

Travel Business Analyst

Markets + Marketing + Strategy

ASIA PACIFIC • AUGUST 2006

Winter* Special

This month, our shorter seasonal issue, without the Main News, Market Intelligence, Market Outlook, and Trends sections, but with a special report on Australia – and retitled for that purpose. The September issue will revert to the regular publishing pattern.

Marketing Australia

Given the marketing intelligence with which Australia's GNTO conducts itself, we feel somewhat humbled to initially review results and outlook in the old (traditional? legacy? out-dated?) way.

We take comfort, however, in the fact that this is core information, without which the more-intelligent approach would have less relevance. Quickly then, our main comments:

- Annual growth rate has been falling, see Table 1. With non-travel traumas 2000-05 (notably 9/11 and SARS), perhaps a lower rate is expected. We are told to expect the unexpected, but this 2005-10 forecast (and others, see below) seems to add "but do not include in your forecasts".

- In the top 10 markets, Japan, US, and Singapore have

fallen since 2000, see Table 2.

- Top five had 56% combined share in 2000, but 58% in 2006. Best would be smaller.

- This year started off flat – 0% overall growth Jan-Apr, but five in the top 10 markets in decline. *Not yet serious enough to be a barbecue-stopper, but warrants attention.*

- TIEV shares (see below) out of sync with arrival totals. This measure makes UK the largest market, followed by Japan, US, New Zealand, China. And markets more important than with arrival totals – UK, US, China, Korea, Malaysia, Germany. *A rethink that other destinations should try.*

- Forecasts. Given what has gone before, some look too positive – notably Japan, Singapore. Others too cautious – NZ, UK? *And we think there will be more surprises in the China market – with Australia losing to Europe, unless it can capture the younger market, which still sees Australia as the 'big coun-*

Notes: *For those in the northern hemisphere, Summer Special ...

Table 2

Visitor arrivals in Australia, x1000										
	2010	AAGR†,%	Share,%	2005	Growth*,%	AAGR†,%	Share,%	TIEV share,%	2000	Share,%
Top 10										
New Zealand	1152	1.0	16	1099	6.4	6.0	20	8.6	821	17
UK	865	4.1	12	708	4.7	4.1	13	17	578	12
Japan	749	1.8	11	686	-3.5	-1.0	12	11	720	15
US	568	4.9	8.1	446	3.0	-1.5	8.1	9.7	482	9.7
China	579	15	8.3	285	13	18.0	5.2	8.1	124	2.5
Singapore	314	3.4	4.5	265	5.6	-0.8	4.8	3.8	276	5.6
Korea	353	7.1	5.1	250	18	9.3	4.6	4.9	160	3.2
Malaysia	196	3.4	2.8	166	-0.5	1.6	3.0	3.2	153	3.1
Hong Kong	192	3.8	2.7	160	16	1.1	2.9	2.7	151	3.1
Germany	175	3.6	2.5	146	4.1	0.2	2.7	3.8	145	2.9
Selected other markets										
Canada	146	7.3	2.1	103	4.4	3.1	1.9	2.2	88	1.8
India	142	16	2.0	68	22	10.6	1.2	1.1	41	0.8
France	86	6.2	1.2	64	9.6	2.2	1.2	1.1	57	1.2
Italy	62	4.0	0.9	51	8.1	-2.6	0.9	1.1	58	1.2
South Africa	79	8.3	1.1	53	4.2	-2.5	1.0	1.1	60	1.2
Taiwan	135	4.0	1.9	111	12	-3.9	2.0	1.6	135	2.7
TOTAL	6983	4.9	100	5497	5.4	2.1	100	100	4946	100

Notes: *Over 2004. †AAGR = average annual growth rate, 2005-10 and 2000-5. Source: Tourism Australia (TA), Tourism Forecasting Committee (TFC), Travel Business Analyst.

Special Report...1; Market Data Tables...3: GDS or Internet Sales; Travel standardisation; Visitor arrivals; Running totals; Hotel results; Resident departures; Agency sales; Airport traffic; Airline results; Airline stock prices; Air traffic to and within Asia Pacific; AAPA counts; Economics.

contd from p1

Table 1

Visitor arrivals in Australia, x1000		
1990		2215 (14.0)
1995		3726 (11.0)
2000		4946 (5.8)
2005		5497 (2.1)
2010*		6983 (4.9)

Notes: (% AAGR over previous five years in brackets.) *Forecast. Source: TA, TFC.

try'. (Okay, China is also big, but it houses 1200mn people instead of 20mn.)

- Forecasts (see 'Special' on Page 3). Here is the evidence of over-confidence.

A wrap-up summary of the above is that Australia still needs to fight for visitors. Which then makes more sense to look at the measures in what we might call the 'new way' – centred on TIEV. That is Total Inbound Economic Value, which is designed to calculate the value to Australia of visitors.

TIEV includes not just visitor spend in Australia, but other factors – such as percentages of international air fares,

constantly improves, but sometimes leaves good ideas behind in favour of the new) – what it calls 'dispersal' – nights spent by visitors in centres other than the main ones.

In some ways that is better than TIEV, or, better dispersal would improve TIEV almost by definition. Latest data, see Table 4, shows dispersal for Asia markets weak.

But in fact, Australia is moving away from its image – wide-big-outback-adventure-Australia. That element is not even included in the list of top 10 activities. Closest is 'visits to national and state parks' – and even that is under-

non-air fare component of tour packages etc. The results are shown in part of Table 2. Unfortunately, TIEV does not measure an earlier NTO idea (like most cerebials, Australia's NTO

Table 3

Dispersal of visitors into Australia from selected Asia markets, 2004		
Market	% share	Growth,%
China	6	-2
Hong Kong	9	-5
India	11	5
Japan	20	8
Korea	7	-1
Malaysia	8	2
Singapore	8	-3

Notes: % of nights beyond main destinations. Source: TA.

taken by less than half of visitors, only 46%.

