



ASIA PACIFIC TOURISM TRENDS

**Kris Lim, Associate Director – Strategic Intelligence Centre
Office of Strategy Management
Pacific Asia Travel Association**

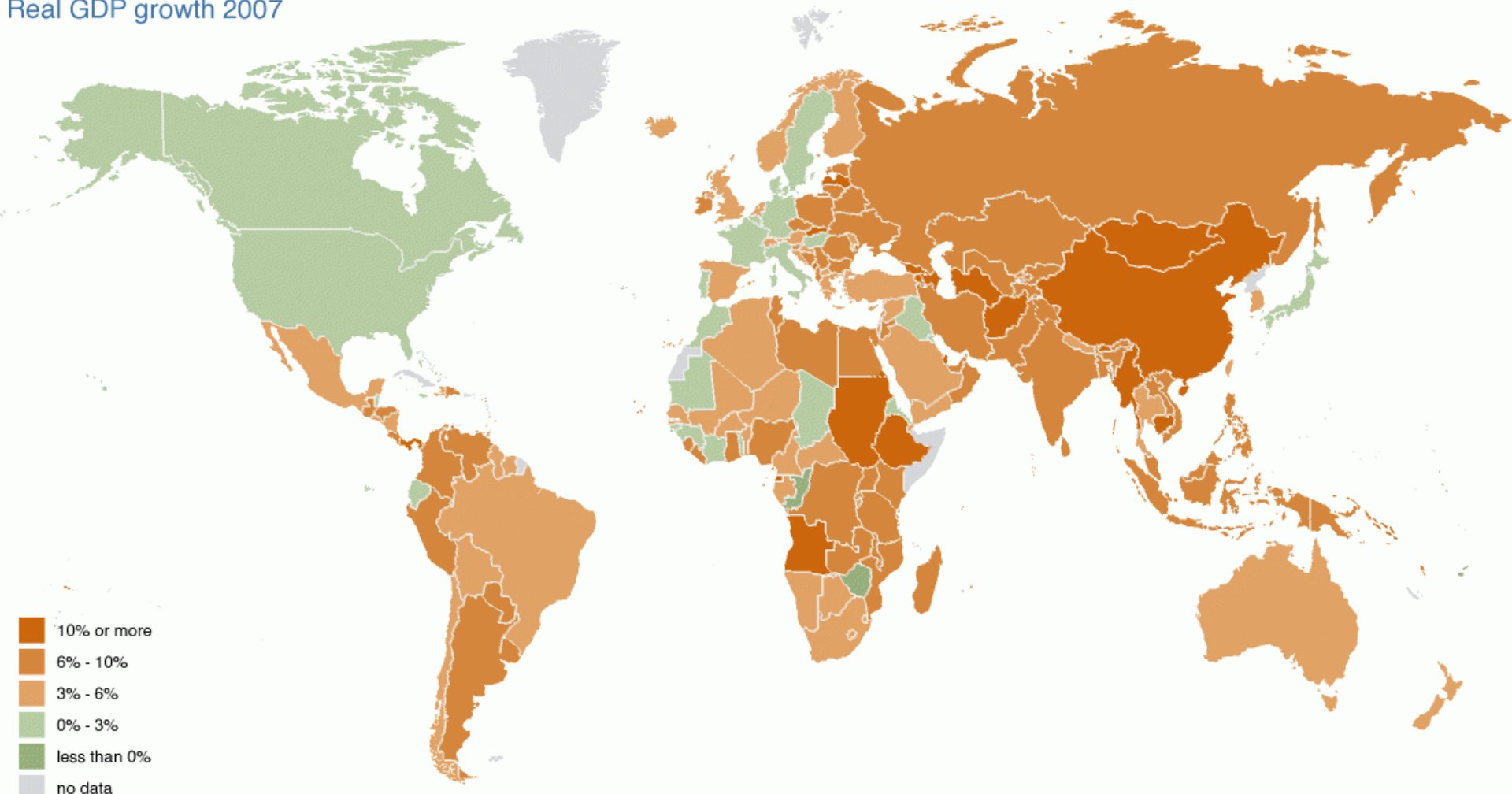
CONTENTS

- Asia Pacific tourism trends
- Airline traffic trends
- Hotel trends
- Outlook



IMF Data Mapper

Real GDP growth 2007



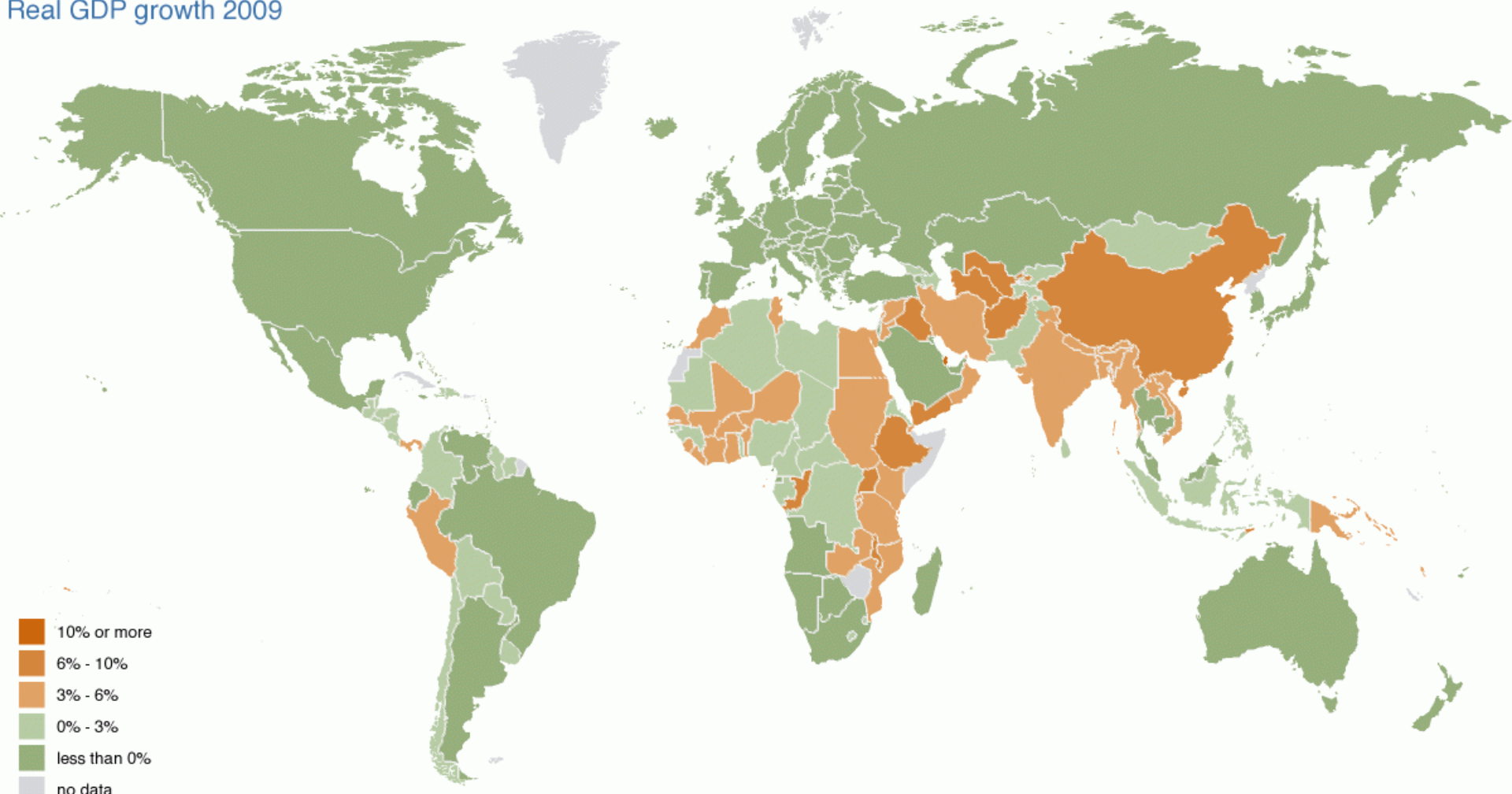
- 10% or more
- 6% - 10%
- 3% - 6%
- 0% - 3%
- less than 0%
- no data

