

# Travel Business Analyst

Markets + Marketing + Strategy

ASIA PACIFIC • NOVEMBER 2006

Japan agencies

## First-half

Growth in sales of Japan's top-50 outbound travel agencies increased 6% in the first half of this year. Figures are now above those for 2000, but still below those of 10 years earlier. Average annual growth this decade has been just 1.0%.

### First-half international outbound sales of leading outbound travel agencies in Japan

Agency	2006				2005			2000		
	US\$m*	Growth,%	AAGR†,%	Share,%	US\$m*	US\$m*	Share,%	US\$m*	US\$m*	Share,%
JTB	1772	7.7	-2.1	17.5	1645	2013	21.1			
Other JTB	1301	12.5	NA	12.8	1157	NA	NA			
Hankyu	1045	-1.3	2.0	10.3	1058	930	9.7			
HIS	1029	16.0	7.0	10.2	887	685	7.2			
KNT	704	2.2	-5.2	7.0	689	968	10.1			
NTA	650	7.8	2.4	6.4	603	563	5.9			
NEC	475	0.9	1.0	4.7	470	447	4.7			
Jalpak	380	-10.5	-5.8	3.8	425	545	5.7			
Tokyu	189	3.0	-5.7	1.9	183	269	2.8			

Notes: AAGR = annual average growth rate, 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. †2000-06. Source: Travel Journal International, Travel Business Analyst.

Of the leading eight (well ahead of the other 42), JTB, KNT, Jalpak, and Tokyu have all fallen this decade. However, JTB has a number of other agencies (JTB World Vacations, JTB Traveland, JTB Business Travel Solutions).

Fastest growth, by far, has been HIS, which has been on the verge of taking over from Hankyu as Japan's second-largest agency in outbound travel. With current trends, this should have happened before year-end.

### First-half international outbound sales of top-50 outbound travel agencies in Japan, US\$m\*

2006	10130
2005	9577
2000	9540

Notes/Source: See main table.

### Main News

#### Corporate

- Recent corporate developments – big or significant.
- 10 years after first proposed, Hong Kong seeks tenders for a cruise-ship terminal at the site of the city's former Kai Tak airport; opening due 2012.
  - All Nippon Airways signs deal with InterContinental Hotels. Next, Nikko?

#### Market

- Recent market developments – big or significant.
- World visitor arrivals up 4.5% Jan-Aug.
  - World air traffic up 5.9% Jan-Sep.
  - World airport passengers up 3.6% Jan-Sep.

Starwood x2

## New brands

The two Starwood companies are introducing new brands.

- **Starwood Hotels\*** is introducing a new extended-stay hotel brand – Element. The new brand is described as “smart design, modern style”, and providing a “social” environment with design features inspired by nature, where guests can be “in their element”.

Lobbies will be lit by natural light from multi-storey window-walls while public spaces within the hotels will include a water feature. Amenities include a courtyard and patio where guests can sit by an outdoor fire pit and barbeque. Starwood anticipates 500 Element hotels worldwide – but the timescale is not known. The first is expected to be in Lexington, Massachusetts in early 2008.

The first hotel in Starwood's other new brand – ‘Aloft’, a mid-priced, reduced-service version of W Hotels – is due in 2007. This brand is also expected to total 500 hotels by 2015.

- **Starwood Capital\*** goes for green. It has launched the ‘1’ hotel brand, which it describes as “luxury, eco-friendly” hotels.

1 hotels will be based on environmentally-sustainable internal and external design, and will follow green construction and operating principles together with a commitment to consumption of natural resources. SC wants to demonstrate that green principles can coexist and enhance a luxury hospitality experience.

The US Natural Resources Defense Council will be an environmental advisor on 1s – with the initial goal of setting a new standard for environmental excellence and, over time, to transform the entire hotel industry. And each 1 will donate 1% of its revenue to local environmental organisations.