With more visitors shopping, going to the beach, restaurants, pubs, etc, does Australia risk losing what separates it from most other destinations? But perhaps the question should be does it matter, if TIEV grows satisfactorily?

The September issue of Travel Business Analyst will include another detailed report on Australia, including development at leading bodies – such as the NTO and Qantas.



Net Value

Marketing Travel On The Internet

Selling Australia

Bloody good. That might be the reaction to Tourism Australia's promotional campaign launched February 2006 – SWTBHAY (So Where The Bloody Hell Are You).

At that time, visits to the NTO's website, Australia.com, were around 22,000 daily (over a week), see table. After a bizarre ban in the UK (quickly lifted), this increased to 27,000 – and over one 24-hour period reached 70,000. But at the same time a dedicated

website was introduced, and that reached 24,000 daily at the time of the UK ban. International trade launches got it up again to 15,000, then it trailed below 5000 until launches in China and Korea in June, when there was another peak – to even higher than the UK-ban peak, to 30,000 daily.

But the key now is to convert that interest or activity into actual trips. TA says it will not know if the 'intention to visit' share has increased after this campaign.

This is an extract from **Net Value**, a monthly report on marketing travel on the internet. A combination subscription to NV costs US\$50 for one year; full price is US\$100. For more information, contact Raymonde Perpignani at Travel Business Analyst, TBAoffice@aol.com



People-in-Travel

Tracking Travel's Leaders

Diana Ee-Tan

With an unworkable corporate structure, senior appointments at the Fairmont Raffles group must also be unworkable by definition.

Diana Ee-Tan has been appointed MD of Singapore-based Raffles. One indication of the ill-thought (unless temporary) corporate combination is that she has also been named EVP of Canada-based Fairmont Asia Pacific.

This is an extract from **People-in-Travel**, a monthly report tracking travel's leaders. A combination subscription to PinT costs US\$50 for one year; full price is US\$100. For more information, contact Raymonde Perpignani at Travel Business Analyst, TBAoffice@aol.com

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MARKET DATA

For a copy of a document showing how to get the best out of these tables, subscribers should circle this paragraph and mail to us, and separately send a cheque for "International Committee of the Red Cross" for a token amount in any currency to ICRC, 19 Ave de la Paix, CH-1202 Geneva, Switzerland

Special

Getting forecasts right is hard. Pointing out shortcomings is easier, so we apologise in advance for this report.

Australia's forecasts have changed greatly, see table – at least 20% in four of the top seven Asia markets for 2005 – although that is in comparison with forecasts in 2002, which although post-9/11 was pre-SARS.

But confidence for the future seems to have fallen – five out of seven markets are now expected to produce fewer visitors in 2010. That compares forecasts made in 2005 and this year.

One market marked down is China; the market which generally we feel will perform better than most predict. In this case, we think Australia may have got it right. The Chinese market is maturing – and this will mean not all destinations will continue to get more Chinese visitors just by being there. Other factors are starting to count more.

Australia visitor arrival forecasts, x1000

Made in:	2006	2005	2005	2003	2002
For:	2010	Difference,%	2010	2005	Difference,%
Market					
China	579	-17.2	699	314	-28.0
Hong Kong	192	-2.0	196	150	-13.8
India	142	25.7	113	62	10.7
Japan	749	-16.9	901	727	15.9
Korea	353	5.7	334	230	-19.9
Malaysia	196	-18.0	239	175	-20.5
Singapore	314	-2.2	321	260	-21.9
Total	6983	-6.3	7454	5575	-10.3

Source: Tourism Forecasting Committee.

1 Air passenger* traffic to and from major Asia Pacific centres, x1000

From:	Kuala Lumpur			Singapore			Sydney			Tokyo*					
To:	Mar 06	YTD		May 06	YTD		Mar 06	YTD		Apr 06	YTD				
	+/-,%	06	+/-,%	+/-,%	06	+/-,%	+/-,%	06	+/-,%	+/-,%	06	+/-,%			
Bangkok	13.5	296	20.6	Indonesia	5.4	1384	2.3	Auckland	-10.3	324	-6.6	Pacific	-33.9	10440	-12.0
Hong Kong	-7.3	173	-8.3	Malaysia	1.1	983	4.1	Bangkok	5.9	136	14.3	Oceania	-2.6	2165	-4.3
Jakarta	6.5	211	8.4	Thailand	5.5	1516	14.1	Denpasar	-50.9	23	-45.4	SE Asia	-20.4	13439	-4.9
London	-19.4	124	-6.1	Hong Kong	-1.8	868	2.5	Hong Kong	3.4	213	6.6	China	4.2	7487	4.1
Shanghai	-27.0	73	-4.7	Japan	1.7	680	5.0	London	-2.1	123	2.9	Korea	0.0	4549	-0.7
Singapore	-5.9	410	-2.6	UK	1.5	542	0.2	Los Angeles	-1.6	171	1.8	Europe	-2.6	5802	1.3
Sydney	-24.0	96	-7.7	Australia	4.5	1489	5.8	Singapore	1.2	244	1.9				
Tokyo	13.7	99	15.1	US	2.3	307	2.3	Tokyo	-8.7	126	-7.1				
TOTAL	-0.2	3669	8.6	TOTAL	7.2	13171	10.2	TOTAL	-1.3	2533	1.2	TOTAL	-1.0	47465	-1.0

Notes: See Master Notes, this page. Routes are selected; may not be largest. *Flights from Tokyo Narita, not passengers; double for approximate city-pair total. Source: Airports Authority of Thailand, New Tokyo International Airport Authority, Civil Aviation Authority of Singapore, Department of Transport and Communications (Australia).

