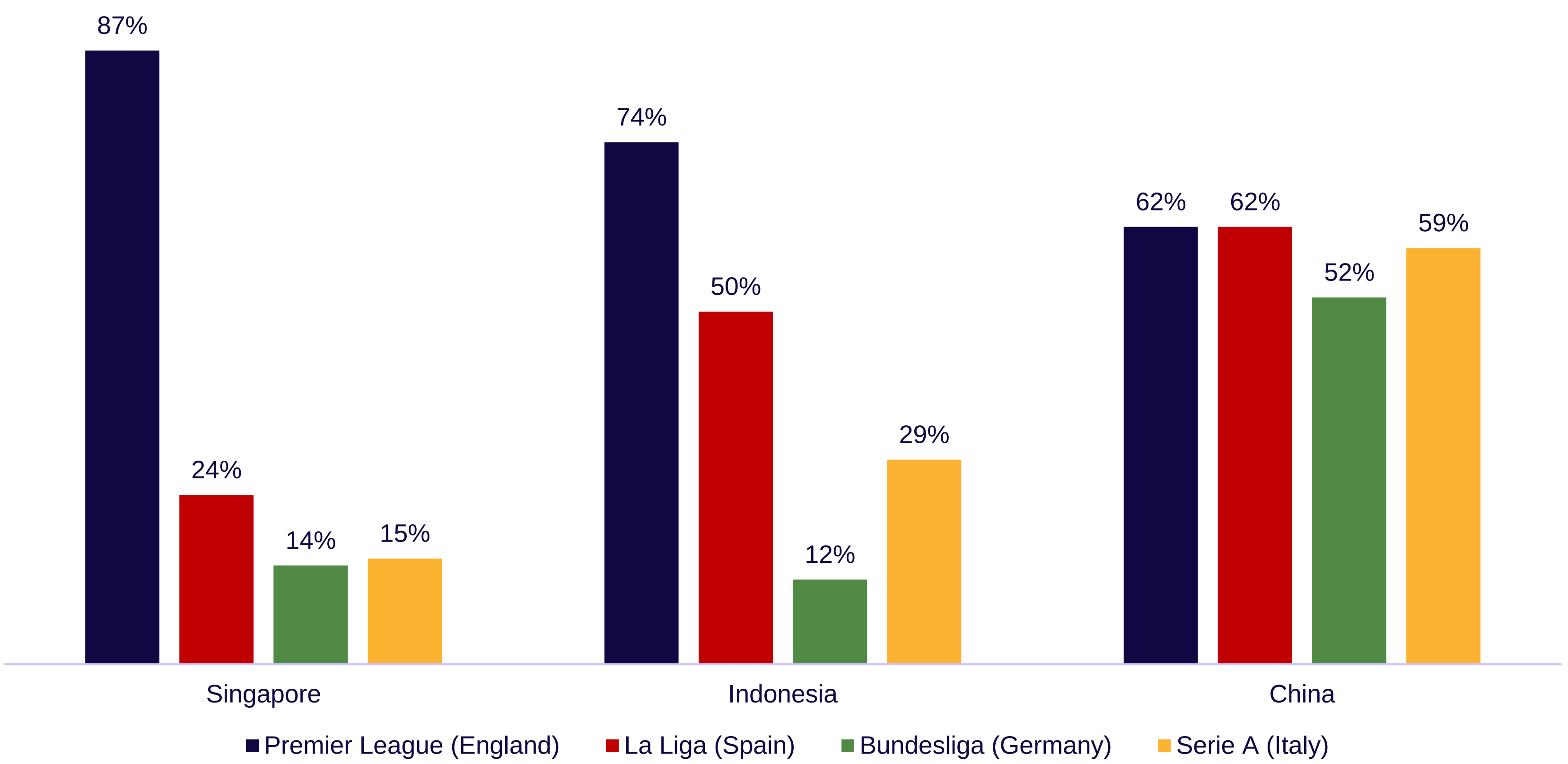
Holiday wants and % saying destination is best place for…

Importance	Attributes (20 least important)	UK	France	Italy	Australia	US	Germany
5.89	Offers good value for money	33%	56%	50%	33%	36%	30%
5.88	Do something environmentally sustainable/ green	34%	43%	34%	33%	39%	42%
5.85	Visit a place with a lot of history/historic sites	50%	67%	67%	28%	27%	48%
5.80	Good shopping	29%	51%	43%	36%	40%	19%
5.75	Enjoy high quality food and drink (gourmet food)	20%	77%	65%	31%	33%	26%
5.64	Do what I want when I want spontaneously	25%	48%	36%	45%	30%	45%
5.57	Visit places important to my family's history	17%	30%	25%	29%	25%	24%
5.55	Get off the beaten track	31%	21%	50%	33%	21%	25%
5.46	Feel special or spoilt	19%	47%	45%	34%	21%	14%
5.41	To participate in an active pastime or sport	43%	34%	44%	42%	36%	30%
5.38	Meet the locals	39%	26%	28%	73%	32%	41%
5.38	Meet and have fun with other tourists	28%	27%	35%	54%	27%	5%
5.29	Experience adrenalin filled adventures	28%	36%	31%	44%	30%	28%
5.29	Get some sun	16%	37%	36%	51%	25%	19%
5.17	Fashionable destination	29%	79%	67%	19%	38%	19%
5.04	Soak up the atmosphere	67%	45%	45%	22%	55%	0%
4.97	Do something useful like volunteering to help on a project	37%	39%	33%	21%	38%	26%
4.76	Go somewhere that provided lots of laid on entertainment/nightlife	42%	67%	52%	49%	62%	31%
4.62	Party	51%	68%	42%	56%	47%	34%
4.61	Watch a sporting event	44%	41%	47%	26%	33%	32%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of Britain: focus on football

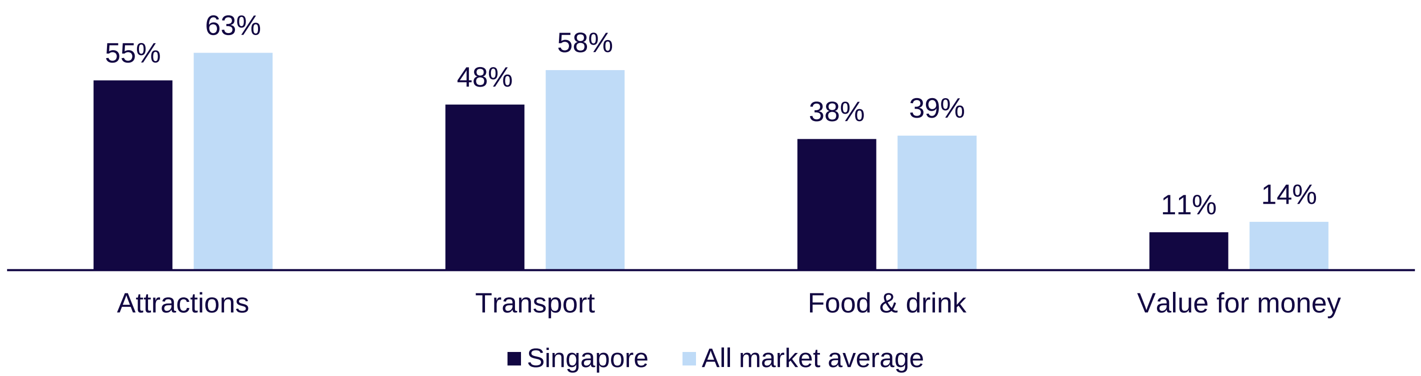
Interests in British Premier League compared to other similar European offers (2014)



Source: Statista.com from YouGov 2014

2.3 Visitor experience: Singapore

Trip satisfaction (% very satisfied)



When it comes to trip satisfaction, visitors from Singapore are generally less satisfied with their trip when compared to the all market average. Across attractions, transport, food and drink, they demonstrate lower satisfaction scores than other global markets. They are most likely to feel very satisfied with the UK's attractions (55%) and least likely to be satisfied with value for money (11%).

Source: IPS 2015, overnight visitors, excluding UK nationals

Chapter 3:

Understanding the market

3.1 Structural drivers

Southeast Asian countries are mostly linked together by ASEAN; the Association of Southeast Asian Nations, an intergovernmental organisation created in 1967 to promote economic, politic, security, military, social-cultural and educational cooperation in the area. It is headquartered in Jakarta, Indonesia, and gathers this country and Malaysia, the Philippines, Singapore, Thailand, Brunei, Cambodia, Laos, Myanmar, and Vietnam. Only Timor-Leste (East Timor) is not part of the association.

All these countries have been marked by colonialism and the Cold War. Vietnam and Laos are communist states, while Timor-Leste, Indonesia, Myanmar, and Singapore are republics. Brunei is an absolute monarchy and the other nations are parliamentary constitutional monarchies.

Southeast Asian culture is diverse, with Asian, Arabic as well as European heritage. Indonesia is the most populated country in the region and has the largest Muslim population in the world, which greatly influences travel trends. The urbanisation rate, demographics and economies of these countries also affect travel patterns. Singapore has, proportionately, the largest migrant population in this region as well as (Brunei aside) the highest GDP per capita in the area by far. It also has the most mature outbound market with people willing to escape the mega city they live in by travelling abroad.

Economic growth in some markets across the region has been significantly impacted by the US-China trade war in 2019.

4th
most populated country in the world: Indonesia

Source: Oxford Economics, CIA World Factbook 2019

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure – 2019 estimates (unless otherwise stated)	**Singapore**	**Malaysia**	**Thailand**	**Indonesia**	**Philippines**	**Vietnam**
Total population (m)	5.8	32.0	69.7	271.0	108.3	96.4
Median age (years, 2020 est.)	35.6	29.2	39.0	31.1	24.1	31.9
Population growth rate between 2019-2023 (%)	+3.6	+5.1	+0.8	+4.1	+5.4	+3.3
Proportion of international migrants (% of total population)	37.1%	10.7%	5.2%	0.1%	0.2%	0.1%

Indonesia is the most populated country in Southeast Asia, and the 4th most populated country in the world.

Overall, the population in Southeast Asia is quite young, with all markets' median age at around 30 years old or less, aside from Singapore and Thailand. Southeast Asian populations are forecast to grow.

All inhabitants in Singapore live in an urban area, about 3-in-4 in Brunei and Malaysia, and just above 1-in-2 in Indonesia and Thailand. Thus the main visitor source markets to the UK have the highest urbanisation rates in the region.