The first four 1s – all in the US – will be new-builds. The first may be in Seattle, due late 2008; others are Mammoth Mountain ski resort (California), Scottsdale (Arizona), and Fort Lauderdale (Florida). The first international 1 will be in Paris, a renovation of an existing hotel. (SC bought 800 hotels in Europe in 2005, most of them in France, and in 2006 launched a luxury brand under the name of one of them, the

cont'd on p3

# MARKET OUTLOOK

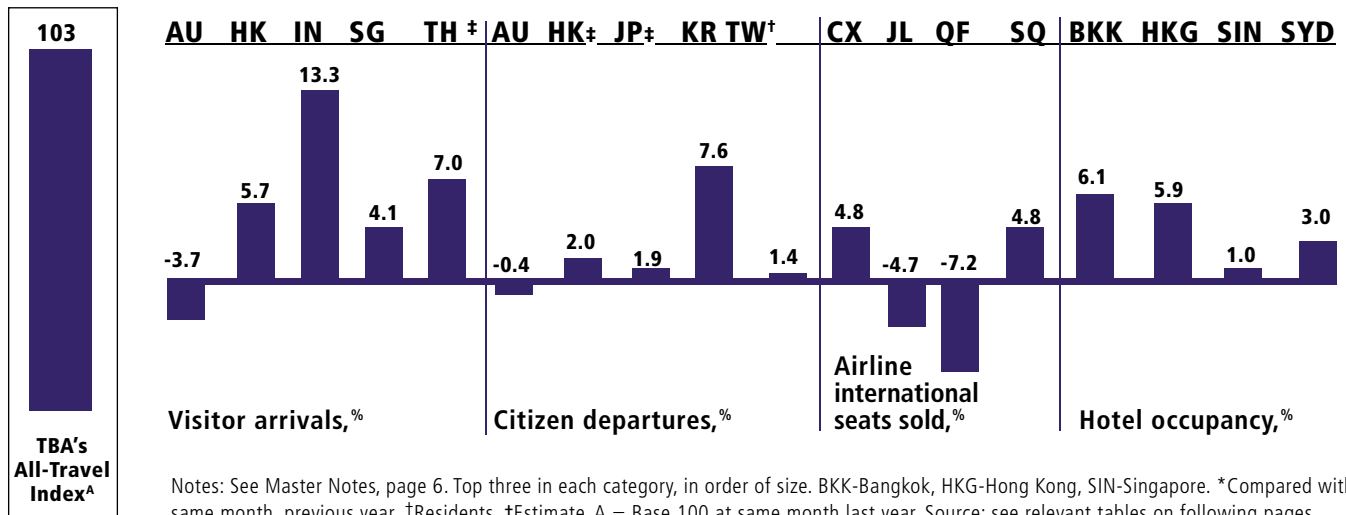
## Headlines

### Commentary on tables

- **Barometer.** Overall travel index at just 3% above same month in 2005.
- **Inbound trends.** China and Thailand slightly ahead, Hong Kong and Singapore slightly down.
- **Outbound trends.** Slight slowdown.
- **Forecasts.** Includes operational plans, not just market statistics.

## Barometer

Percentage growth in latest matching month\* available; July 2006



## Visitor arrival trends\*, next 12 months

Source	Number, x1000
China	21,967
Hong Kong	25,295
Singapore	9,695
Thailand	12,982

Notes: \*Statistical base on past performance; aggregates for latest 3 and 6 months, and full calendar year. Source: NTOs, Travel Business Analyst.

## Citizen departure trends\*, next 12 months

Source	Number, x1000
Hong Kong †	6,596
Japan	17,686
Korea	11,033
Taiwan	8,457

Notes: China monthly data not available. \*Statistical base on past performance; aggregates for latest 3 and 6 months, and full calendar year. †By residence. Source: NTOs, Travel Business Analyst.

