

Asia Pacific Tourism: The Current State of Play 2016, YTD

10th UNWTO/PATA Forum on Tourism Trends & Outlook



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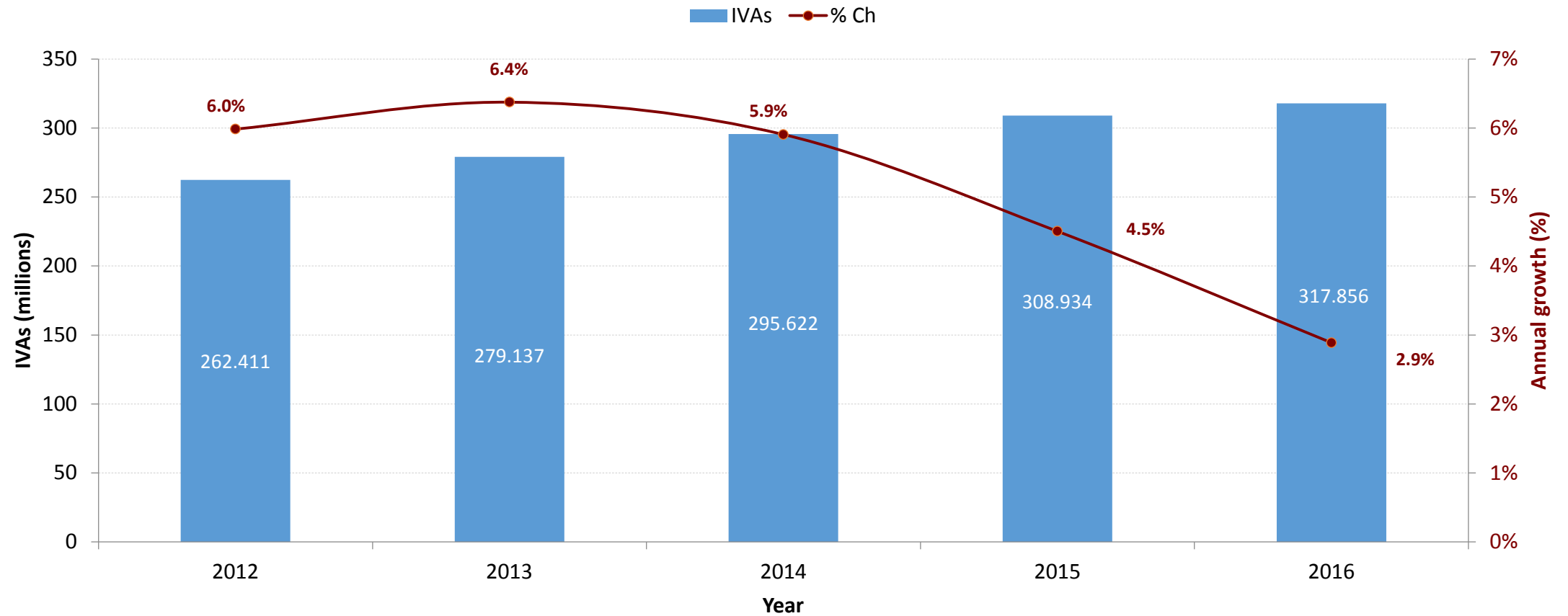


The Asia Pacific Position, 2016 YTD



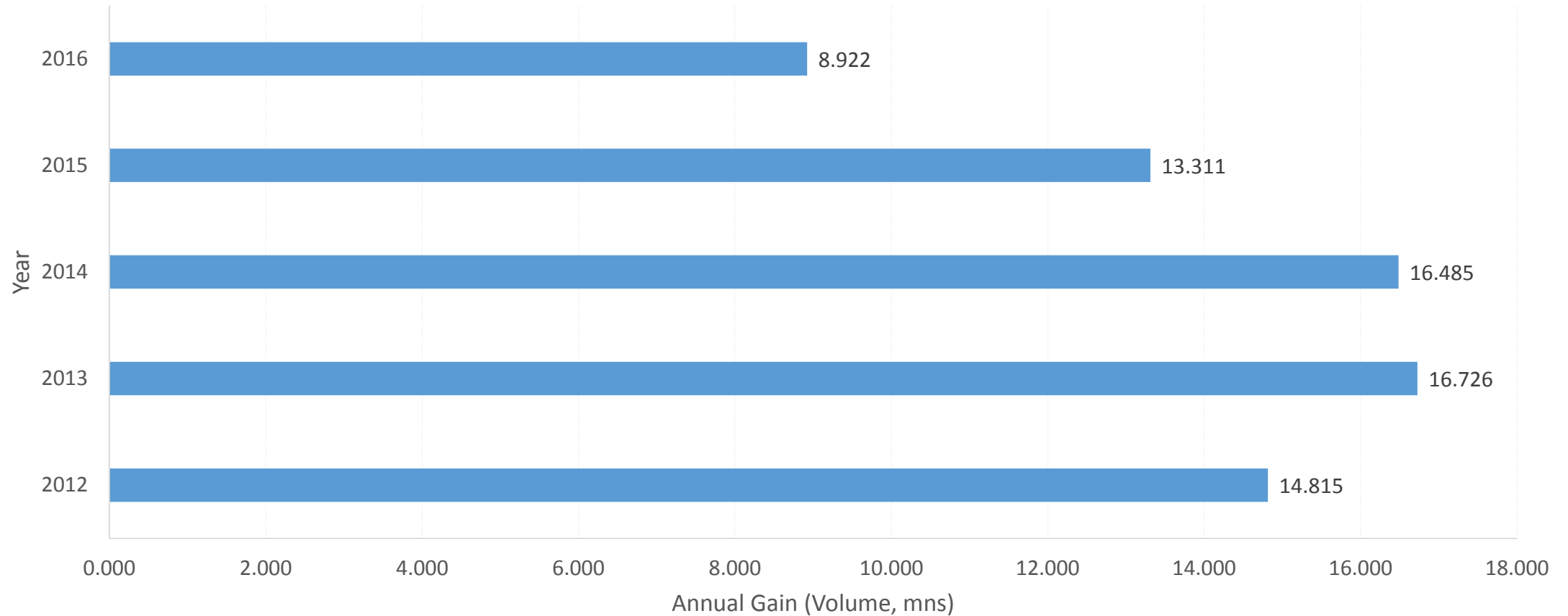
IVAs to Asia Pacific 2012-16 YTD

By inbound volume (absolute, mns) and Annual Growth (%)



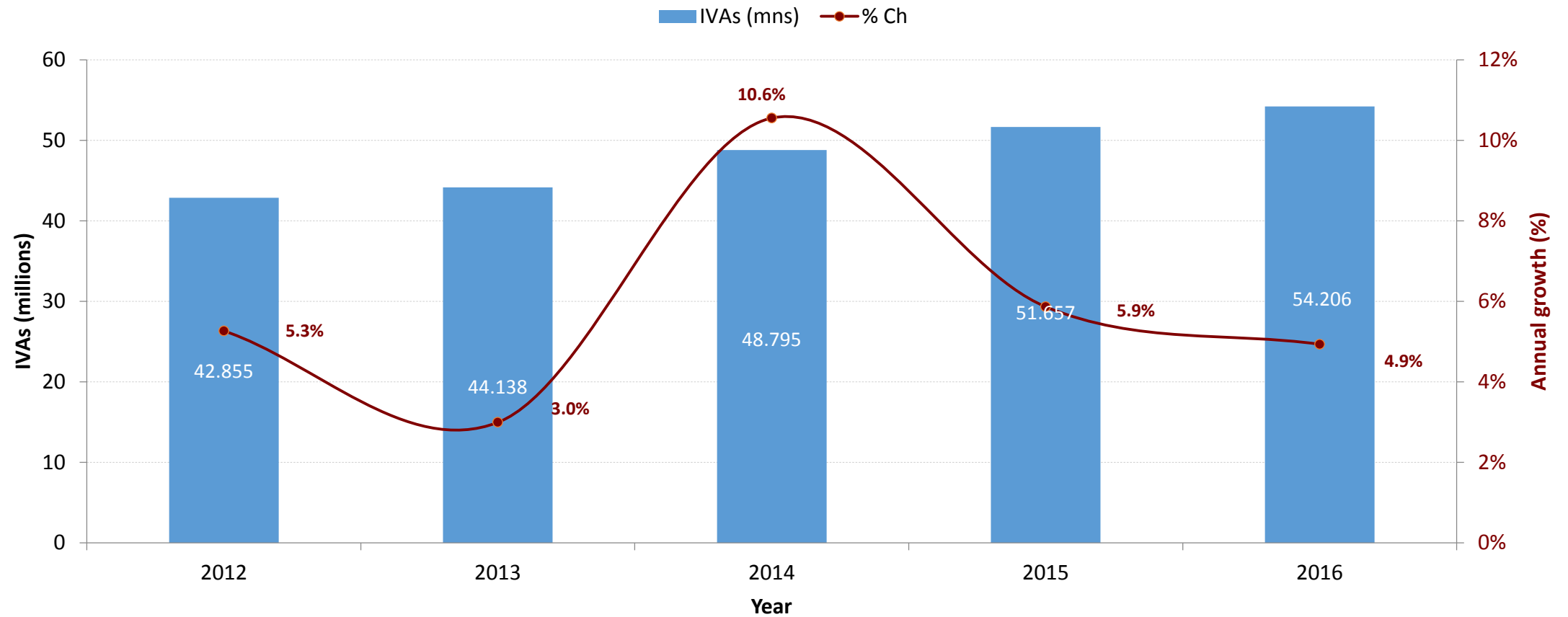
Asia Pacific YTD 2012-16

By Annual Gain (Absolute Volume, mns)



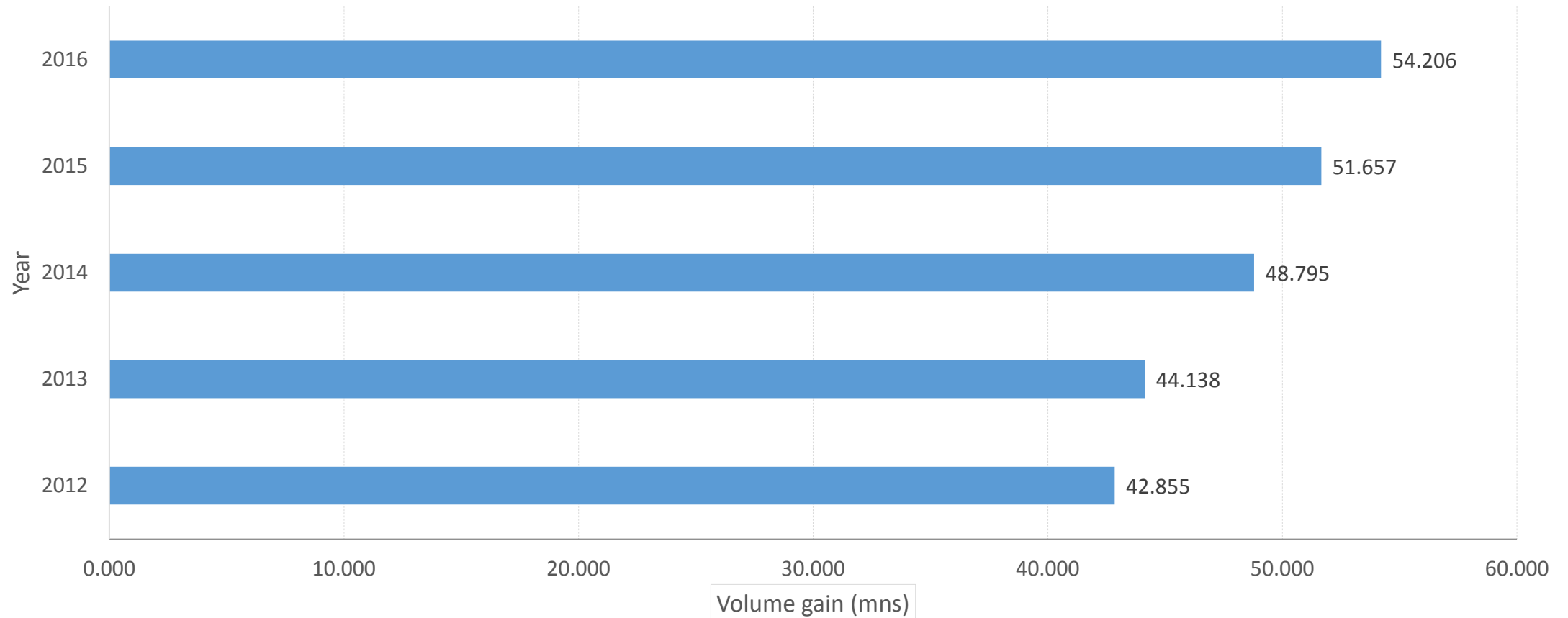
IVAs to the Americas, 2012-16 YTD

By inbound volume (absolute, mns) and Annual Growth (%)



IVAs to The Americas, 2012-16 YTD

By inbound volume (absolute, mns)



IVAs into the Americas, YTD 2016

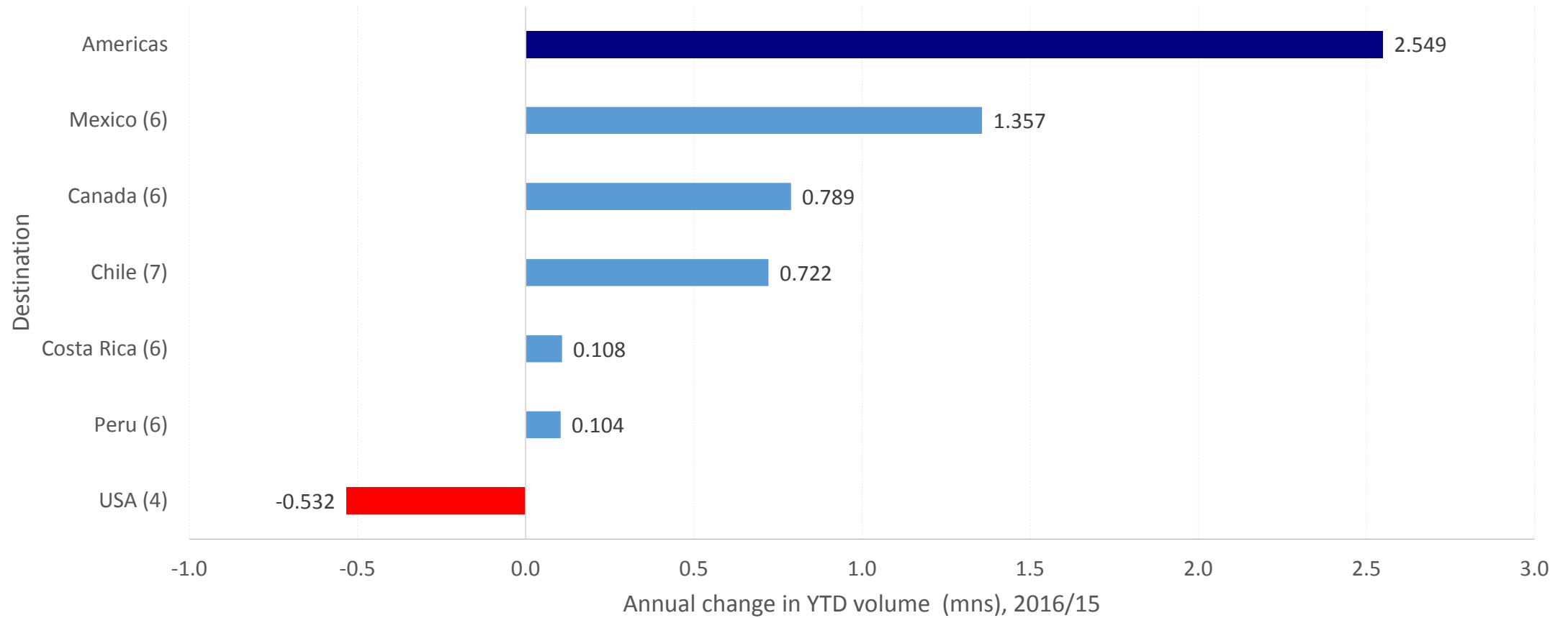
By Destination

Destination	Coverage	Arrivals, 2016 (mns)	Annual Growth	
	Months		%	Volume (mns)
Costa Rica	6	1.839	6.3	0.108
Mexico	6	17.049	8.7	1.357
Canada	6	7.888	11.1	0.789
USA	4	22.489	-2.3	-0.532
Chile	7	3.163	29.6	0.722
Peru	6	1.778	6.2	0.104
Americas		54.206	4.9	2.549