Apart from Brunei, Singapore and Malaysia, immigrants constitute fewer than 1-in-10 inhabitants in Southeast Asian countries (the global average is 3.5%). However, different cultures still cohabite in this area where Christians, Muslims, and Buddhists are all well represented. For example, in Malaysia alone, the population is an estimated 61% Muslim, 20% Buddhist, 9% Christian, and 6% Hindu, among other religious groups.

The population of HNWIs* in Indonesia grew between 2017 and 2018, and Indonesia is currently ranked 23rd for population of HNWIs globally; the only country in the region to rank in the top 25.

Source: Oxford Economics, CIA World Factbook 2020, UN Migration report 2019 Highlights, Capgemini Asia Pacific Wealth Report 2019
**HNWIs: stands for High Net Worth Individuals, people whose liquid assets are worth US$1m or over*

3.1 Structural drivers: economic indicators

Previously strongly growing economies in Southeast Asia have been negatively hit by the US-China trade war in 2019.

Singapore and Thailand's economies slumped in 2019 due to a drop in Chinese exports, as well as welcoming fewer tourists from China.

However, some countries in the region have been beneficiaries, with Vietnam and Cambodia enjoying increased exports to the US as investment moves away from China.

However, Southeast Asian economies have been seen to remain resilient in the face of economic challenges, and increased domestic demand may buffer these markets against global headwinds.

Rising GDP per capita is set to boost the middle class in the region's main markets, who will look to travel more and further than before to enjoy their holiday allowance (between 12 and 26 days, including public holidays).

GDP per capita PPP (US$)

	2019
Singapore	78,760
Malaysia	26,292
Thailand	15,360
Indonesia	10,695
Philippines	7,390
Vietnam	6,262

GDP yearly growth rate (real, %)

	2019	2020	2021
Singapore	0.7	1.0	2.7
Malaysia	4.5	3.9	4.4
Thailand	2.3	2.0	3.7
Indonesia	5.0	4.9	5.3
Philippines	5.9	5.9	6.0
Vietnam	7.0	6.5	6.5

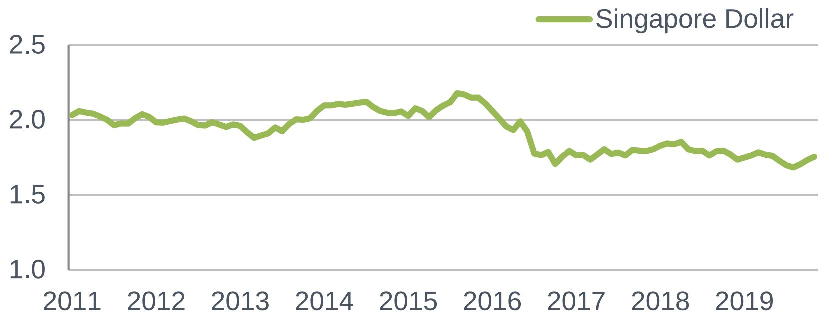
Consumer spending growth rate (real, %)

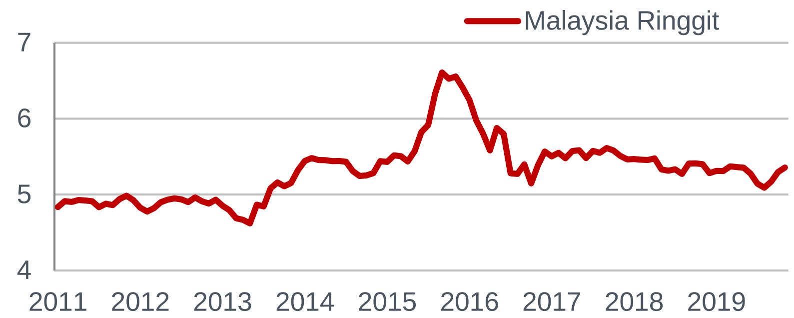
	2019	2020	2021
Singapore	4.2	2.3	3.8
Malaysia	7.3	5.2	4.5
Thailand	4.4	3.4	3.4
Indonesia	5.2	5.2	5.4
Philippines	5.8	5.8	5.4
Vietnam	7.31	6.62	6.26

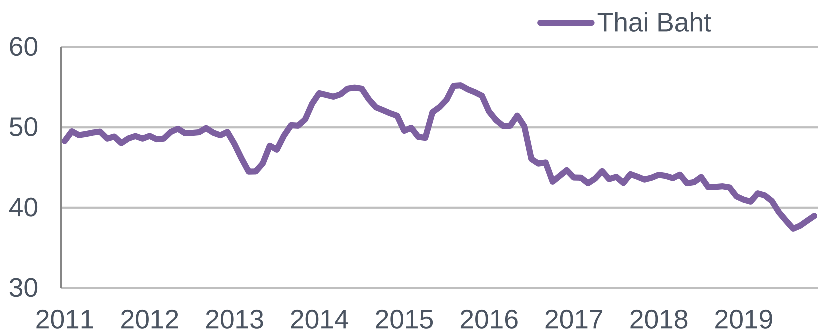
Source: Oxford Economics, CIA World Factbook 2019, McKinsey 'Urban World: Global Consumers to watch' April 2016 report, Public Holidays

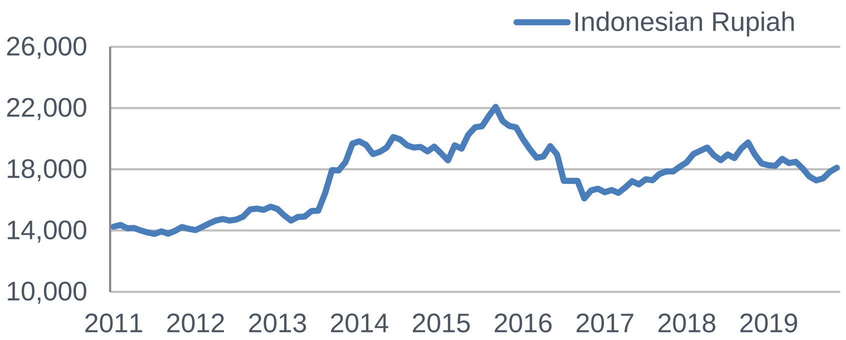
3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in SGD, MYR, THB, and IDR)









Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source: Bank of England

3.2 Consumer trends

Southeast Asia is a diverse area where trends, and more precisely travel trends, can be quite varied. However, some commonalities exist across the region.

As the region has been developing, travel needs have been changing too. Higher education can be an important draw for some parents who want to send their children to English-speaking countries in order to improve their employability in the future. Malaysia, Singapore and Thailand are among the top 10 non-EU source countries of students attending higher education courses in the UK. This trend is becoming more prominent in Indonesia too.

In those source markets, and in Indonesia in particular, cultural heritage is also determinant in terms of holiday trends. In 2020, Muslims represent two thirds or more of the population in Malaysia, Brunei and Indonesia. Therefore destinations that are seen as Muslim-friendly are among the top preferred destinations in the region as people know those will be able to better cater for their needs and suit their values, which is especially important for families travelling together.

Finally, as wealth grows in this region, the appetite for luxury travel grows too, including a particular segment of female sole travellers.

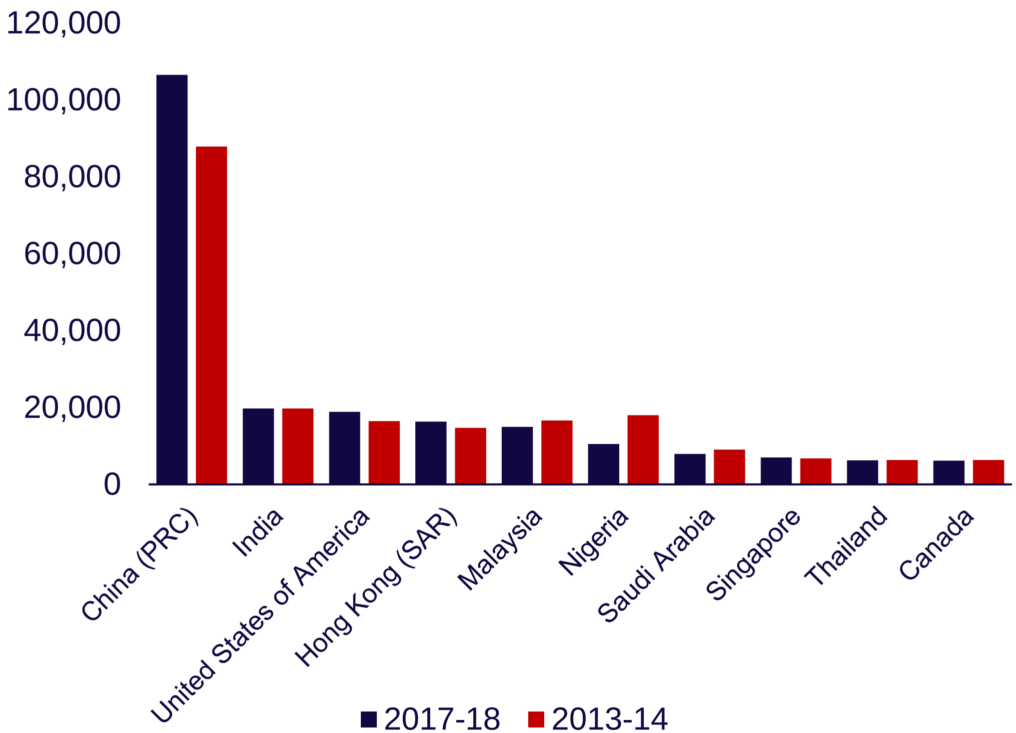
3

Southeast Asian markets are in the top 10 non-EU source countries for higher education

Sources: UKCISA/HESA, Pew Research Center, Oxford Economics, Capgemini Asia-Pacific World Wealth Report, Foresight Factory

3.2 Consumer trends: the UK as a key destination for studying

HE student enrolments from top 10 non-European countries



Focus on education

Studying in English is often seen as a way to improve employability, and English tests are often taken at high school level to improve students' chances of being able to study abroad in an English-speaking country. Britain is one of the favourite destinations to study English or in English abroad.

Three main Southeast Asian markets are in the top non-EU source countries by volume of students sent to the UK to attend higher education courses: Malaysia, Singapore and Thailand. As a consequence it is not rare to see families visiting their children at university in Britain, or sending them to visit before applying for those courses, or even coming to find accommodation all together. Education is thus an important way to promote visits to the UK in those markets.