## Official\* travel industry forecasts

Item	Date †	Forecast	Source
Garuda, JKT-DXB-AMS route	Sep	Jun 07	company
Garuda, drop Bali hub	Sep	summer 07	company
Indonesia per-visitor-per-day spend, 2010	Sep	\$111 (\$100 05)	NTO
Indonesia visitors, 2007	Sep	6m	NTO
Indonesia visitors, 2010	Sep	10m	NTO
Bali visitors, 2007	Sep	1.6m	NTO
Accor hotels in Indonesia, end-07	Sep	50, now 32	company
Tiger Airways seat sales, 06	May	3m	company
Asian Trails turnover, 06	Sep	\$60m	company
Australia visitor arrivals, 2010	Jul	7m, 5% AAGR	TFC/NTO
from China	Jul	0.6m, 15% AAGR	TFC/NTO
from Japan	Jul	0.7m, 2% AAGR	TFC/NTO
from NZ	Jul	1.2m, 1% AAGR	TFC/NTO
from Korea	Jul	0.4m, 7% AAGR	TFC/NTO
from Singapore	Jul	0.3m, 3% AAGR	TFC/NTO
from Malaysia	Jul	0.2m, 4% AAGR	TFC/NTO
from Hong Kong	Jul	0.2m, 4% AAGR	TFC/NTO
Jetstar Intl routes, Nov 06	Jul	DPS SGN HNL KIX BKK HKT	company
Australia visitor spend growth	Jul	3.5%, 2006	TFC/NTO
Australia visitor spend growth	Jul	7.1%, 2006-15	TFC/NTO
Macau hotel rooms	Jun	2016 50k	NTO
China outbound to Hong Kong, 2008	Apr	15.4m	PATA
China outbound to Macau, 2008	Apr	14.8m	PATA
India outbound to Singapore	Apr	0.8m, 2008	PATA
India outbound to China, 2008	Apr	0.5m	PATA

Notes: All \$s are US\$. †When forecast made. Source: \*Management statements or documentation from relevant authority.

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cont'd from p1 – Starwood x2

Crillon in Paris.)

Other target locations are Los Angeles, New York, and Washington. The aim will be to have 15 hotels signed or under construction within two years.

*\*Starwood Hotels and Starwood Capital are no longer directly linked.*

Visitor arrivals

## Growth at 5%

The World Tourism Organization says visitor arrivals worldwide increased 4.5% in the first eight months this year (to 578mn).

However, it expects slower growth for the rest of the year, as it forecasts overall 4.0% growth for the whole year. The WTO's long-term forecast growth is 4.1% annually through 2020.

Regional results over January-August showed Asia Pacific up 8.3%, Europe up

### Visitor arrivals, Jan-Aug 06

Region	Growth,%
Southeast Asia	11.4
Northeast Asia	6.9
South Asia	6.6
Oceania	-1.1
Asia Pacific	8.3
World	4.5

Source: World Tourism Organization.

3.1%, and the Americas up 2.5%.

In Asia Pacific, the growth is slightly distorted by the fast growth in Southeast Asia, itself related to the recovery from a tsunami-related downturn in 2005. That said, part of the Oceania downturn may also be related to that, as some post-tsunami traffic diverted to Pacific destinations – providing a one-off boost that was not there in 2006.

Singapore

## Setting the sights

Singapore targets to increase its number of visitors from 8.9mn in 2005 to 17mn in 2015; that represents an average annual increase of 7% – which is a hard-but-reachable target.

However, the revenue target – to grow from US\$6.5bn to US\$18bn – is higher so possibly harder, representing an average 11% annually.

Singapore has experienced good growth in the past two years from neighbouring countries served by low-fare-airlines. *Figures were depressed in*

*2003 by the SARS pandemic, then hurt by the tsunami in early 2005, so a trauma-free comparison is not possible.*

Over 2003-05, arrivals grew 35% from Indonesia, 61% from Thailand, and 81% from the Philippines – as Tiger and Jetstar (both Singapore-based), Lion Air and Indonesia Air Asia (Indonesia), and Thai Air Asia (Thailand) launched flights.

Malaysia has agreed to discuss the bilateral air agreement with Singapore – which is expected to increase competition on Malaysia-Singapore routes. Kuala Lumpur-Singapore is the main target; despite being a big-volume air route (2.5mn seats sold annually), it operates under a Singapore Airlines/Malaysia Airlines duopoly.

Also ahead are planned casinos. Singapore expects to boost its tourism profile with building two 'integrated resorts' of which the major element would be their casinos.