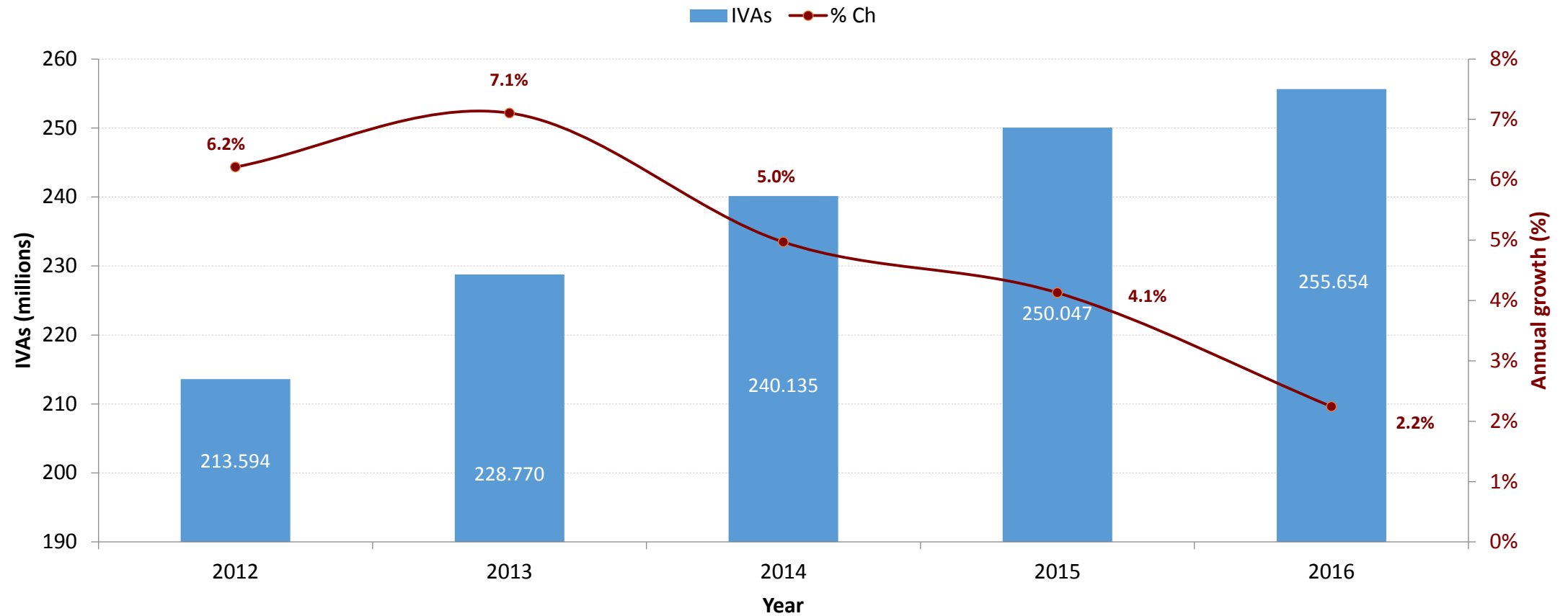
IVAs to the Americas 2016 YTD

By YTD Volume Gain (mns)



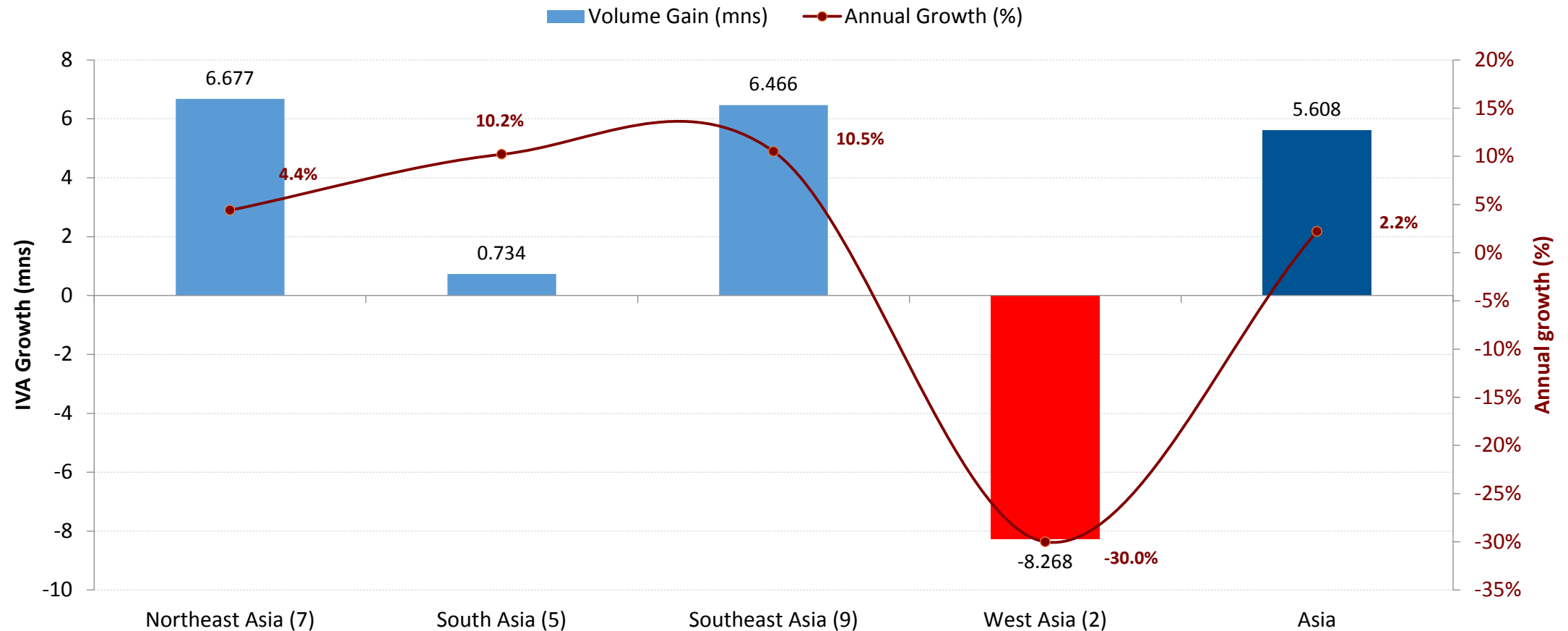
IVAs to Asia, 2012-16 YTD

By inbound volume YTD (absolute, mns) and Period-to-Period Growth (%)



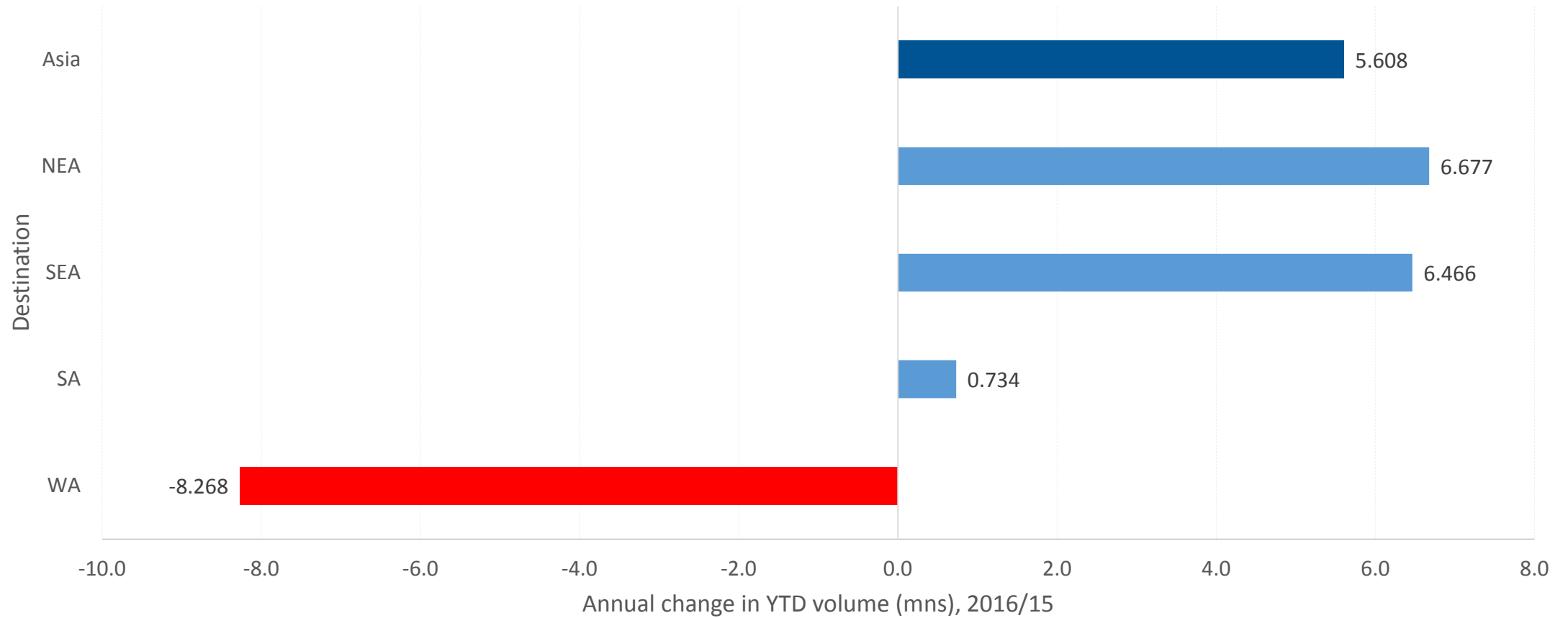
IVAs to Asia, 2016 YTD – By Destination Sub-region

Annual Volume Gain (mns) and Annual Growth (%)



IVAs to Asian Destination Sub-regions, 2016 YTD

By Annual Volume Gain (mns)



Asia, YTD 2016

	Destination	Arrivals, 2016	Annual Growth	
Destination	Count	(mns)	%	Volume (mns)
Northeast Asia	7	160.133	4.4	6.677
South Asia	5	7.959	10.2	0.734
Southeast Asia	9	68.249	10.5	6.466
West Asia	2	19.314	-30.0	-8.268
Asia		255.654	2.2	5.608

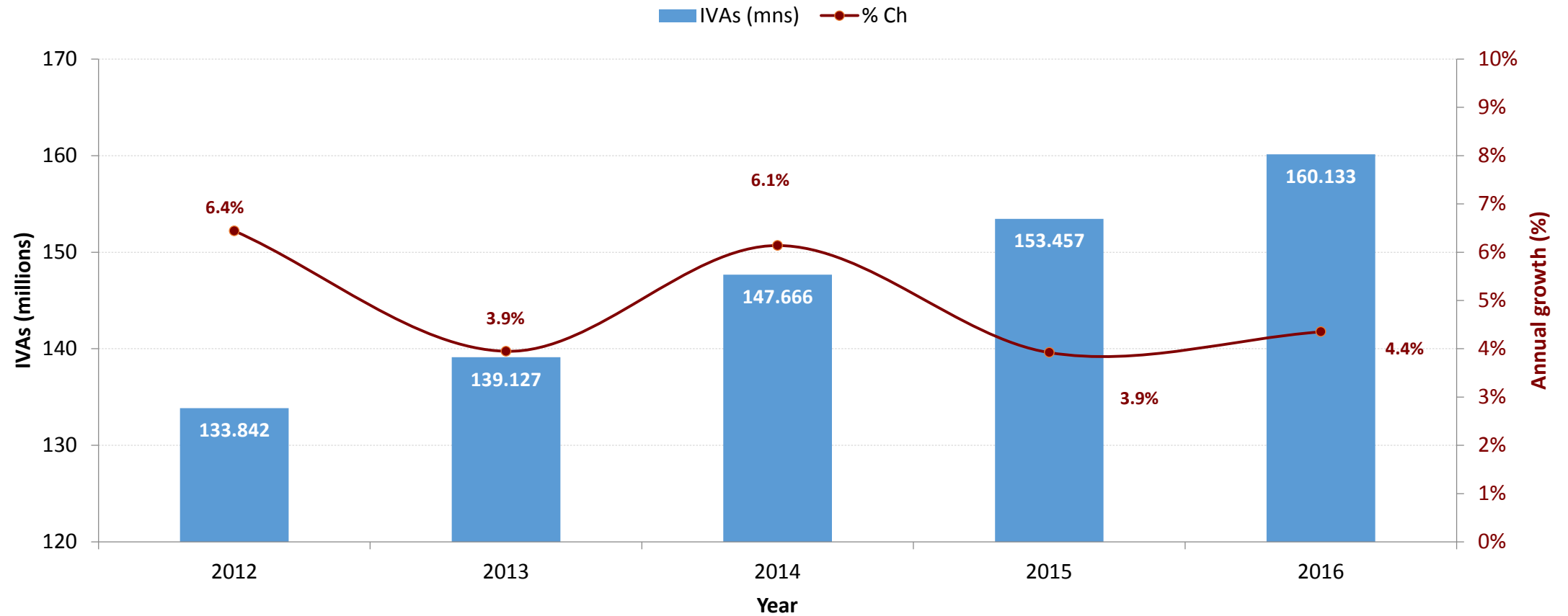


Northeast Asia



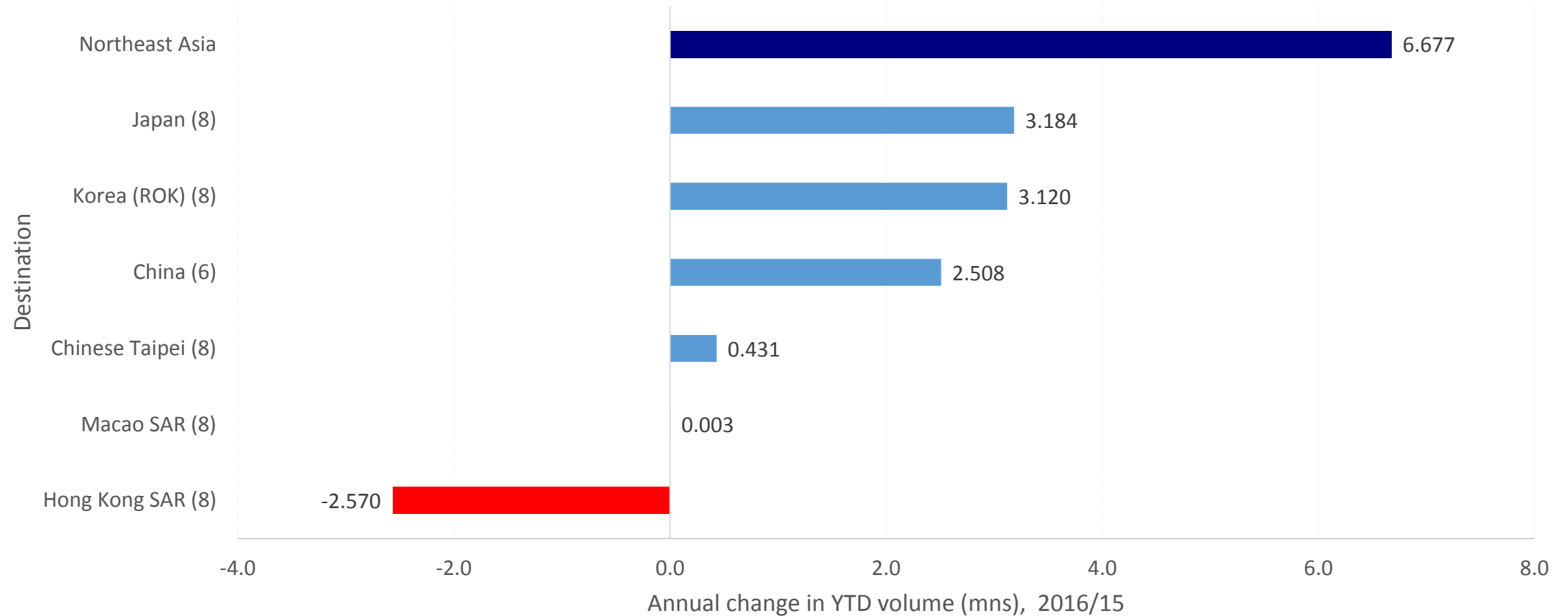
IVAs to Northeast Asia, 2012-2016 YTD

YTD Volume Gain (mns) and Period-to-Period Growth (%)



IVAs to Northeast Asia 2016 YTD

By Annual Volume Gain (mns)



Northeast Asia, YTD 2016

	Coverage	Arrivals, 2016	Annual Growth	
Destination	Months	(mns)	%	Volume (mns)
China	6	67.870	3.8	2.508
Chinese Taipei	8	7.144	6.4	0.431
Hong Kong SAR	8	37.296	-6.4	-2.570
Japan	8	16.060	24.7	3.184
Korea (ROK)	8	11.322	38.0	3.120
Macao SAR	8	20.442	0.0	0.003
Northeast Asia		160.133	4.351	6.677