Source: Foresight Factory (local perspective), UKCISA/HESA

3.2 Consumer trends: Muslim-friendly destinations

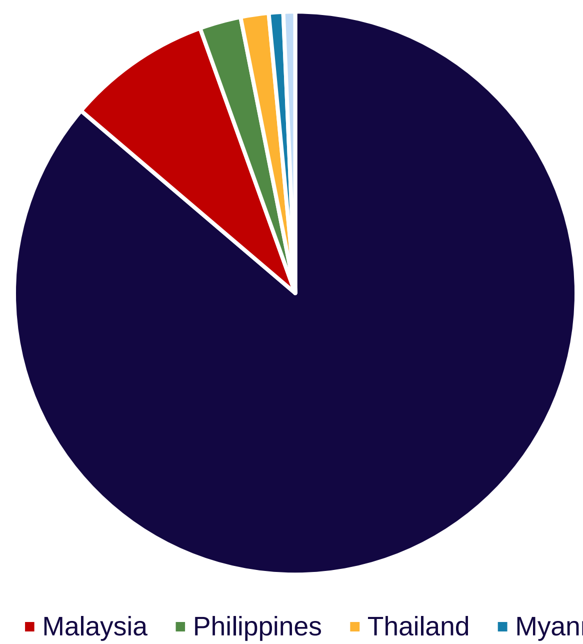
Indonesia has the largest Muslim population in the world

Saudi Arabia is Southeast Asia's first destination by volume of outbound overnight visits outside of the immediate region.

The Muslim culture has a great influence in much of Southeast Asia, especially in Malaysia, Brunei and Indonesia (Muslims are forecast to constitute 66%, 75%, and 87% of their respective populations in 2020). Islam's main celebrations are public holidays in some Southeast Asian countries such as Indonesia and Malaysia, but also in Singapore and Thailand.

When it comes to travel, many would prefer going to destinations that cater for their specific food requirements and other religious obligations such as praying. So even outside of pilgrimage, going to other Muslim-majority country or Muslim-friendly destination is popular, most of all for families. On their way to Mecca for pilgrimage, Southeast Asians are also likely to make stopovers to Istanbul or Dubai.

Muslim population in Southeast Asia by country in 2020



Source: Oxford Economics, Pew Research Center, Public Holidays, Google Top Travel Trends

3.2 Consumer trends: luxury travel and shopping

A growing market for luxury goods and experiences

Thanks to economic growth in these markets, and also thanks to the growth of the High Net Worth Individual (HNWI) population in the area, the appetite for luxury goods and experiences is growing in Southeast Asia, especially in Indonesia and Thailand. Singapore also boasts the highest GDP per capita of all Southeast Asian countries by far, and has been a key market for luxury for a long time already.

The desire for experiential luxury, compared to more material luxury, in these markets is shifting slowly, with the exception of Singapore, which is already a mature luxury market. Long-haul travel is a key aspiration for many, but is still often linked to retail experiences. Many travellers would travel to explore the culture of their destination, and to see the most famous sites, but also to shop for iconic brands abroad. Shopping, as much as relaxing away from a stressful life in a busy city, can also be a strong motivator for travel.

Southeast Asians are no stranger to luxury travel offers: the region itself boasts some key destinations for luxury travel and shopping. As a consequence, Southeast Asians can be quite assertive in the type of luxury goods and experiences they want to enjoy.

Most would be attracted to Europe for its culture, and for some brands to an extent. Some would also have had the possibility to fly to Europe for work and might have been able to extend a business trip there for leisure. Some might have studied there or sent their children there, so visiting them is an important draw, as well as key sites and destinations within the continent.

Source: Capgemini Asia-Pacific Wealth Report, Oxford Economics, Foresight Factory

3.2 Consumer trends: other travel trends

Growing health concerns and influence on travel trends

Influenced by Eastern philosophies, but also thanks to the standard of living of the growing middle class, more and more people have a growing interest in healthy living. It is not just about maintaining appearance or fitness, but also taking part in sports to feel well and relax, as well as eating well and using organic products to take care of oneself. This might influence travellers to turn to more active holidays, or destinations that can accommodate their lifestyle, offering visits of local food markets for instance. A regional example of how travel is impacted by this trend is the Airport Wellness Oasis at Changi Airport which includes a fish spa, manicure and massage services.

Interests in cruises

There is a growing interest in cruise trips in Southeast Asia. Indonesia saw a 55% growth in demand for cruises from 2017 to 2018, and other markets in the region also demonstrated strong growth in the same period (54% from Vietnam, 50% from the Philippines, 15% from Thailand, and 40% from Singapore).
Royal Caribbean also revealed that Malaysia is their fastest-growing market. The company deployed 3 ships in the area to accompany the growth in cruise demand. CLIA explains that Asian passengers recognise cruising as an easy, relaxing holiday choice which is great value for money.

Family vs. solo travellers

Family is a very important value which affects travel in the region. However, in the last few years, demand for solo travel has been growing.
Solo women travellers are often looking for safe, pampering holidays away from their busy, stressful city life. Safety is a very important element for this segment, as they want travel to be stress-free, but the thought of going to a long haul destination can be quite stressful on its own. They need reassurance that what they are booking will make them feel safe and secure enough, address any special requirements and be convenient for them to truly enjoy it.

Source: Foresight Factory (Local perspectives, and other reports), TTG Asia, CLIA, Statista.com, TravelMarketReport

3.3 Booking and planning

Southeast Asian travellers will rely on tips and recommendations from friends and relatives (often via social media) when they plan an international holiday. The types of recommendations they would appreciate the most are different depending on the market, but almost all are looking for tips on how to get the best value for money.

Mature markets such as Singapore would mostly appreciate hearing about the place and being guided in how to best plan their itinerary. Meanwhile, less mature outbound markets (Indonesia and the Philippines for example) would prefer some reassurance on how to stay safe during their travel, or recommendations on how to have a more comfortable trip.

Overall in 2019, most bookings to the UK via an agent were made at a brick and mortar travel agency. Such bookings made through a corporate travel agents were also as frequent as those made with an online travel agent (OTA). This suggests the importance of business travel to the UK and bleisure in these markets.

1-in-2 flight bookings for a trip from Southeast Asia to the UK made through an agent in 2019 were made within two months of departure; a rather short lead-in time for long-haul flight booking.

February, March and August were the favourite months for booking flights in 2019.

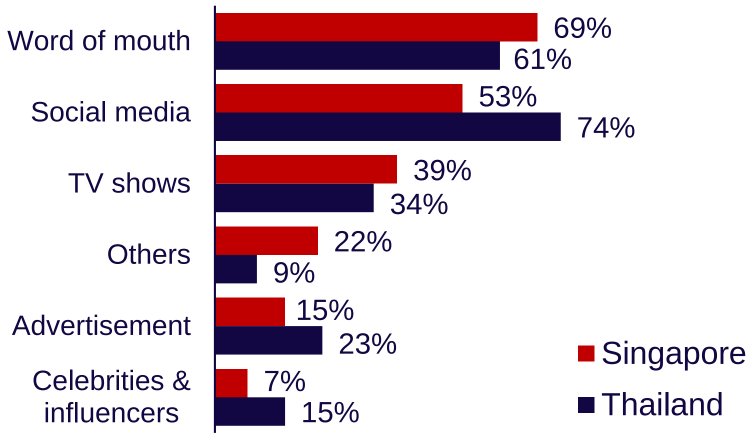
Most popular months for Southeast Asian travellers to book their flights to the UK

February, March and August

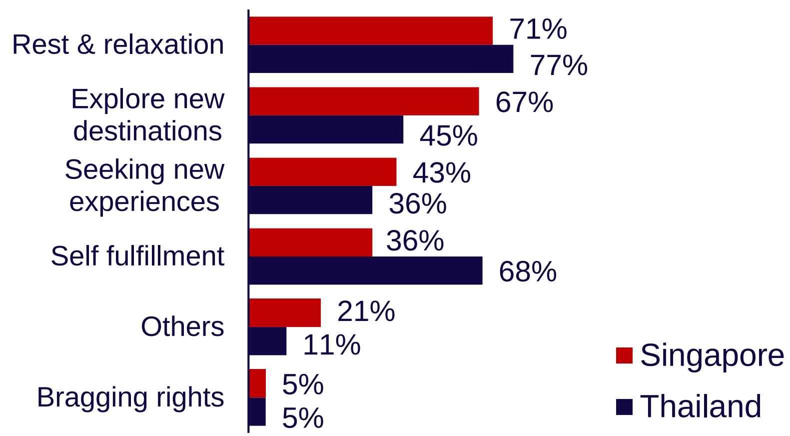
Source: The 'Journey of Me' 2017 study by Amadeus, ForwardKeys 2019

3.3 Booking and planning: Singapore and Thailand

Influences for choice of travel destination



Motivations for travelling



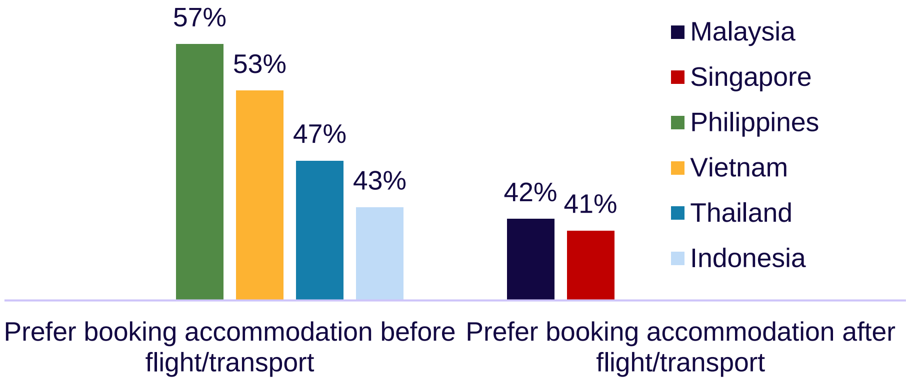
Thai travellers are highly influenced by social media when it comes to choosing a travel destination, with 74% citing this source. Those from Singapore are also influenced by social media, at 53%; but their most important influence is word of mouth, at 69%.
Neither market are strongly influenced by celebrities and influencers, and advertisements only influence 23% of Thai travellers and 15% of Singaporean travellers.

When travelling, both Singaporean and Thai travellers are most likely to be seeking rest and relaxation. Next, Singaporeans are most likely to be interested in exploring new destinations, at 67%. However, Thai travellers are most self focussed: with 68% stating that they are motivated to travel for self fulfillment.
Neither market are motivated to travel for bragging rights, as this option is only chosen by 5% in each market.