2 Air passengers to and from Asia Pacific, x1000

From	Australia			France*			Germany			UK			US		
To	Feb 06	YTD	+/-t,	Mar 06	YTD	+/-t,	Mar 06	YTD	+/-t,	Mar 06	YTD	+/-t,	Dec 05	YTD	+/-t,
	+/-t,%	06	%	+/-t,%	06	%	+/-t,%	06	%	+/-t,%	06	%	+/-t,%	05	%
Australia	na	na	na	na	na	na	-1.8	25	-7.1	-4.2	304	-5.7	10.8	1597	6.3
China	9.5	108	4.4	15.3	210	11.9	7.8	268	3.8	37.4	114	37.2	23.9	1405	34.4
Hong Kong	4.4	309	5.5	7.0	110	5.6	1.7	133	-1.8	12.7	339	17.1	22.3	1776	13.8
India	-16.4	11	-10.8	25.6	188	34.0	-1.0	303	0.1	48.1	644	54.0	147.1	298	21.3
Indonesia	-42.5	67	-44.0	na	na	na	-6.9	6	7.4	na	na	na	-54.6	19	-27.0
Japan	-1.3	312	-3.8	3.2	300	3.0	-0.2	234	-0.7	-5.3	272	-6.3	1.5	12111	2.5
Korea	-9.9	74	-8.5	5.2	70	10.0	5.1	118	4.4	-2.0	56	-2.3	3.8	2762	6.2
Malaysia	-7.2	205	-3.7	-17.6	33	-8.6	-15.3	39	-7.6	-17.7	153	-11.3	31.3	103	11.2
New Zealand	1.9	853	0.8	na	na	na	na	na	na	-3.7	46	-3.5	3.4	823	-6.1
Philippines	-5.0	25	-11.2	na	na	na	26.5	38	42.5	na	na	na	-5.9	727	-6.8
Singapore	5.2	618	5.8	4.8	104	7.6	2.7	179	4.3	-0.6	303	6.2	18.2	367	6.3
Taiwan	-14.2	41	-7.0	6.7	21	7.1	16.4	28	19.1	73.1	42	72.6	27.8	2068	11.2
Thailand	12.2	162	15.0	7.7	112	9.2	9.1	333	20.9	-13.8	169	-11.7	-4.3	130	37.9
TOTAL	2.2	3706	2.0	4.6*	11600*	4.7*	1.4	25104	3.0	1.2	37162	3.6	0.9	117647	2.7

Notes: *Paris airports only; total is month earlier. †Over same period, year earlier. Source: Department of Transport and Communications (Australia), Aeroports de Paris (France), Statistisches Bundesamt (Germany), Civil Aviation Authority (UK), US Department of Commerce (US).

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Master Notes: Exchange rates (start of previous month) - US\$1 to A\$1.37, Y8.00, HK\$7.77, IRp46.1, ¥116, W961, MR3.69, NZ\$1.68, S\$1.60, NT\$32.6, B38.4. AL = Airlines, ASK = available seat kilometre, AW = Airways, BI = Royal Brunei AL, BR = Eva AW, CI = China AL, CX = Cathay Pacific AW, E = TBA estimate, GA = Garuda, HK = Hong Kong, ID = Indonesia, IN = India, J-D = Jan-Dec, JL = Japan AL, JP = Japan, KE = Korean Air, KR = Korea, LF = load factor, MH = Malaysia AL, MI = Silk Air, MY = Malaysia, NA = not available, na = not applicable/nil, NH = All Nippon AW, NZ = Air New Zealand, OZ = Asiana, P = provisional, Pax = passenger, PH = Philippines, PR = Philippine AL, RPK = revenue passenger kilometre, Q = quarter (of year), QF = Qantas AW, SF = seat factor, SG = Singapore, SQ = Singapore AL, SS = seats sold, TG = Thai AW, TH = Thailand, TW = Taiwan, VN = Vietnam AL, YTD = year-to-date

MARKET DATA

3 Traffic on international routes of selected Asian airlines, 2006

Airline	Mth	SS 1000	+/- %	RPK mn	+/- %	Jan thru	SS 1000	+/- %	ASK mn	+/- %	RPK mn	+/- %	SF %	+/- pts
Systemwide														
Air Macau*	Apr	223	27.3	268	32.4	Apr	755	18.9	1260	15.6	933	25.7	74.1	6.0
Cathay Pacific	Jun	1392	10.7	5996	14.1	Jun	8144	11.1	43814	10.8	34633	12.1	79.0	0.9
China Southern	Jun	3845	9.0	5405	11.1	Jun	22687	11.8	45391	8.5	32091	12.5	70.7	NA
Dragonair*	May	451	7.7	576	7.8	May	2166	10.2	4357	10.0	2809	10.2	64.5	0.1
Eva Air	May	484	-0.5	1924	1.7	May	2507	5.0	12703	6.7	9979	6.9	78.6	0.2
Jet AW	Apr	948	36.0	991	60.9	Apr	3623	na	5236	na	3804	na	72.7	na
Royal Brunei	Apr	103	22.8	342	26.9	Apr	411	15.9	1806	3.5	1326	15.5	73.5	7.6
Singapore AL	Jun	1513	7.5	7383	8.8	Jun	8646	9.4	55212	3.3	42039	9.1	76.1	4.0

Low-fare airline traffic*, 2006

Systemwide	Jetstar	May	Jan-May
SS,x1000		486	2537
Growth,%		27.9	25.7
SF,%		66.2	72.6
Virgin Blue	May	Jan-May	
SS,x1000	1141	5739	
Growth,%	7.6	7.2	
SF,%	72.3	76.2	
Air Asia	Mar	Jan-Mar	
Indonesia:			
SS,x1000	124	313	
Growth,%	175.8	160.9	
Malaysia:			
SS,x1000	557	1560	
Growth,%	39.9	41.9	
Thailand:			
SS,x1000	246	659	
Growth,%	62.2	60.7	

Notes: See Master Notes, page 3. pts=points. *Domestic and international. †Growth against earlier period. Virgin is booked loads, including free passengers; Jetstar paid travelled passengers only (add 4-5 points for others); Air Asia does not specify. Source: companies.