Annual percent change



IMF Data Mapper

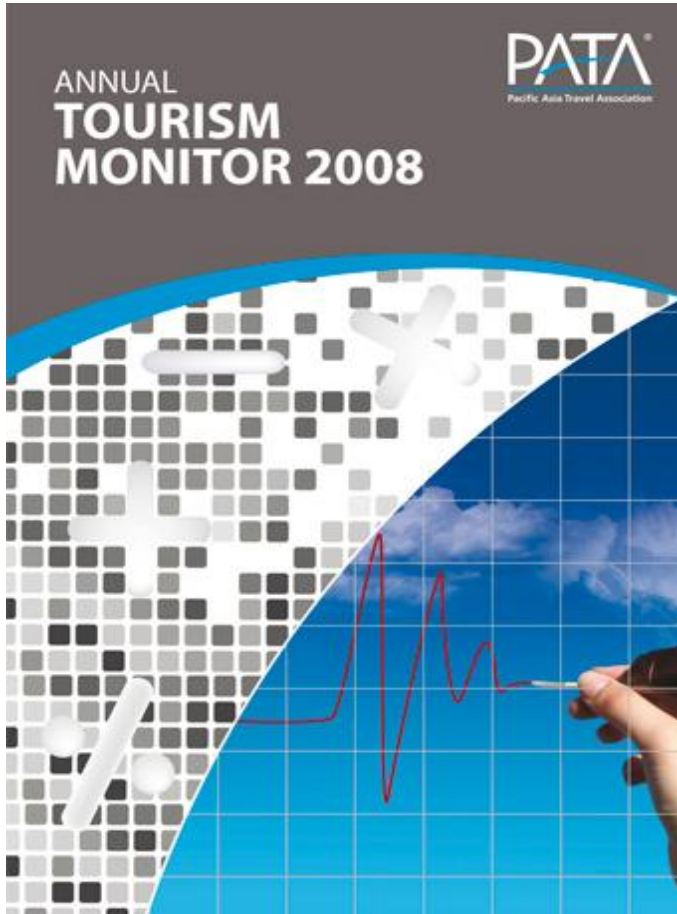
Real GDP growth 2009



Annual percent change



The PATA region



In 2008

Asia Pacific 377 million +0.3%

The Americas 33 million +3%

Northeast Asia 202 million -2%

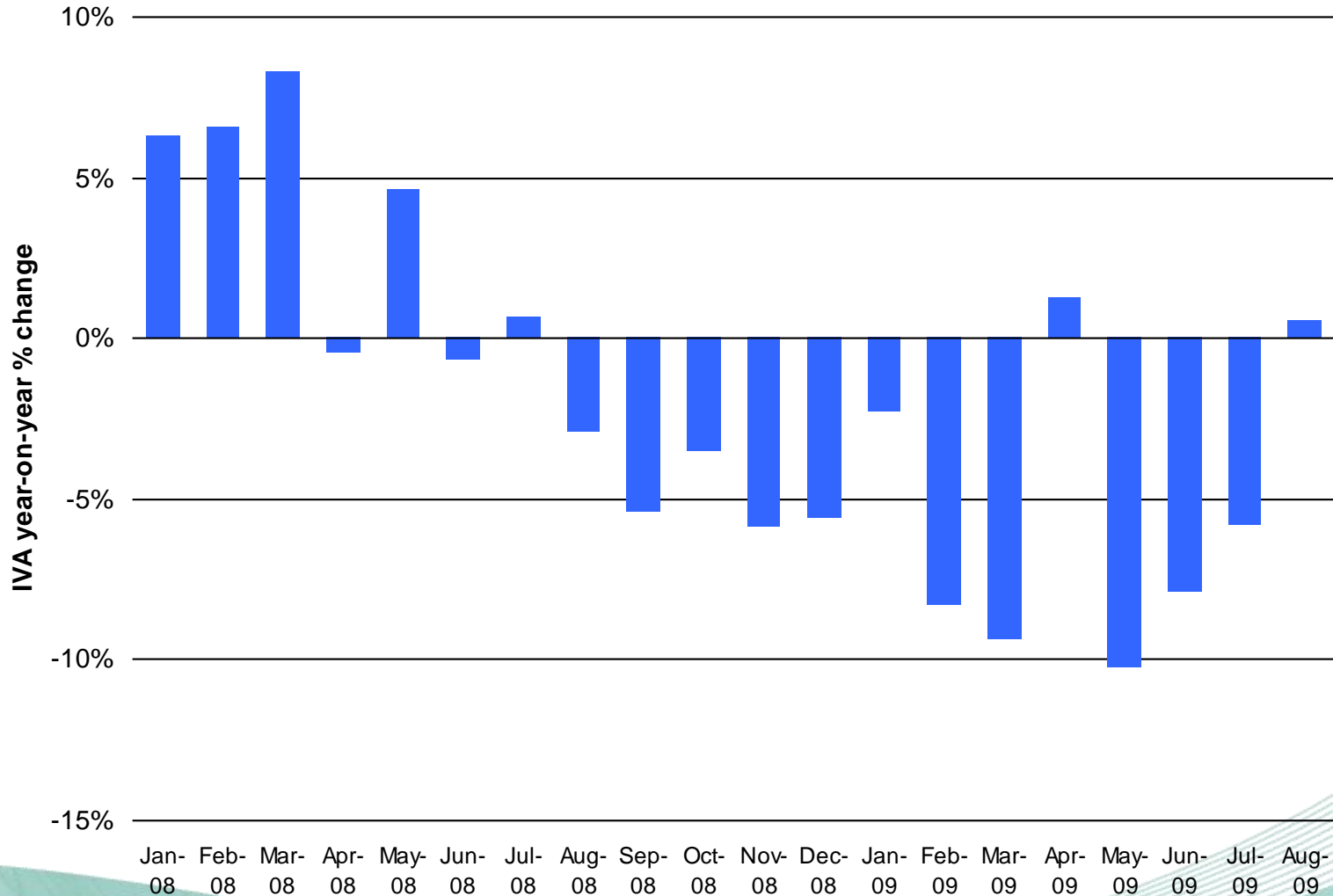
South Asia 7.7 million +3%

Southeast Asia 64 million +3%

The Pacific 18 million -4%

International visitor arrivals trends

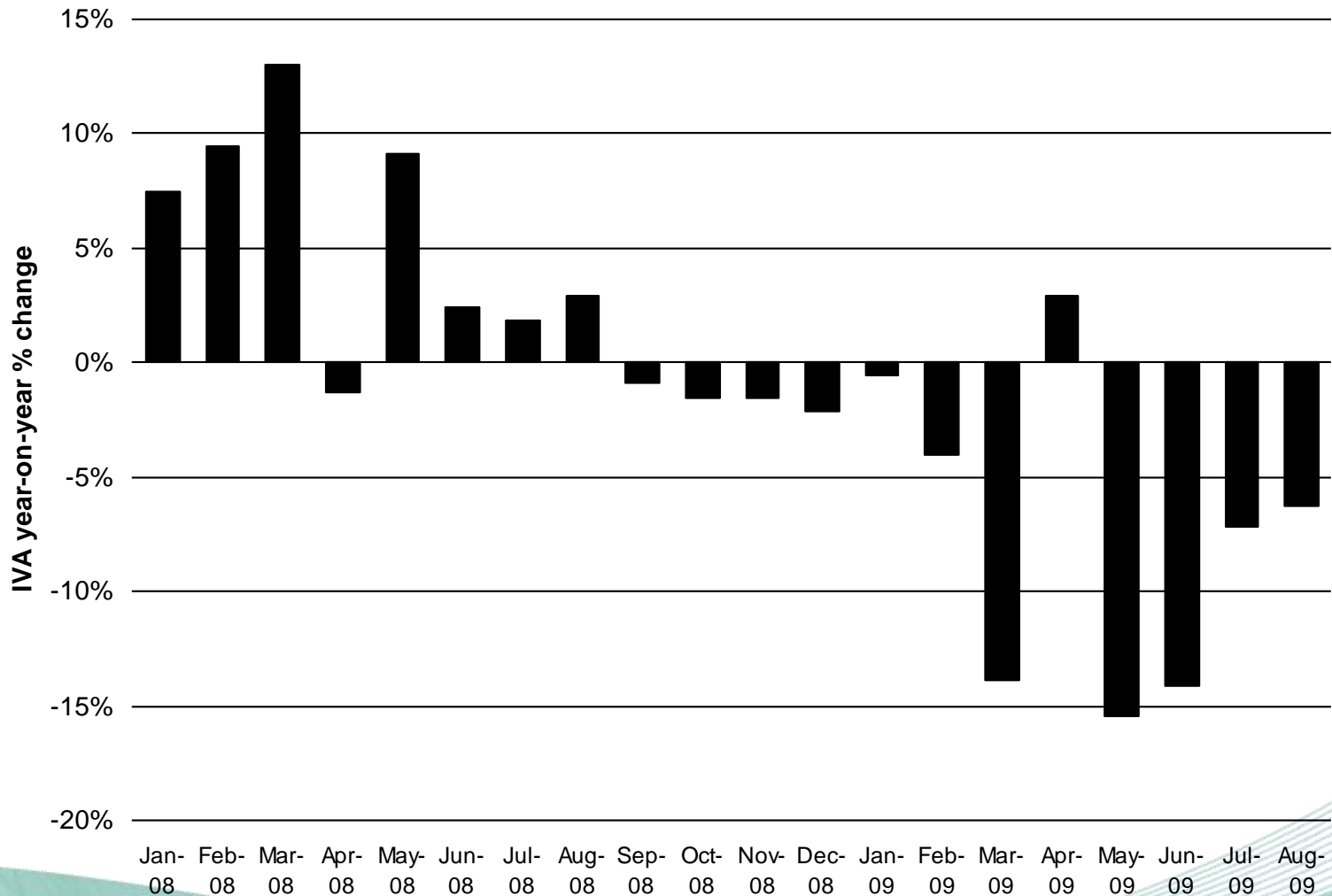
Asia Pacific



Sourced from respective NTOs, compiled by PATA

International visitor arrivals trends

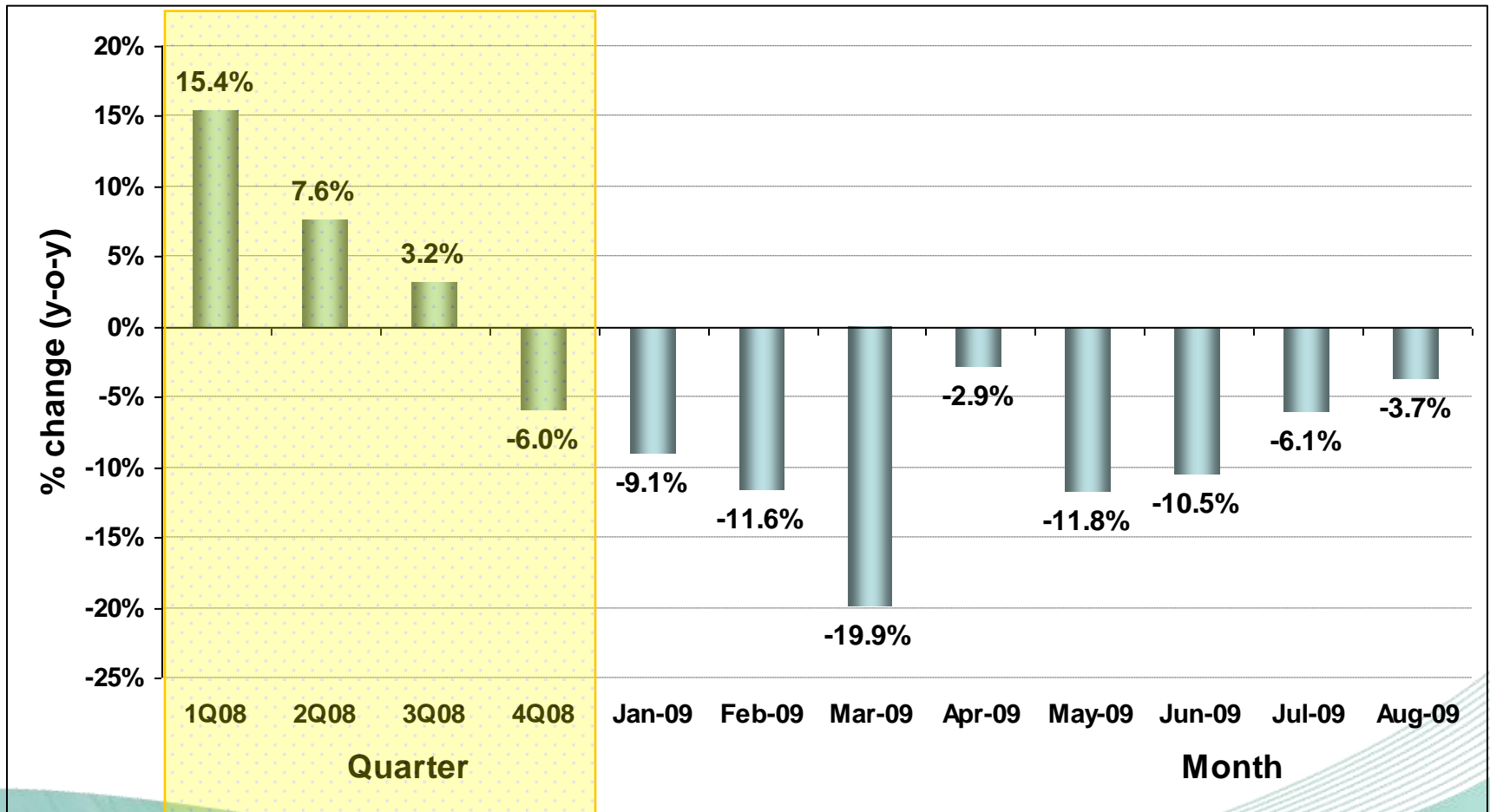
Americas



Sourced from respective NTOs, compiled by PATA

USA

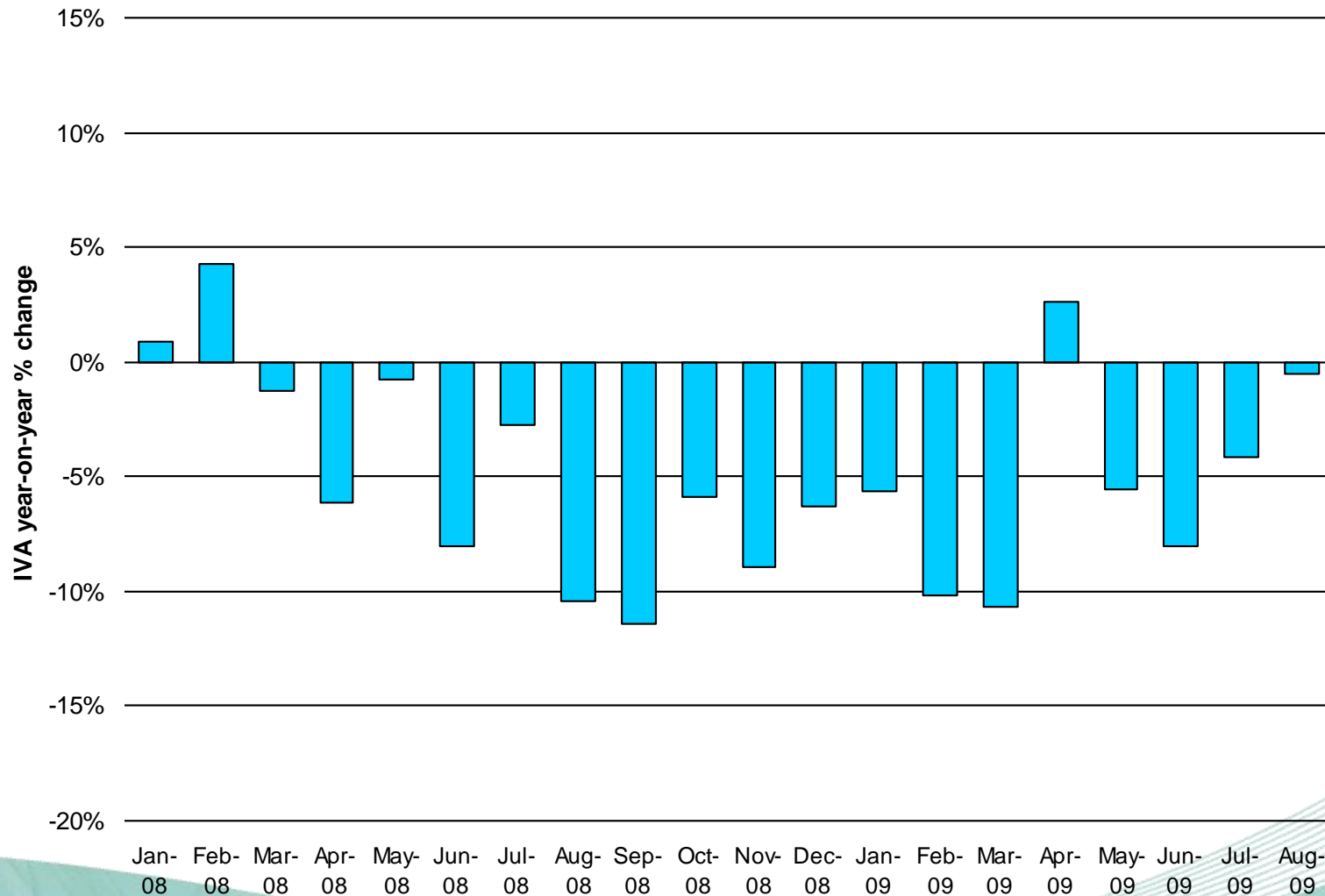
total international arrivals



Sourced from respective NTOs, compiled by PATA

International visitor arrivals trends

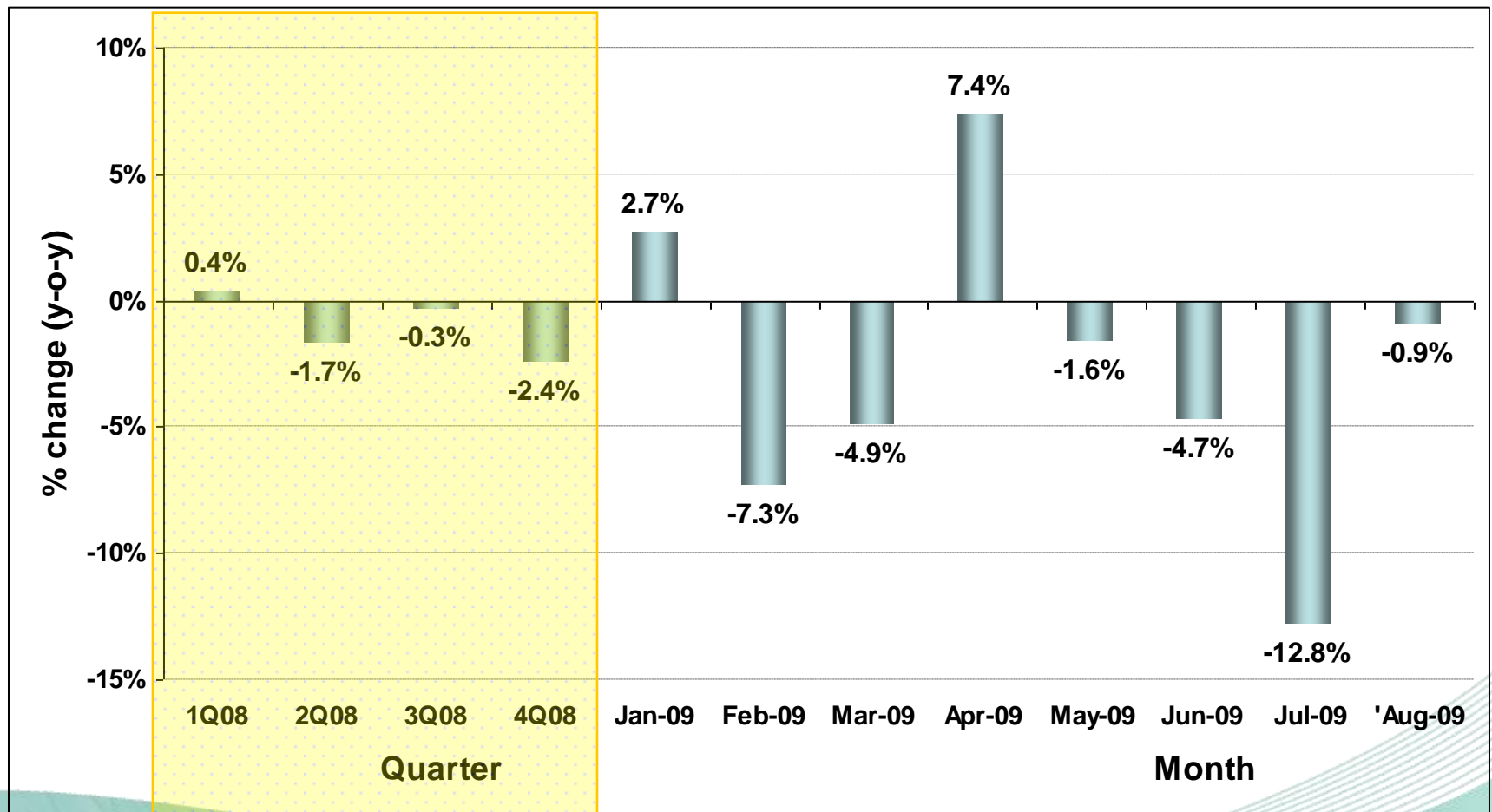
Pacific



Sourced from respective NTOs, compiled by PATA

Australia

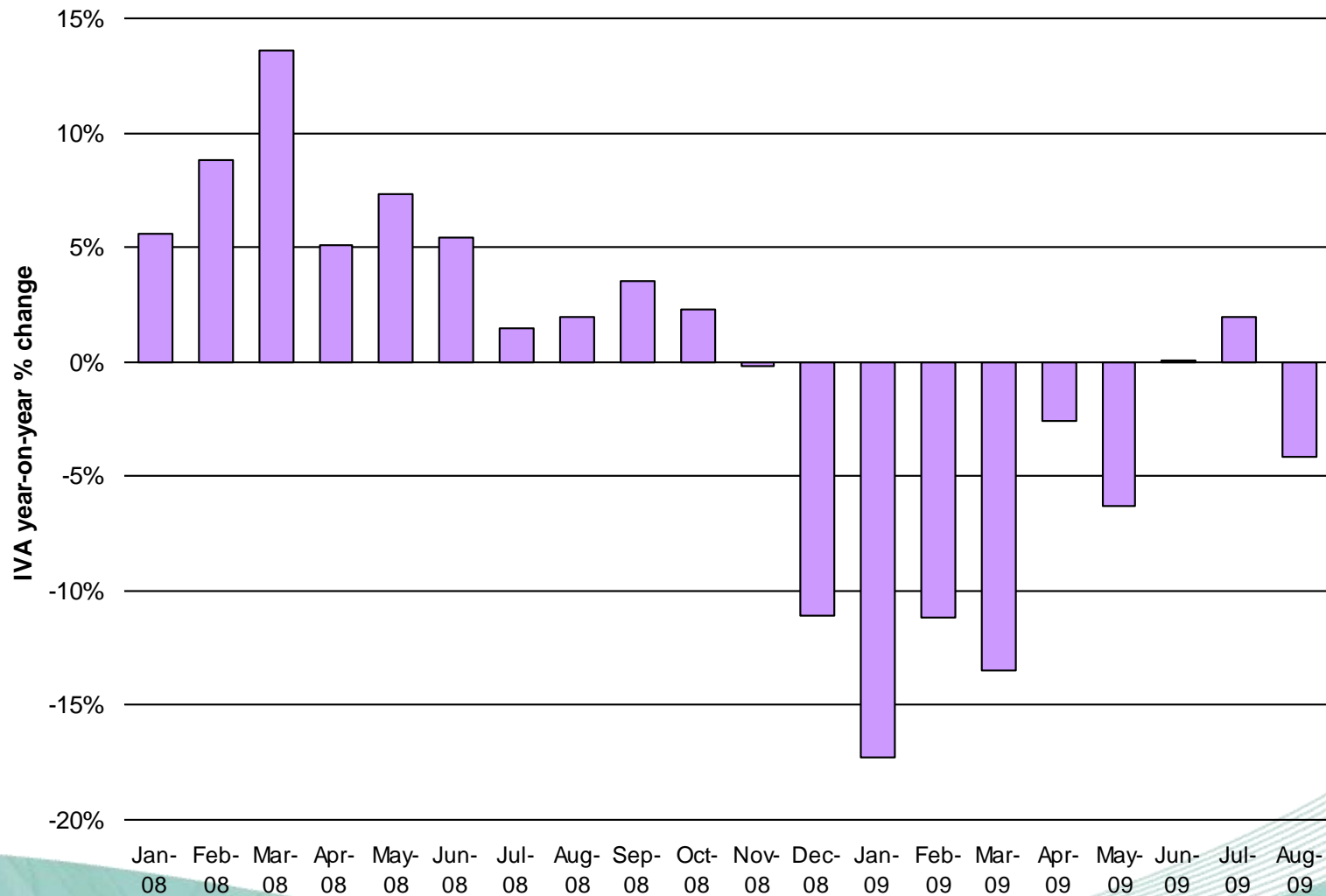
total international arrivals, include arrivals from Norfolk Island