Skyscanner APAC Travel Trends 2018

3.3 Booking and planning: timings

Favourite order to book trip elements:
accommodation and flight (or transport to destination)



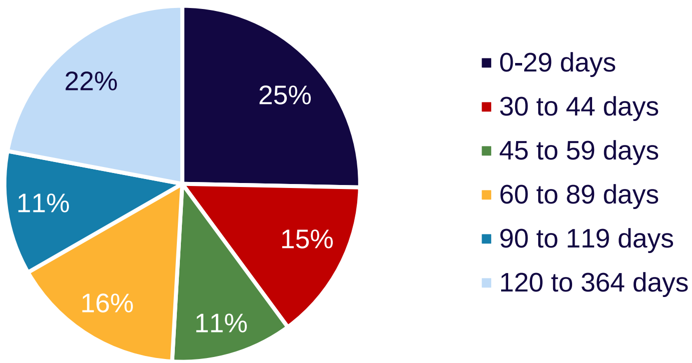
Most Asia Pacific markets would prefer booking accommodation and transport at the same time. However, Southeast Asian markets are different.

More mature markets such as Malaysia and Singapore would usually book their accommodation after having booked their flight tickets (or secured other transport).

Travellers from the other main markets, the Philippines, Vietnam, Thailand and Indonesia, would prefer to secure their accommodation before confirming their transport arrangements.

Source: The 'Journey of Me' 2017 study by Amadeus, ForwardKeys 2019

Lead-times on flight bookings to the UK through a travel agent



Southeast Asian markets tend to have quite short lead-in times for booking their flight to the UK despite being long-haul markets.

A quarter of the tickets booked to the UK in 2019 were booked in the month prior to departure, and just over 1-in-2 flights were booked in the two months before the planned date of arrival. However, 22% of the travellers still book over 4 months before travelling.

Most of those bookings (64%) were made via a retail travel agent, while 17% were made online travel agents and corporate travel agents respectively.

3.3 Booking and planning: recommendations

Top 3 preferred recommendation types for leisure travel

	Singapore	Malaysia	Thailand	Indonesia	Philippines	Vietnam
1	How to save money	How to save money	How to save money	How to save money	How to save money	Ensuring safety
2	Itinerary planning	Itinerary planning	Itinerary planning	Making travel more comfortable	Ensuring safety	Finding the best sightseeing options
3	Finding the best sightseeing options	Finding the best sightseeing options	Finding the best sightseeing options	Ensuring safety	Making travel more comfortable	How to save money

Good value on a trip is a key subject for which Southeast Asian travellers are looking for recommendations, and is the most preferred recommendation type for a leisure trip in all markets except Vietnam, where safety tips are seen as the most important.

Safety is also present in the top 3 for Indonesian and Philippine travellers, suggesting that it is more of a concern for less mature outbound markets.

More mature markets – Singapore, Malaysia and Thailand – would prefer tips on itinerary planning and what is best to visit at their destination.

Source: The 'Journey of Me' 2017 study by Amadeus

3.3 Booking and planning: mobile use

Top 3 most used apps during a trip

	Singapore	Malaysia	Thailand	Indonesia	Philippines	Vietnam
1	Google Maps	WhatsApp	Google Maps	Traveloka	Facebook	Facebook
2	WhatsApp	Google Maps	Facebook	WhatsApp	Google Maps	Zalo
3	Trip Advisor	Facebook	Line	Facebook	Trip Advisor	Google Maps

Across all main Southeast Asian markets localisation, recommendations from other travellers or locals about where to go, and staying in touch with people at home seem to be the most popular reasons why they would use apps during a trip.

Some regional players – Line, Traveloka and Zalo – have a great importance in some markets – Thailand, Indonesia and Vietnam respectively.

Source: The 'Journey of Me' 2017 study by Amadeus

3.4 Reaching the consumer

Online media are becoming more and more important in Southeast Asia; consumers in the major markets in the region spend more time per day consuming digital media than traditional media.

Despite the importance of TV consumption, websites, apps and social media are often more effective platforms, as there may be issues of trust towards traditional broadcast and print media. Most Southeast Asian governments tend to influence those media as they manage some of the most important networks, and laws to protect the quality of information tend to encourage journalists' self-censorship.

On the contrary, social media are often seen as platforms where opinions can be expressed more freely and where ideas can be debated. They are more generally trusted and followed.

YouTube, Facebook and messenger apps and services are among the favourite platforms in the main Southeast Asian markets.

Trust in social and digital platforms
is key in Southeast Asia

Source: BBC Media profiles, GlobalWebIndex

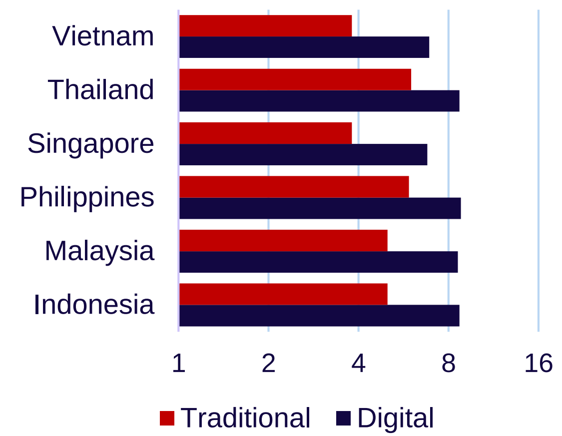
3.4 Reaching the consumer: overview of the media landscape

For the last few years, online media has been more popular than TV across Southeast Asia, and residents also consume more digital media per day than traditional media.

However, TV remains an important medium in most Southeast Asian countries, and they are also the top countries in terms of traditional media consumption within Asia.

Looking at the media landscape in these markets, amongst the leading players there are both state- or army-owned and private media players. The role of the state (and in some cases the army) in Southeast Asian broadcast and print media has been increasing recently, raising some concerns towards the freedom of the press. This partially explains why some prefer turning to blogs or social media to get up-to-date with news, as journalists might often apply self censorship to their writing.

Hours per day consuming types of media (2017)



This also applies to broadcast media. In Indonesia, for example, radio remains a key medium; however, private radios can carry news but cannot relay live news from international broadcasters. The anti-blasphemy law and the Electronic and Information Transactions Law might also block online content. In most countries Muslim shows are created to counterweight the international shows for the youth too.

Local news agencies exist: state-run Antara in Indonesia, or state-run Bernama in Malaysia, for example.

Source: Nielsen, Morning Addiction, BBC Media profiles, GlobalWebIndex 2017

3.4 Reaching the consumer: main traditional media players

	Newspapers and magazines	Television	Radio
Singapore	Singapore Press Holdings (almost monopoly in newspaper industry): The Strait Times, Business Times Media Corp, owned by a state investment agency: Today	Media Corp: Channel News Asia (news), Channel 5, Channel 8 (entertainment), Suria (in Malay), Channel U (in Mandarin)	Singapore Press Holdings: One FM and Kiss 92 in English, UFM in Mandarin Media Corp owns a dozen stations in English (938 Live), Chinese, Malay and Indian
Malaysia	Daily newspapers in English: New Strait Times The Star The Sun The Malay Mail	Owned by RTM (public): TV1, TV2 Commercial terrestrial networks: TV3, ntv7, 8TV, TV9 Astro TV has many different programmes with celebrities travelling to different destinations (KTO and Tourism Australia partnered up with those shows)	RTMC owns about 30 national and regional stations Private networks: Era FM, Hot FM, Sinar FM, THR FM
Thailand	Daily newspapers in Thai are the most important in mass circulation, including: Daily News, Thairath Main titles in English: Bangkok Post, The Nation	Thai Public Broadcasting Service (TPBS) manages the public TV service Owned by MCOT, Mass Communications Organisation of Thailand: Thai TV3 and ModerNine Owned by the Royal Thai Army: TV5, BBTV Channel7	Very competitive environment: over 60 stations exist in Bangkok, including: Army Radio MCOT Radio Network Radio Thailand run by the National Broadcasting Service of Thailand

Source:BBC Media profiles

3.4 Reaching the consumer: main traditional media players

	Newspapers and magazines	Television	Radio
Indonesia	Daily newspapers in English: The Jakarta Post, The Jakarta Globe Other daily newspapers: Kompaa, Poa Koba, Indo Poa, Republika Biana Indonesia Weekly newspapers: Tempo	TVRI, Televisi Republik Indonesia, state-owned, operates two networks Private networks: Surya Citra Televisi Indonesia (SCTV), Rajawali Citra TV Indonesia (RCTI), Indosiar, MNCTV, Trans 7, and Metro TV (news)	RRI, Radio Republik Indonesia, state-owned, operates national, regional and local stations
Philippines	The most popular are Filipino language tabloids. Daily newspapers include Philippine Star, The Daily Tribune, Philippine Daily Inquirer, Malaya Business Insight, Manila Bulletin, Manila Times, Business World	ABS-CBN, GMA Network, ETC are commercial, and People's Television is government owned.	There are hundreds of radio stations. ABS-CBN, GMA Network and Manila Broadcasting Company operate stations nationally.
Vietnam	Nhan Dan is the communist party daily, with English language pages. Le Courrier du Vietnam in French, Vietnam News in English, Tuoi Tre and Thanh Nien are also daily	VTV (Vietnam Television) run the only national networks	Voice of Vietnam operates national networks and an external service, plus there is Dai Tieng Noi Nhan Dan

Source:BBC Media profiles

3.4 Reaching the consumer: digital media landscape

With various laws constraining what can or cannot be published in traditional media, people in Southeast Asia quickly adopted social media for debating of the news. Investments in developing a 4G network in most markets, along with good results of digital start-ups and the influence of nearby Asian social media champions like WeChat or Line, have influenced the adoption pace of new technologies. Internet penetration across the region is 63%.

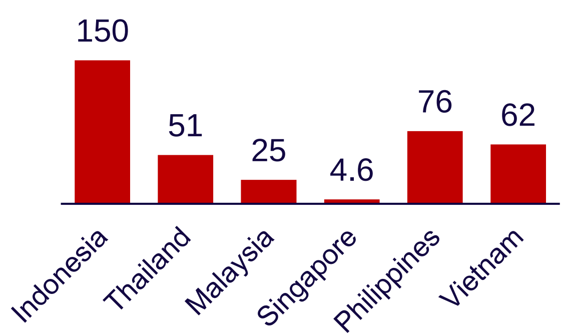
In the main Southeast Asian markets the desire to be always connected to the Internet is higher than the global average. Mobile technologies that allow consumption of digital media on the go, such as smartphones but also tablets, are particularly popular, especially in the main urban areas.