4 Airline financial results, US\$*

Item	CX Y-Dec 04	KE Y-Dec 04	QF group Y-Jun 04	SQ Y-Mar 05	TG Y-Sep 04
Revenue,mn	5008	7161	7885	7325	3902
Op Profit,mn	673	1404	763	827	517
Revenue per					
ASK,USc*	6.8	11.1	7.6	7.0	5.6
RPK,USc*	8.7	15.6	9.7	9.4	7.7
Pax,US\$*	367	335	262	459	200
Profit per					
ASK,USc*	0.9	2.2	0.7	0.8	0.7
RPK,USc*	1.2	3.1	0.9	0.8	1.0
Pax,US\$*	49	66	25	52	26

Notes: See Master Notes, page 3. Although these figures show indicative comparisons between airlines, they do not provide precise comparisons because of different definitions. Op = Operating, USc = US cents, Y = year. *See Master Notes for approximate conversion rate. Source: companies.

5 Stock market last-day airline and hotel closing prices

Airline/ Hotel	Price, local currency			Growth±,%		TBA 100 index*	
	Dec 05	May 06	Jun 06	stock	market	AL	All AL
Air China	2.50	2.95	3.25	10.2	2.6	108	160
Air NZ	1.28	1.24	1.18	-4.8	-0.8	5	7
All Nppn AW	480	418	440	5.3	0.2	22	33
Cathay P AW	13.7	12.8	13.6	6.3	2.6	171	253
China AL	15.3	14.8	15.4	4.1	-2.1	31	46
Japan AL	321	298	287	-3.7	0.2	17	25
Malysn AL	2.84	2.95	2.68	-9.2	-1.4	28	41
Qantas AW	4.07	3.15	2.96	-6.0	1.4	136	201
Singpre AL	12.7	12.4	12.7	2.4	2.2	86	128
Thai AW	43.0	45.0	39.3	-12.8	-4.4	73	107
Mndrn-Orntl	0.86	1.10	1.15	4.5	2.2	na	na
Shangri-La	12.5	15.2	15.0	-1.3	2.6	na	na

Notes: See Master Notes, page 3. *100 base on Jan 90 prices except Jan 93 for NZ and TG, Jan 95 for CI, Jan 96 for QF, Dec 04 for CA. †Latest month over month earlier. Source: various.

6 Running 12-month total citizen departures, x1000

12 mths through	CN†	+/- %	JP	+/- %	KR	+/- %	TW	+/- %
Dec 90	620	24.0	10,997	13.8	1,561	28.7	2,942	39.6
Dec 00	10,473	13.4	17,812	8.9	5,508	27.0	7,329	11.7
Dec 05	31,067	9.0	17,401	3.5	10,078	14.2	8,208	5.5
Apr 06	31,959	6.5	17,324	-1.2	10,574	14.4	8,390	5.2

Notes: See Master Notes, page 3. †Estimates by Travel Business Analyst. Source: NTOs, Travel Business Analyst.

7 Overseas travel by Asia Pacific residents

Market	Jan* thru:	Departures	Growth,%	Source	Spend,US\$mn*
Australia	Dec	4,754,046	8.8	PATA	9,407
	Apr†	1,418,719	2.8	PATA	9,407
China	Dec†	28,850,000	42.7	PATA	15,187
	Dec	31,026,000	7.5	PATA	15,187
Hong Kong	Mar†	17,876,229	3.0	PATA	NA
-A	Dec	5,785,756	15.4	NTO	13,123
India	Dec 03	5,400,000	10.2	PATA	2,255
	Dec†	6,200,000	14.8	PATA	2,255
Indonesia	Jun	1,563,292	4.8	PATA	3,082
Japan-B	Dec	17,401,084	3.5	PATA	38,103
	Apr†	5,611,647	-1.4	NTO	38,103
Korea-B	Dec	10,077,619	14.2	NTO	9,499
	Apr†	3,608,883	15.9	NTO	9,499
Macau	Mar†	147,748	26.0	PATA	71
New Zealand	Apr†	485,151	-0.2	PATA	2,360
Philippines	Aug	1,360,506	13.1	PATA	632
Singapore-D	Dec	5,159,403	-0.1	NTO	7,744
	Mar†	1,192,529	2.0	NTO	7,744
Taiwan-B	Dec	8,208,206	5.5	NTO	8,170
	Apr†	2,761,690	7.1	NTO	8,170
Thailand	Nov	2,758,878	12.1	PATA	3,495
UK	Mar†	13,122,000	1.8	NTO	55,930
US	Dec	38,051,614	5.3	PATA	65,635

Notes: See Master Notes, page 3. *2005 unless stated otherwise. †2004. ‡2006. A = Excludes travel to China and Macau. B = Citizens. D = Excludes departures by land. Source: NTO-national tourist office, Ot-Other, PATA-Pacific Asia Travel Association.

Notes: *Quoted in US dollars for latest whole year; may not match period in other columns. Source: World Tourism Organization.