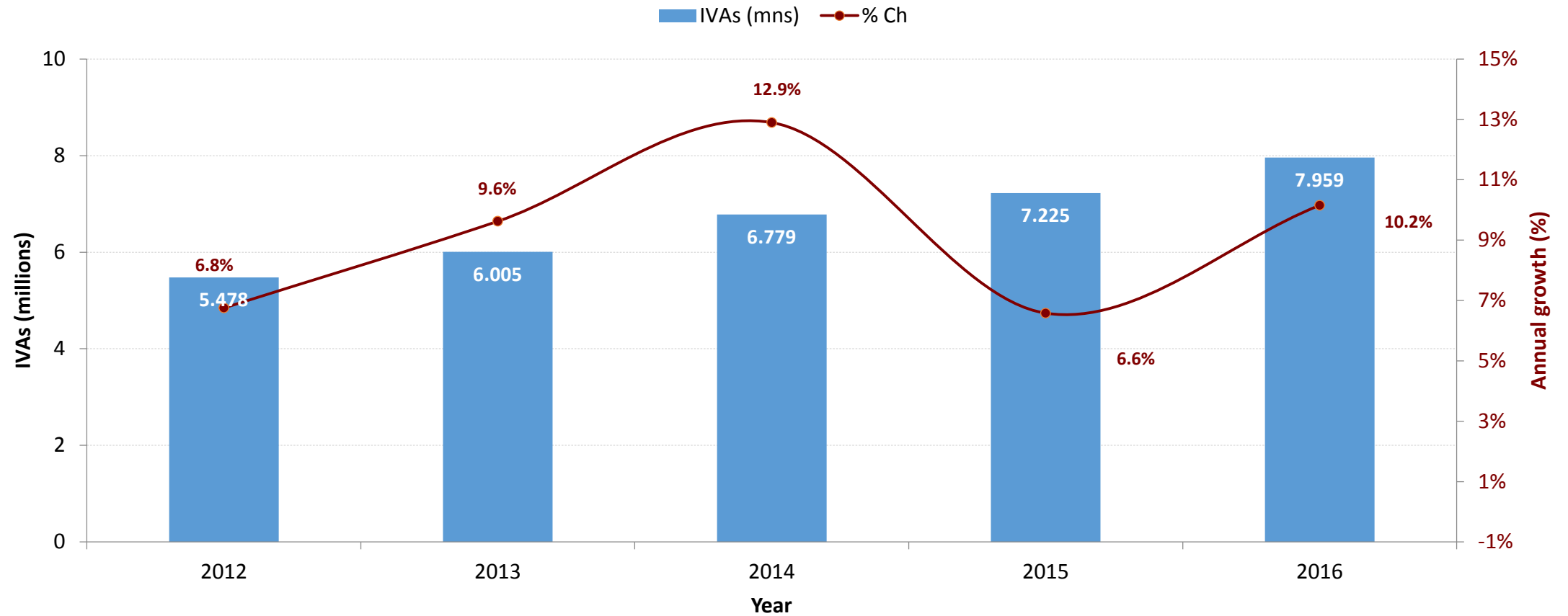


South Asia



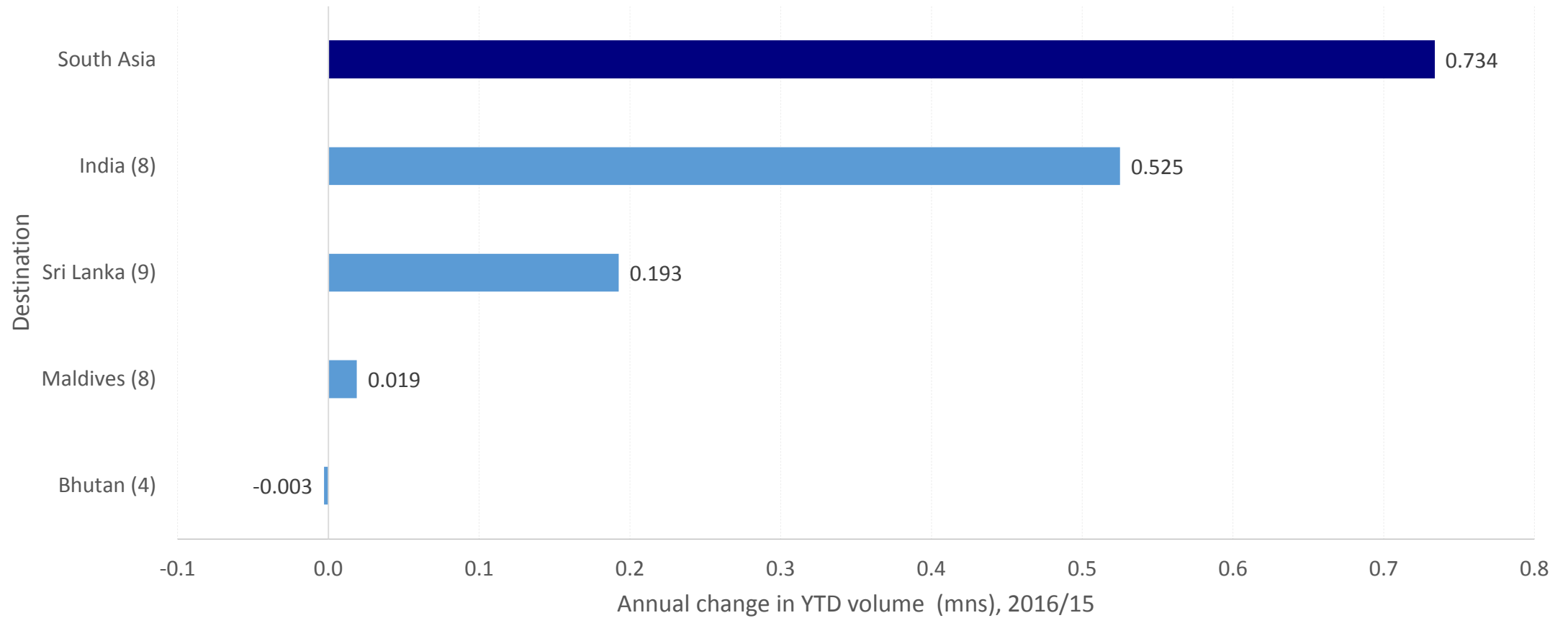
IVAs to South Asia, 2012-2016 YTD

Annual Volume Gain (mns) and Annual Growth (%)



IVAs to South Asia 2016 YTD

By Annual Volume Gain (mns)



South Asia, YTD 2016

	Coverage	Arrivals, 2016	Annual Growth	
Destination	Months	(mns)	%	Volume (mns)
Bhutan (4)	4	0.016	-15.7	-0.003
India (8)	8	5.592	10.4	0.525
Maldives (8)	8	0.843	2.3	0.019
Sri Lanka (9)	9	1.508	14.6	0.193
South Asia		7.959	10.2	0.734

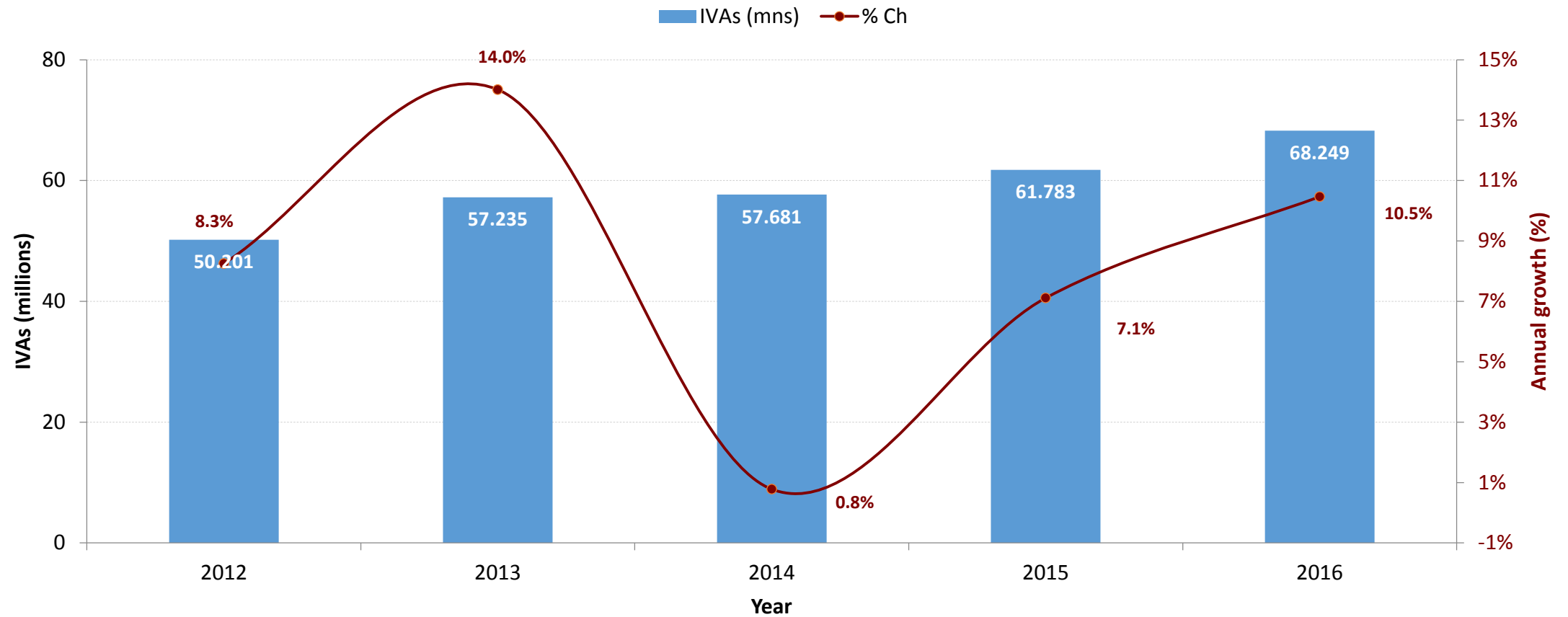


Southeast Asia



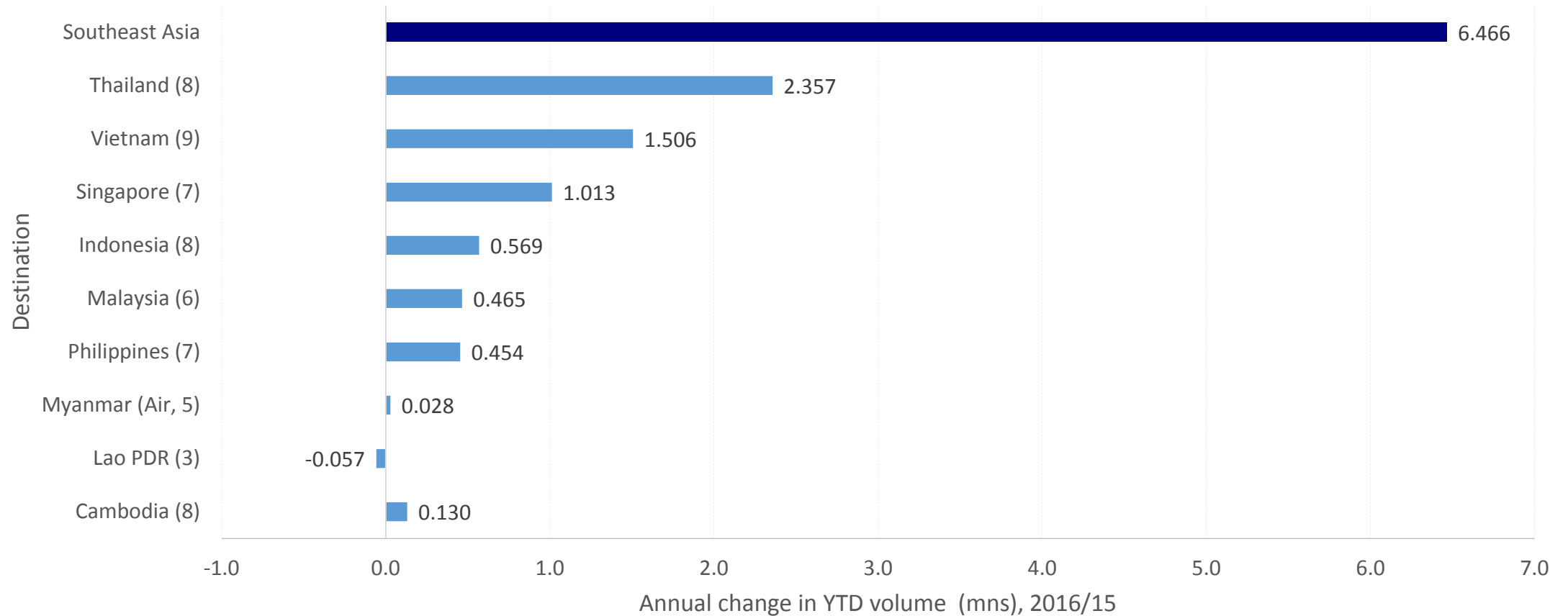
IVAs to Southeast Asia, 2012-2016 YTD

Annual Volume Gain (mns) and Annual Growth (%)



IVAs to Southeast Asia 2016 YTD

By Annual Volume Gain (mns)



Southeast Asia, YTD 2016

	Coverage	Arrivals, 2016	Annual Growth	
Destination	Months	(mns)	%	Volume (mns)
Cambodia	8	3.163	4.3	0.130
Indonesia	8	7.356	8.4	0.569
Lao PDR	3	1.228	-4.5	-0.057
Malaysia	6	13.033	3.7	0.465
Myanmar	5	0.569	5.2	0.028
Philippines	7	3.434	15.2	0.454
Singapore	7	9.791	11.5	1.013
Thailand	8	22.413	11.8	2.357
Vietnam	9	7.262	26.2	1.506
Southeast Asia		68.249	10.5	6.466

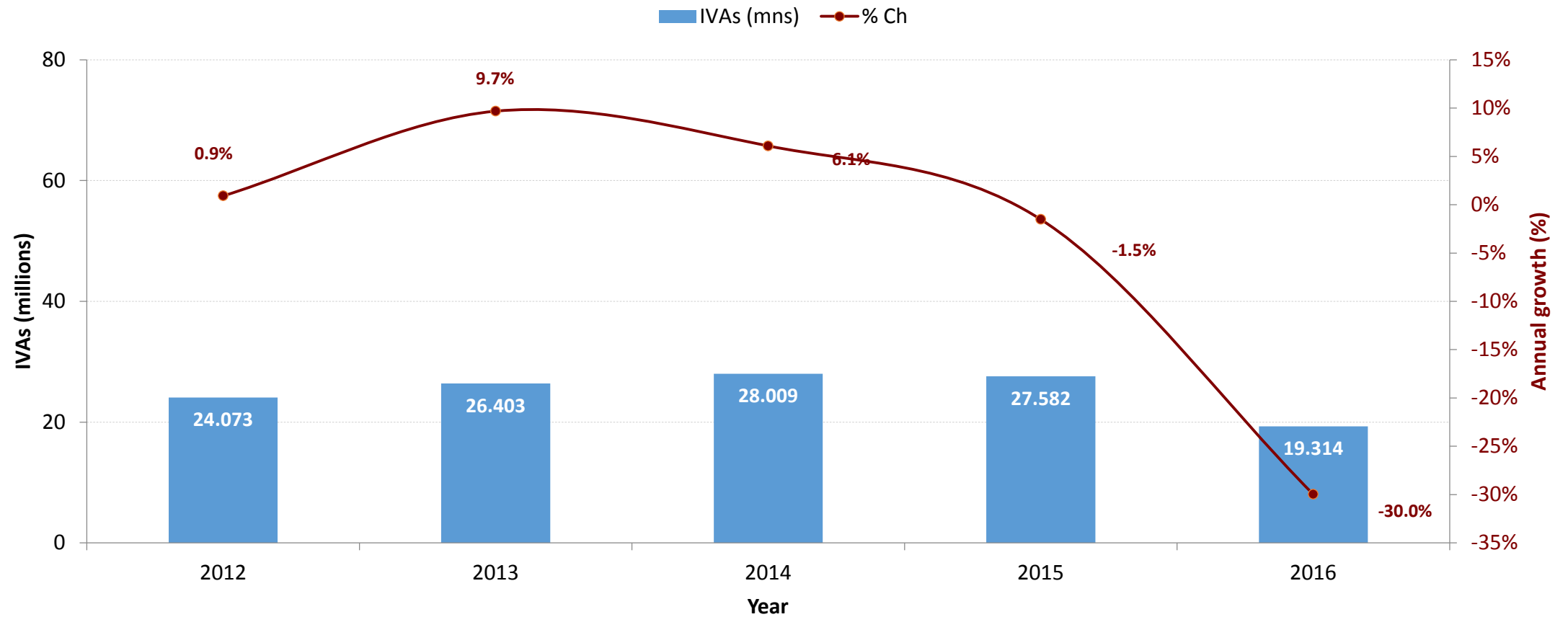


West Asia



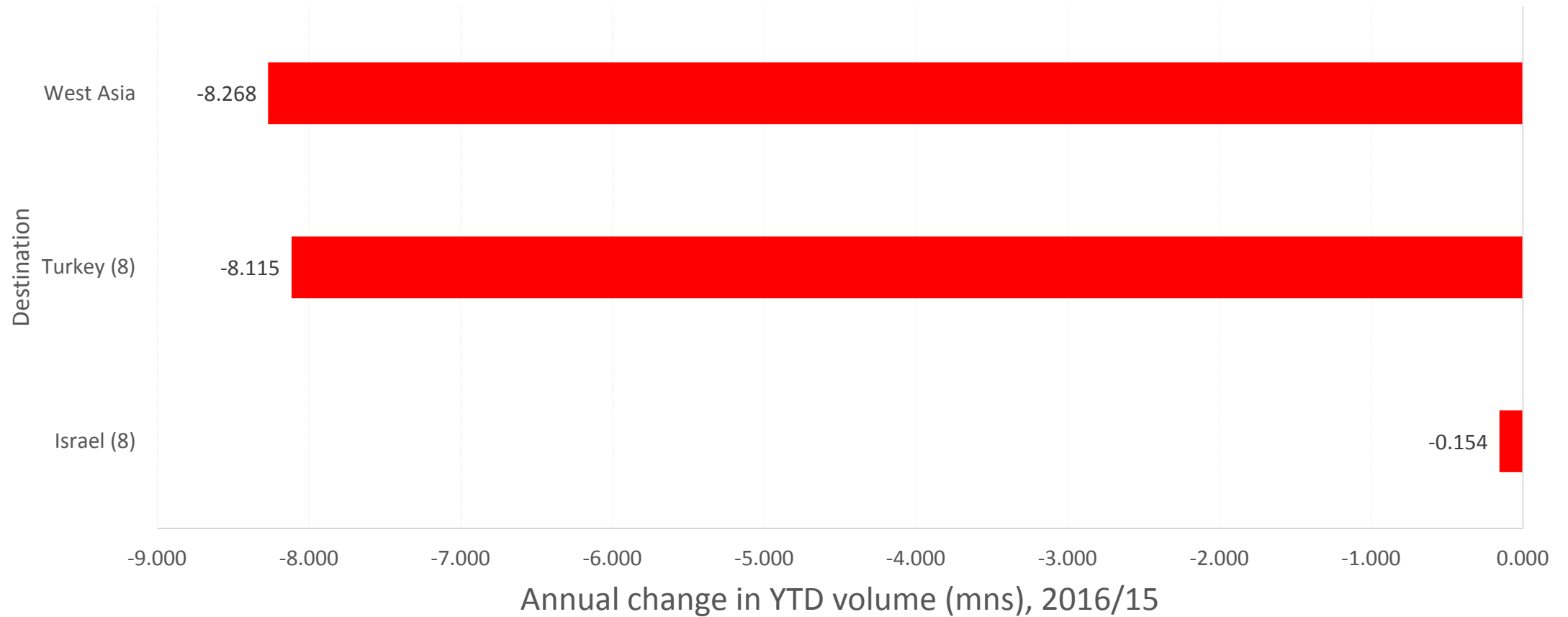
IVAs to West Asia, 2012-2016 YTD

Annual Volume Gain (mns) and Annual Growth (%)