E-commerce and mobile payment solutions have also become popular in markets such as Vietnam, reinforcing this for mobile connectivity.

As a consequence, Southeast Asian travellers will be well-connected and keen on searching for travel information online, or even book their next trip with their smartphones, when it is straight-forward.

Traditional media have launched online news portal such as Says.com by Media Prima in Malaysia, targeting young Malaysian and including travel features. Those websites can be read in the local language, or in English.

Social media users (millions, 2019)



Most active social media platforms (2019)

Indonesia	Thailand	Malaysia	Singapore	Philippines	Vietnam
YouTube	Facebook	Facebook	YouTube	Facebook	YouTube
WhatsApp	YouTube	YouTube	WhatsApp	YouTube	Facebook
Facebook	Line	WhatsApp	Facebook	FB Messenger	FB Messenger

Source:BBC Nedia profile, Nielsen, Hootsuite

Chapter 4:
Access and travel trade

4.1 Access: key facts

A standard visitor visa to the UK will cost £93, but not all need a visa, with citizens from Brunei, Malaysia, East Timor and Singapore being able to enter the UK for up to 6 months for leisure without one.

The tunnel is an important mode of transport for those on a multi-country trip and accounted for 8% of visits to the UK from this region in 2016-2018. In the last five years to 2018, the number of visitors coming via the tunnel have increased significantly. Overnight visits from Thailand, Singapore and Malaysia to the UK were more likely to be part of a multi-country trip than the all-market average. However, most Southeast Asian visitors arrive in the UK by plane.

Visitors from Thailand and Singapore are the most likely of the main Southeast Asian countries to have flown to visit the UK. They are also the two countries with the largest direct seat capacities to the UK in the region.

Despite the growing importance of the Gulf airports as hubs between Asia Pacific and Europe, 13 Southeast Asian airports in 7 countries have regular, direct routes to the UK, with the large majority of seats landing in Heathrow. Singapore Airlines and British Airways make up almost half of those seats to the UK.

89% of visits from Southeast Asia to the UK are made by air

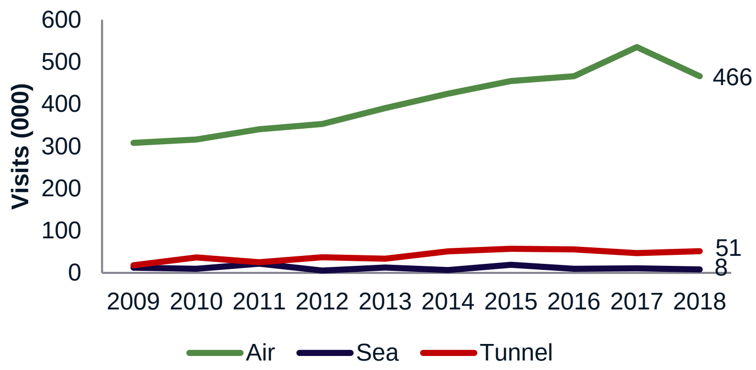
Access to Britain

Measure	2019
Weekly aircraft departures	127
Weekly aircraft seat capacity	42,460
Airports with direct routes in Southeast Asia	13
Airports with direct routes in Britain	4

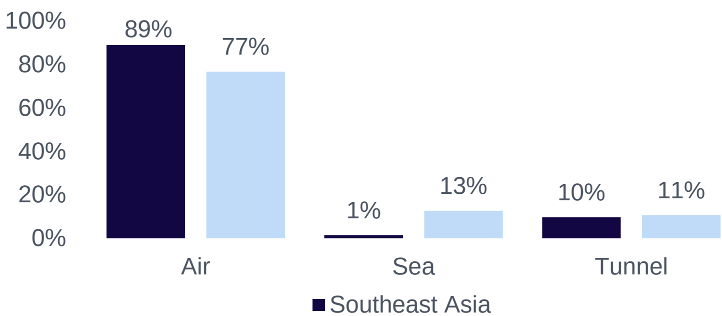
Source: International Passenger Survey by ONS, Apex RdC 2019 (includes direct, stopping flights).

4.1 Access: mode of transport

Visits by mode of transport*



Annual share by mode (2018)



Share of visits by mode per market (2016-2018)

Share of visits…	Air	Sea	Tunnel
Singapore	91%	1%	8%
Malaysia	85%	3%	12%
Thailand	95%	0%	5%
Indonesia	89%	2%	9%
Philippines	85%	4%	11%
Vietnam	98%	2%	0%
Southeast Asia	**89%**	**2%**	**9%**
All markets	**76%**	**13%**	**11%**

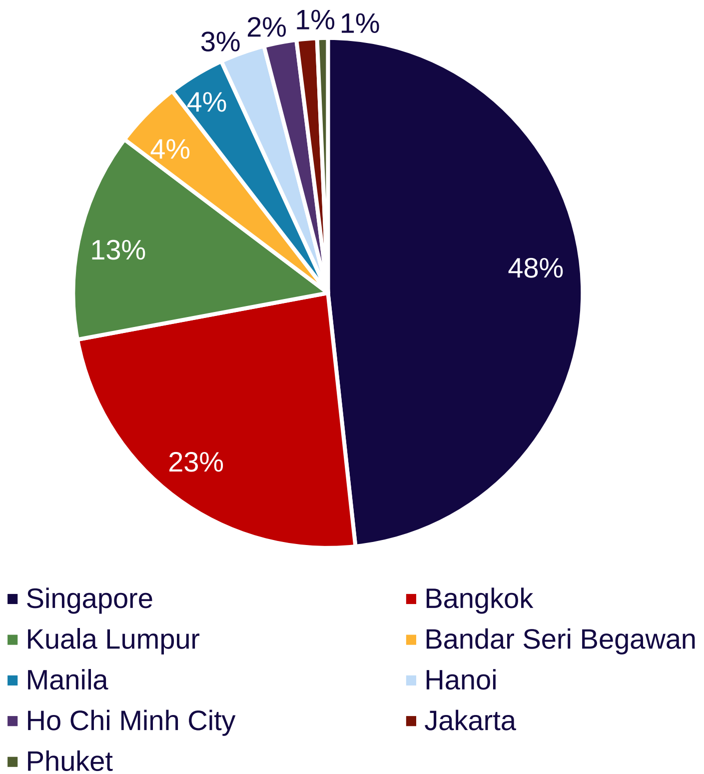
Source: International Passenger Survey by ONS
**Note: Data based on Singapore, Malaysia, Indonesia, Thailand and the Philippines*

4.1 Access: capacity

Annual airline seat capacity trends

Weekly average seat capacity on direct flights to Britain	2009	2014	2019
Singapore	18,894	14,195	20,213
Malaysia	6,137	6,916	5,687
Thailand	12,020	8,665	10,385
Indonesia	N/A	N/A	747
Philippines	N/A	1,640	1,503
Vietnam	N/A	951	2,141
Southeast Asia	**37,051**	**32,366**	**42,460**

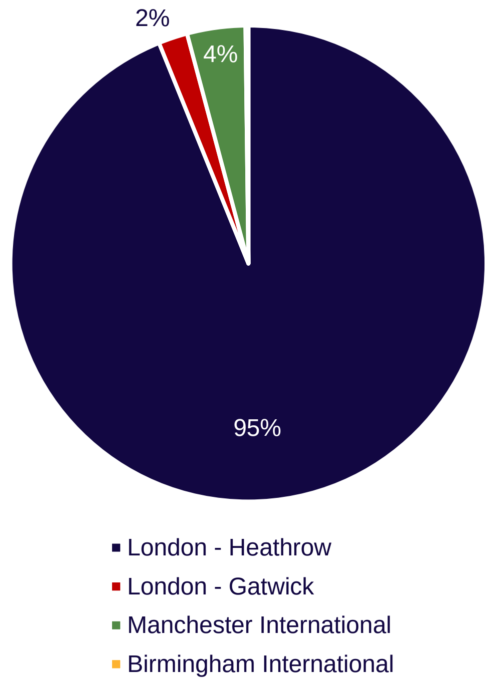
Origin city annual seat capacity (2019)*



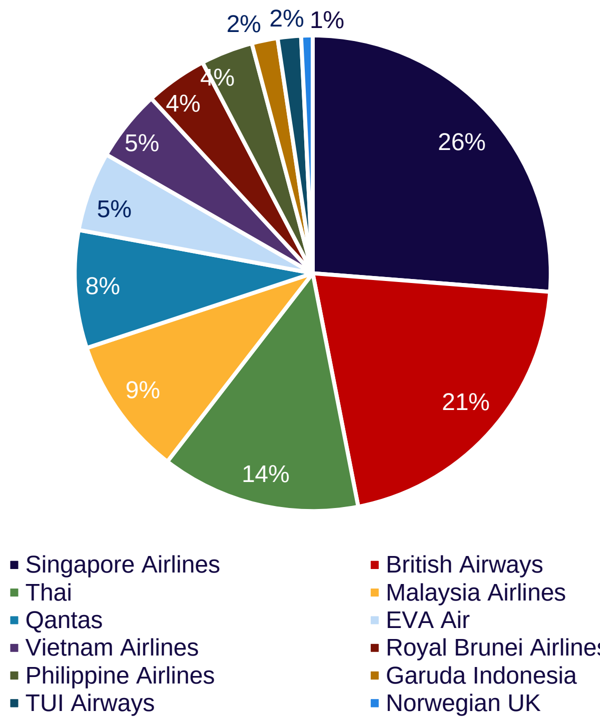
Source: Apex Rdc (includes direct, stopping flights)
**Note: Medan, Langkawi, Utapao and Phu Quoc constituted less than 1% of annual seat capacity*

4.1 Access: capacity

Destination airport annual seat capacity (2019)



Airline seat capacity by carrier (2019)



Source: Apex Rdc (includes direct, stopping flights).

4.2 Travel trade: general overview

The UK used to be mainly sold as part of a longer, multi-country package trip to Europe. However, more and more mono-UK itineraries are promoted by the Southeast Asian trade.

Some large agents and wholesalers exist within the markets, but overall the Southeast Asian travel trade is quite fragmented.

The Southeast Asian trade has been developing more and more products for the Free and Independent Traveller (FIT) segment. Those products include seasonal products and destinations such as skiing in Europe or Japan, but also more thematic packages like marathon trips or shopping-related short-trips. The latter are an increasingly important segment: female solo travellers that need tours and itineraries catered especially for them, to suit their particular needs. Another such segment is Muslim travellers' groups, as they need reassurance about food options for example.