The first project, in Marina Bay, was awarded earlier this year to Las Vegas Sands and is due to open in 2009; it will also have 3000 hotel rooms. The winner of the bid for a second casino/resort, on Sentosa island, is due to be announced by year-end. Genting (from Malaysia), Kerzner (South Africa), and Eighth Wonder (in association with local-hotel group Banyan Tree) have bid for the project, which would also have 1800 hotel rooms.

Casino activities will be limited to only 5% of the total resort surface and Singaporeans will have to pay a high fee – US\$60 per person/per day – to access the gambling area.

Maldives

## Opening new zone

The tourism ministry of the Maldives says arrivals have now surpassed pre-tsunami levels. *But according to data we have (in fact, sourced from the Maldives), the visitor total through August this year was still 6% down on 2004, and only in one of the eight months was the total higher than in 2004.*

Another source puts the 2006 target at 600,000.

Meanwhile, Four Seasons has opened its second resort, on Landda Giraa-varu, and reopened its first on Kuda Huraa – closed after the tsunami. Also opening this year have been Minor's Anantara, Starwood's W, and two new Coco Palms.

35 new islands will be developed in the new central and southern tourism zones – planned to open tourism more

evenly across the atolls. Over the next five years this should add 5000-7000 beds to the current 17,400. First to open in the newly-designated southern zone should be the Shangri-La, in late 2007.

And there are more air services to Male. Bangkok Airways has restarted its flights from Bangkok, and Singapore Airlines now operates daily from Singapore. Also, there is expected to be a new international airport on Gan to service the southern zone.

Korean Air

## Significant expansion

At the end of last month, Korean Air added two significant routes in Malaysia and Thailand from Seoul.

Frequency to Kota Kinabalu and Pattaya is only 3-4 times weekly with 149-seat B737-800s, but the key factor is that these are almost-entirely tourist-traffic routes. The Pattaya route may take growth from Thailand's main resort, Phuket – which has still not recovered from the downturn following the December 2004 tsunami.

Korean Air also plans extraordinary expansion of its China network (including Hong Kong and Macau).

This includes: Operating three daily flights Seoul-Beijing/Hong Kong/Shanghai in 2007; adding 12 new destinations over the next four years from its current 20; expanding cooperation/links with Guangzhou-based China Southern in particular (in the process of becoming a formal member of Sky Team, of which Korean is a founder member).

Tourist offices

## Getting it wrong

The pattern is depressingly-common. New appointed administrators of the visitor business change what was there before – good or bad. Usually the reasons are political; the outgoing administration was from a rival party, so by definition must have the wrong policies.

*Some changes look like well-meaning ideas from an inexperienced team driven by what it wants for the destination, not what travellers want from the destination.*

Sustainability and environment-friendly tourism are Thailand's new credos for the new government's new minister of tourism, Suvit Yodmani. He wants to re-orient the destination's tourism strategy – less prestigious and costly projects, and more focus on a sustainable environment and training.

The minister promises funds to restore 1000 sites and monuments of

historical or natural importance. The promotional theme of 'Bangkok, fashion hub' has been dropped, replaced by 'kitchen, window to the world' (literal translation), promoting Thailand through Thai restaurants around the world.

*We presume these policies will be adjusted when it is realised they are costly, ineffective, or when visitor growth slows. But perhaps the first move could be to speed up counting of visitors; so far it has just February 2006 data.*

Nepal's new minister for tourism and aviation has proposed a master plan for tourism.

This will incorporate policies, strategies, and action plans for development, expansion, and promotion of the visitor business. The minister hopes to better integrate private initiatives with the government's tourism agenda.

The government puts peace and security as vital elements of any tourism development. The minister wants the travel trade to develop special packages for travellers from China and India. India is already Nepal's largest inbound market, but has fallen in recent years – as have most markets.

The Nepal Tourism Board will re-structured again to become a National Tourism Council which will integrate representatives from all visitor sectors. And Air Nepal will also be converted into a company entity – which should give it more autonomy in commercial decisions.

*Is there any change here, apart from re-naming the NTO?*

Then there is **Indonesia**. As we noted last month, for the second year running, the country's minister of tourism, Jero Wacik, did not attend the destination's most important travel exhibition, Time, run by a semi-government department.