8 Running 12-month total visitor arrivals, x1000

12 mths through	CN	+/- %	HK	+/- %	SG	+/- %	TH	+/- %
Dec 90	1,747	19.6	5,933	10.7	5,313	10.0	5,299	10.2
Dec 00	10,160	20.5	13,059	16.5	7,686	10.5	9,579	10.7
Dec 05	20,255	19.6	23,359	7.1	8,933	7.3	11,759†	0.2†
Apr 06	20,707†	12.9†	24,300	7.7	9,333	9.4	12,463†	9.6†

Notes: See Master Notes, page 3. †Estimate by Travel Business Analyst. Source: NTOs, Travel Business Analyst.

MARKET DATA

9 Visitor arrivals in Asia Pacific destinations

International arrivals

Destination	Months* Jan thru:	Arrivals	Growth %	Stay days†	PVPD US\$-A
Australia	Dec	5,496,987	5.4	27.0	69.87
	Apr‡	1,868,953	-0.5	27.0	69.87
Bangladesh	Dec‡	271,270	10.9	5.0	50.00
Bhutan	Dec‡	9,249	47.7	5.0E	230.19E
Cambodia	Apr‡	600,374	18.9	5.0	200.00
China	Mar‡	28,732,813	1.8	7E	100E
foreigners	Dec	20,255,178	19.6	7E	100E
	Mar‡	4,632,398	6.3	7E	100E
Cook Islands	Mar‡	16,602	1.5	5.0	115.84
Fiji	Dec	544,536	8.8	7.5	124.58
Guam	Mar‡	340,561	3.9	4.0	302.93
Hawaii	Dec	7,379,635	7.1	11.4	179.98
	Apr‡	2,390,312	0.9	11.4	179.98
Hong Kong	Dec	23,359,417	7.1	3.6	79.13
	Apr‡	8,353,504	12.7	3.6	79.13
India	Dec	3,915,324	13.2	27.0	46.62
	Apr‡	1,605,773	14.4	27.0	46.62
Indonesia	Apr‡	1,201,344	-10.2	10.0	231.71
Japan	Dec	6,730,519	9.7	9.4	96.95
	May‡	2,965,499	9.5	9.4	96.95
Korea	Dec	6,021,764	3.5	6.3	163
	Apr‡	1,935,966	-1.5	6.3	163
Laos	Dec	1,095,315	22.4	5.0	23.03
Macau	Apr‡	3,404,319	20.8	1.2	141.65
Malaysia	Dec	16,431,055	4.6	4.8	76.95
	Feb‡	2,838,282	3.6	4.8	76.95
Maldives	May‡	264,613	90.5	8.8	56.00
Marianas	Apr‡	145,477	-18.8	1.0E	100.00E
Myanmar	Dec	232,221	-4.0	7.3	70.00
Nepal	May‡	100,151	7.8	10.0	14.09
New Caledonia	Apr‡	30,406	-3.6	5.0	235.95
New Zealand	Dec	2,382,950	1.5	19.2	115.33
	May‡	1,056,878	1.2	19.2	115.33
Pakistan	Dec	798,260	23.2	5.0	68.06
Palau	Dec	40,425	-6.8	NA	NA
PNG	May‡	28,236	-3.7	5.0	255.48
Philippines	Apr‡	965,853	13.3	8.9	132.26
Singapore	Dec	8,932,991	7.3	2.7	327.87
	Apr‡	3,128,055	14.6	2.7	327.87
Sri Lanka	Apr‡	209,440	25.0	9.8	57.00
Tahiti	Mar‡	45,146	-3.7	5.0	223.98
Taiwan	Apr‡	1,149,927	7.5	7.3	212.10
Thailand	Dec	11,726,262	14.8	9.2	111.44
	Nov‡	10,364,763	-2.1	9.2	111.44
Tonga	Dec‡	17,959	0.8	5.0	56.87
Vanuatu	Mar‡	41,734	30.0	5.0	146.17
Vietnam	Dec	3,467,758	17.6	5.4	200.00
	May‡	1,583,580	12.1	5.4	200.00

International arrivals

City/region	Period	Number	Growth,%	Source	Comment
Bali	Jan-May 06	442,922	-19.8	PATA	direct arrivals
Jakarta	2002	1,267,106	14.0	CTO	none
Sabah	2005	761,094	-3.9	PATA	direct arrivals
Sarawak	Jan-Jun 05	1,145,395	9.6	PATA	direct arrivals

Domestic arrivals

Destination	Period	Number	Growth,%	Source	Comment
Australia	2002	75.3m	1.0	NTO	overnights
Malaysia	2001	15.8m	NA	NTO	1998: 8.32m
Thailand	2001	60m	NA	NTO	2002: up 2%
Vietnam	2005	16m	10.3	NTO	1995: 6.9m

Notes: See Master Notes, page 3. *2005 unless stated otherwise. ‡2004. †2006. Source: national tourist offices, PATA.

Notes: See Master Notes, page 3. Latest figures; may not tally with period. PVPD-per visitor per day. *Figure for period as shown. †In nights for Australia, Bangladesh, Guam, Hong Kong, Korea, Macau, Maldives, Philippines, Sri Lanka, Switzerland, Taiwan and UK. A = Converted at current rates. Source: national tourist offices, PATA, WTO.