IVAs to West Asia 2016 YTD

By Annual Volume Gain (mns)



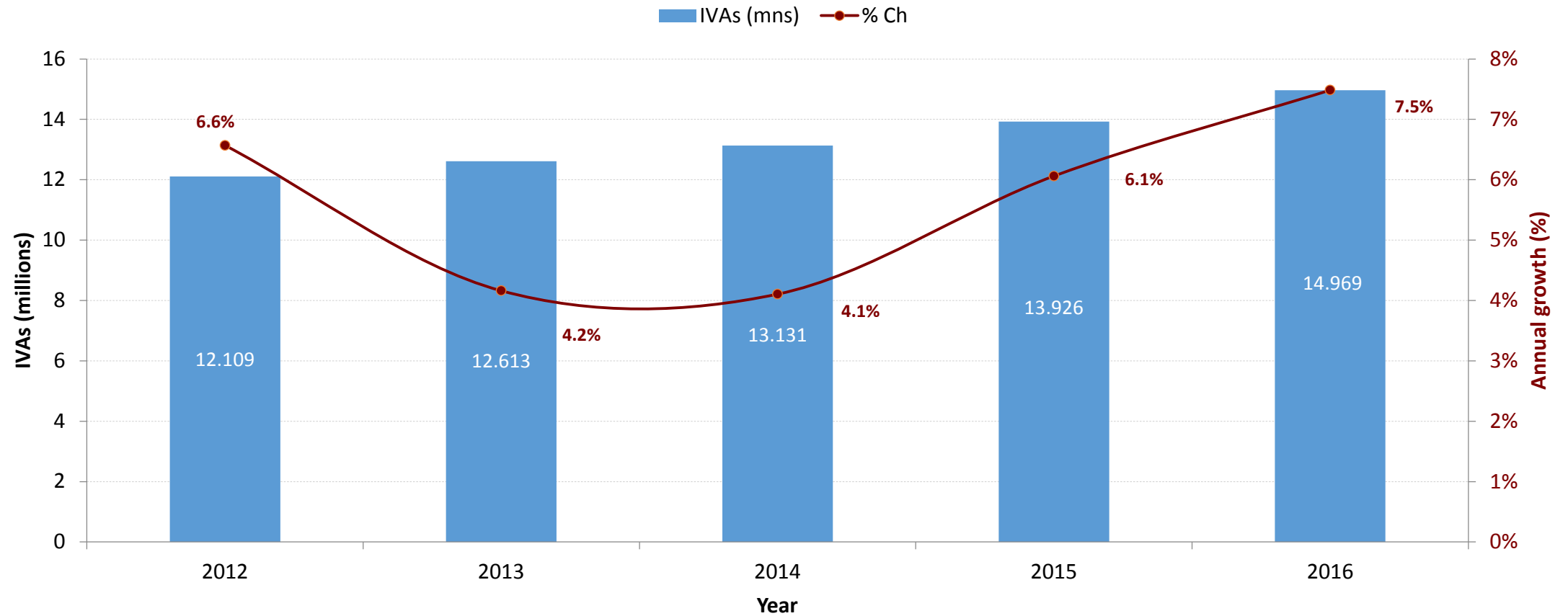
West Asia, YTD 2016

	Coverage	Arrivals, 2016	Annual Growth	
Destination	Months	(mns)	%	Volume (mns)
Israel	8	1.922	-7.4	-0.154
Turkey	8	17.391	-31.8	-8.115
West Asia		19.314	-30.0	-8.268



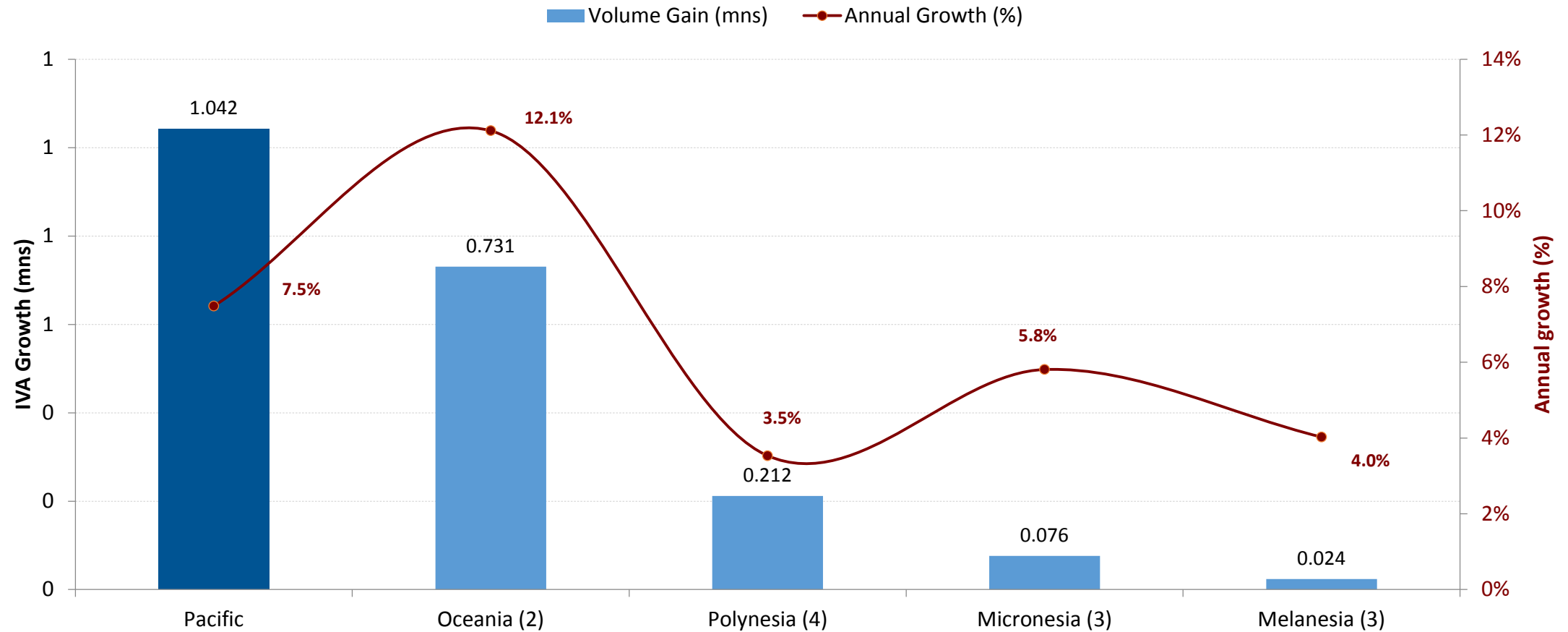
IVAs to the Pacific, 2012-16 YTD

By inbound volume YTD (absolute, mns) and Period-to-Period Growth (%)



IVAs to the Pacific, 2016 YTD – By Destination Sub-region

Annual Volume Gain (mns) and Annual Growth (%)



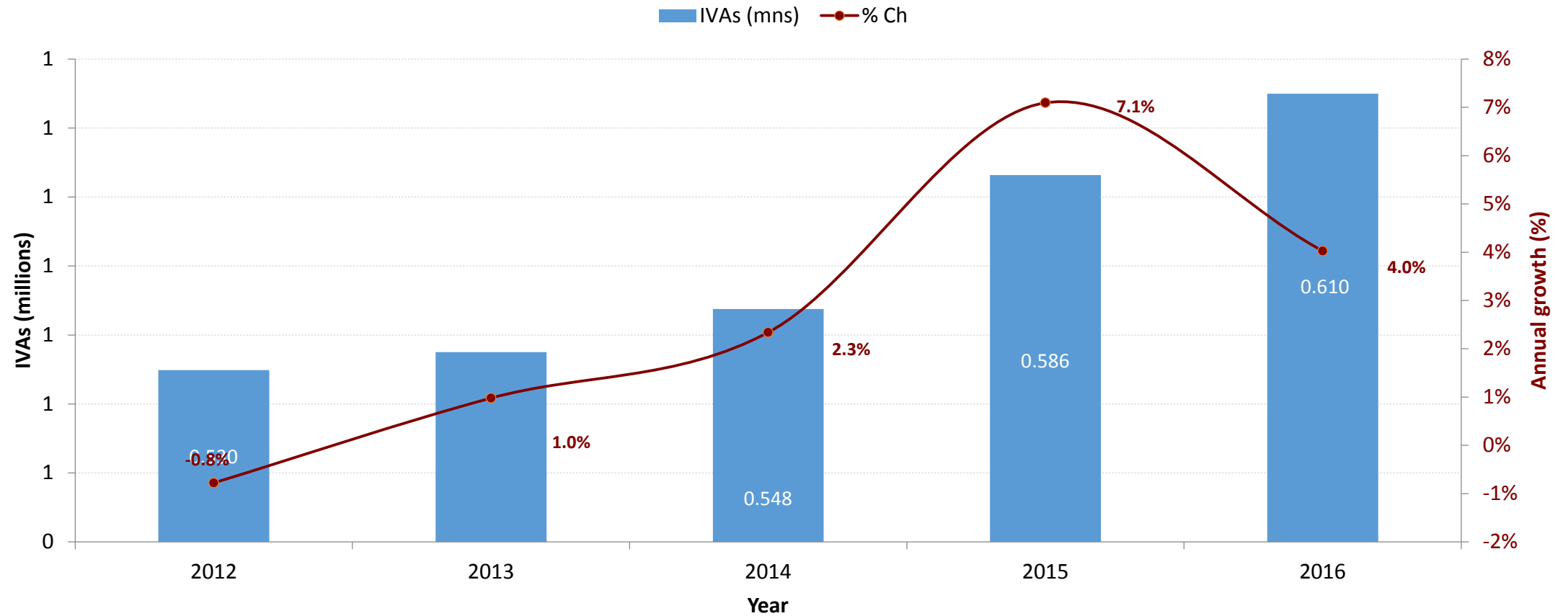
The Pacific, YTD 2016

Destination	Destination	Arrivals, 2016	Annual Growth	
Sub-region	Count	(mns)	%	Volume (mns)
Melanesia	3	0.610	4.0	0.024
Micronesia	3	1.390	5.8	0.076
Oceania	2	6.764	12.1	0.731
Polynesia	4	6.206	3.5	0.212
Pacific		14.969	7.5	1.042



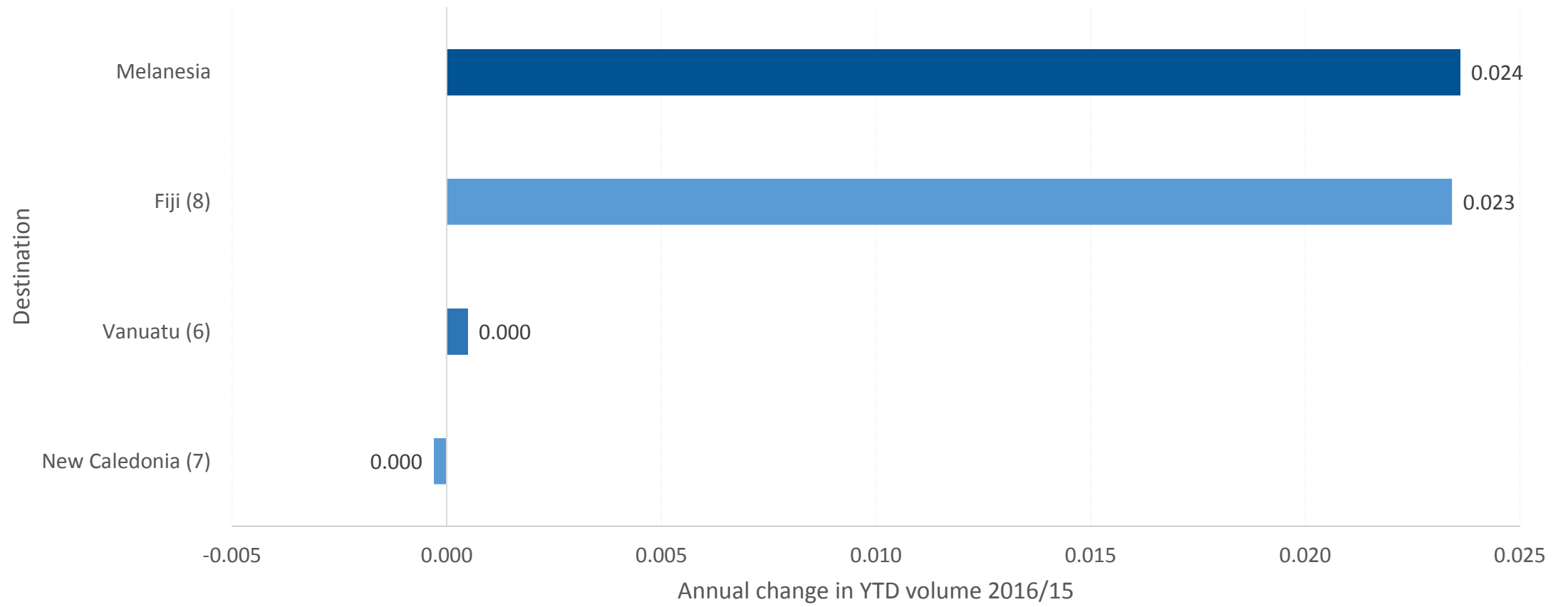
IVAs to Melanesia, 2012-16 YTD

By inbound volume YTD (absolute, mns) and Period-to-Period Growth (%)



IVAs to Melanesia, 2016 YTD

By Annual Volume Gain (mns)



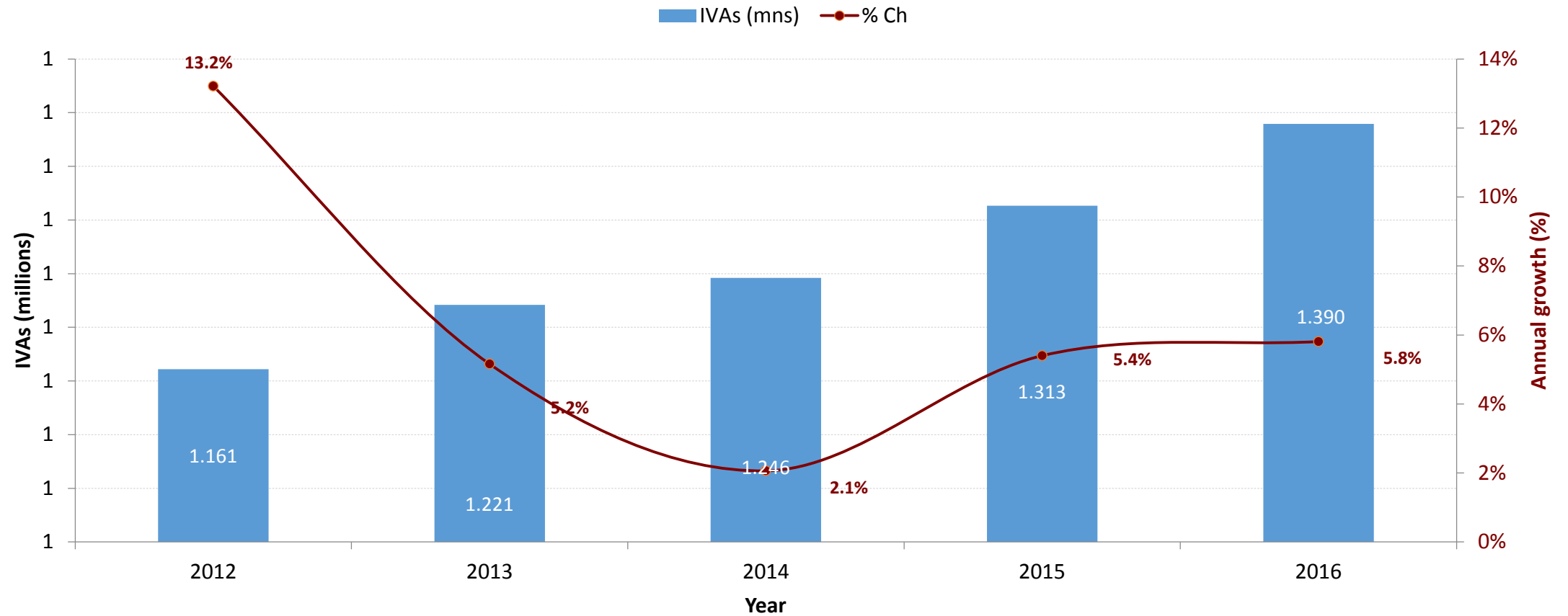
Melanesia, YTD 2016

Destination	Coverage	Arrivals, 2016	Annual Growth	
	Months	(mns)	%	Volume (mns)
Fiji	8	0.512	4.8	0.023
New Caledonia	7	0.060	-0.5	0.000
Vanuatu	6	0.038	1.3	0.000
Melanesia		0.610	4.0	0.024