Sourced from respective NTOs, compiled by PATA

International visitor arrivals trends

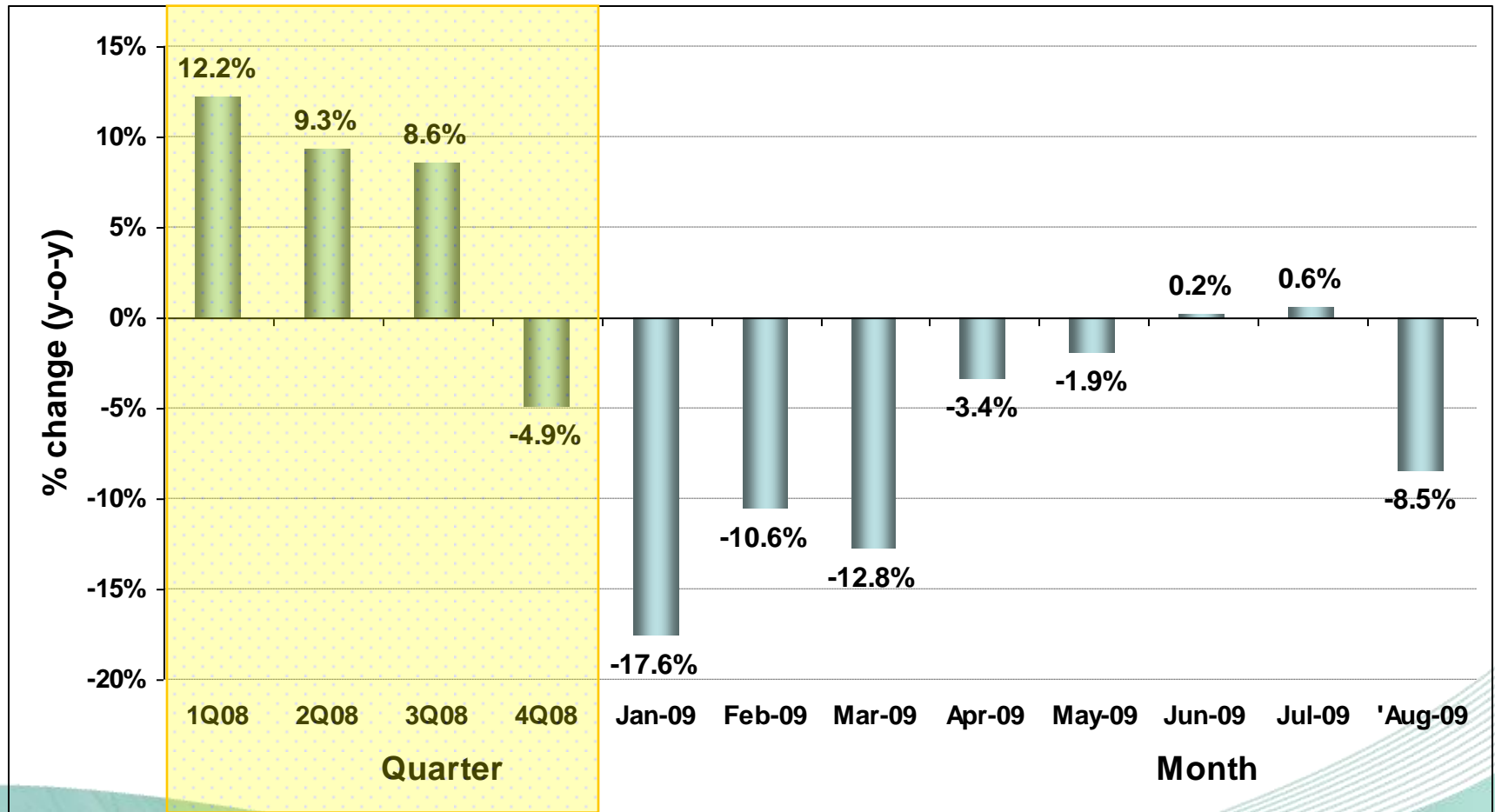
South Asia



Sourced from respective NTOs, compiled by PATA

India

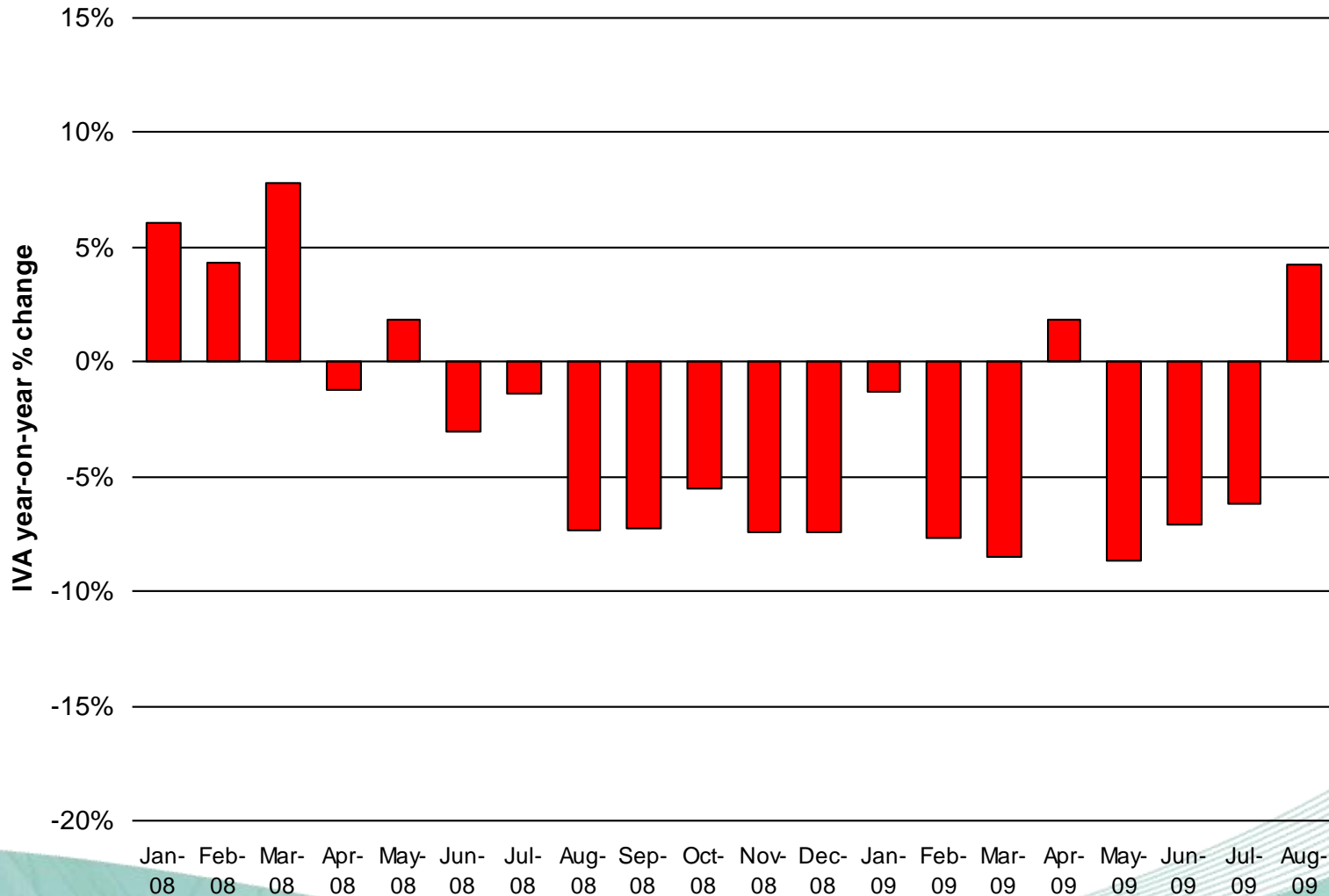
total international arrivals



Sourced from respective NTOs, compiled by PATA

International visitor arrivals trends

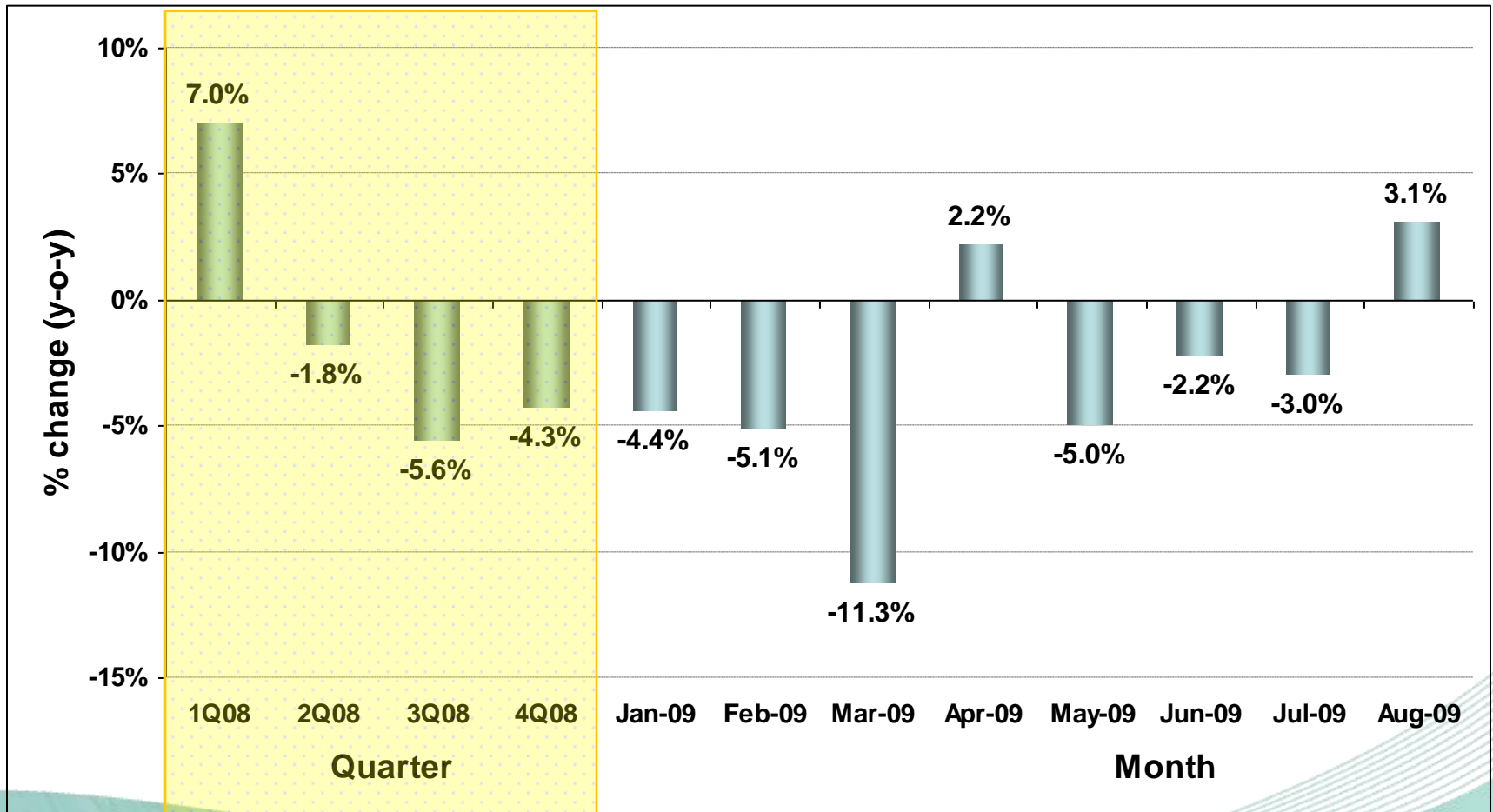
Northeast Asia



Sourced from respective NTOs, compiled by PATA

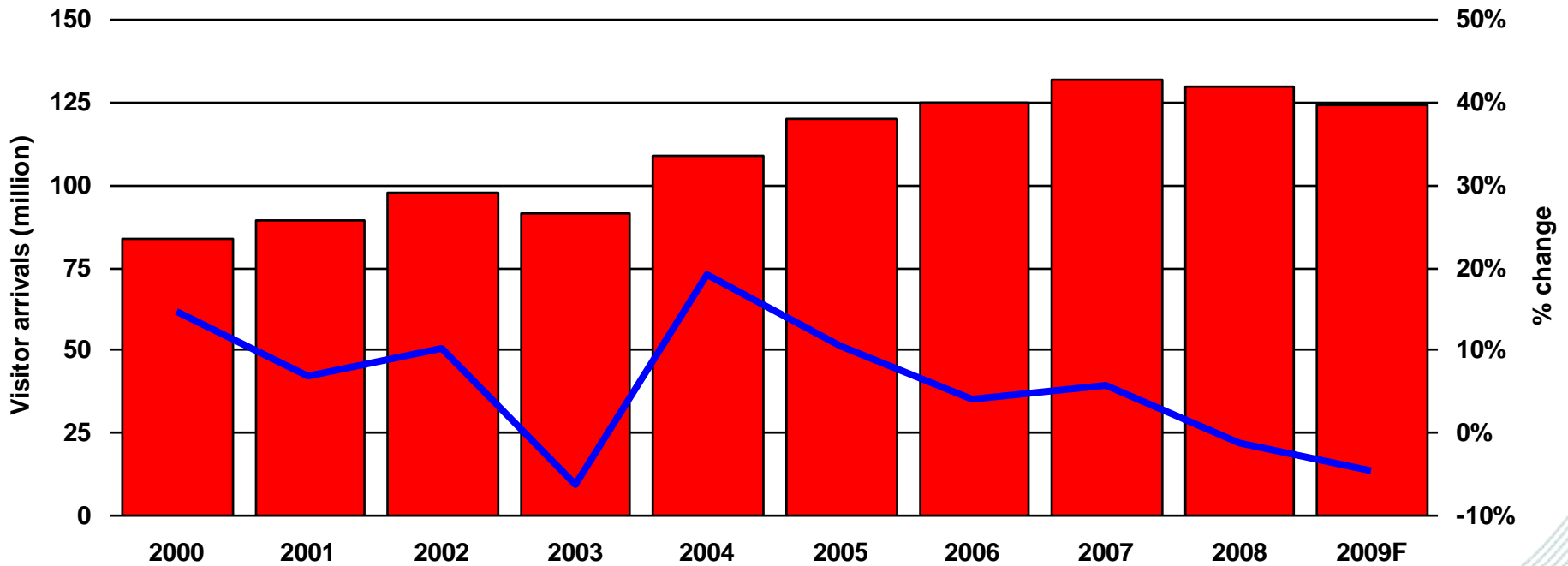
China (PRC)

total international arrivals (include Hong Kong SAR and Macau SAR)

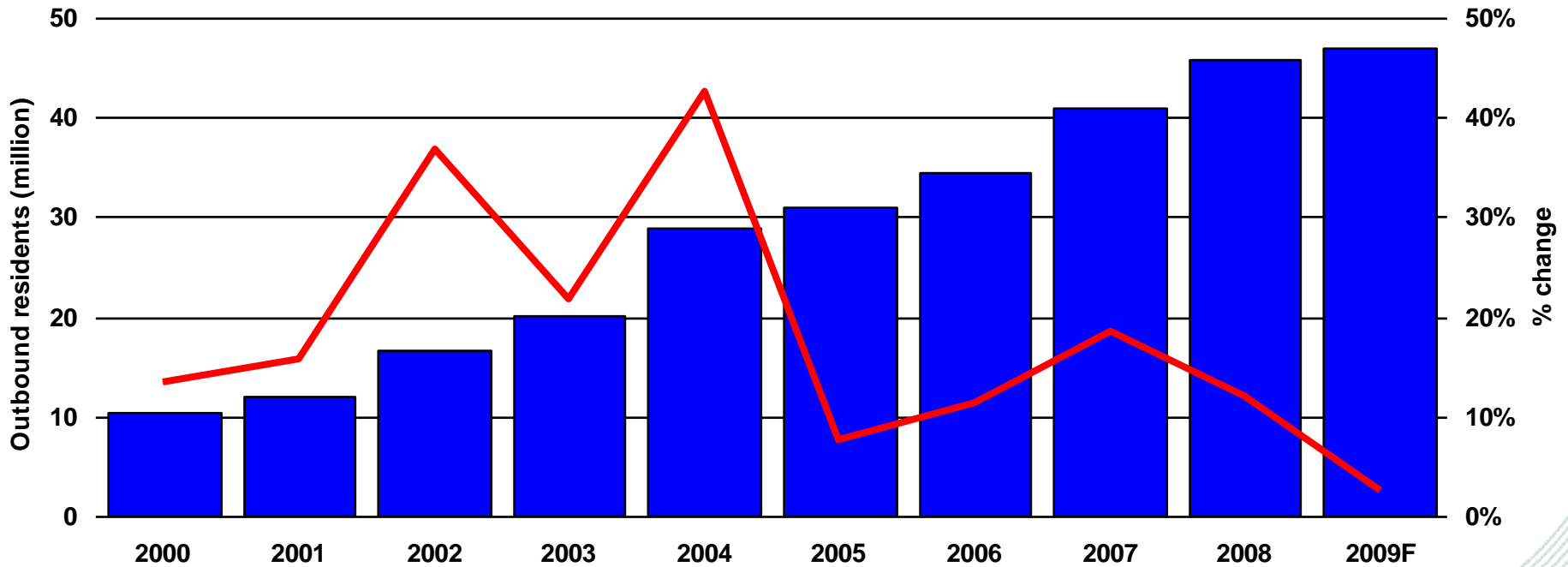


Sourced from respective NTOs, compiled by PATA

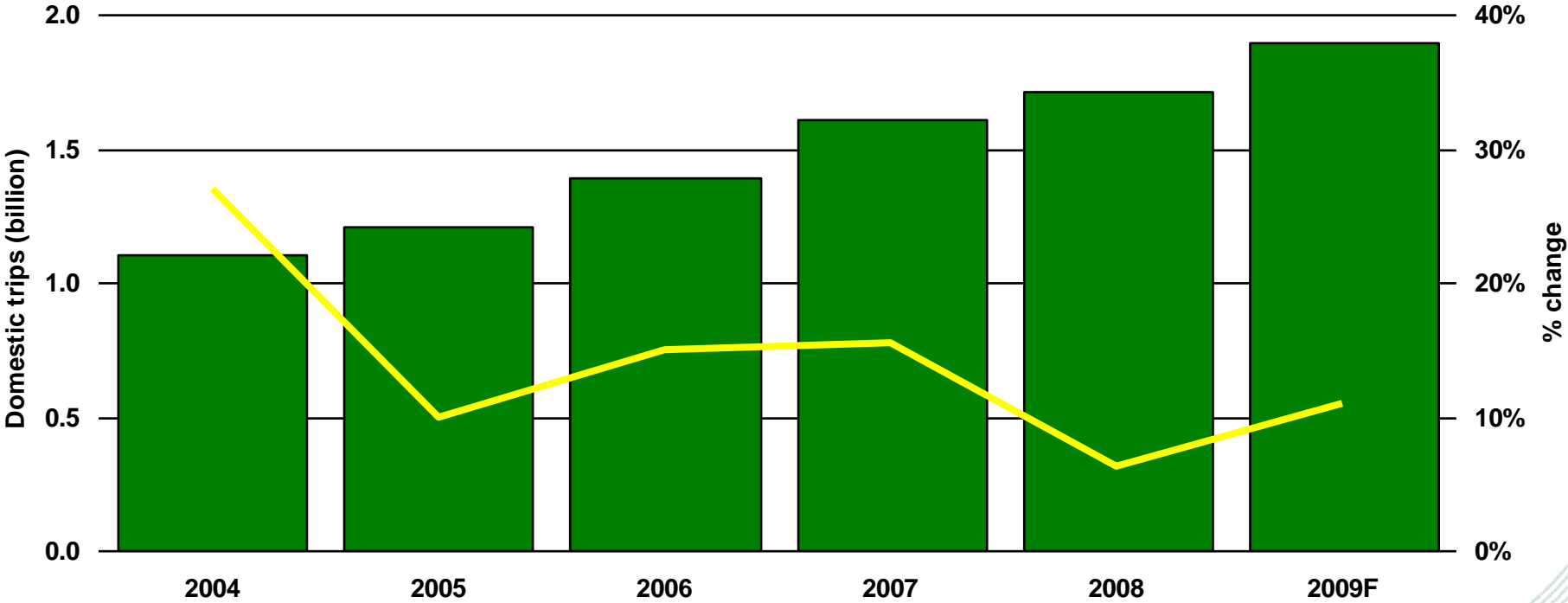
China (PRC) Inbound Travel Market 2000 - 2009F
(include arrivals from Hong Kong SAR, Macau SAR and Chinese Taipei)
Source: CNTA, compiled by PATA



China (PRC) Outbound Travel Market 2000 - 2009F
(include outbounds to Hong Kong SAR, Macau SAR and Chinese Taipei)
Source: CNTA, compiled by PATA