*Wacik (whose first name, embarrassingly, is changed to Zero by his detractors) can be found in Berlin for ITB and London for WTM, however.*

## InterContinental Link with ANA

UK-based InterContinental Hotels and Japan's All Nippon Airways have signed a deal to form a joint-venture company to operate hotels. InterContinental will invest US\$15mn (at US\$1 to £0.53) for a majority stake in the venture – named IHG-ANA Hotels Group Japan. The deal is due to be finalised by end-year.

ANA will sign short 5-year management contracts with IHG-ANA for the 13-hotels/5000-rooms that it owns or

leases in Japan. These are due to be re-branded either ANA-InterContinental, ANA-Crowne Plaza, or ANA-Holiday Inn over the next 18 months. ANA's flagship ANA Hotel in Tokyo should be the first, re-branded ANA-InterContinental Tokyo next April.

IHG-ANA will also operate ANA's other 18-hotels/4000-rooms in Japan that it currently manages. Names for these have not yet been announced.

InterContinental says it will commit US\$19mn over the next two years in brand advertising and research, and in addition will lend up to US\$13mn to IHG-ANA to help fund the implementation of an IT programme to improve the hotels' operating performances.

## Briefs

• **IATA** reports that worldwide **air traffic** growth (measured by RPKs, see table notes) was 6% in the first three quarters. Regional results showed a marked difference – 5% Asia Pacific, 5% Europe, and 6% growth for North America.

Results for airlines based in Asia Pacific were slower than the world average, but capacity growth was just under 3%. This indicates the balance between capacity and traffic is better balanced.

Table 1

### Percent growth in world air traffic RPKs, over earlier period

Jan-Sep 2006	5.9
Jan-Sep 2004	17.7
Jan-Dec 2005	7.6
Jan-Dec 2004	15.3

Notes/Source: As Table 2.

Table 2

### Air traffic percent growth, over earlier period

Region	2006		2004	
	Jan-Sep	ASK	Jan-Sep	RPK
Asia Pacific	2.9	5.4	25.3	18
North America	4.7	5.7	11.1	6.9
Europe	4.4	5.3	11.3	8.7

Notes: % growth in periods shown over same period year earlier. ASK = available-seat kilometre, RPK = revenue-passenger kilometre. Source: International Air Transport Association.

• Growth in the first three quarters worldwide in worldwide passengers through **ACI**-member airports (see table notes) was 4% – divided into 6% international passengers, and only 2% for domestic passengers, see table. *If that pattern continues, it could indicate an important trend in aviation.*

### Airport passengers, Jan-Sep 06

Region	International		Domestic		Total	
	YTD	Growth %	YTD	Growth %	YTD	Growth %
Asia Pacific	190	7.4	189	6.8	379	7.1
Europe	486	5.9	133	3.8	619	5.5
North America	107	1.8	526	-1	633	-0.4
<b>Total</b>	<b>863</b>	<b>5.8</b>	<b>900</b>	<b>1.6</b>	<b>1763</b>	<b>3.6</b>

Source: Airports Council International.

Asia Pacific's total increased 7%, as did international and domestic. Europe's total was up 6%; international up 6%; domestic up 4%. And North America's total was unchanged; international up 2%; domestic down 1%.

• In the first half of this year **Amadeus** increased travel agency bookings in Asia Pacific 8% to 25mn, and etickets 30% to 4mn.

• **Philippines** may surpass 3mn visitors this year. Since the 1.5% fall in the SARS-pandemic year of 2003, there was 20% growth in 2004, and 17% in 2005.

The expectation for this year is 10% growth; through July, the numbers were on target to reach that. The department of tourism forecasts 5mn visitors by 2010. But that looks unlikely; it would require annual average growth of nearly-14%.

• **Taiwan** aims for a remarkable doubling of visitors by 2008 – which would mean almost 6mn visitors, compared with just under 3mn counted in 2004 and probably 3.4mn in 2005.

The target looks tough, or worse, however; an annual increase of 20% is needed. Growth was 15% in 2005, but was running only 5% earlier this year.