10 Asia Pacific international airport passengers

City	Month*	Number	Growth %	Jan thru month shown	Growth %
Bali	Jan‡	180,388	-24.2	3,031,629	1.1
Bangkok	Dec	2,509,289	2.1	26,821,227	3.9
	Jan‡	2,560,258	23.1	26,821,227	3.9
Beijing	Dec	750,632	14.7	9,367,303	12.6
	Jan‡	758,124	21.2	9,367,303	12.6
Brisbane	Mar‡	272,657	-4.3	870,690	0.6
Chennai	Jan‡	236,394	14.7	2,495,956	7.8
Colombo	Jan‡	445,385	42.8	4,325,710	6.3
Delhi	Jan‡	546,708	20.0	5,291,778	17.1
Guangzhou	Jan‡	272,873	14.2	3,213,838	12.4
Hong Kong	Dec	3,580,000	7.0	40,743,000	9.7
	Apr‡	3,798,000	14.1	14,125,000	10.6
Jakarta	Jan‡	517,602	0.1	5,799,061	6.1
Kuala Lumpur	Jan‡	1,220,444	20.6	14,337,805	14.9
Macau	Jan‡	323,282	11.6	4,210,156	13.4
Male	Jan‡	159,227	172.0	1,015,410	-28.8
Manila	Jan‡	873,170	11.4	9,222,006	9.6
Melbourne	Mar‡	360,498	-0.1	1,116,263	-0.1
Mumbai	Jan‡	609,284	6.5	5,988,791	11.9
Nadi	Jan‡	107,736	-0.9	1,224,086	9.4
Noumea	Jan‡	44,305	-1.4	407,523	5.2
Osaka KIX	Dec	898,900	-1.6	11,169,200	3.5
	Mar‡	976,100	-0.3	2,728,300	-2.5
Papeete	Jan‡	52,388	-4.1	637,732	1.7
Perth	Mar‡	157,652	-10.0	500,965	-3.8
Phnom Penh	Jan‡	85,348	18.3	858,273	7.5
Phuket	Jan‡	182,227	705.2	878,951	-55.0
Seoul	Dec	2,190,799	5.3	26,535,623	9.5
	Jan‡	2,352,398	6.8	26,535,623	9.5
Shanghai	Dec	1,178,681	0.5	14,548,377	13.2
	Jan‡	1,188,455	4.9	14,548,377	13.2
Singapore	Dec	2,801,076	3.3	29,327,699	7.0
	May‡	2,784,615	6.8	14,046,209	11.1
Sydney	Dec	902,372	2.4	9,507,538	6.0
	Mar‡	780,196	-1.3	2,532,984	1.2
Taipei	Dec	1,483,804	3.8	19,213,399	8.4
	Jan‡	1,560,818	15.2	19,213,399	8.4
Tokyo Narita	Dec	2,487,338	-0.1	30,409,471	1.1
	Apr‡	2,417,736	1.7	9,894,004	-0.3
ASIA PACIFIC-A	Dec	73,114,213	8.2	831,555,667	6.5
	Mar	77,782,699	8.7	221,368,264	12.2

Notes: See Master Notes, page 3. Airports with January figures show 2005 total in YTD column. *2005 unless stated otherwise. ‡2004. †2006. A = Domestic and international. Source: civil aviation departments, airports, Airports Council International.

MARKET DATA

11 Operating results of AAPA airlines, 2006

AL	SS,x1000				RPK,mn			
	Apr 06	+/-,%	YTD 06	+/-,%	Apr 06	+/-,%	YTD 06	+/-,%
BI	87	26.1	350	16.7	342	26.9	1323	15.4
BR	511	3.9	2022	6.4	1946	5.7	8049	8.1
CI	800	2.7	3098	5.3	2663	2.4	10605	5.9
CX	1395	14.6	5413	11.7	5862	16.3	22943	11.7
GA	184	2.8	682	-5.3	585	9.7	2143	-1.2
JL	887	-6.9	3939	-8.1	4535	-5.3	19945	-5.7
KE	898	3.6	3640	3.8	3698	7.9	14612	7.2
MH	727	-2.9	2808	-6.6	3314	-3.2	12757	-8.7
NH	309	9.6	1251	2.3	1435	6.6	5842	1.9
OZ	595	8.6	2344	7.4	1576	6.7	6128	5.7
PR	291	7.0	1097	5.1	1230	0.2	4730	-0.4
MI	127	51.2	485	51.1	217	36.6	814	36.5
SQ	1467	11.7	5735	10.2	7061	11.0	28007	10.8
TG	1121	10.7	4414	9.7	4307	13.2	17017	14.3
VN	233	17.1	1016	13.3	677	18.9	2861	17.5

Notes: See Master Notes, page 3. Source: Association Of Asia Pacific Airlines.

12 Operating resultst of AAPA member airlines

Item	Feb	+/-	Mar	+/-	Apr	+/-	YTD	+/-
	06	%	06	%	06	%	06	%
SS,mn	9.6	4.8	10.4	3.9	10.3	6.8	40.5	3.3
ASKs,bn	50.5	4.1	55.4	2.5	54.3	2.4	216.5	-0.5
RPKs,bn	37.4	5.4	41.0	4.3	40.3	7.0	160.9	2.0
Pax LF,%	74.1	0.9*	74.0	1.3	74.3	3.2	74.3	1.8

Notes: See Master Notes, page 3. *Points. †Because some member airlines have not supplied data to AAPA, these are not complete totals; however, percentage changes have been adjusted. Source: Association Of Asia Pacific Airlines.

13 IATA travel agencies in Asia Pacific, 2005

Country	Locations	Growth %	Net sales US\$m*	Growth %	Per agency US\$m*	Growth %
Australia†	1,973	-2.7	6,214	36.6	3.15	40.3
China	3,873	5.6	7,231	38.5	1.87	31.1
Hong Kong	238	0.8	1,984	24.9	8.34	23.8
India	2,482	32.4	2,140	15.9	0.86	-12.5
Indonesia	447	-58.3	853	9.3	1.91	162.0
Japan	852	1.2	13,320	34.7	15.63	33.1
Korea	784	-2.9	3,073	25.7	3.92	29.4
Malaysia	649	1.9	1,141	18.6	1.76	16.4
New Zealand†	593	-1.7	1,337	21.6	2.25	23.7
Philippines	246	0.4	674	15.1	2.74	14.7
Singapore	196	-1.5	1,638	23.5	8.36	25.4
Taiwan	396	3.4	1,624	30.2	4.10	26.0
Thailand	387	29.0	955	27.5	2.47	-1.2
Asia Pacific	13,116	1.7	42,185	26.6	3.22	28.4
US‡	23,324	-9.0	65,911	6.6	2.83	17.1
Europe	32,142	2.4	64,402	16.9	2.00	14.2
World	68,582	-1.9	172,498	17.8	2.52	26.7

Notes: IATA = International Air Transport Association. *Quoted in US\$. †Includes, in order as shown: Kiribati, Fiji. Source: IATA Billing & Settlement Plan, ‡Airlines Reporting Corporation.