China (PRC) Domestic Travel Market 2004 - 2009F
Source: CNTA, compiled by PATA



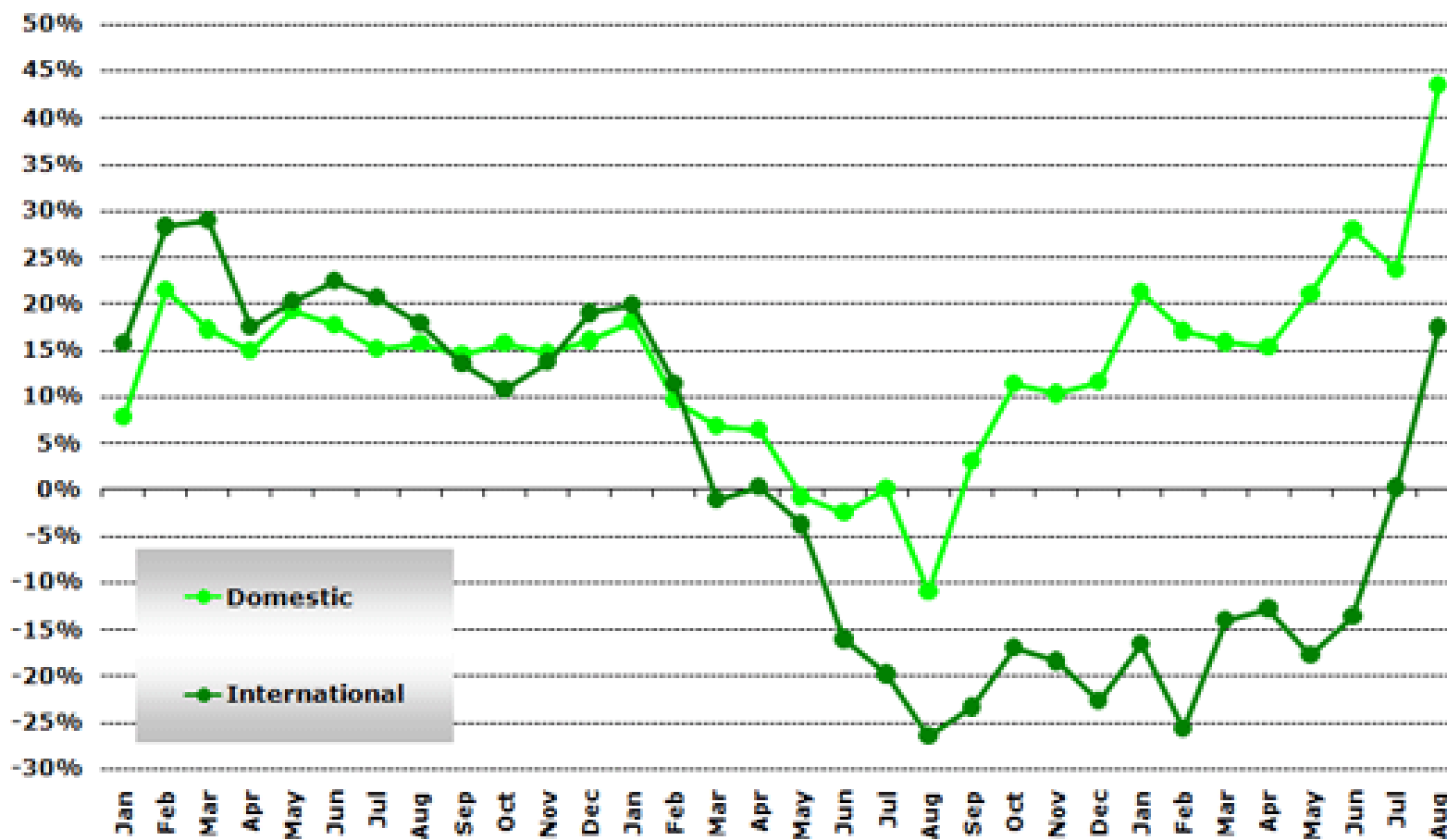
China

source: OAG flight atlas



Chinese airlines development

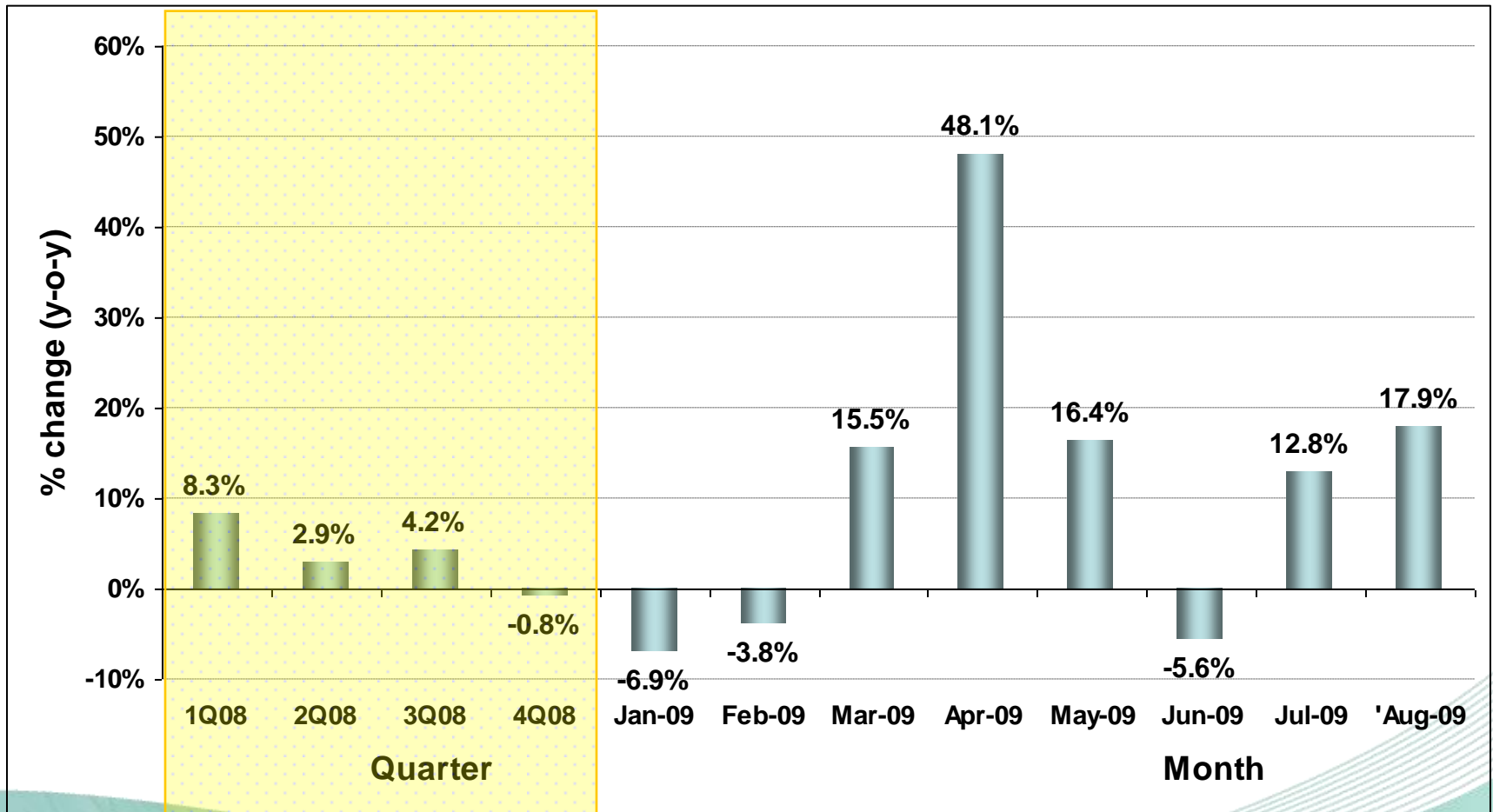
Year-on-year change in monthly passengers: 1/07 to 8/09



Source: anna.aero (Market Trends, 02 October 2009)