*In fact, the key will probably be political agreements on letting travellers from mainland China visit Taiwan.*

Taiwan may ease its limitations on visitors from China, possibly as soon as in the next few months.

*Depending on the degree of liberalisation, Taiwan could easily double its visitor total by 2008 – from an increase in the China market alone.*



## Net Value

### Marketing Travel On The Internet

#### Bites

• Tralliance, which runs **.travel**, says Egypt's tourism authority counted 1.6mn visits to its official website, [egypt.travel](http://egypt.travel), between its launch in March and through October 2006.

*However, despite our request, Tralliance will give us no data to indicate whether this 230,000-monthly matches pre-launch forecasts. It says the number is "staggering"; we would expect a worldwide travel site such as this to attract 100-400k monthly – admittedly a wide range.*

• From statements made by **Club Med**, we estimate that its sales via the internet represent about 5% of its total. Its half-year report said that these had grown 30% in that period.

Head of the company says he hopes the internet share will reach (what we calculate to be) 7.5% of total sales – *although he gave no date, making the comment near meaningless.*

Both these numbers are weak, and show that Club Med has not grasped the importance of this sales mode.

• The US office of Tourism **Australia** says almost all its target audience has broadband access. *But it is imprecise in its targets. It expects 2mn or 3mn to visit Australia.com in the next 12 months; that is a wide range.*

TA says travel research in the US is now a web business; 80% are doing their research online, and doing this in 7/8 minute bursts of information-gathering. Trip planning, though, still takes place 7.1 months in advance.

• There is insufficient space here to show the rest of this report. Subscribers wishing to see the full report, please email [TBAoffice@gmail.com](mailto:TBAoffice@gmail.com).

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](mailto:TBAoffice@aol.com)



## People-in-Travel

### Tracking Travel's Leaders

#### James Hogan

James Hogan joined Etihad Airways as chief executive almost the day after he left the same job at Gulf Air – which he held for four years. We believe his appointment last month changes the airline business in the Gulf – but then, almost by definition, in other parts of the world as well.

When Etihad was launched in late-2003, we thought it an inferior copycat of Emirates. We changed our minds quickly when we saw the pace of its expansion, the quality of its service.

• There is insufficient space here to show the rest of this report. Subscribers wishing to see the full report, please email [TBAoffice@gmail.com](mailto:TBAoffice@gmail.com).

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](mailto:TBAoffice@aol.com)

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- Forecasts for Asia Pacific, Europe, US.
- Hotel chain internet bookings.
- Iberia.

Excerpts from the single-page **Net Value** report are included in the Asia Pacific and Europe editions of **Travel Business Analyst**. *Net Value is delivered only via email.*

#### People-in-Travel

- James Hogan; Choice chooses; Airbus saga; others

Excerpts from the single-page **People-in-Travel** report are included in the Asia Pacific and Europe editions of **Travel Business Analyst**. *People-in-Travel is delivered only via email.*

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*See back page for more offers.*

## Headlines

### Commentary on tables pages 6-10

#### Aviation.

**T1.** City-pair results. First-half for Kuala Lumpur (up 6% but lots of declines in our list of city-pairs, including Singapore, where new airlines are expected soon), Sydney (up 3%, so one to watch). YTD Singapore up a comfortable 9%, but miserable results for Tokyo, down 1%. **T2.** Country-pair results. First-half for Australia and Germany. Sluggish for Australia, with 8 of the 12 pairs in decline. Better for Germany; up 7%, with growth in all big pairs listed, but India's growth has slowed. YTD UK up 6%. **T3.** Airlines traffic. First-three-quarters for the big three (Cathay, strong 9%; Japan international down 6%; Singapore strong 8%). Downsizing for Malaysia (a giant 21% on its international routes); note that this is often what happens to regular airlines that try to beat LFAs at that game – they lose. **T10.** First-half for Australia's main airports – Sydney's 3% was the best! And for all-Asia Pacific airports, whose data is supplied to us by Airports Council International; strong growth of 9% does not seem to match much weaker performance from many sizeable airports; big growth in Beijing and Guangzhou, but these are relatively-small airports. **T11.** Results for AAPA-member-airlines. Add Singapore and its Silk Air subsidiary and they are doing better than the Cathay/Dragonair combine. Declines for Garuda, Japan, Malaysia. **T12.** Slight capacity decline for AAPA airline members which, with traffic growth, pushes load factor up 2 points.