While Southeast Asian outbound visitors might still book their trip to the UK through a bricks and mortar travel agency, online planning and booking solutions are developing quickly, with international players investing in the development of local travel companies into regional ones.

Free and Independent Travellers segment is growing, accompanied by **more online solutions**

Source: Google's Top Travel Trends report for Southeast Asia, Agoda

4.2 Travel trade structure

Main actors in selected markets	
Singapore	*Wholesalers and large agents*: ASA Holidays (Air Sino-Euro Associates), Chan Brothers, Commonwealth Travel, Dynasty Travel and Jetabout Holidays *OTAs**: Agoda, Chan Brothers, CheapTickets.sg, Expedia, Flight Centre, Tripzilla, and Zuji
Malaysia	*Wholesalers and large agents*: Airlink Travel, Apple Vacations, Forever Travel, Golden Deluxe, Golden Tourworld, Malaysian Harmony, Parlo Tours, PNL Travel, and Sedunia Travel *OTAs**: 12Fly, Agoda, AirAsiaGo.com, Booking.com, Holidaytoursonline,com, Hotels.com, PYOtravel.com, Seduniatravel.com, Traveloka, Trivago
Indonesia	*Wholesalers and large agents*: ASA Holidays (Air Sino-Euro Associates), Chan Brothers, Commonwealth Travel, Dynasty Travel Jetabout Holidays and Miki Travel (also present in Thailand) *OTAs**: Agoda, Expedia, Walk about South East Asia

Source: Secretariat of the ASEAN, Oxford Economics

The Association for Southeast Asian Nations (ASEAN), whose Secretariat is based in Jakarta, released an ASEAN Tourism Marketing Strategy for 2017-2020, and an ASEAN Tourism Strategic Plan for 2016-2025. It recognises one of the key challenges of the area to be the disparity between the levels of inbound and outbound market maturity.

Whilst inbound tourism is mostly well-developed in most of the Southeast Asian markets, the outbound trade is usually less organised, especially in smaller markets. Looking at the main markets' travel trade structure, there is usually a sizeable number of wholesalers or large travel agents that can be approached. However, the traditional travel agent landscape is quite fragmented, and most will mainly promote trips within Asia. Some of the main agents have an online presence.

Other important online players include international brands with a local or regional presence (Expedia, Kuoni, Agoda, Booking, Hotels.com, Trivago, or Flight Centre). Some local actors, such as Traveloka, are growing regionally, branching out from their origin market to other Southeast Asian ones, sometimes with the support of larger international brands. This usually benefits the growing Free and Independent Travel (FIT) segment.

Airlines are also key trade facilitators: most of them sell holiday packages online and their routes and codeshare agreements are used by other trade actors to promote destinations.

4.2 Travel trade: focus on Malaysia

Some agents selling the UK in Malaysia in 2018	
Kowamas Holidays	European tours around Premier League matches for Muslim groups
Holiday Tours	8-day 'Britain & Ireland Delight' itinerary
Famous World Tours	9-day/8-night 'Taste of Britain' group tour
Chan's World Leisurelink	12-day 'Highlights of Scotland & England' group tour
Best Tour	8-day 'England & Scotland' itinerary
Confidence	12-day 'England, Scotland & Jacobite Steam Train' group tour
CIT	- 7-day/6-night 'Landmarks of Britain' tour for Muslim travellers - 4-day/3-night London city break for FIT
Oscar Holidays	11-day group tour around the UK
Felda Travel	5-day/4-night 'London shopping paradise' for FIT
Summit Holidays	9-day or 12-day 'Let's Go England & Scotland' group tour
POTO	Premier League match ticket & package for FIT
Roystar	7-day/6-night London, Manchester and Liverpool group packages
PST	5-day/4-night 'London shopping paradise' for FIT
Safir	11-day/9-night around England, Wales, Ireland & Scotland for Muslim groups

The UK has long been sold as part of a multi-country European trip to Southeast Asian travellers. However, in Malaysia there are a growing number of mono-UK itineraries on sale and promoted at the main national trade exhibitions (MATTA, MITM). Those mono-UK itineraries are usually London-centric and can pair it with a visit to Manchester, Oxford, the Lake District, Liverpool, Edinburgh, or even Stonehenge. A first visit to the UK will mostly be focused on visiting the main cities, while a repeat visit or a longer stay might try to balance staying in a big city and going to the countryside.

New offers in the UK include short trips to go shopping in London, but also to watch a Premier League football match live.

Overall the FIT segment is rising and destinations promote self-drive tours, as well as rail itineraries, which are becoming more and more popular. Themed trips are also gaining momentum: the trade developed packages around marathons (Gold Coast, Taipei, Macau), food-themed itineraries, winter sport destinations, and information on how Muslim travellers can find local food, as well as dedicated tours to cater for their needs.

November sales for Black Friday, Cyber Monday, or even Singles' Day can drive more in interest in a destination as regional online actors launch in the market (Traveloka, Klook, Get Your Guide, or Have Halal Will Travel).

4.2 Travel trade: some trade exhibitions

Singapore	Malaysia	Other – cross Southeast Asia
Digital Travel APAC, in April	**MITATravel Fair** in Kuala Lumpur in January organised by the Malaysian Indian Tour & Travel Association	**ILTM Asia Pacific**, held in Singapore in May
NATAS, National Association of Travel Agents Singapore, in August, presenting new exotic destinations	**MATTA**, in Kuala Lumpur in March and September, in Johor and Melaka, in August	**ASEAN Tourism Forum (ATF)** and **TRAVEX**
MATTA Fair Johor (Malaysia), in August, also attended by Singaporeans across the border	**MITM**, in Kuala Lumpur, Penang, Johor Bahru, and Ipoh, in August, run by the Malaysian Chinese Travel Association	**Luxperience** – 3-day event in Australia promoting luxury MICE and leisure DMCs, hotels and tourism boards
ITB Asia, in October: Asia's leading travel trade show	**TTM**, a travel trade tabletop, has run in Philippines, Thailand, Cambodia, Malaysia and Myanmar	**Walkabout South East Asia**: 4-day event held in Bali about Australian trade meeting delegates from Malaysia, Indonesia and Singapore

Examples of competitor destinations' thematic events for this market

- **Japan Muslim seminar** (free, half day), Education Fair in Penang and Kuala Lumpur early September to encourage studying in Japan.
- **Korea** has Muslim-friendly initiatives too.

Source: 10 times

4.2 Travel trade: doing business with the Southeast Asian markets

Practical information

- **Time difference:** Southeast Asia is an extended area with time zones from 6.5 to 9 hours ahead of Britain.
- **Climate:** The climate of the Southeast Asian countries is mainly tropical, hot and humid all year-round with a rainy season, or monsoon, some time between June and December.
- **Working days and business hours:** Working days vary depending on the country. Most Southeast Asian countries' working days are from Monday to Friday, and Sunday is the most common rest day. However, Brunei has a non-contiguous week from Monday to Thursday, and then Saturday, but most private offices and retail operate all-day Monday to Friday, and on Saturday morning there, with all offices being closed between 12 noon and 2pm on Friday by law for the prayers. Some states in Malaysia also have a working week starting on Sundays and finishing on Thursdays. Office hours vary too; Singapore for example usually operates 8-hour work days on average.
- **Transport:** Most of the trade actors will be concentrated in the main cities. Make sure you allow enough time between two meetings as traffic is often slow in those mega cities, unless you can use public transport options.
- **Clothing:** Do respect the culture of the country you are going to by dressing appropriately. While most countries in Southeast Asia are Westernised, Asian and Muslim cultures are quite present in the area and so it is still important to dress modestly: men should wear a suit and women ensure their clothing covers their legs and arms.
- **Visas:** You may need a visa to visit some of your Southeast Asian working contacts. Please do plan in advance and check whether the market you are planning to visit offers a short-term visa on arrival or not, as you may have to request a visa in advance.

Source: statista.com, export.gov, tiimeanddate.com

4.2 Travel trade: public holidays in main Southeast Asian markets

National Holiday	Date in 2020	Date in 2021	Observance
New Year's Day	01/01	01/01	Indonesia, Malaysia (most states), Singapore, Thailand
Chinese New Year	25/01-26/01	12/02-13/02	Indonesia (1 day only), Malaysia, Singapore, Thailand (some states and 1 day only)
Makha Bucha Day	10/02	26/02	Thailand
Bali Hindu New Year	25/03	14/03	Indonesia
Good Friday	10/04	02/04	Indonesia, Singapore
Chakri Day	06/04	06/04	Thailand
Songkran Festival	13/04-15/04	13/04-15/04	Thailand
Isra Mi'raj	22/03	11/03	Indonesia
Labour Day	01/05	01/05	Indonesia, Malaysia, Singapore, Thailand (some states)
Ascension Day of Jesus Christ	21/05	13/05	Indonesia
Royal Ploughing Ceremony	21/05	11/05	Thailand (some states and government sector only)
Vesak/Wesak/Waisak Day or Visakha Bucha Day	07/05	26/05	Indonesia, Malaysia, Singapore, Thailand
Pancasila Day	01/06	01/06	Indonesia
Nuzul Al-Quran	10/05-11/05	29/04	Malaysia (most states)
Hari Raya Puasa (end of Ramadhan)	24/05	13/05	Singapore, Thailand
Hari Raya Aidilfitri Holiday	25/03	13/05	Indonesia, Malaysia
Lebaran Holiday	N/A	14/05	Indonesia

Source: Asia Public Holidays

4.2 Travel trade: public holidays in main Southeast Asian markets

National Holiday	Date in 2020	Date in 2021	Observance
Agong's Birthday	06/06-07/06	05/06	Malaysia
Asahna Bucha Day	07/07	24/07	Thailand (government sector only)
King Vajiralongkorn's Birthday Holiday	28/07	28/07	Thailand
Singapore National Day	09/08	09/08	Singapore
Her Majesty the Queen's Birthday Holiday	12/08	12/08	Thailand
Independence Day	17/08	17/08	Indonesia
Hari Raya Haji/ Idul adha	31/07	20/07	Indonesia (1 day only), Malaysia, Singapore
Merdeka Day	31/08	31/08	Malaysia
Awal Muharram (Islamic New Year)	20/08	10/08	Indonesia, Malaysia (for most states only)
Malaysia Day Holiday	16/09	16/09	Malaysia
Passing of His Majesty the Late King Holiday	13/10	13/10	Thailand
Chulalongkorn Memorial Day	23/10	23/10	Thailand
Deepavali	15/11	04/11	Malaysia (most states), Singapore
Prophet Muhammad's Birthday	29/10	19/10	Indonesia, Malaysia
His Majesty the Late King's Birthday	07/12	05/12-06/12	Thailand
Constitution Day	10/12	10/12	Thailand
Christmas' Eve	24/12	N/A	Indonesia
Christmas Day	25/12	25/12	Indonesia, Malaysia, Singapore, Thailand (some states)
New Year's Eve	31/12	31/12	Thailand

Source: Asia Public Holidays

4.3 Caring for the consumer: culture is important… and diverse

Getting your marketing right

Knowing your audience is key for your marketing strategy in this market. The cultural diversity in Southeast Asia makes it important to target a specific group. Developing marketing assets that address the challenges of this particular target to respect the sensibilities across the different cultural groups in those markets is also encouraged.