Chinese Taipei

total international arrivals



Sourced from respective NTOs, compiled by PATA

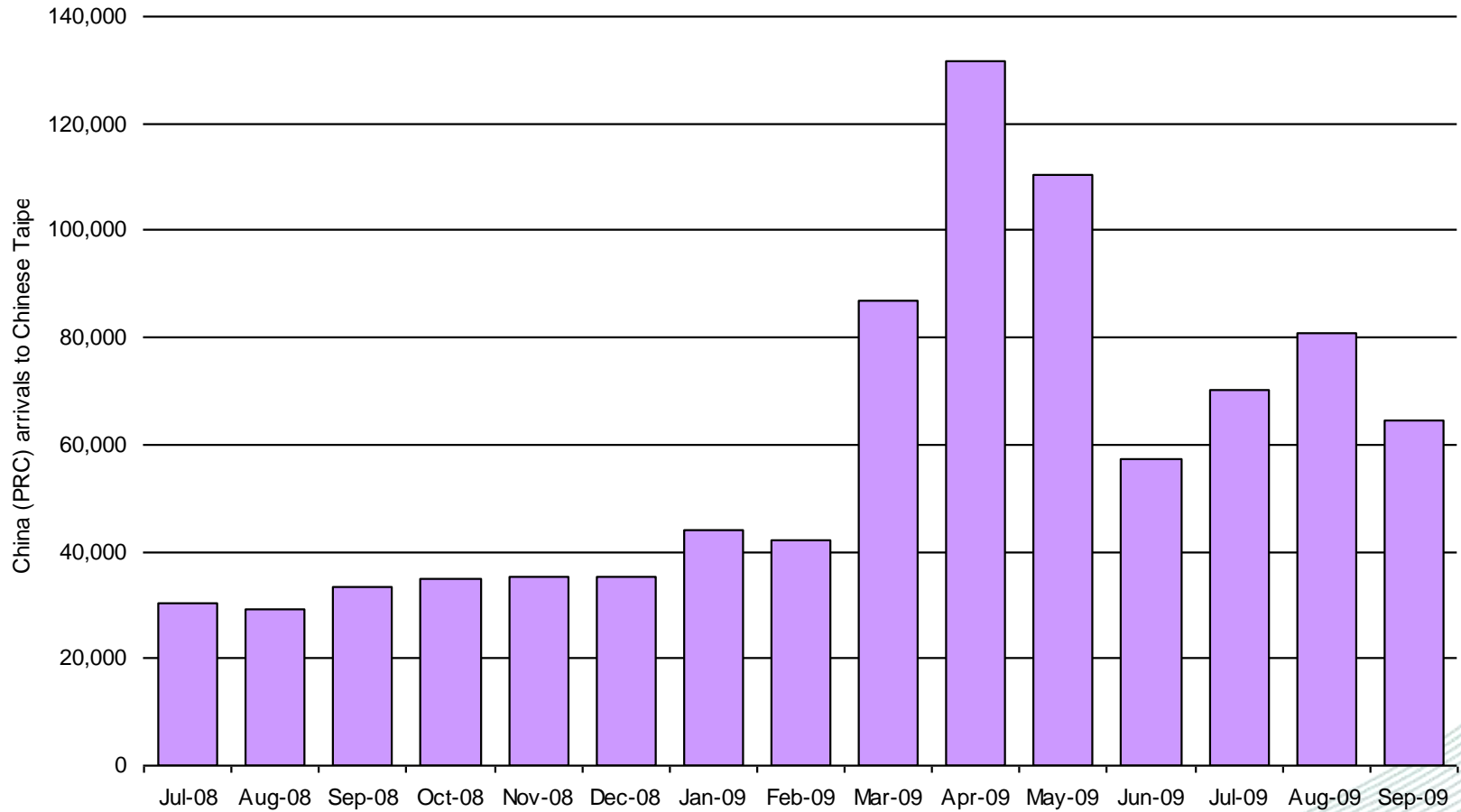


scheduled cross-strait flights

from charter 108 weekly services to scheduled 270 weekly services

Chinese Taipei

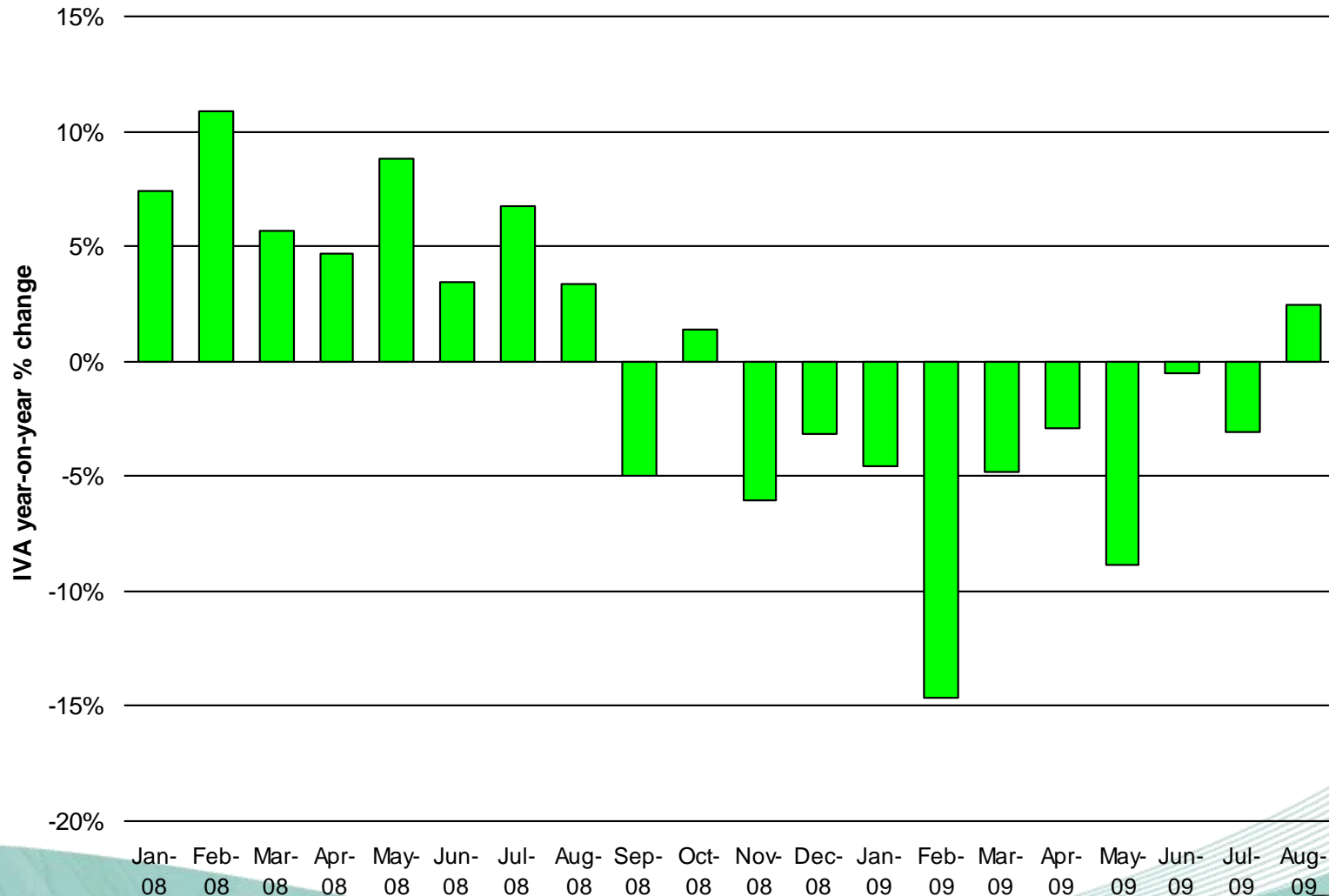
China (PRC) arrivals



Sourced from respective NTOs, compiled by PATA

International visitor arrivals trends

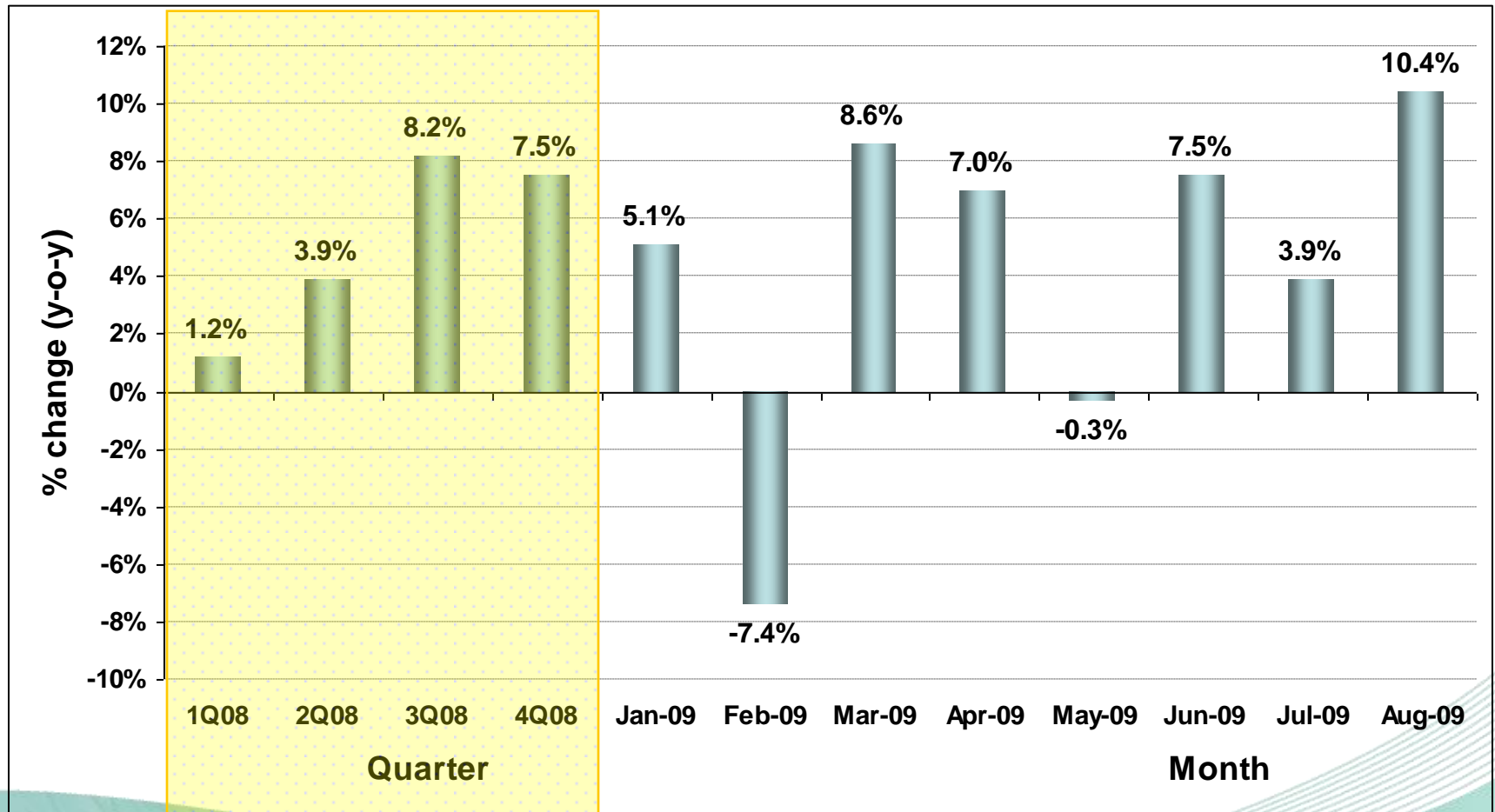
Southeast Asia



Sourced from respective NTOs, compiled by PATA

Malaysia

total international arrivals



Sourced from respective NTOs, compiled by PATA

airline traffic trends



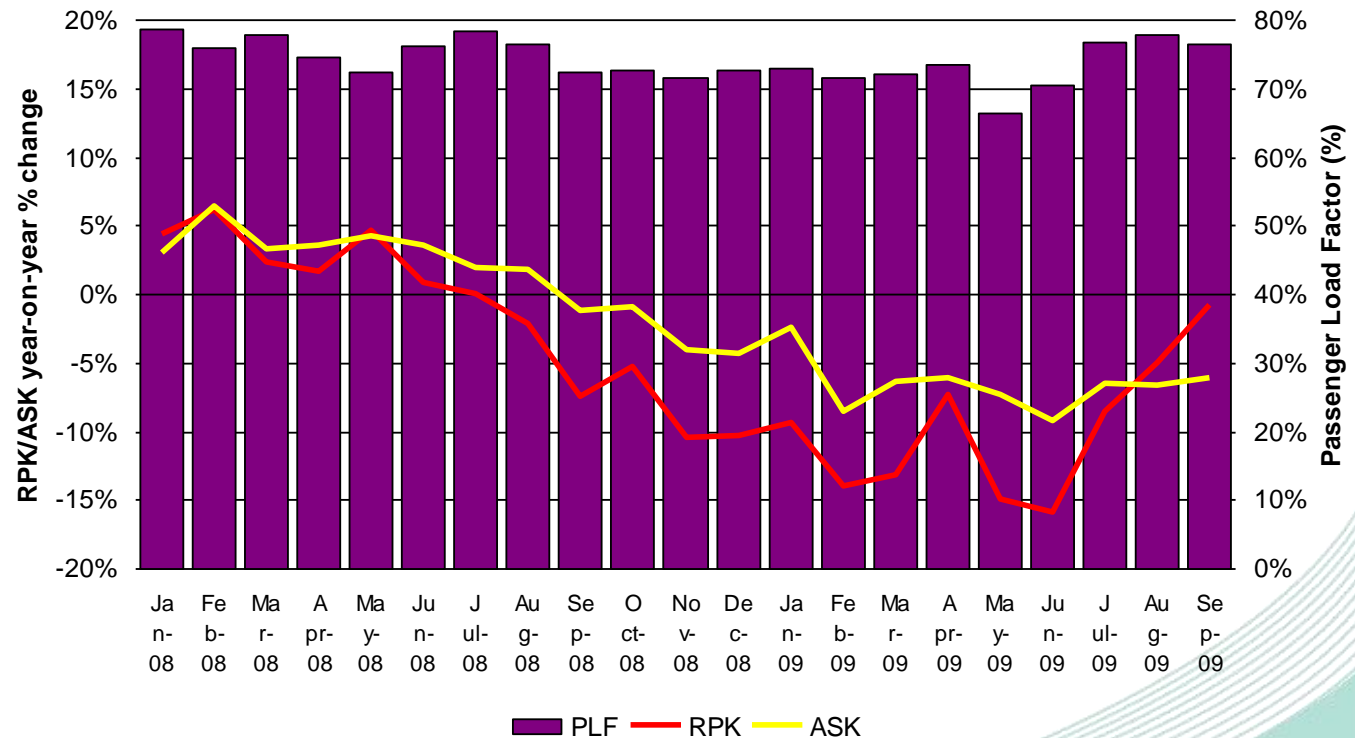


Airline traffic trends: Asia Pacific



Asia Pacific international passenger traffic trends 2008-2009