#### Inbound.

**T8.** Running 12-month total; only Thailand comfortable, but that is because it had a bad 2005. **T9.** First-half visitor arrivals for Guam, Malaysia (up 5%, better than the 3.5% forecast). YTD – China foreigners good; Hong Kong and Singapore even better; Thailand meaningless – because the figures are old, and because that compares with the two post-tsunami months. More domestic data, as start of expansion of this section.

#### Outbound.

**T6.** Running 12-month total; China slow but Korea looks good. **T7.** First-half for UK and US; both up 5% – good for mature markets. Japan weak, Taiwan bit better, and Korea ok.

#### Hotels.

**T18.** For YTD, Asia Pacific occupancy unchanged, average rate up US\$11 to US\$119, helping push yield up nearly US\$7 to US\$86.

#### Others.

**T5.** Stock prices; buy travel! **T14.** Leading travel agency groups in Japan; Hankyu fall and strong growth at HIS puts HIS as Japan's second-largest outbound agency. Overall growth an encouraging 6%.

# 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

### Meetings business

Each year ICCA estimates meetings participants worldwide. All criteria are not given here, just the resulting totals.

First Asia Pacific country, Japan, was only 15th. Australia figures highly, even though its visitor content is not as high as some others in the region, and not many meetings would take place there.

In terms of cities, Hong Kong and Seoul were in the top 10. Perhaps no surprise for Hong Kong, but Seoul? Genting shows up, even though it is not a city. Is its position related to big incentive-travel movements from China?

Also, which Chinese cities did the 76,000 meet? No city made the top-50, meaning each city counted less than 10,000 participants – in at least seven Chinese cities. Back to the spreadsheet?

### Estimated meetings participants per country in Asia Pacific, 2005

Rank	Country	Participants
15	Japan	84,500
16	Australia	83,334
18	China	75,558
20	Korea	69,003
22	Hong Kong	59,777
25	Thailand	51,253
26	Singapore	48,957
29	Malaysia	40,787
30	India	32,335
38	Philippines	23,247
39	Taiwan	21,016
41	New Zealand	13,210
46	Indonesia	9,299
49	Macau	8,486

### Estimated meetings participants per city in Asia Pacific, 2005

Rank	City	Participants
5	Hong Kong	55,555
7	Seoul	48,424
11	Singapore	41,587
16	Bangkok	28,380
17	Sydney	27,642
30	Kuala Lumpur	16,515
33	Melbourne	15,485
39	Taipei	12,806
41	Tokyo	12,505
43	Kyoto	11,349
45	Genting*	11,100

Source: International Congress & Convention Association. Notes: \*In Malaysia. Source: ICCA.

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

From:	Kuala Lumpur			Singapore			Sydney			Tokyo*					
	Jun 06	YTD		Aug 06	YTD		Jun 06	YTD		Jul 06	YTD				
To:	+/-,%	06	+/-,%	+/-,%	06	+/-,%	To:	+/-,%	06	+/-,%	To:	+/-,%	06	+/-,%	
Bangkok	16.0	607	16.7	Indonesia	4.1	2350	2.3	Auckland	0.3	597	-3.5	Pacific	-5.9	19156	-9.1
Hong Kong	5.7	378	-3.8	Malaysia	2.8	1603	2.2	Bangkok	14.6	263	16.3	Oceania	-0.4	3781	-3.0
Jakarta	17.3	433	13.0	Thailand	6.8	2477	11.0	Denpasar	-38.4	49	-43.0	SE Asia	-43.5	19427	-22.2
London	-1.5	256	-1.9	Hong Kong	-2.4	1461	2.0	Hong Kong	12.0	418	12.5	China	0.7	13261	2.9
Shanghai	-8.7	144	-14.3	Japan	0.9	1125	3.7	London	15.5	242	4.3	Korea	4.4	8044	0.8
Singapore	-7.2	838	-4.1	UK	6.7	902	2.8	Los Angeles	-3.1	325	-0.0	Europe	-2.0	10314	-0.3
Sydney	-14.3	171	-12.5	Australia	5.3	2426	5.1	Singapore	6.5	473	4.5				
Tokyo	10.2	184	10.9	US	5.1	520	3.2	Tokyo	-14.8	211	-9.0				
<b>TOTAL</b>	<b>5.6</b>	<b>7274</b>	<b>6.4</b>	<b>TOTAL</b>	<b>7.0</b>	<b>21721</b>	<b>8.6</b>	<b>TOTAL</b>	<b>5.3</b>	<b>4792</b>	<b>3.4</b>	<b>TOTAL</b>	<b>-0.1</b>	<b>84232</b>	<b>-0.9</b>