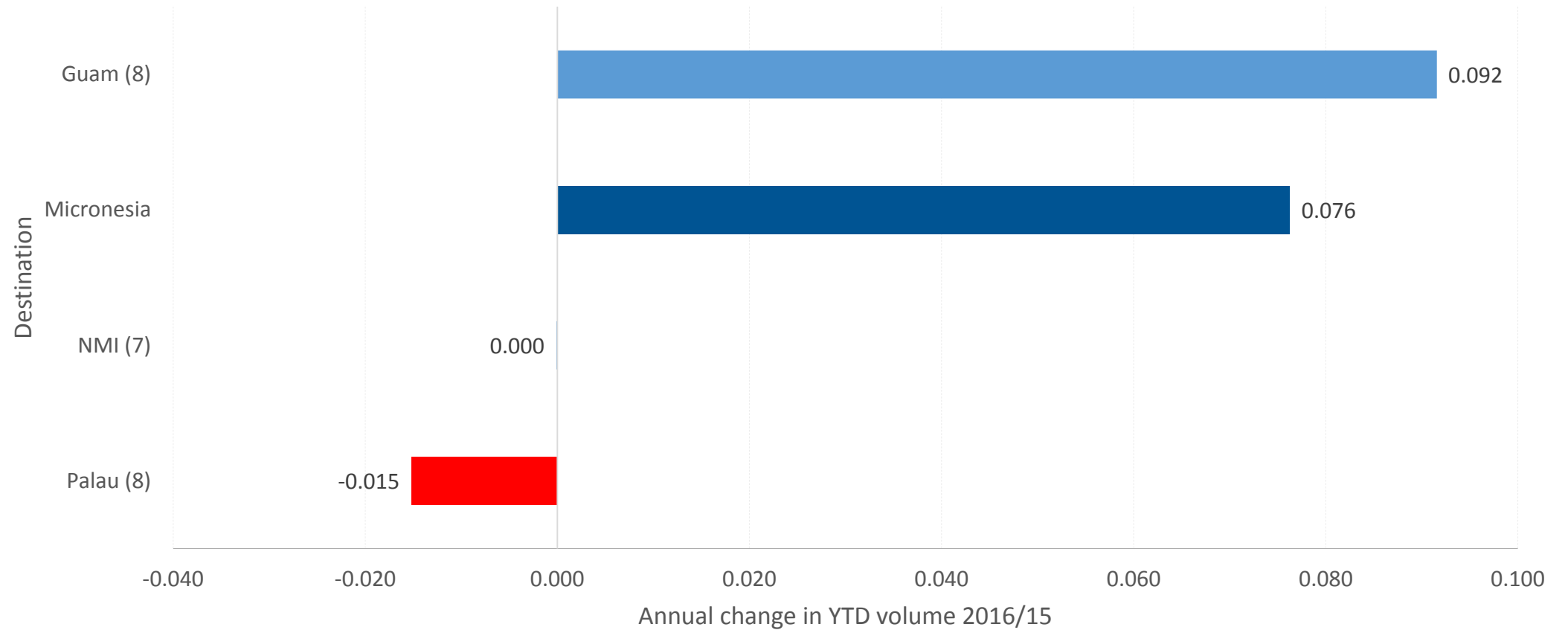
IVAs to Micronesia, 2012-16 YTD

By inbound volume YTD (absolute, mns) and Period-to-Period Growth (%)



IVAs to Micronesia, 2016 YTD

By Annual Volume Gain (mns)



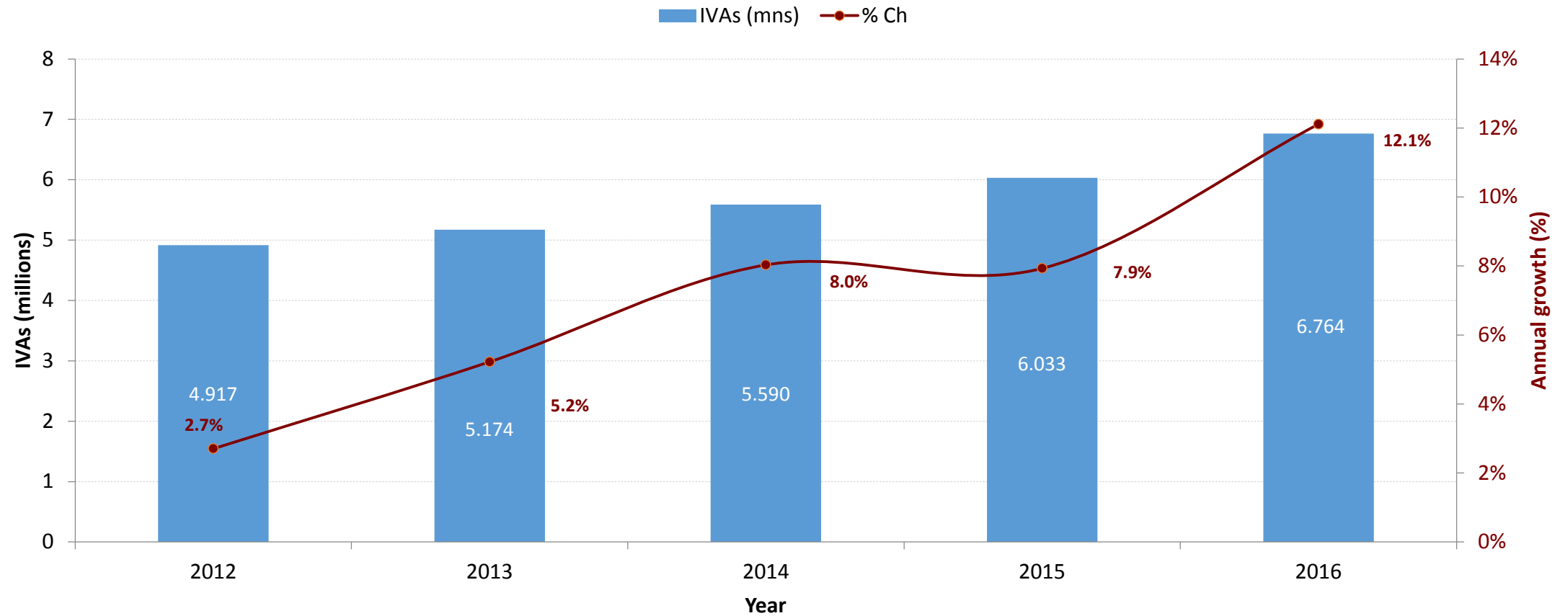
Micronesia, YTD 2016

Destination	Coverage	Arrivals, 2016	Annual Growth	
	Months	(mns)	%	Volume (mns)
Guam	8	1.001	10.1	0.092
NMI	7	0.291	0.0	0.000
Palau	8	0.098	-13.4	-0.015
Micronesia		1.390	5.8	0.076



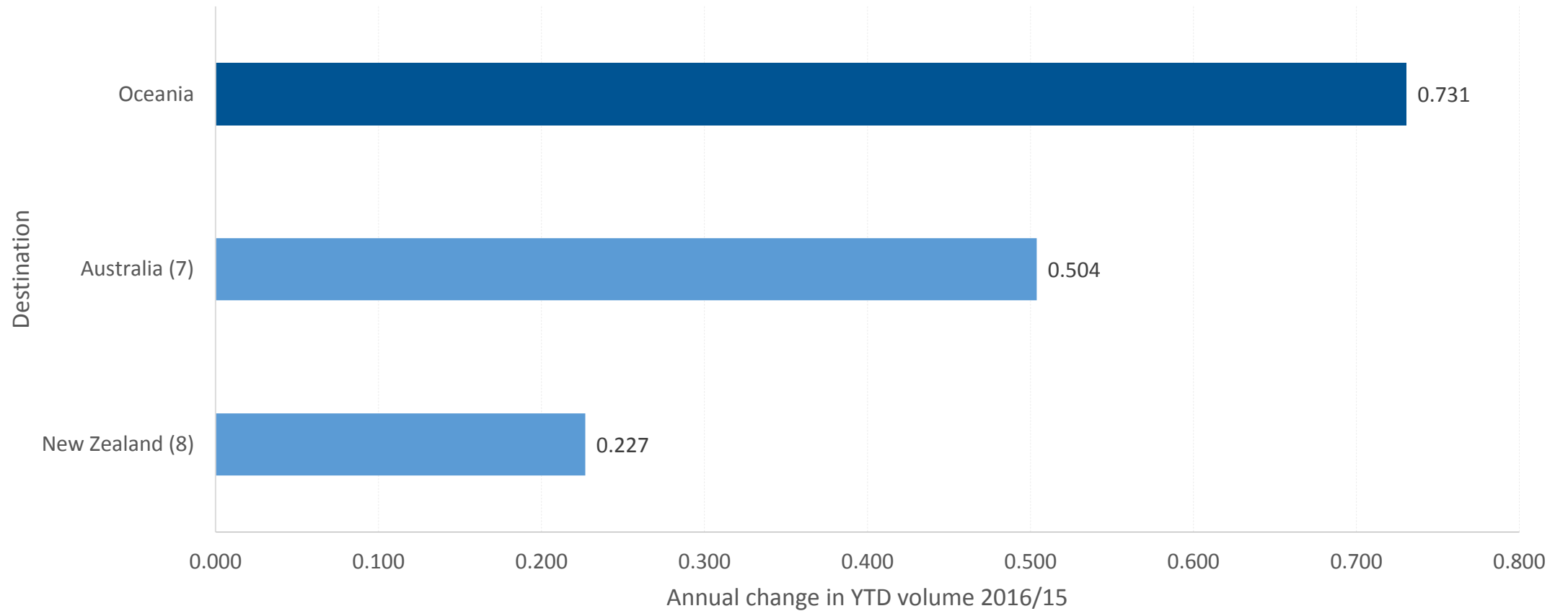
IVAs to Oceania, 2012-16 YTD

By inbound volume YTD (absolute, mns) and Period-to-Period Growth (%)



IVAs to Oceania, 2016 YTD

By Annual Volume Gain (mns)



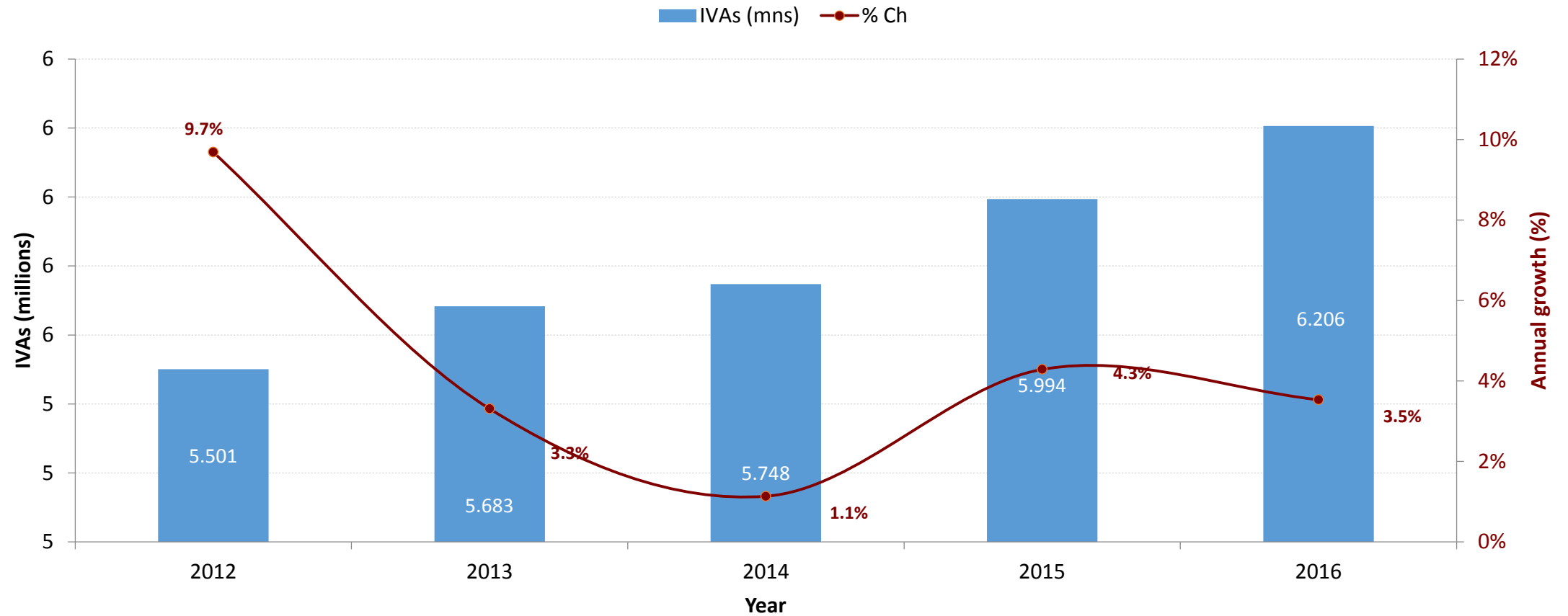
Oceania, YTD 2016

Destination	Coverage	Arrivals, 2016	Annual Growth	
	Months	(mns)	%	Volume (mns)
New Zealand	8	2.167	11.7	0.227
Australia	7	4.597	12.3	0.504
Oceania		6.764	12.1	0.731



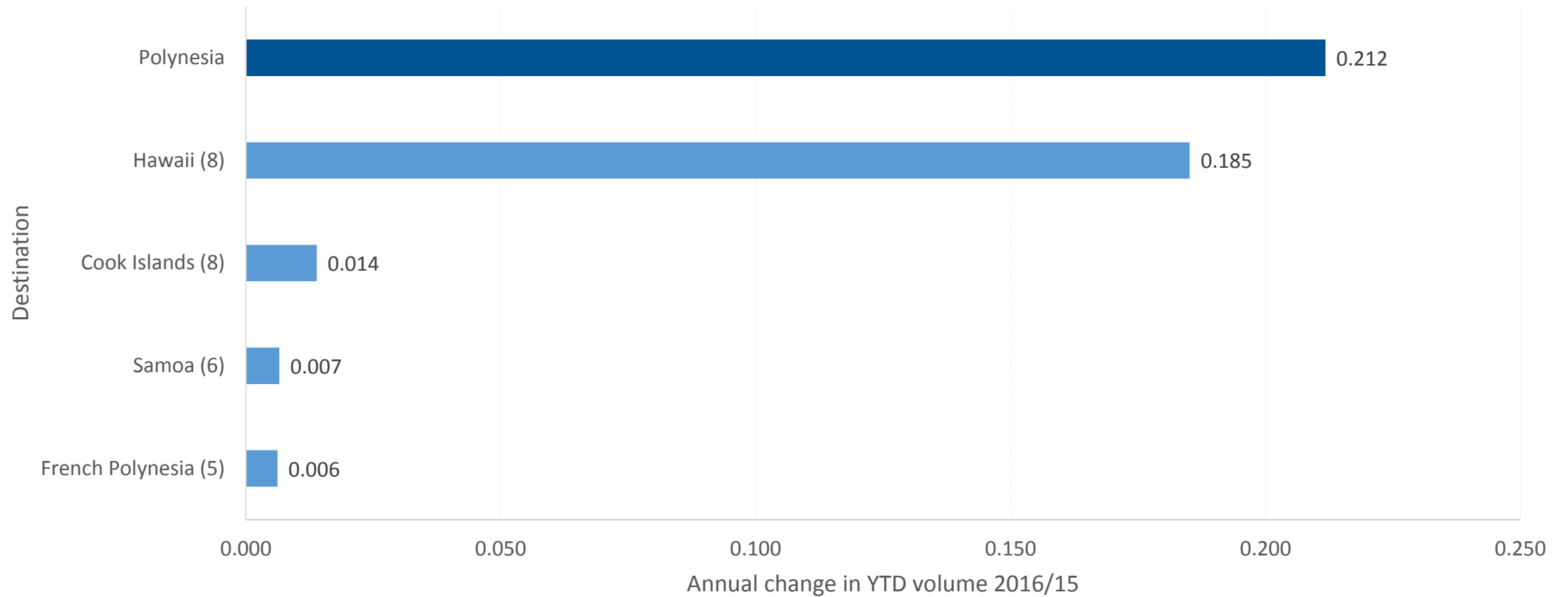
IVAs to Polynesia, 2012-16 YTD

By inbound volume YTD (absolute, mns) and Period-to-Period Growth (%)