14 International outbound sales of leading outbound travel agencies in Japan, US\$m*

Agency	Mar 06	+/-,†,%	Apr 06	+/-,†,%	YTD 06	+/-,†,%
JTB	311	8.6	303	0.3	1138	2.0
Other JTB	234	16.4	233	6.2	879	10.0
HIS	207	17.8	166	6.6	719	12.7
Hankyu	185	8.1	184	-10.0	669	-0.2
KNT	138	5.6	114	-8.7	447	-4.3
NTA	115	15.9	111	3.9	444	6.2
NEC	118	1.7	53	-6.6	326	-0.2
Jalpak	69	-4.9	63	-16.9	269	-11.6
Tokyu	33	-1.6	29	-2.7	122	0.5
Top 50	1852	7.8	1707	-0.9	6717	2.7

Notes: JTB = (originally Japan Travel Bureau), HIS = (originally Hideo's International Services), KNT = Kinki Nippon Tourist, NEC = Nippon Express Company, NTA = Nippon Travel Agency. *Converted at US\$1 to ¥116. †Over same period, year earlier. Source: Travel Journal International.

15 Internet bookings/sales of selected companies/markets

Company	Item	Period	Number	Previous	Source
Europe	online share	2006	20%	4% '02	PCW
AsPac airlines	online share	2010	42%	16% '05	Forrester
Hotel online sales share	intl groups	2005	8-11%	NA	PCW
	reg groups	2005	2-5%	NA	PCW
Intl hotel bookings	at 30 major	2005	up 27%	NA	Travelclick
online share	at 30 major	2005	35%	30%	Travelclick
British AW	online booking	2008	50%	30% '05	company

Notes: See Master Notes, page 3, and Net Value. All \$s are US\$. Source: various.

16 Economic indicators of major countries in Asia Pacific

Country	Forecast GDP growth*†,%		Actual GDP growth*,%		GDP per capita US\$	Inflation period Growth*%	
	2005	2006	Period	2006			
Australia	2.7	3.1	Q1:	3.1	19,070	Q1:	3.0
China	8.7	8.0	Q2:	11.3	900	Jun:	1.5
Hong Kong	4.6	4.6	Q1:	8.2	23,260	Apr:	1.9
India	6.7	6.8	Q1:	9.3	470	May:	6.3
Indonesia	5.1	5.5	Q1:	4.6	680	Mar:	15.6
Japan	2.5	2.9	Q1:	3.8	32,520	May:	0.6
Korea	3.6	4.5	Q1:	6.1	23,260	May:	2.4
Malaysia	4.8	5.3	Q1:	5.3	3,890	Jun:	3.9
Philippines	4.7	5.0	Q1:	5.5	23,260	May:	6.9
Singapore	3.8	4.7	Q2:	7.5	20,850	Jun:	1.4
Taiwan	4.1	4.2	Q1:	4.9	23,260	May:	1.6
Thailand	4.8	5.6	Q1:	6.0	1,800	Jun:	5.9

Notes: See Master Notes, page 3. GDP = gross domestic product. *Over period year earlier. †Official and other estimates; 2006 and 2007 for Australia and Japan. Source: The Economist, Wall Street Journal(s).

17 Economic indicators of major visitor-producing countries for Asia, 2006

Country	GNP/GDP	Retail sales	Consumer prices	Wages/earnings
Australia	3.1 Q1	2.7 Q1	2.4 Q4	4.5 Q1
Germany	1.4 Q1	3.2 May	2.0 Jul	0.6 May
Japan	3.8 Q1	-0.3 May	0.2 May	0.1 May
UK	2.2 Q1	3.0 Apr	1.9 May	4.6 Apr
US	3.7 Q1	4.7 May	2.5 Jun	2.7 Jun
Euroland	1.9 Q1	0.8 May	2.1 Jun	3.2 Q1

Notes: All figures are percentage changes, compared with one year earlier. Source: The Economist.