Source: AAPA at www.aapaairlines.org



Source: AAPA

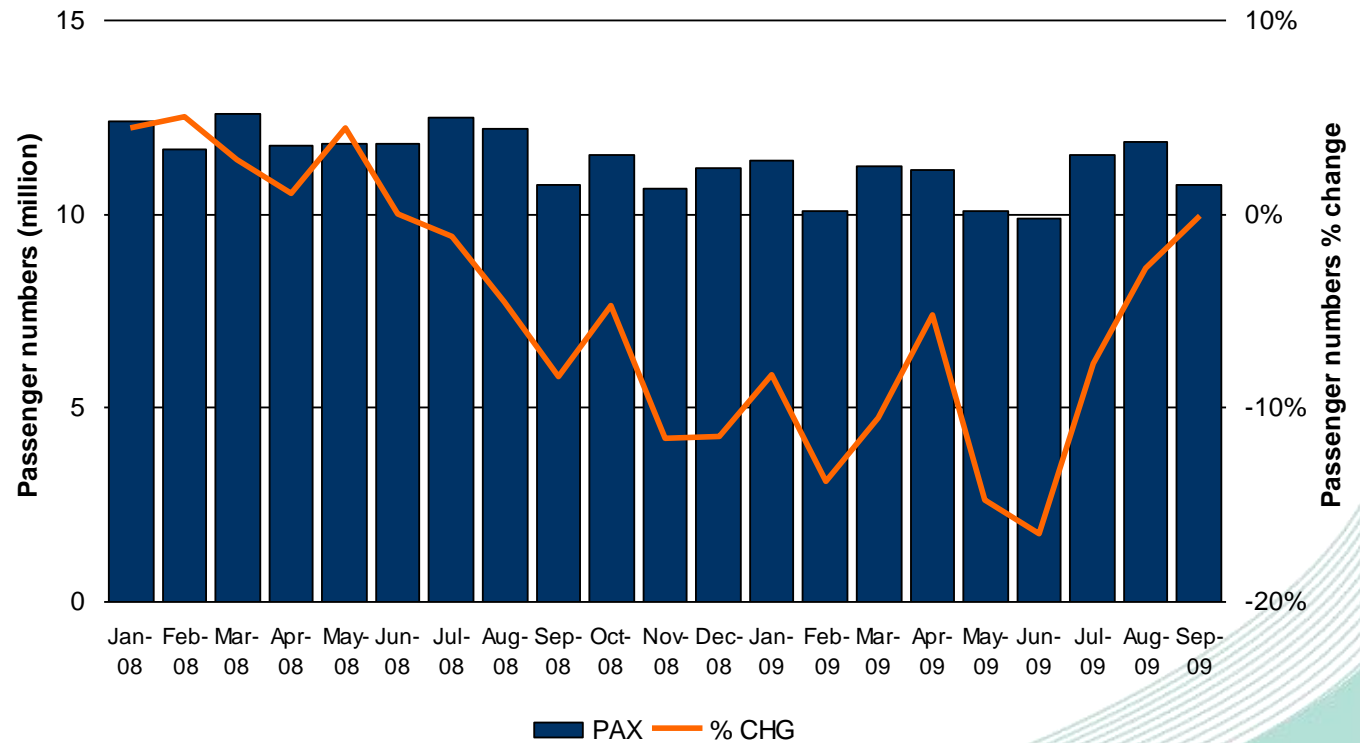




Airline traffic trends: Asia Pacific



Asia Pacific international passenger traffic trends 2008-2009
Source: AAPA at www.aapaairlines.org



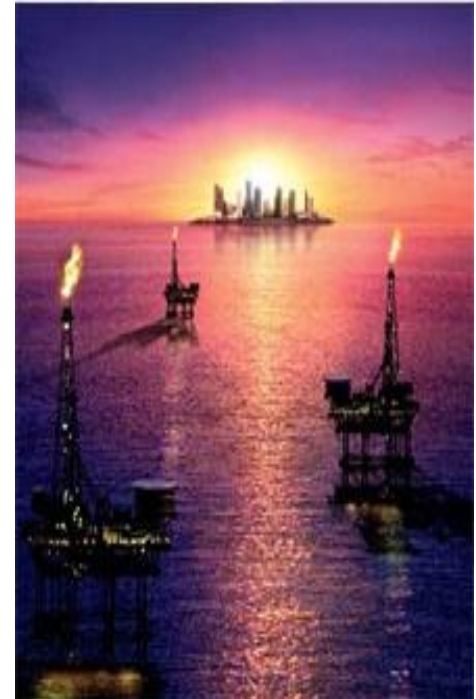
Source: AAPA





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middle east carriers remain committed to expanding capacity



LCC traffic remain robust

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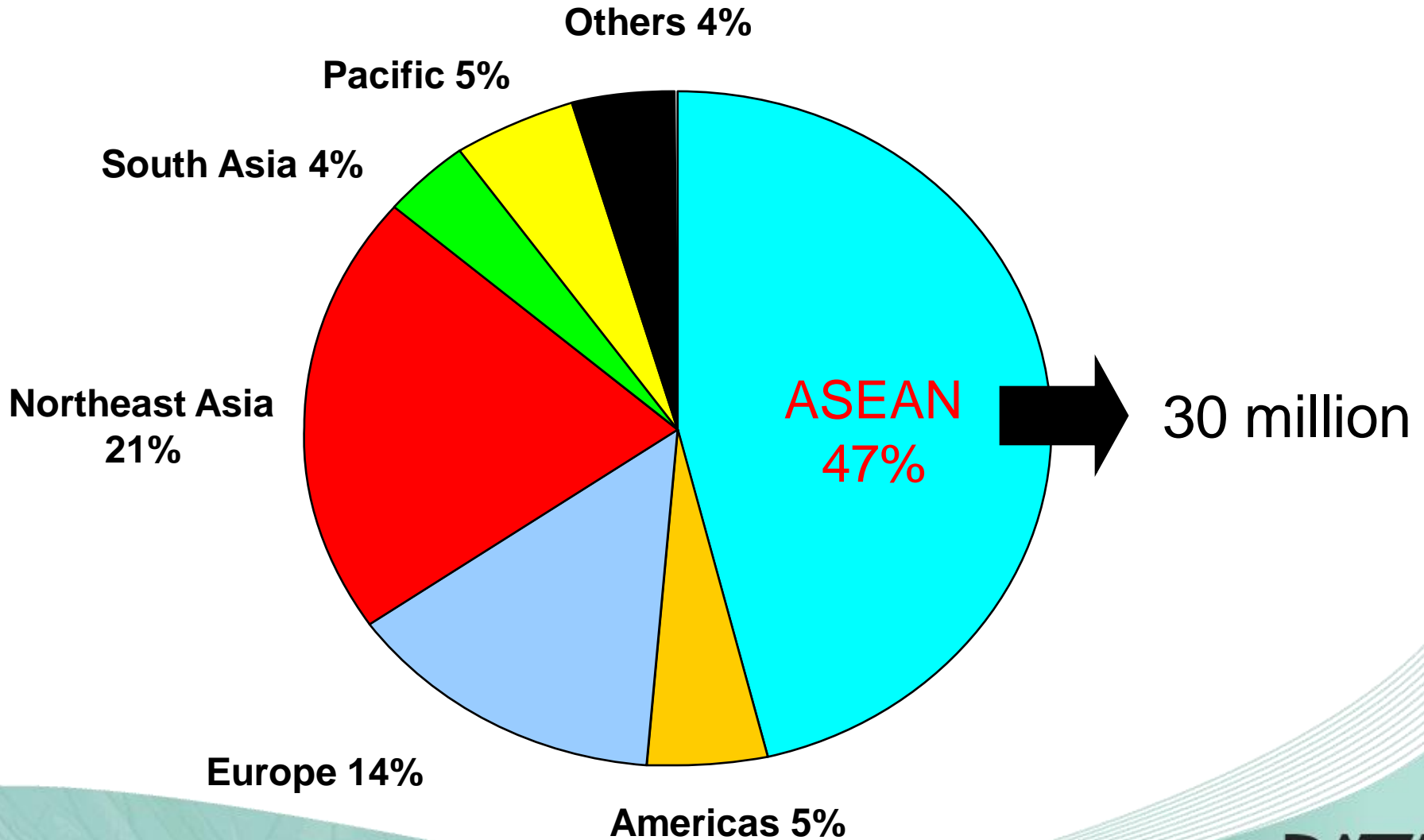
Book Now

Book from 31 Aug - 6 Sep 2009 | Travel from 20 Oct 2009 - 31 Jul 2010
✦ Flight is operated by AirAsia X. Terms & conditions apply



ASEAN

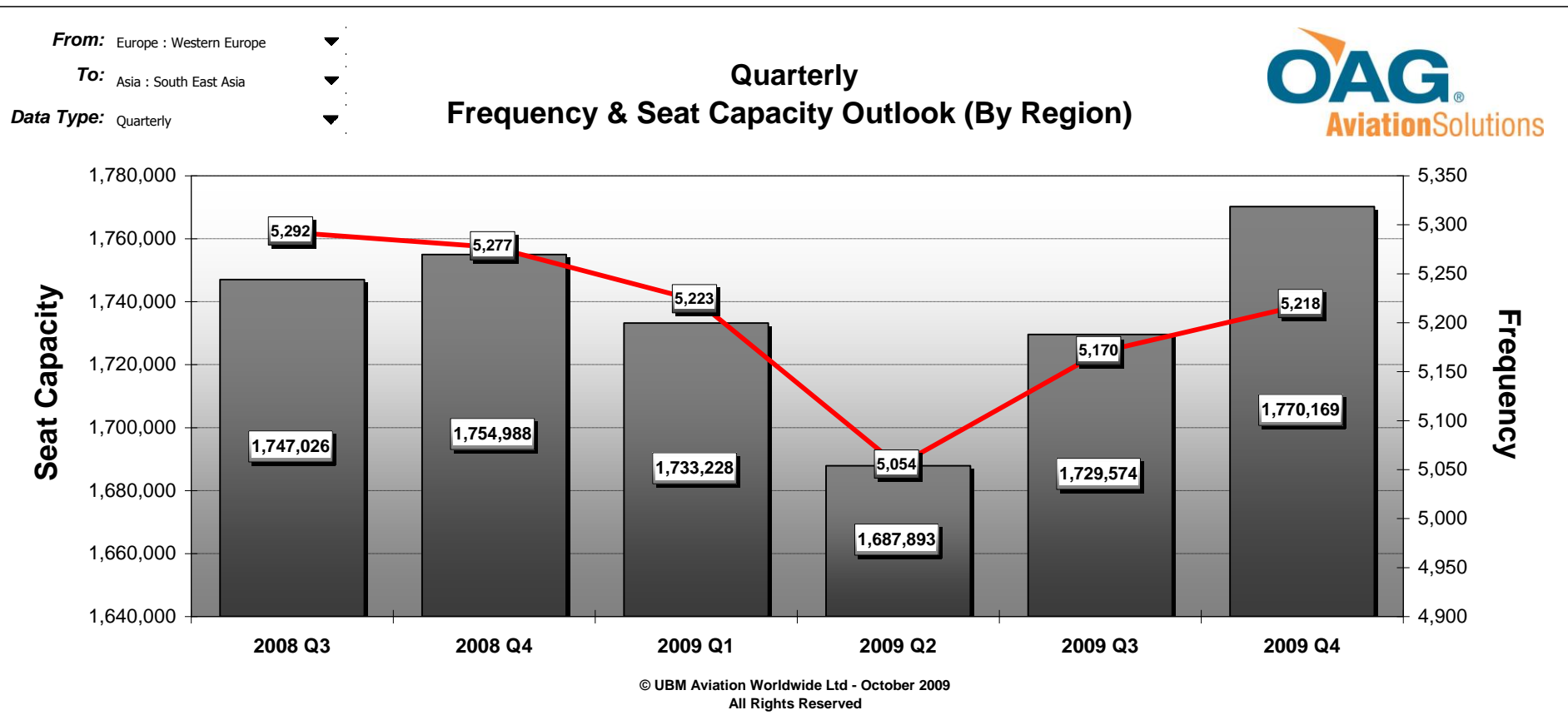
Intra-ASEAN





ASEAN open skies 2015?