IVAs to Polynesia, 2016 YTD

By Annual Volume Gain (mns)



Polynesia, YTD 2016

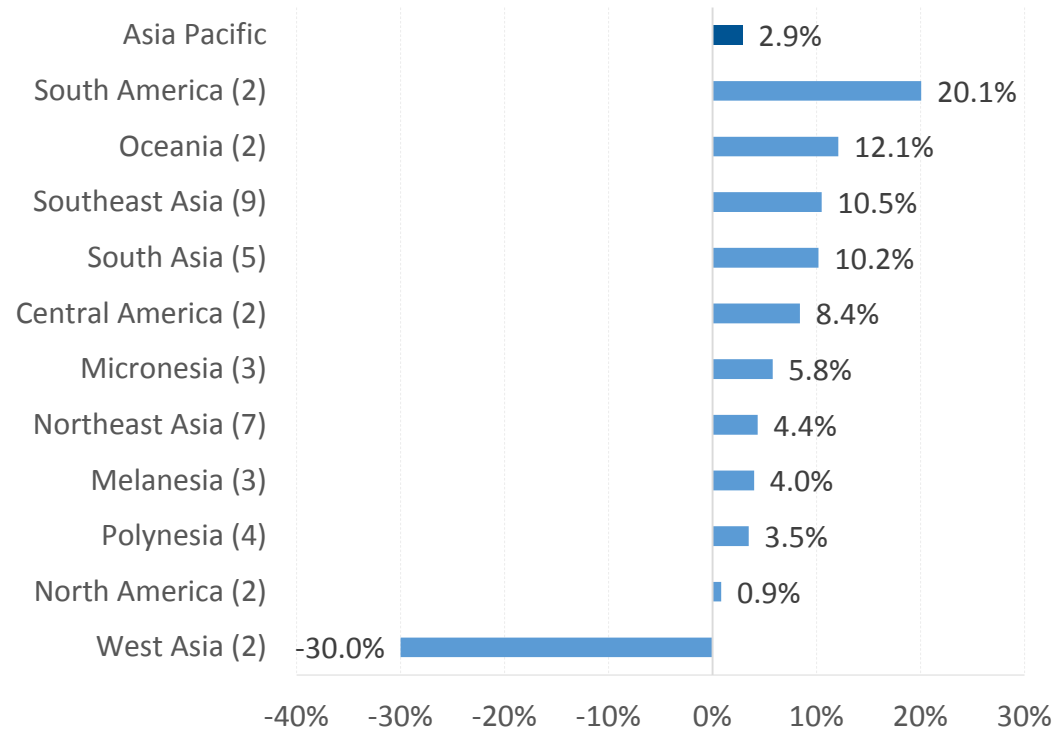
Destination	Coverage	Arrivals, 2016	Annual Growth	
	Months	(mns)	%	Volume (mns)
Cook Islands	8	0.093	17.5	0.014
French Polynesia	5	0.075	9.0	0.006
Hawaii	8	5.973	3.2	0.185
Samoa	6	0.065	11.2	0.007
Polynesia		6.206	3.5	0.212



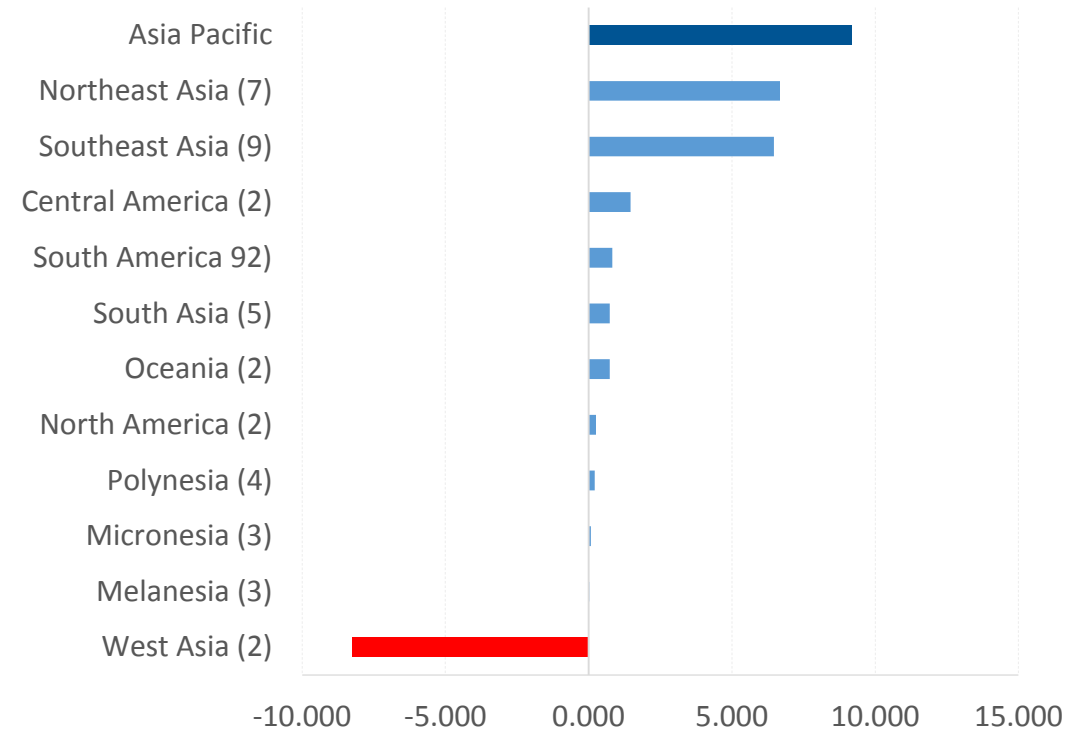
Asia Pacific 2016 YTD

By Destination Sub-region

Annual Growth (%)



Annual Growth (Volume, mns)



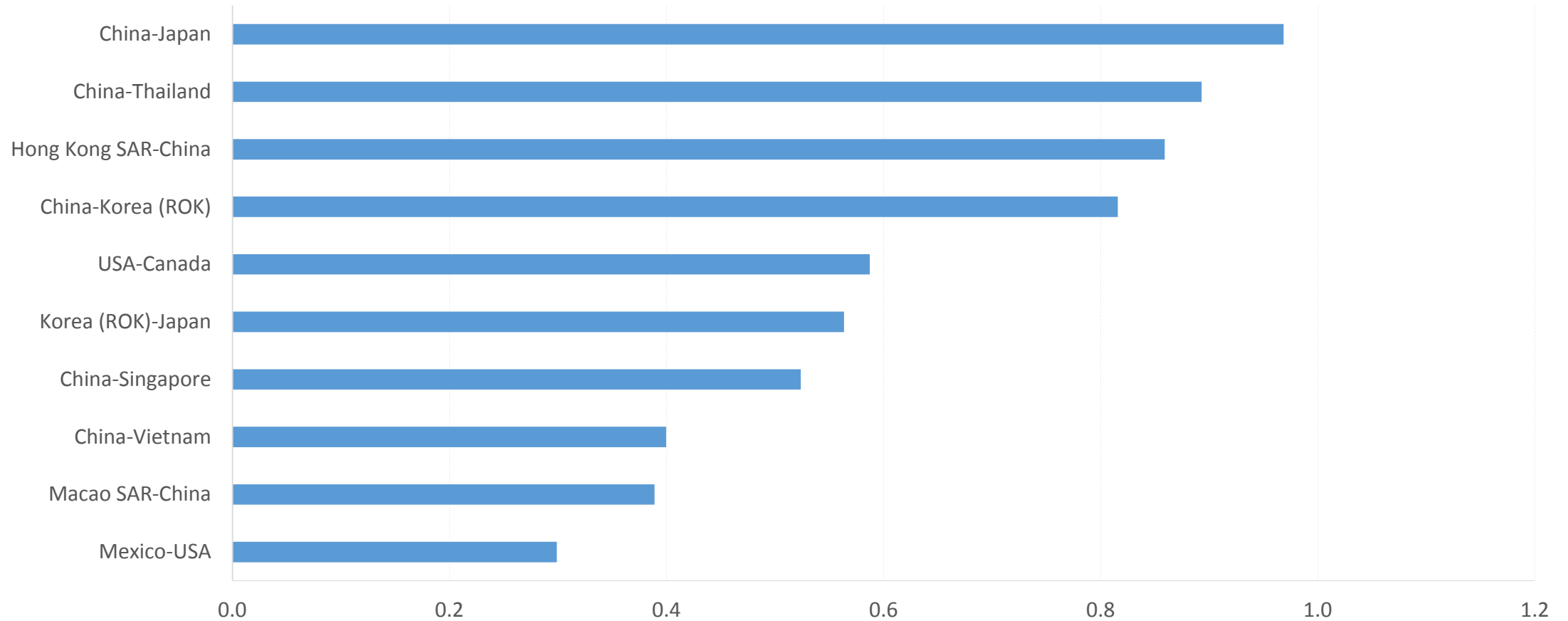
Some Extreme Growth Rates

Origin	Destination	Arrivals YTD, 2016	Annual Growth	
			%	Volume
Cuba	Mexico	44,666	346.1	34,654
China	Mexico	59,366	129.4	33,490
Iran	Singapore	11,932	103.9	6,080
China	Philippines	285,348	80.8	127,518
China	Singapore	1,472,654	55.2	523,576



Strongest YTD Growth in Volume (mns)

Origin-Destination Pairs



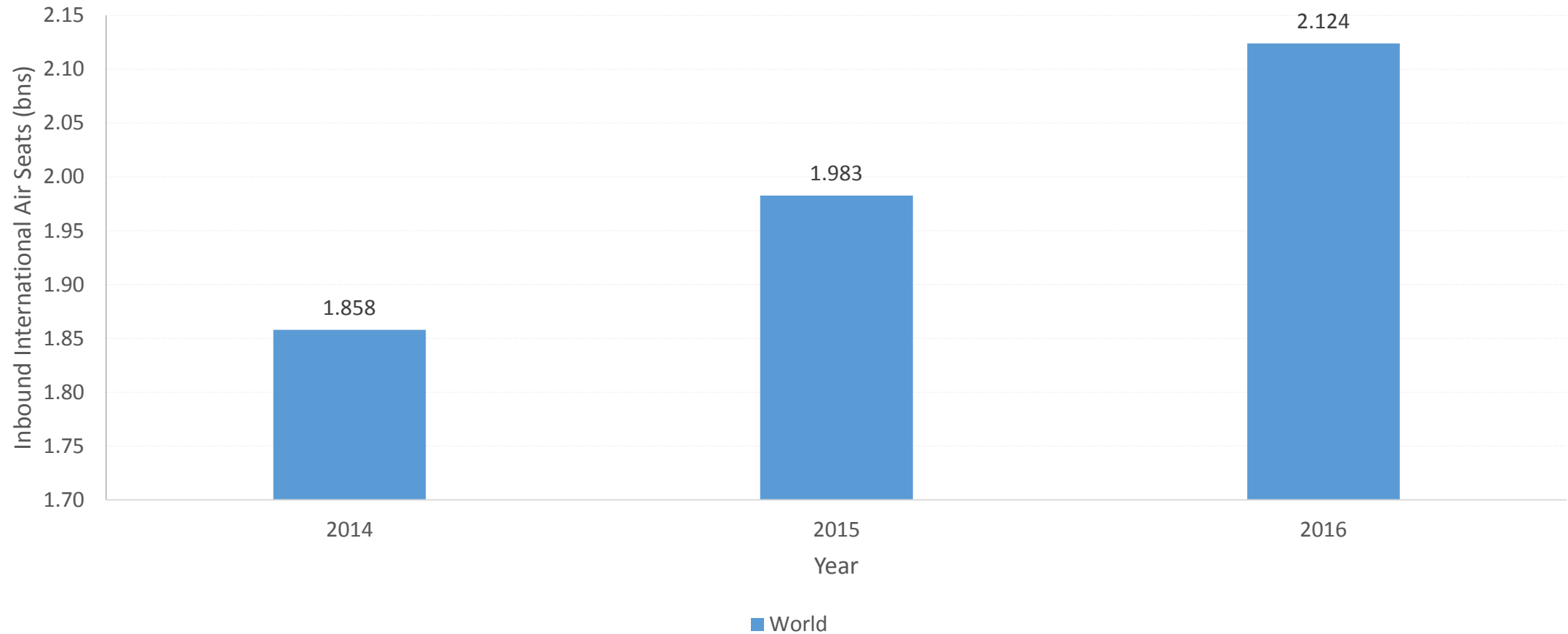
Structural Elements

International Air Seat Capacity



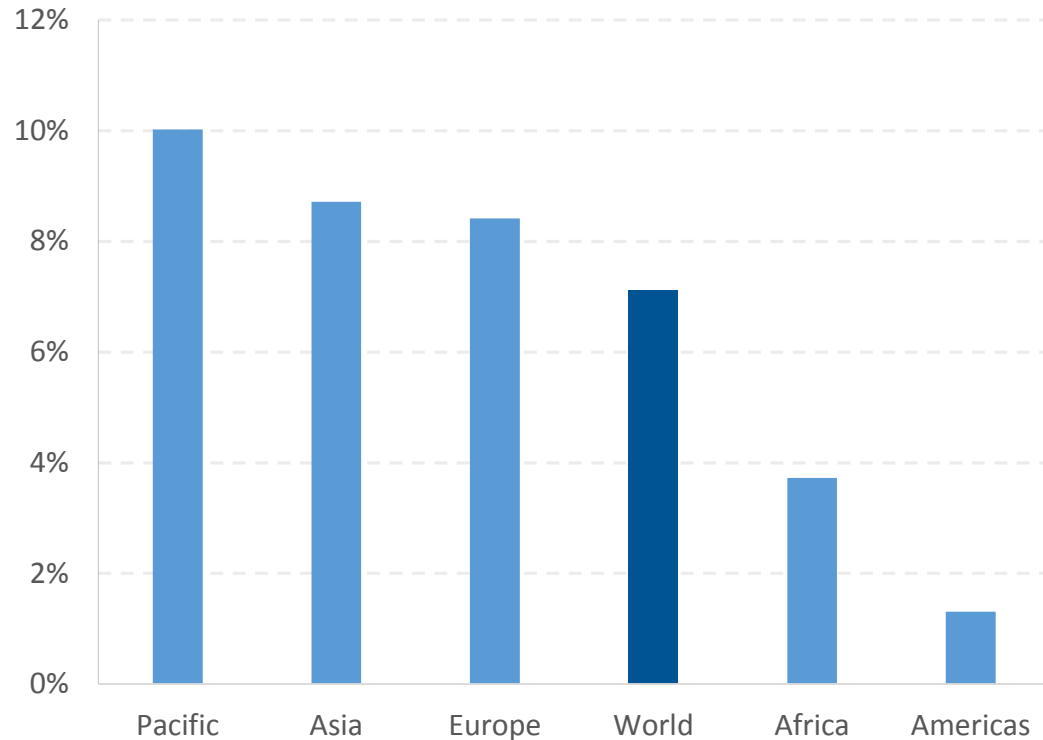
Global International Air Seat Capacity, 2014-16