MARKET DATA

18 Hotelt measures in Asia Pacific, May

Location	Occupancy,%				Average room rate, local				Revpar, US\$*				
	2006		2005		2006		2005		2006		2005		
	Mth	YTD	Mth	YTD	YTD	Mth	YTD	Mth	YTD	Mth	YTD	Mth	YTD
Auckland	69.8	78.6	68.1	81.6	165.77	88.72	113.56	108.82	115.06	61.96	89.29	74.15	93.84
Bali	47.8	41.3	56.2	51.1	729998	90.11	81.68	81.88	78.42	43.05	33.77	46.05	40.08
Bangkok-all	69.0	78.2	72.2	75.1	4307.79	108.11	111.56	94.53	102.32	74.61	87.25	68.27	76.87
5-star	75.2	79.6	74.8	77.8	6120.05	151.06	158.50	123.89	138.64	113.54	126.12	92.70	107.88
Beijing-all	78.0	70.7	80.3	74.5	1113.16	143.84	138.79	127.01	117.79	112.23	98.09	101.99	87.74
5-star	79.5	71.4	79.8	76.1	1478.86	202.68	184.39	171.89	160.12	161.11	131.58	137.16	121.84
Colombo	49.8	66.6	65.0	70.9	6681.50	52.22	65.32	91.50	70.80	26.01	43.53	59.45	50.22
Delhi	66.7	81.2	71.3	86.8	9278.19	159.77	206.73	137.20	156.99	106.62	167.92	97.83	136.32
Fiji	49.3	53.1	73.6	68.6	239.25	140.61	136.87	128.33	122.75	69.39	72.69	94.46	84.17
Goa	68.2	79.3	NA	NA	7773.45	103.74	173.20	NA	NA	70.71	137.33	NA	NA
Hanoi	68.7	79.3	NA	NA	1854872	119.61	116.38	NA	NA	82.18	92.26	NA	NA
Ho Chi Minh City	60.1	66.0	61.9	71.2	1400690	94.72	87.88	69.64	69.81	56.90	58.03	43.13	49.70
Hong Kong-all	83.9	86.2	81.2	82.3	1230.16	154.42	158.58	136.34	153.12	129.52	136.66	110.76	126.01
5-star	76.9	80.9	78.1	79.0	2270.95	291.33	292.75	234.68	257.32	224.07	236.77	183.21	203.22
Jakarta U-4	52.8	54.4	53.4	53.2	691934	83.51	77.42	81.46	83.06	44.09	42.09	43.51	44.16
Kuala Lumpur-all	67.6	72.9	68.6	73.1	320.90	82.75	87.39	71.52	71.74	55.96	63.68	49.10	52.45
Maldives	63.2	79.8	NA	NA	7095.27	415.94	553.45	NA	NA	262.68	441.63	NA	NA
Manila-all	75.9	78.8	76.8	78.9	4363.46	86.51	84.07	68.83	68.62	65.68	66.23	52.84	54.11
Melbourne-all	83.6	80.3	72.2	79.9	213.29	148.02	159.44	133.69	145.36	123.69	127.99	96.51	116.20
U-4	79.2	78.7	NA	NA	249.90	171.52	186.80	NA	NA	135.83	146.95	NA	NA
Mumbai	73.6	77.9	60.0	77.1	8296.70	163.85	184.86	126.95	142.79	120.58	143.97	76.13	110.10
Pattaya	78.8	81.2	56.7	72.6	2458.75	51.81	63.68	51.95	60.56	40.84	51.68	29.47	43.97
Penang	61.9	62.9	42.3	47.4	170.58	48.85	46.45	45.56	48.80	30.23	29.23	19.26	23.12
Phuket-all	45.0	63.3	36.4	42.3	4299.01	70.86	111.34	59.36	75.18	31.90	70.52	21.62	31.81
Seoul	66.5	62.1	70.8	70.7	195091	213.90	203.82	184.68	185.46	142.15	126.60	130.82	131.11
Shanghai-all	72.2	66.5	70.1	73.1	1408.03	183.28	175.56	163.77	148.43	132.42	116.72	114.76	108.45
5-star	74.6	66.8	71.9	74.4	1925.45	248.81	240.07	217.45	210.81	185.71	160.36	156.30	156.75
Shenzhen	71.7	74.5	66.4	73.5	671.31	83.03	83.70	78.92	79.50	59.50	62.33	52.37	58.46
Singapore-all	75.6	78.5	79.7	79.2	230.81	150.10	144.16	103.96	103.92	113.49	113.14	82.91	82.35
5-star	73.7	75.7	73.1	71.8	298.99	186.47	186.75	144.11	147.29	137.49	141.32	105.32	105.82
Sydney-all	63.3	69.0	69.5	80.0	221.85	157.71	165.84	147.43	153.63	99.90	114.38	102.48	122.83
U-4	61.8	67.5	NA	NA	254.59	176.00	190.31	NA	NA	108.78	128.46	NA	NA
Taipei	75.9	74.3	84.2	76.4	4628.07	140.89	144.35	158.01	142.44	106.87	107.32	133.10	108.76
Tokyo-all	77.8	77.0	76.3	76.4	24017	225.34	209.40	243.79	250.85	175.24	161.33	185.93	191.71
5-star	76.4	74.0	NA	NA	42285	388.44	368.68	NA	NA	296.65	272.68	NA	NA
Asia Pacific-total	67.4	70.6	67.2	71.5	na	121.79	126.77	112.30	114.47	84.28	91.02	78.62	84.36

Notes: See Master Notes, page 3. Totals may be adjusted later as final figures are filed. Not all categories are shown every month; all categories available at low additional cost. L = lower 4-star, Revpar = revenue per available room, U = upper 4-star. *At exchange rate for relevant month, YTD at same month; exchange rate can be calculated by taking the ARR YTD in local currency and US\$. †4-star unless marked. ‡Unrepresentative sample for this month's figures; guide only. Source: Asia Pacific - Travel Business Analyst Asia Pacific; London - Travel Business Analyst Europe; New York - Smith Travel Research.

19 Comparison* of visitor arrival measurements

Destination	Ratio*
Australia	44
China	150
Hong Kong	100
Indonesia	49
Japan	55
Korea	45
Malaysia†	28
New Zealand	20
Philippines	28
Singapore	78
Taiwan	39
Thailand	130

Notes: *Air arrivals in latest 12-month period in comparison with Hong Kong (100); no account taken of length of stay or spending. †Excludes Sabah and Sarawak. Source: Travel Business Analyst.

20 Standardisation of visitor arrival measurements

Destination	Ratio*
Australia	99
China	14
Hong Kong	42
Indonesia	61
Japan	98
Korea	73
Malaysia†	24
New Zealand	99
Philippines	99
Singapore	72
Taiwan	99
Thailand	82

Notes: *Air arrivals as share of total arrivals. †Excludes Sabah and Sarawak. Source: Travel Business Analyst.

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TRAVEL DATA

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