Be mindful of the type of language or images used in marketing or promotional activities. Imagery for some segments, such as the traditional Muslim family segment, should stay away from showing couples being too close, women with bare shoulders or short clothing. However, it should provide information regarding the food options of your packages (vegetarian options might be appreciated too among other segments), and the solutions available for prayers, other religious obligations, or even potential safety measures.

However, an expensive campaign or costly print or digital artwork is not necessary as long as the information is in places they can identify and access easily.

Having an understanding of the norms and expectations is needed for each Southeast Asian market. It should include what welcome and hospitality means to them. Direct recommendations go a long way and so a simple gesture can be a quick win.

Payment methods

Southeast Asians are increasingly using mobile banking services, e-wallets, or m-wallets, especially younger generations, so offering those payment services will be appreciated.

Recently, AirAsia has launched its own e-wallet, BigPay; the Thai government has launched its own electronic transaction service, Prompt Pay; Filipinos prefer using online solutions like DragonPay. However, Singaporeans still use cash payments: even Uber changed their policy to accept them there.

Source: Foresight Factory

4.3 Caring for the consumer: hospitality tips

Accommodation

Whether targeting Muslim-friendly groups or Southeast Asian women solo travellers, it is important to know how best to address the needs of those travellers, as all will need reassurance about their travel. Entertainment for the children is important to families, while convenience of the accommodation location is mandatory for women travelling alone (preference for safe areas in the centres of the main cities).

Overall, Southeast Asian travellers will tend to avoid very traditional accommodation options as some architectural elements such as a sloping roof might put them off, but they would also worry that they don't feature some of their 'must-have' amenities, such as super-fast, in-room Wi-Fi, which is usually a deal-breaker.

Food and drink

As many Southeast Asian travellers have food restrictions, you will need to demonstrate you can accommodate their food needs. Fresh, local products will also be appreciated.

They would usually be open to taste the local cuisine, but it might need to accommodate their restrictions so having a vegetarian option, or a non-pork meal is preferable. Not all Southeast Asian markets would be interested in alcoholic beverages either.

Some activities or tours can be organised just to discover the local specialities though, as this trend for authentic and quality food is increasing.

Indonesian travellers tend to appreciate having access to room service, and an included breakfast.

Source: Trip Advisor's Trip Barometer

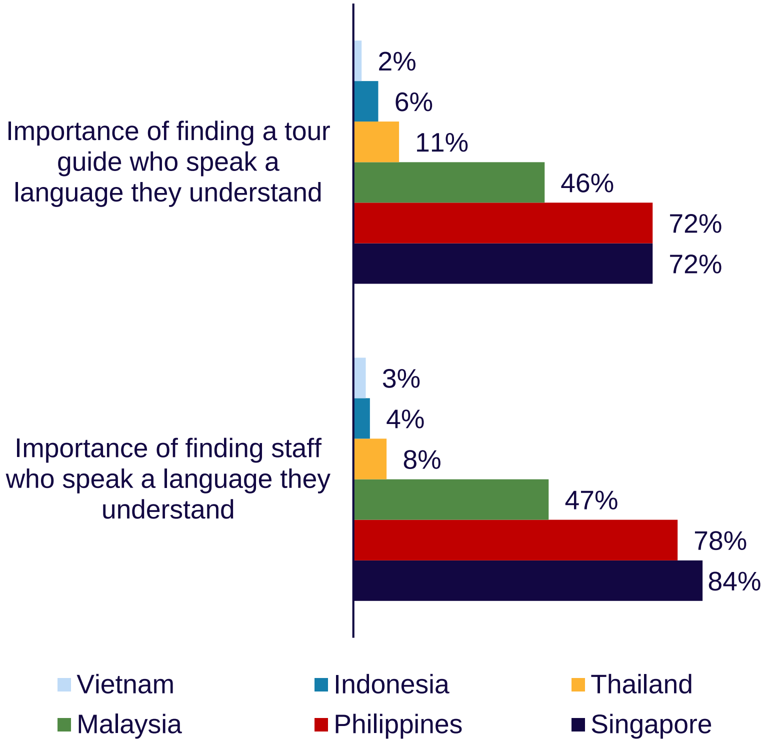
4.3 Caring for the consumer: being understood

Language

10 official languages coexist in the ASEAN area: Burmese, Filipino, Indonesian (or Bahasa Indonesia), Khmer, Lao, Malay, Mandarin, Tamil, Thai and Vietnamese.

However, English is widely spoken, especially among the expat community and for business, especially as studying English abroad, or post-graduate studies in an English-speaking countries are quite popular in the middle and upper classes. English is one of the Philippines' and Singapore's official languages, and is also recognised nationally in Malaysia.

Knowledge of language basics will always be appreciated among Southeast Asian visitors, and some might need more than others to have material in their own language or some staff member or guide speaking their language while travelling in the UK as the level of English varies. For that reason, it is important to communicate clearly and simply as some may have issues understanding slang or accents.



Source: The 'Journey of Me' 2017 study by Amadeus

Appendix:

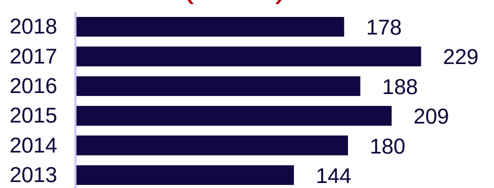
Individual inbound market overviews

(main markets only)

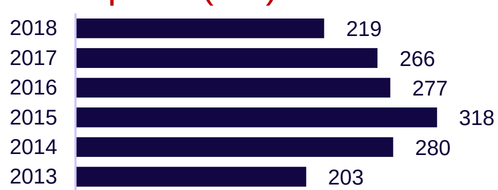
Market overview: Singapore

Key statistics

Visits (000s)

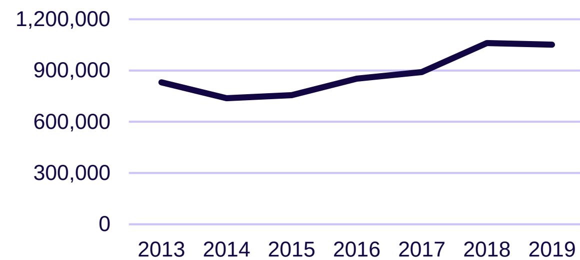


Spend (£m)



Connectivity (2019)

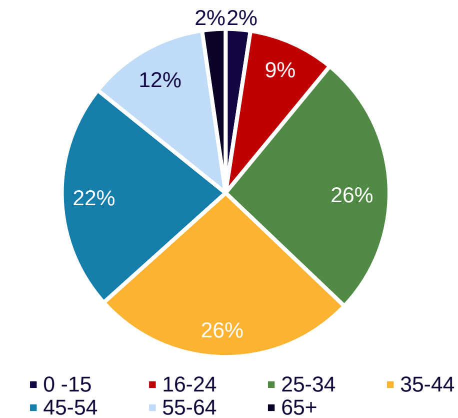
Departing seats



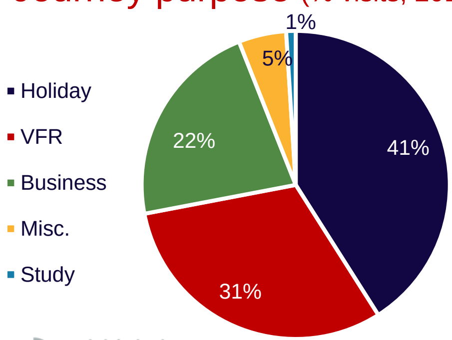
In 2019	
Departure airport	Singapore Changi
Arrival airport	Heathrow, Gatwick, Manchester

Visitor profile (2016-2018)

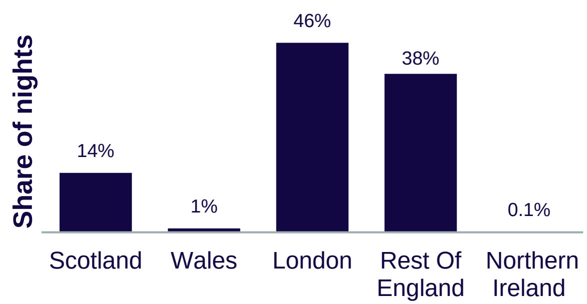
Visitors' age (% visits)



Journey purpose (% visits, 2016-2018)



Regional spread (2016-2018)



Visitors' nationality (% visits)

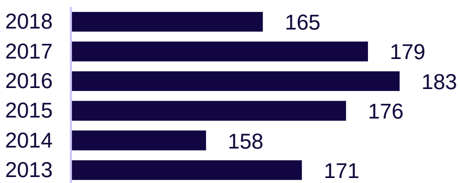
Singaporean	51%
British	22%
Other nationalities	27%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only)

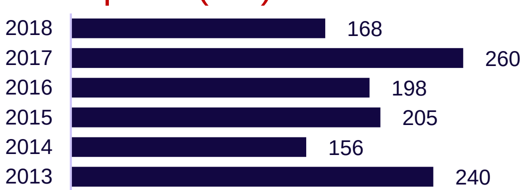
Market overview: Malaysia

Key statistics

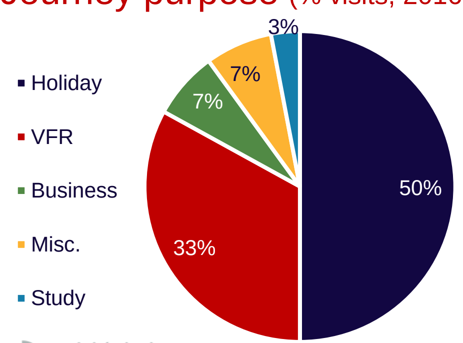
Visits (000s)



Spend (£m)