Inbound only (in bns); Source SRS Analyser via PATAmPOWER

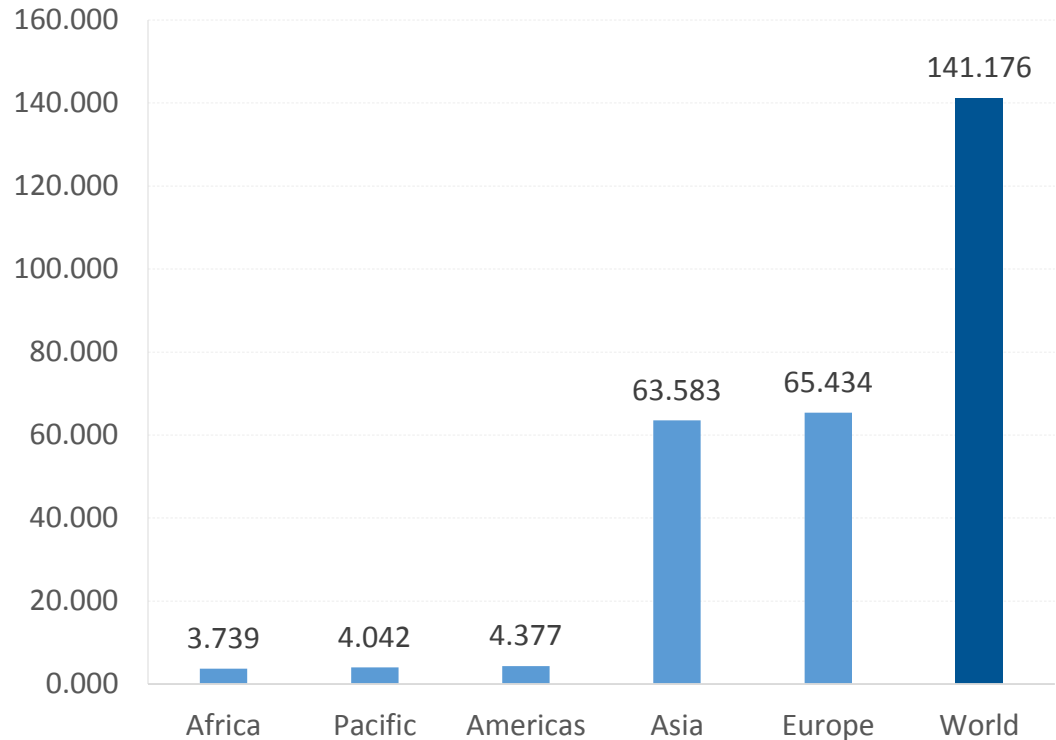


International Inbound Air Seat Capacity

Growth (%), 2016/15

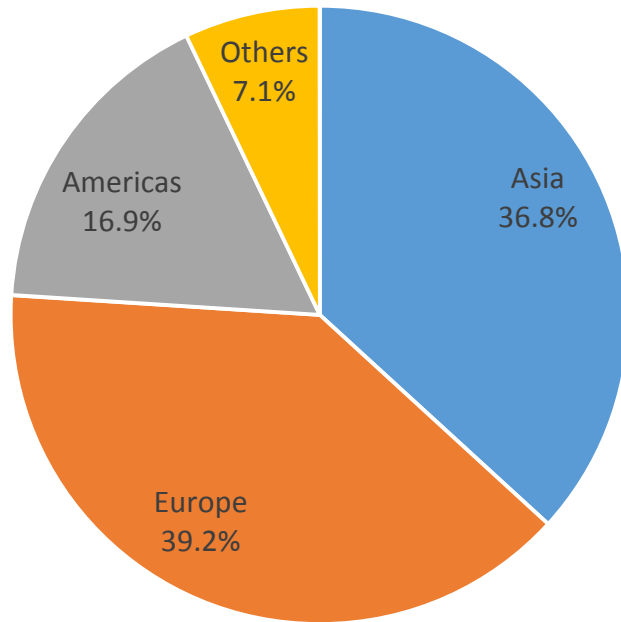


Growth (volume, mns), 2016/15

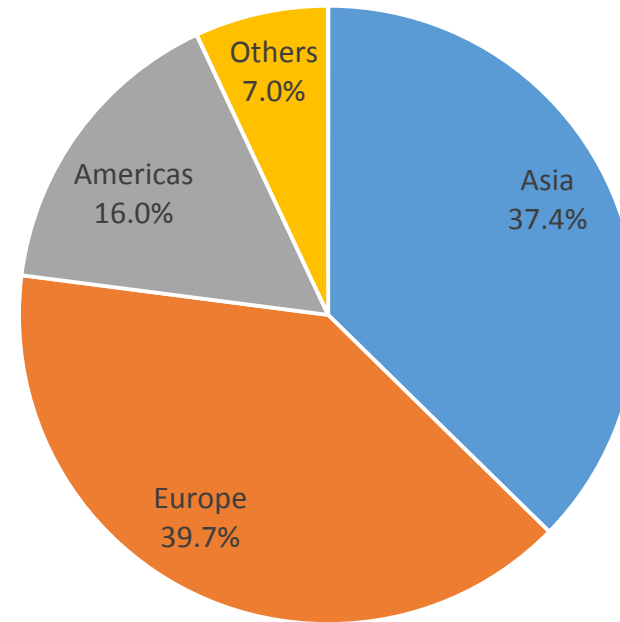


Relative Share (%) of Air Seats, 2015 & 2016

2015



2016





United Kingdom
Blue Fin Building
110 Southwark Street
London SE1 0TA
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Fax: +44 (0)20 7922 1931
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Fax: +1 (615) 824 3848
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Global Hotel Review (Media Version) - Constant Currency Edition

Global Hotel Industry Performance for the Month of July 2016

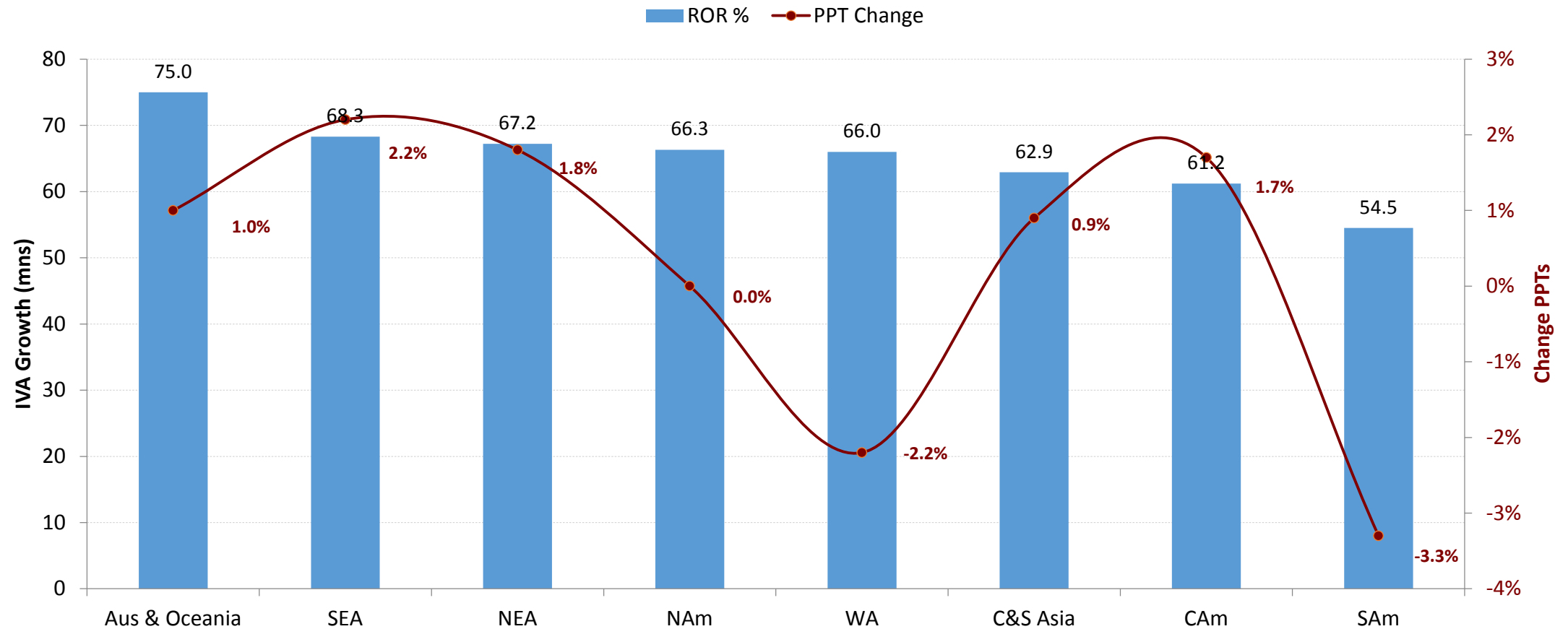
Volume 16, Issue MED7

Date Created: August 18, 2016



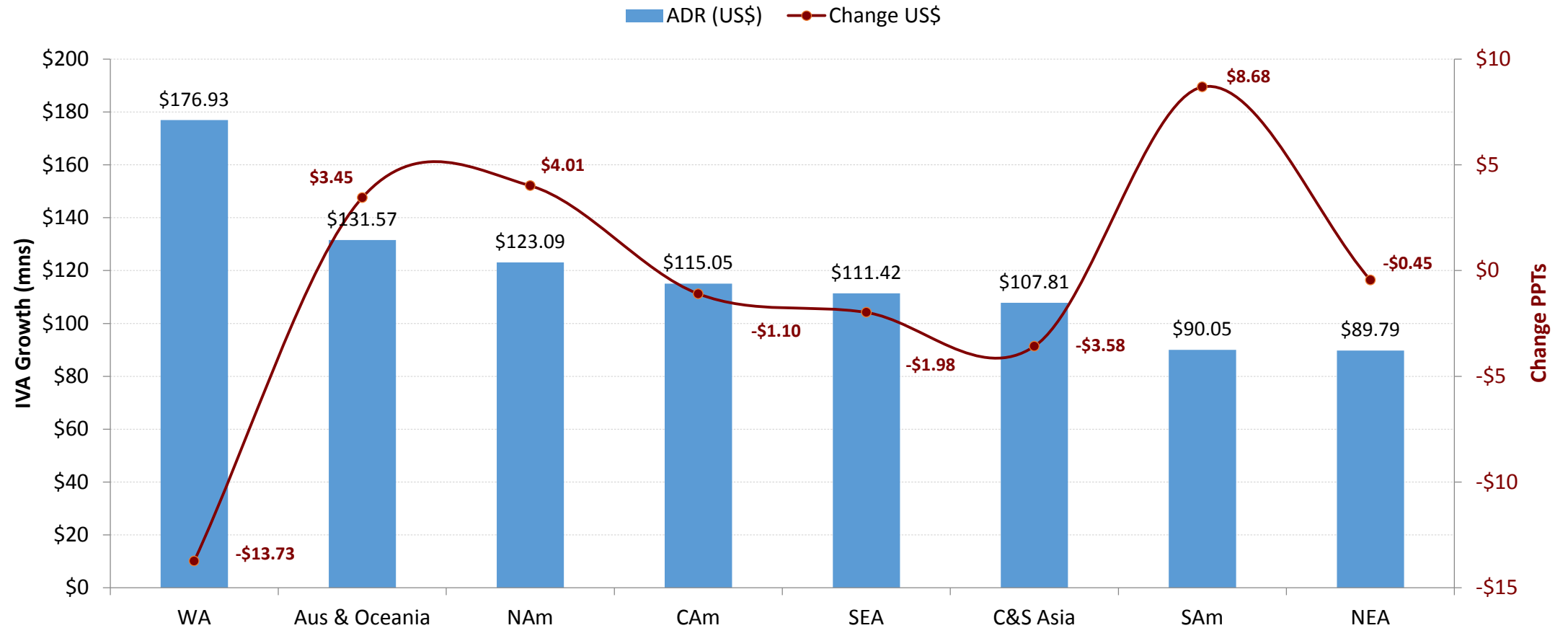
ROR (%) Jan to July 2016 – By Destination Sub-region

Jan-Jul 2016, Rates (%) and Annual Growth (ppts)



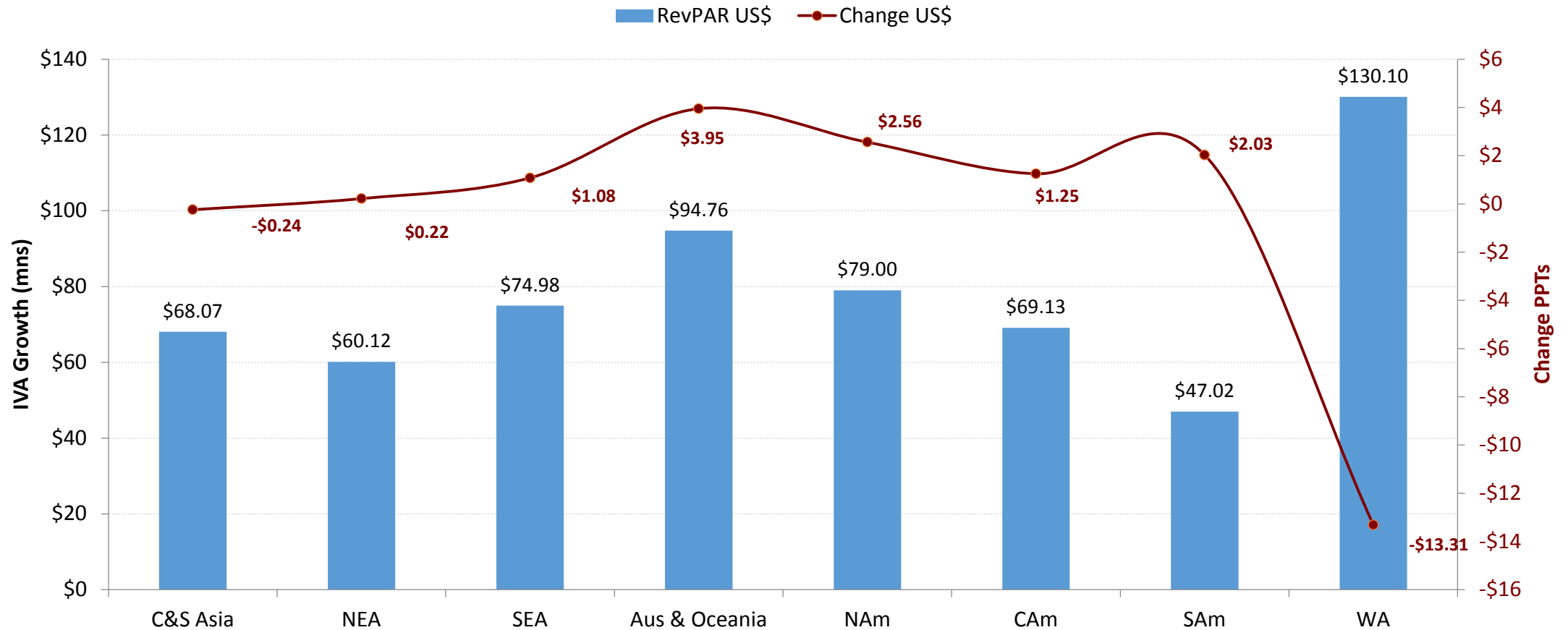
ADR Jan to July 2016 – By Destination Sub-region

ADR YTD (US\$) and Year-on-Year Period Growth (US\$)



RevPAR Jan to July 2016 – By Destination Sub-region

RevPAR YTD (US\$) and Year-on-Year Period Growth (US\$)



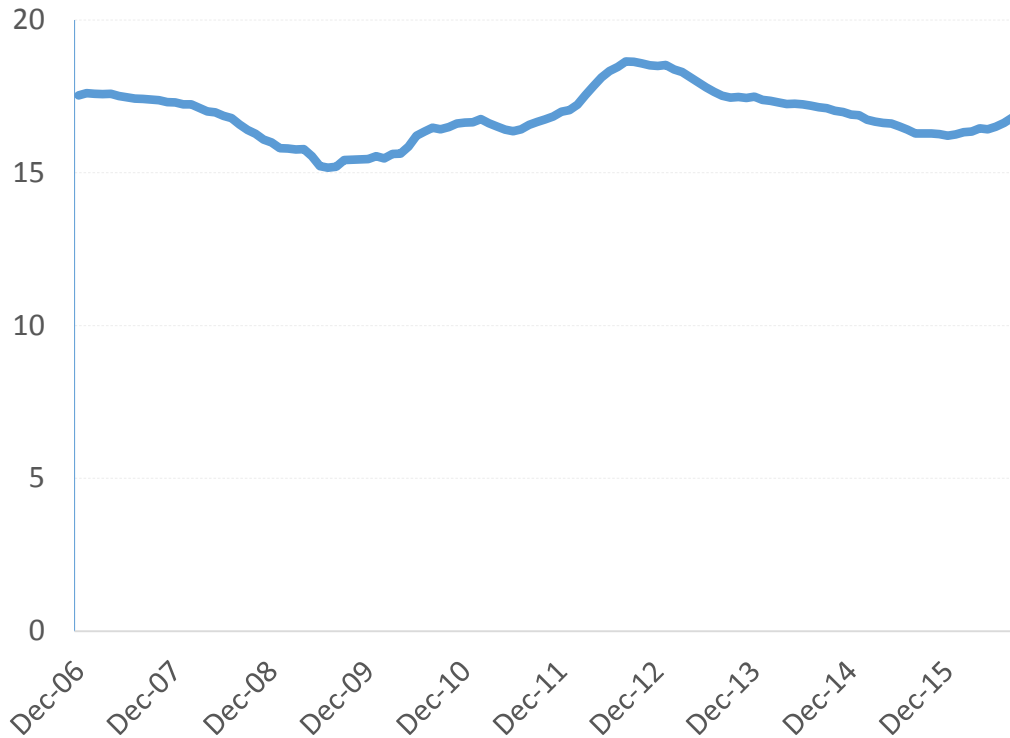
Pressing Questions (Asia Pacific)

1. Where are the Chinese travelling to?
2. Are the Russians coming back?
3. Is the outbound Japanese market growing again?
4. Is Brexit beginning to Bite?

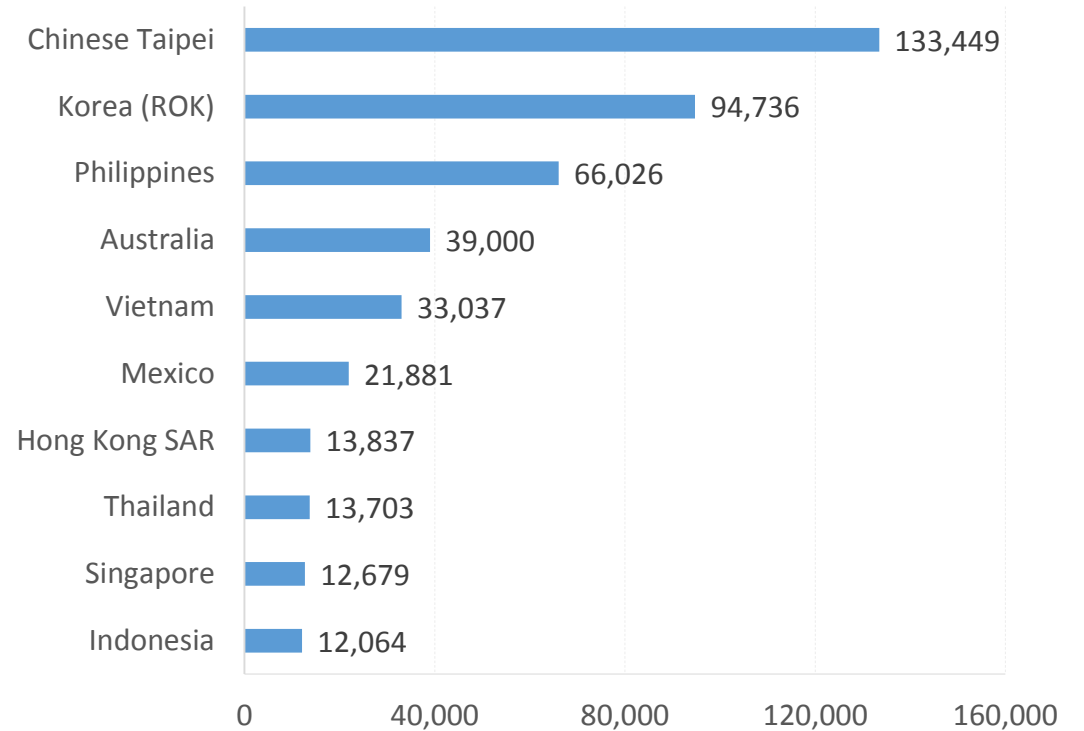


Is Japan Outbound Growing Again?

