

US visitors lead revival of Southeast Asia

✘ The latest data from [ForwardKeys](#) reveals that while Southeast Asia has been lagging far behind the rest of the world in its recovery from the COVID-19 pandemic, visitors from the USA are coming back in substantially greater numbers than from other origin markets.

In the first five months of the year (January 1 - May 31), travel to Southeast Asia reached 18% of pre-pandemic levels, whereas travel to Europe reached 55%, to the Americas 66% and to the Middle East & Africa 64%.

Looking ahead to the summer months (June 1 - August 31), flight bookings for Southeast Asia are at 43% of pre-pandemic levels, whereas bookings for Europe are at 70%, for the Americas are at 78% and for the Middle East & Africa are at 85%.

Analysis of long-haul flight bookings this summer reveals that travel from the USA is set to reach 75% of where it was in 2019, before the COVID-19 outbreak. The next healthiest source market is Australia, where bookings are currently at 60% of 2019 levels. It is followed by the UK, at 47%, Germany, at 58%, and France at 57%.

Top source markets for Asia Pacific this summer

Flight bookings confirmed for travel between 1st Jun and 31st Aug 2022, as of 15th June 2022, vs 2019



Top long-haul source markets		Vs 2019 volumes
1 st	U.S.A.	75%
2 nd	Australia	60%
3 rd	United Kingdom	47%
4 th	Germany	58%
5 th	France	57%
TOTAL		43%

Source: ForwardKeys Air Ticket Data

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The most popular destinations for US visitors are the Philippines, Singapore and Indonesia. As US tourists are known for their high spending and average trip durations, this visitor profile is affluent, with 17% flying in the front of the plane, compared to 9% in the equivalent months in 2019.

The destinations that are recovering the best are the Philippines and Singapore. Summer flight bookings to the Philippines are currently at 70% of pre-pandemic levels, Singapore at 58%, Thailand at 35%, Indonesia at 41% and Vietnam at 32%. Travel to the Philippines is dominated by people returning to visit friends and relatives, whereas travel to other destinations is more for work and leisure.

Top destinations in Asia Pacific this summer

Flight bookings confirmed for travel between 1st Jun and 31st Aug 2022, as of 15th June 2022, vs 2019

Top destinations		Vs 2019 volumes
1 st	Singapore	58%
2 nd	Thailand	35%
3 rd	Philippines	70%
4 th	Indonesia	41%
5 th	Vietnam	32%
TOTAL		43%

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The most popular destinations for US visitors are the Philippines, Singapore, and Indonesia. Helpfully, as US tourists are known for being high spending, average trip durations This visitor profile is also more affluent, with 17% flying in the front of the plane, compared to 9% in the equivalent months in 2019.

The destinations which are recovering most strongly are the Philippines and Singapore. Summer flight bookings for the Philippines are currently at 70% of pre-pandemic levels, for Singapore, 58%, for Thailand 35%, for Indonesia 41% and for Vietnam 32%. Travel to the Philippines is dominated by people returning to visit friends and relatives, whereas travel to other destinations is more for work and leisure.

Demand for travel to South East Asia grows faster than scheduled flights

International arrivals and seat capacity to Southeast Asia from 5 September 2021 until 25 May 2022, % of 2019/19 levels



Source: ForwardKeys Air Ticket Data

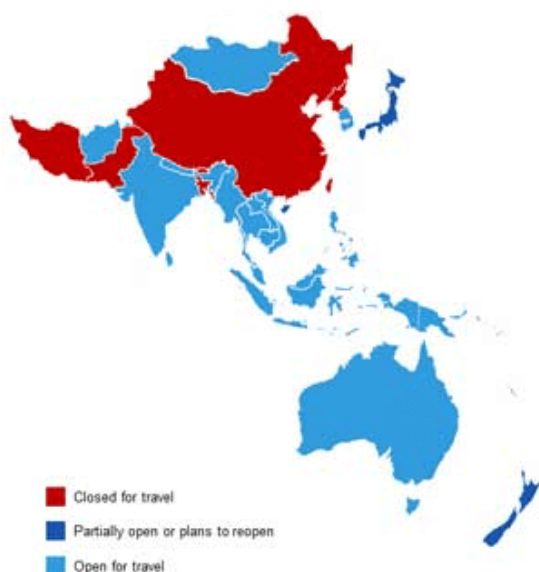
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Throughout the pandemic, airlines flying to Southeast Asia have provided more than enough seat capacity to accommodate passenger demand. However, in May 2022, the acceleration in demand started to outstrip capacity, which has been creating an upward pressure on air fares.

Travel restrictions to major APAC destinations



Country	Requirements
South Korea	Open to all travellers without quarantine on 8 June (pre-departure test is required)
Malaysia	Open to vaccinated travellers without quarantine and tests since 1 May
Indonesia	Open to vaccinated travellers without quarantine and tests since 18 May
India	Open to all travellers without quarantine; flights resumed on 27 March
Thailand	Open to vaccinated travellers without quarantine and tests on 1 May (pre-travel registration with details of vaccination and insurance is needed)
Australia	Open to vaccinated passengers without quarantine on 18 April (pre-departure test is required)
Singapore	Open to vaccinated travellers without quarantine and tests on 1 April
Philippines	Open to vaccinated travellers without quarantine on 10 Feb (pre-departure test is required)
Cambodia	Open to vaccinated travellers without quarantine and tests on 18 May
Vietnam	Open to all travellers with zero Covid-related entry requirement on 15 May
Japan	Open to tourists in tour groups from 98 countries on 10 June
New Zealand	Fully reopen on 31 July (two months earlier than the previous time frame)

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Government-imposed travel restrictions provide the best explanation of the observed recovery trends, as the destinations that relaxed restrictions earlier such as the Philippines and Singapore, have recovered stronger. Some of the most significant dates and changes to travel regulation include:

May 1: Malaysia opened to vaccinated travelers without any quarantine rules or COVID tests

May 1: Thailand opened to vaccinated travelers without any quarantine rules or COVID tests

May 1: Vietnam opened to all travelers without any COVID-related entry rules

May 18: Cambodia opened to vaccinated travelers without any quarantine rules or COVID tests

May 18: Indonesia opened to vaccinated travelers without any quarantine rules or COVID tests

June 8: South Korea opened to vaccinated travelers without any quarantine rules; however, a pre-departure test is required for entry

June 10: Japan opened to tourists visiting in tour groups from 98 countries

July 31: New Zealand will re-open two months earlier than originally planned

“Travel during the pandemic has been a function of pent-up demand pushing in one direction and pandemic protection rules pushing back in the opposite direction. The recovery of air travel in Southeast Asia is lagging because travel restrictions there have been tougher. China, which used to be Southeast Asia’s largest source market, is still effectively closed; Japan, another major market for travel, is reopening very cautiously and seat capacity, which is constrained, is leading to higher air fares, which in turn dampens demand,” says Oliver Ponti, VP Insights at ForwardKeys.