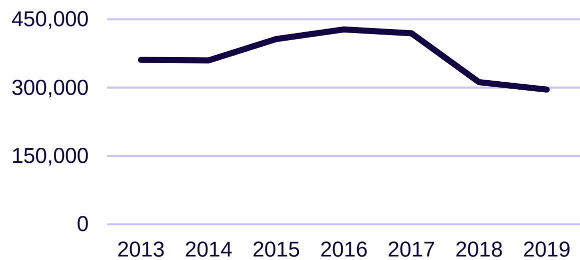


Journey purpose (% visits, 2016-2018)



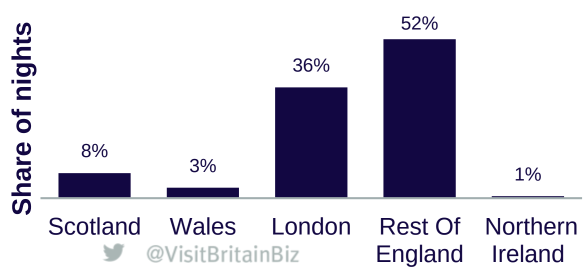
Connectivity (2019)

Departing seats



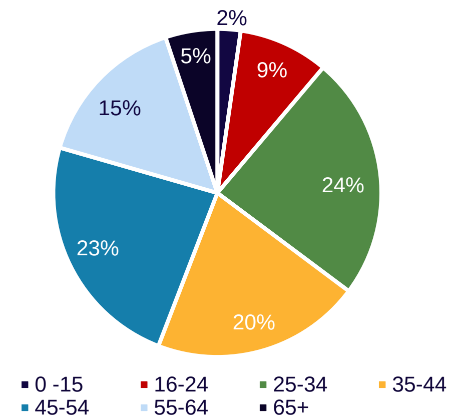
In 2019	
Departure city	Kuala Lumpur, Langkawi
Arrival airport	London Heathrow, London Gatwick, Birmingham, Manchester

Regional spread (2016-2018)



Visitor profile (2016-2018)

Visitors' age (% visits)



Visitors' nationality (% visits)

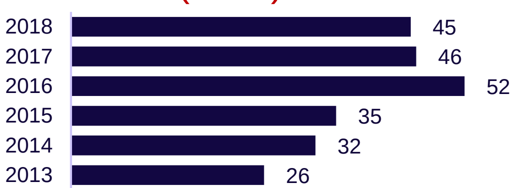
Malaysian	89%
British	6%
Other nationalities	5%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only)

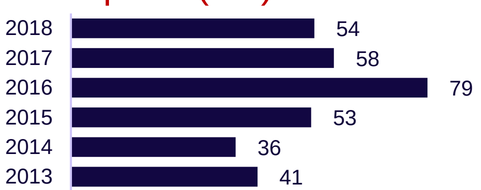
Market overview: Indonesia

Key statistics

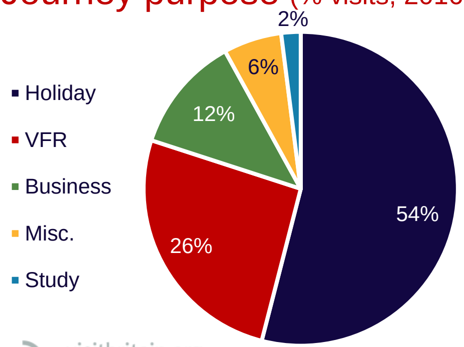
Visits (000s)



Spend (£m)

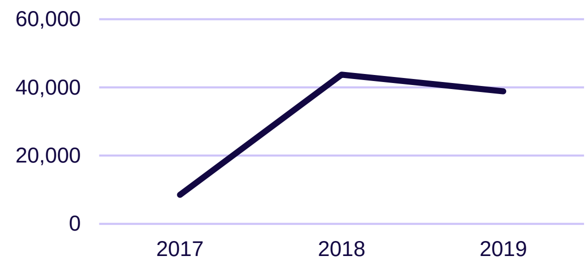


Journey purpose (% visits, 2016-2018)



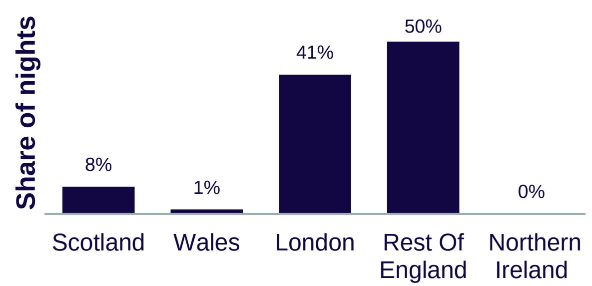
Connectivity (2019)

Departing seats



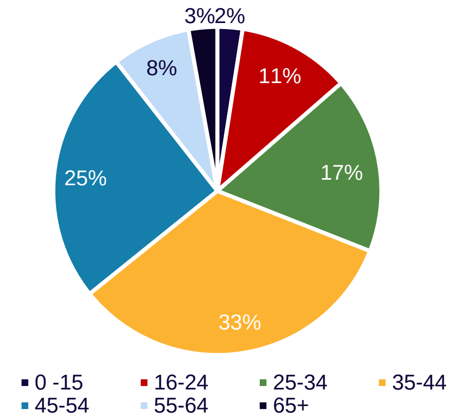
In 2019	
Departure airport	Jakarta Soekarno–Hatta, Kuala Namu
Arrival airport	London Heathrow

Regional spread (2016-2018)



Visitor profile (2016-2018)

Visitors' age (% visits)



Visitors' nationality (% visits)

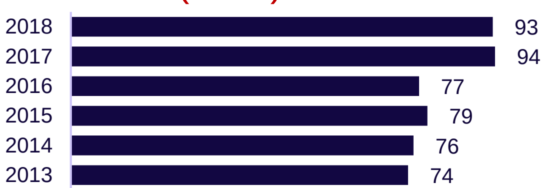
Indonesian	82%
British	10%
Other nationalities	8%

Source: International Passenger Survey by ONS, Apex (direct, stopping routes)

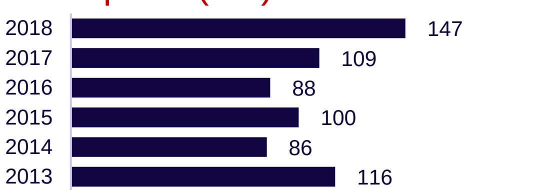
Market overview: Thailand

Key statistics

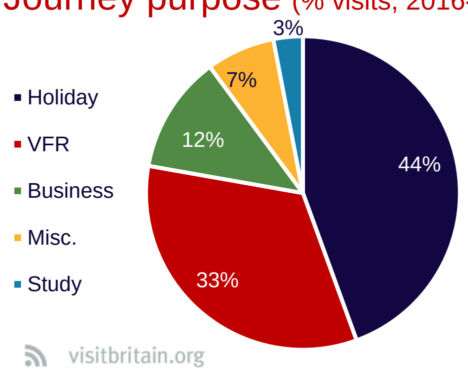
Visits (000s)



Spend (£m)

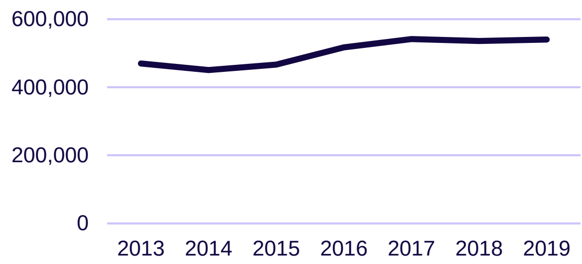


Journey purpose (% visits, 2016-2018)



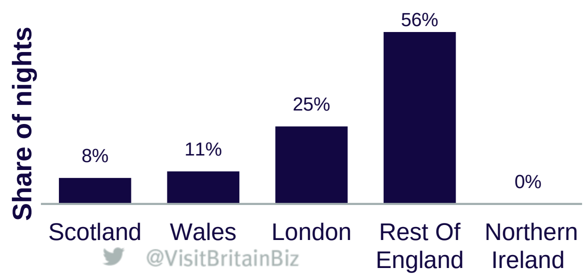
Connectivity (2019)

Departing seats



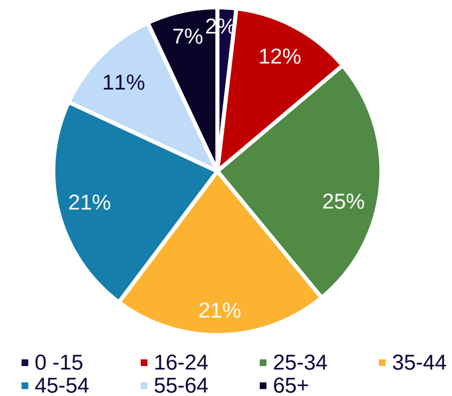
In 2019	
Departure city	Bangkok, Phuket, Utapao
Arrival airport	London Heathrow, London Gatwick, Birmingham, Manchester

Regional spread (2016-2018)



Visitor profile (2016-2018)

Visitors' age (% visits)



Visitors' nationality (% visits)

Thai	69%
British	23%
Other nationalities	8%

Source: International Passenger Survey by ONS, Apex (direct, non-stopping routes only)

Appendix:
Useful links and further information

Appendix 1: Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our opportunity search

or trade website
or contact the B2B events team
or campaign partnerships team
or trade support team
or VisitBritain shop team

Appendix 1: Working with VisitBritain

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since November 2015
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our **'I Travel For…'** marketing campaign.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

'I Travel For…' campaign

The tourism sector deal

Appendix 2: Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS as well as by area of the UK
- Inbound Tourism Trends by Market
- Inbound activity data
- Sector-specific research
- 2020 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about Southeast Asia or other inbound markets browse

our markets & segments pages or

our inbound research & insights or

contact us directly
(Email: research@visitbritain.org)

Appendix 2: Useful market-specific research resources

We have dedicated market-specific research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Technology and social media
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

To find out more about Japan or other inbound markets browse our markets & segments pages.

Or our inbound research & insights.
Or contact us directly.

Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

Details on main sources

The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more, consult the release calendar.

Oxford Economics last updated the 'Global Travel Service' databank in March 2020.

Apex was last updated with December 2019 data.

UNWTO data are based on their latest Tourism Barometer and Statistical Annex, January 2020.

Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** means Miscellaneous – other journey purposes.
- In IPS, to be defined as **a package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals, or HNWIs,** are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2017. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly; IPS question asked in 2015.
- **Likelihood to recommend** Britain as a destination is based on holiday visits, of at least one night, excluding British expats.

Market and Trade Profile: Southeast Asia

Singapore, Malaysia, Indonesia, Thailand, and other Southeast Asian countries

March 2020