MMAT (12ME Dec-06 to Aug-16), mns

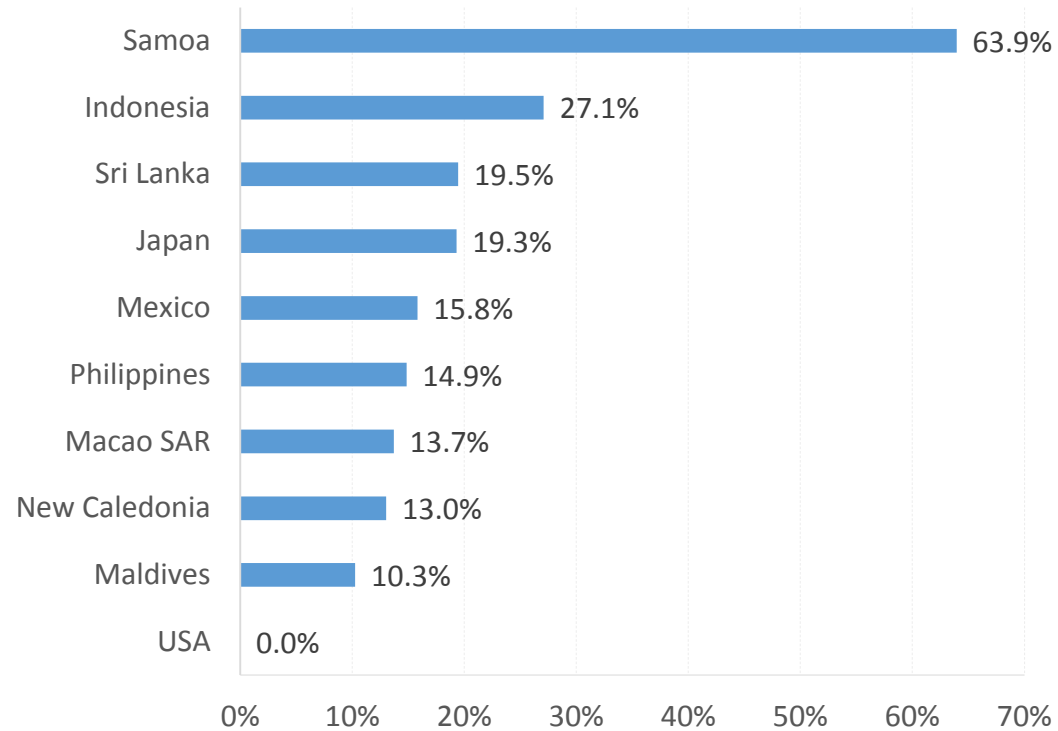


Arrivals to Asia Pacific by Volume Gain YTD 2016/15

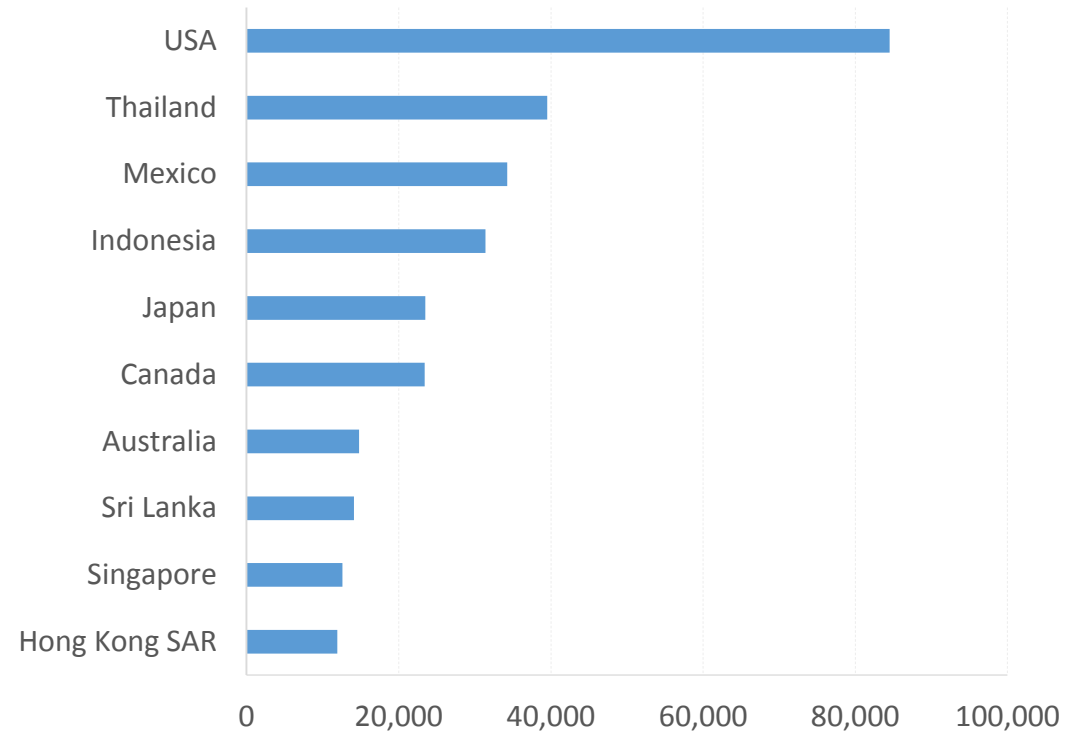


Any Bite from Brexit?

Growth (%)



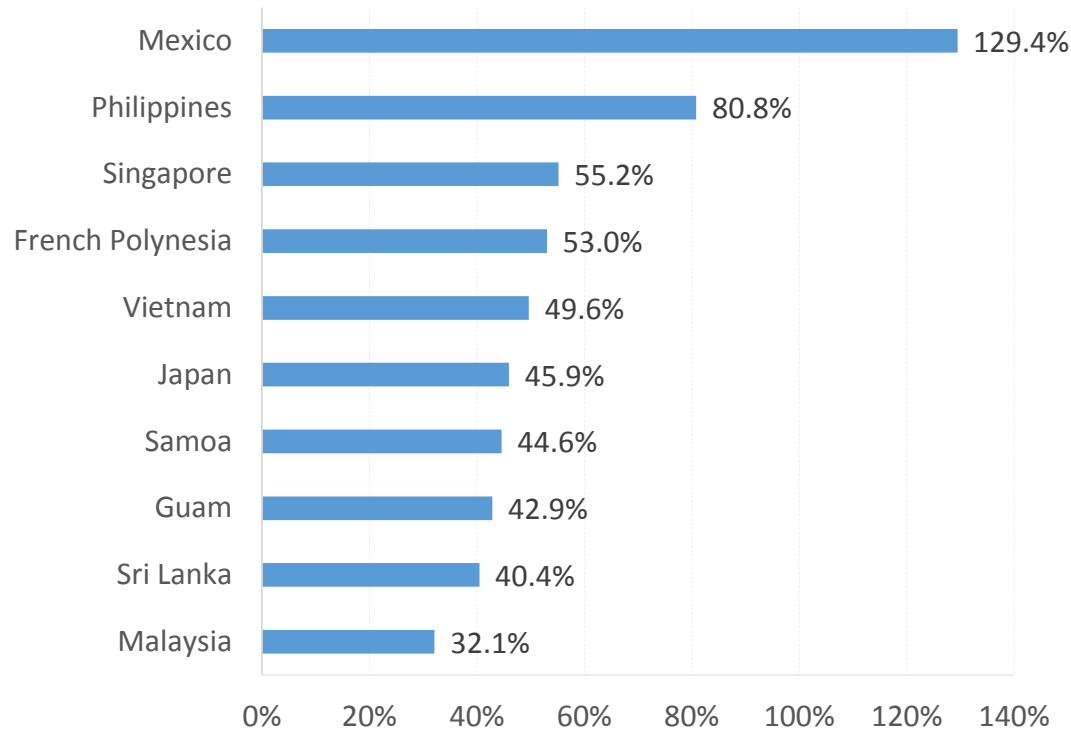
Arrivals to Asia Pacific by Volume Gain YTD 2016/15



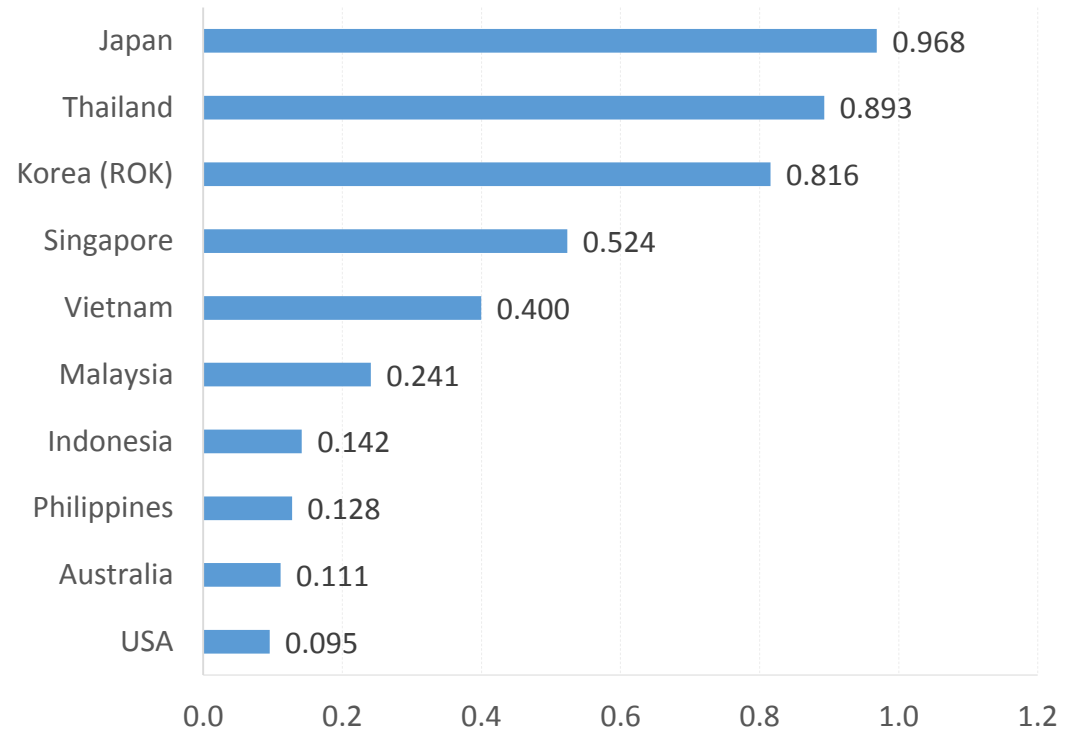
Chinese Travellers across Asia Pacific, Early 2016

Period-to-Period Growth (% & Volume, 2016/15)

Growth (%)



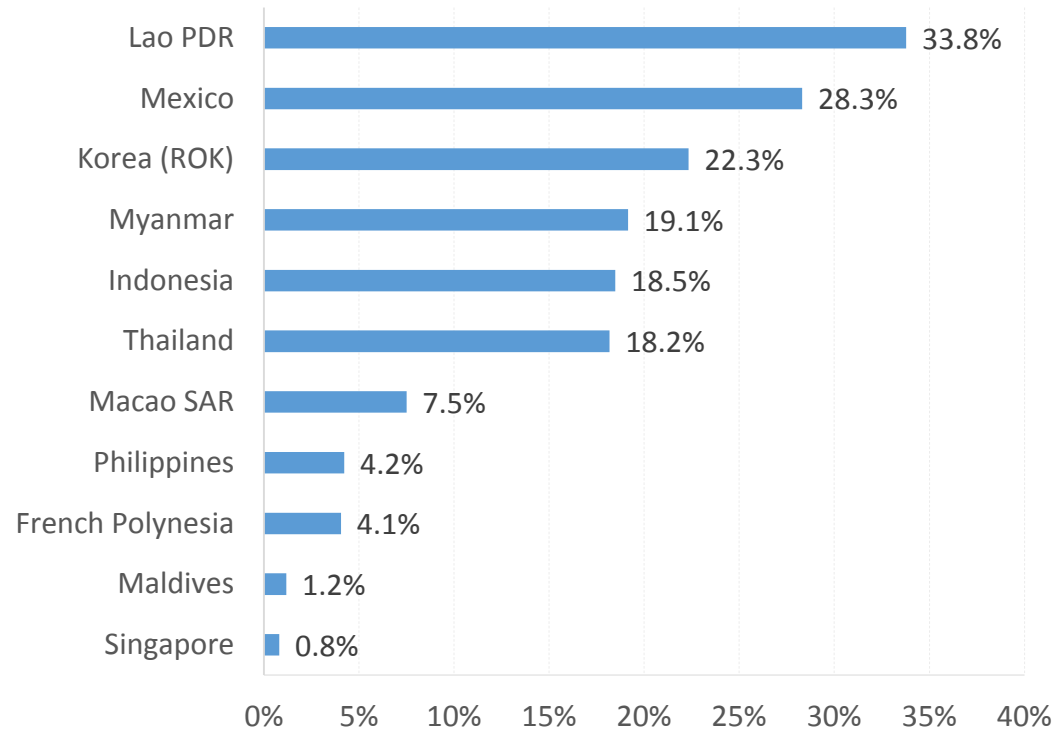
Volume Growth (mns)



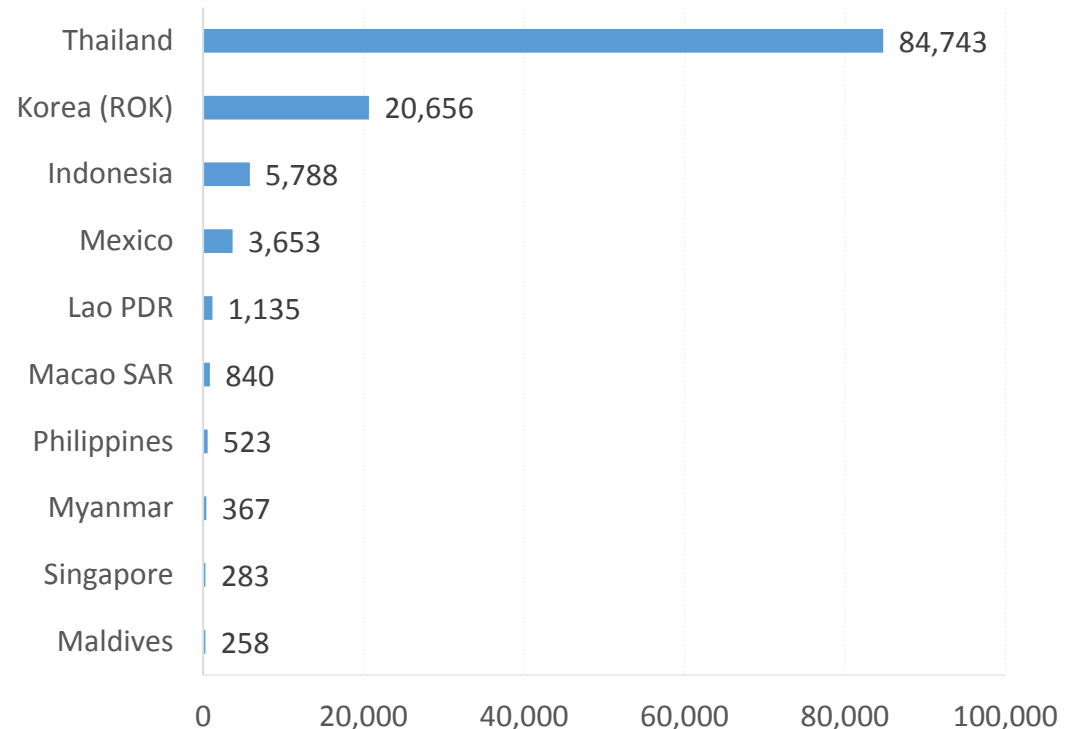
What about the Russians?

Period-to-Period Growth (% & Volume, 2016/15)

Growth (%)



Volume Growth (Arrivals)



Black Swans

- Infrastructure Investment
- Political uncertainties
- Stock Market 'Red Alert'
- Skilled Labour Shortfall
- Increasing Competition
- Terrorism
- Pandemics
- Generational travel changes



ANNUAL TOURISM MONITOR 2016

Final Edition



Thank You
谢谢