Airline capacity trends: Western Europe-Southeast Asia



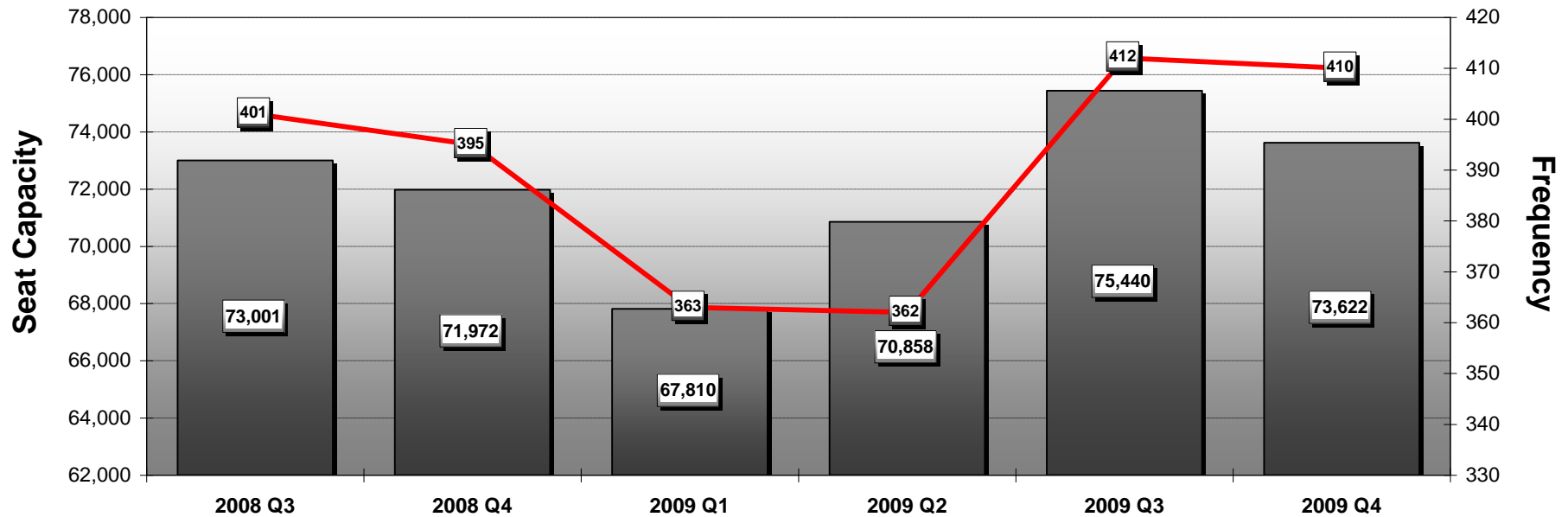
Airline capacity trends: North America-Southeast Asia

From: North America

To: Asia : South East Asia

Data Type: Quarterly

Quarterly Frequency & Seat Capacity Outlook (By Region)

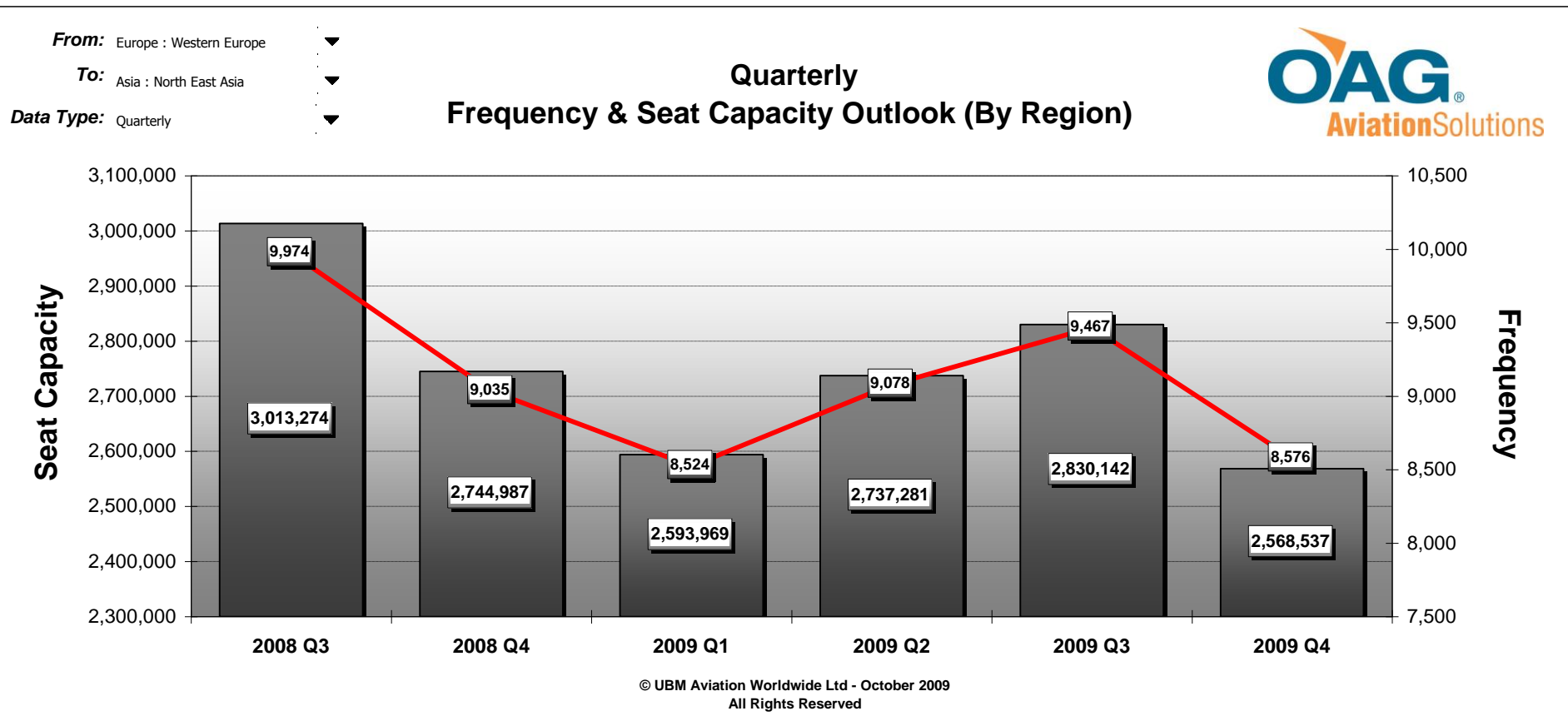


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Source: OAG solutions



Airline capacity trends: Western Europe-Northeast Asia



Airline capacity trends: North America-Northeast Asia

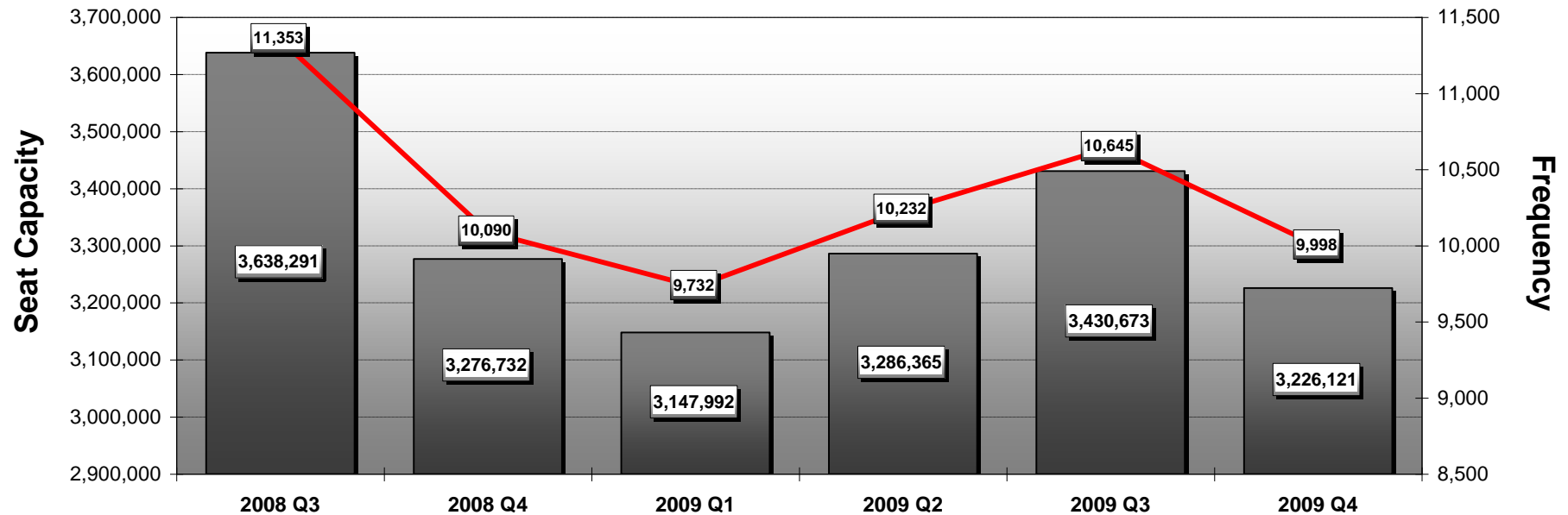


Quarterly
Frequency & Seat Capacity Outlook (By Region)

From: North America

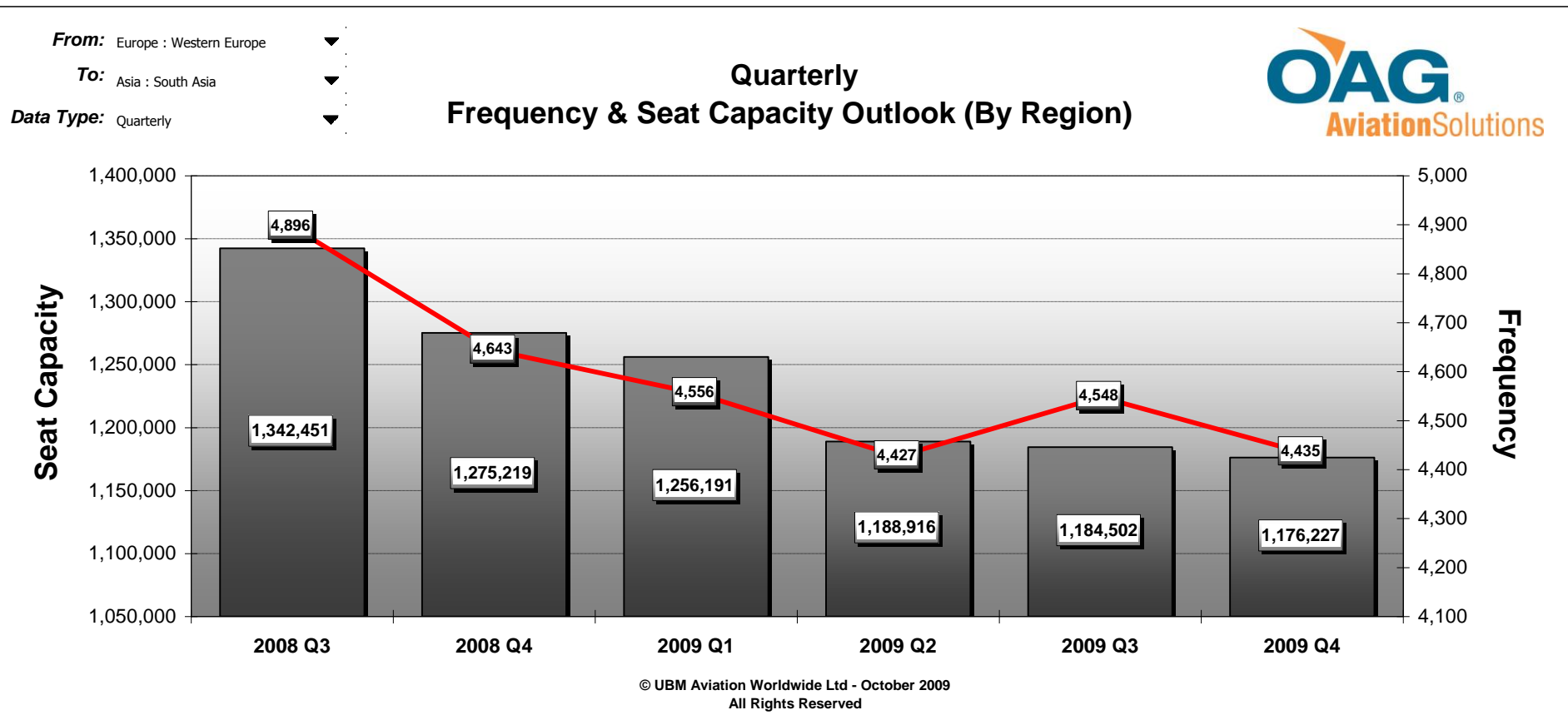
To: Asia : North East Asia

Data Type: Quarterly



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Airline capacity trends: Western Europe-South Asia

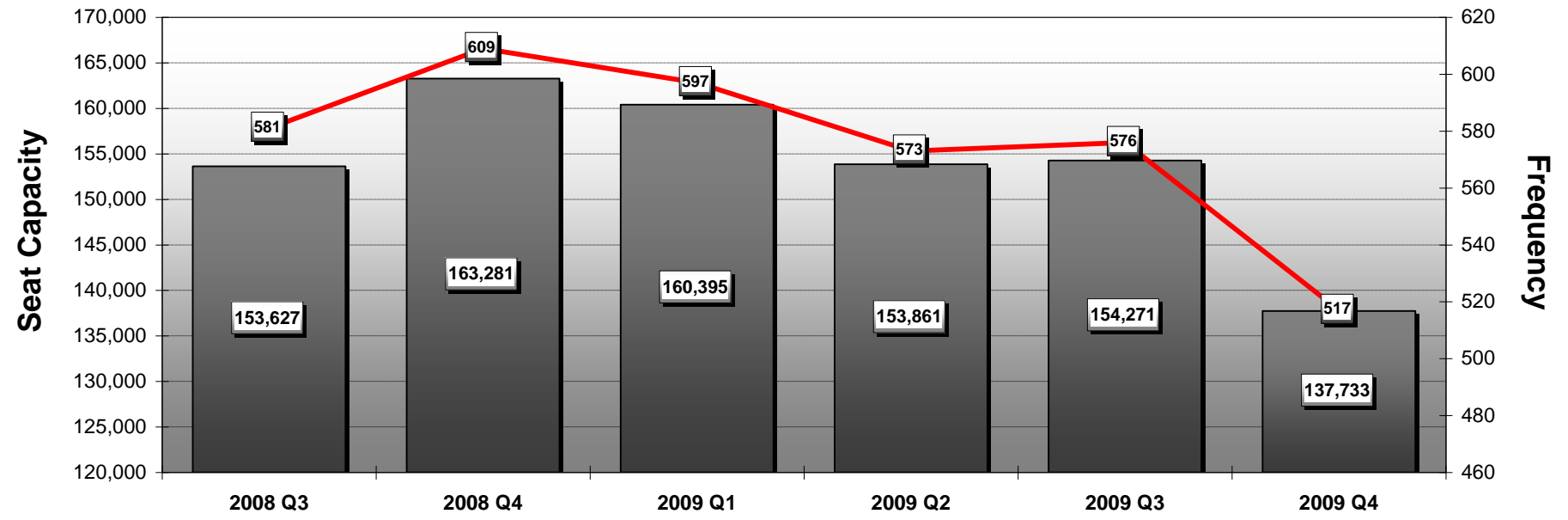


Airline capacity trends: North America-South Asia

From: North America
To: Asia : South Asia
Data Type: Quarterly



**Quarterly
Frequency & Seat Capacity Outlook (By Region)**



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Source: OAG solutions

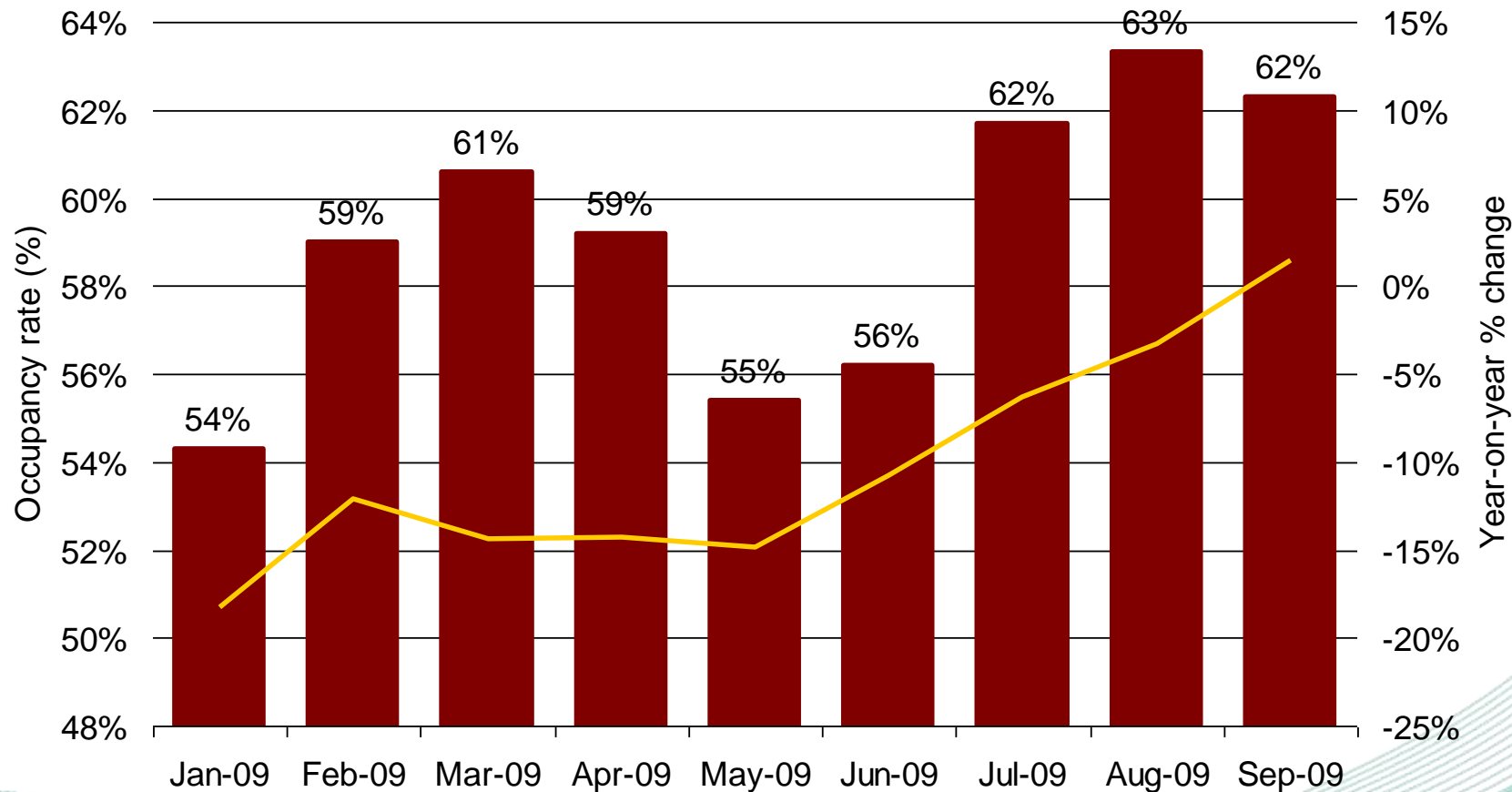




hotel trends

Hotel occupancy rates Jan-Sep 2009

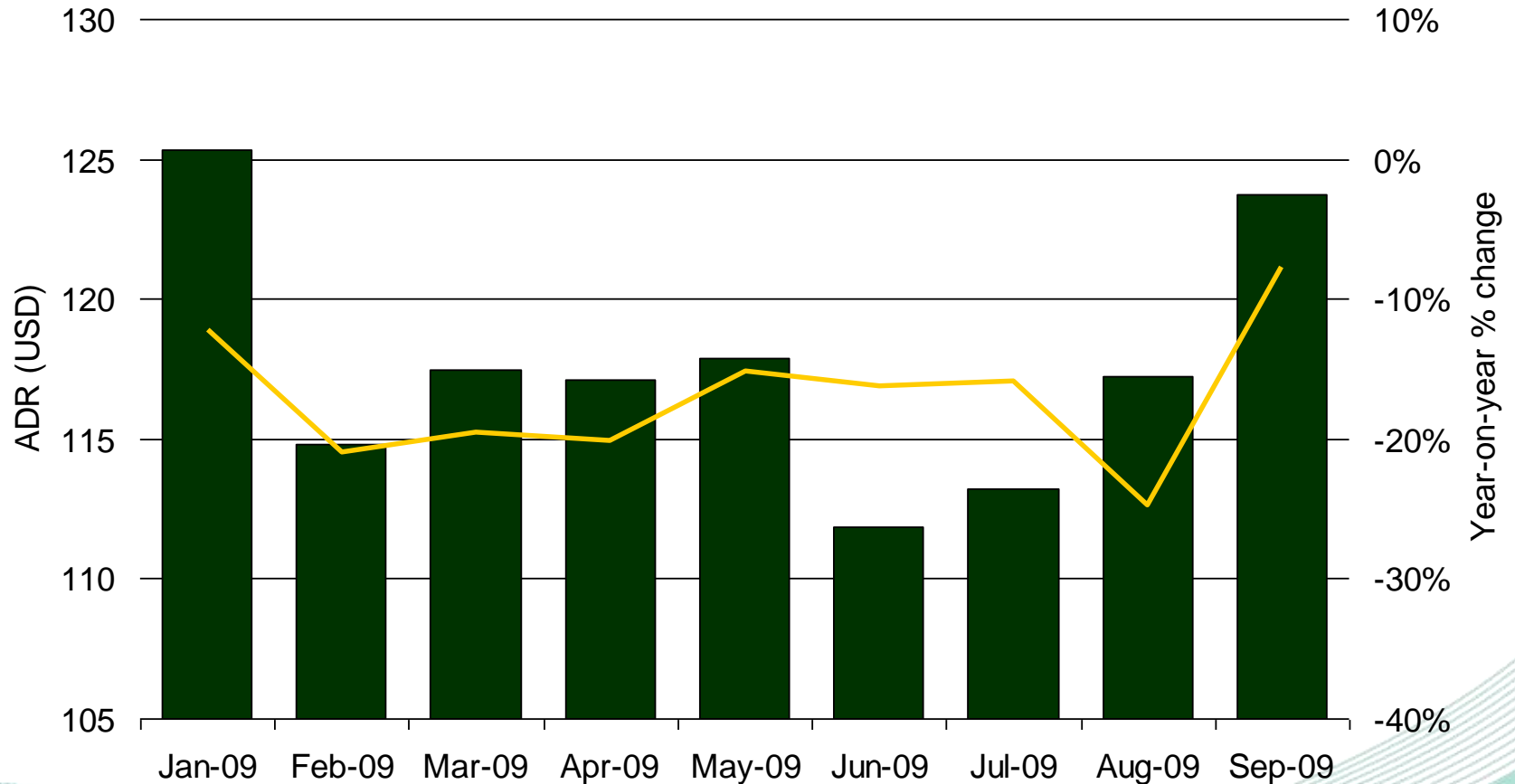
Asia Pacific



Source: STR Global

Hotel average daily rates Jan-Sep 2009

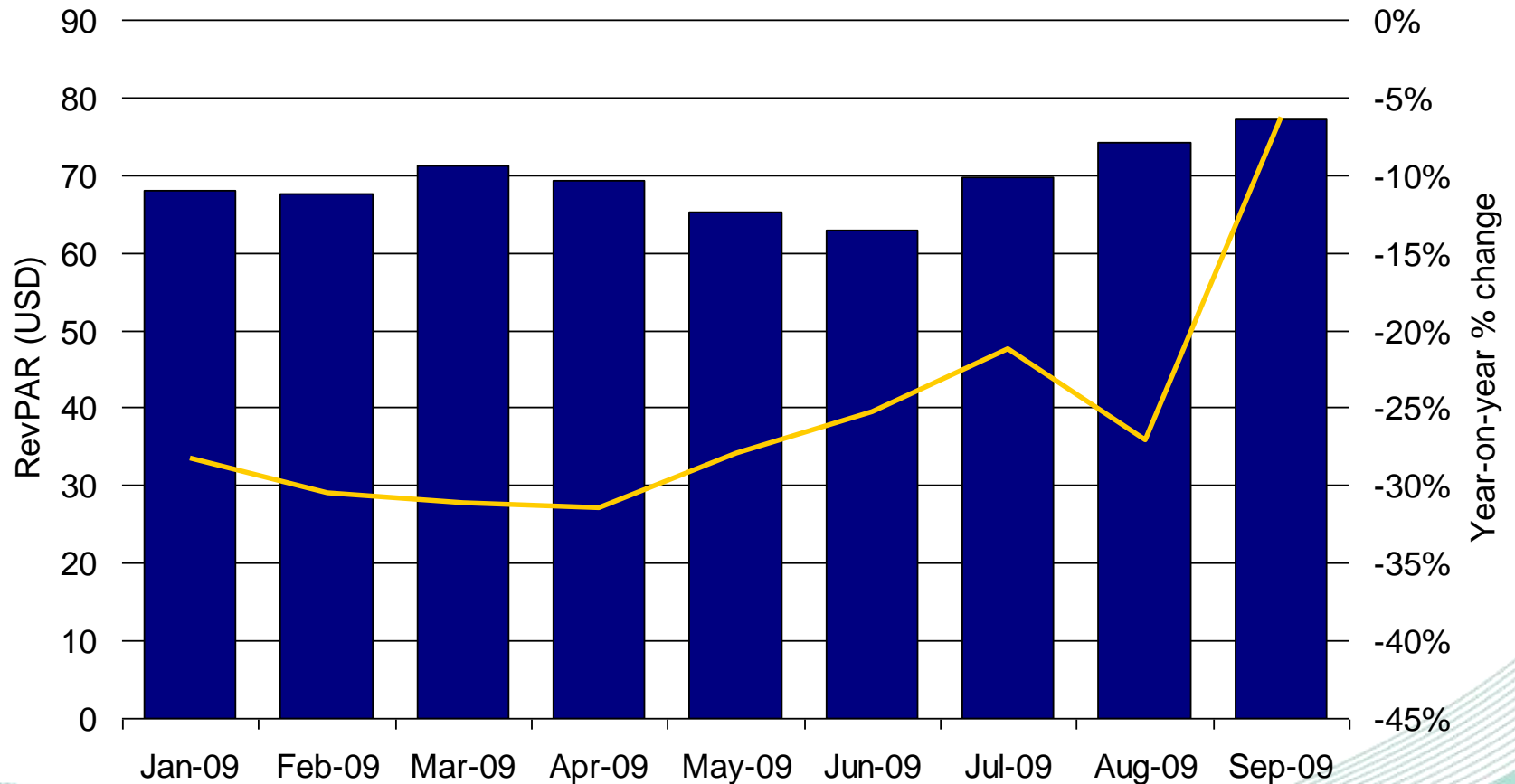
Asia Pacific



Source: STR Global

Hotel RevPAR Jan-Sep 2009

Asia Pacific



Source: STR Global

outlook



Thank You

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