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		
	Jun 06	YTD	+/-,†	Jul 06	YTD	+/-,†	Jun 06	YTD	+/-,†	Jul 06	YTD	+/-,†	Dec 05	YTD	+/-,†
To	+/-,†,%	06	%	+/-,†,%	06	%	+/-,†,%	06	%	+/-,†,%	06	%	+/-,†,%	05	%
Australia	na	na	na	na	na	na	21.1	48	-0.2	-0.8	682	-4.4	10.8	1597	6.3
China	22.7	274	14.3	2.4	575	10.0	12.5	626	9.7	14.9	326	31.9	23.9	1405	34.4
Hong Kong	11.8	855	9.5	38.9	278	13.4	23.6	294	10.4	13.4	824	13.5	22.3	1776	13.8
India	0.2	31	-6.2	1.8	390	22.2	3.5	586	2.5	50.2	1328	55.2	147.1	298	21.3
Indonesia	-39.8	213	-42.9	na	na	na	-51.3	12	-12.2	na	na	na	-54.5	19	-27.0
Japan	-6.9	781	-5.6	3.3	736	2.8	4.7	510	1.4	-7.8	649	-6.2	1.5	12111	2.5
Korea	-5.5	194	-10.7	13.9	203	11.7	-8.7	247	0.1	7.8	158	5.7	3.8	2762	6.2
Malaysia	-8.5	537	-10.7	-23.5	75	-12.9	-6.1	71	-9.1	-22.1	340	-14.2	31.3	103	11.2
New Zealand	-0.6	2383	-0.3	na	na	na	na	na	na	-10.3	109	-3.4	3.4	823	-6.1
Philippines	-3.8	74	-5.0	na	na	na	7.2	70	19.7	na	na	na	-5.9	727	-6.8
Singapore	3.9	1764	6.1	1.5	249	7.5	4.7	351	3.3	12.0	726	5.3	18.2	367	6.3
Taiwan	-31.4	101	-18.5	3.5	50	-0.3	-11.6	55	5.9	15.8	84	57.9	27.8	2068	11.2
Thailand	19.2	453	14.8	-2.1	219	1.0	16.5	577	15.4	-0.2	388	-10.9	-4.3	130	37.9
<b>TOTAL</b>	<b>3.5</b>	<b>10333</b>	<b>2.2</b>	<b>4.8*</b>	<b>39722*</b>	<b>5.0*</b>	<b>12.2</b>	<b>60493</b>	<b>6.7</b>	<b>5.4</b>	<b>106288</b>	<b>5.7</b>	<b>0.9</b>	<b>117647</b>	<b>2.7</b>

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).

Contacts: Germany - fax (49-0611)-724000, luftverkehr@destatis.de, www.statistik-bund.de; US (for International Trade Administration, Tourism Industries), www.tinet.it.doc.gov

Master Notes: Exchange rates (start of previous month) - US\$1 to A\$1.34, Y7.90, HK\$7.79, IRP45.9, ¥118, W947, MR3.69, NZ\$1.53, S\$1.59, NT\$33.1, B37.6. 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	+/-	RPK	+/-	Jan	SS	+/-	ASK	+/-	RPK	+/-	SF	+/-
		1000	%	mn	%	thru	1000	%	mn	%	mn	%	%	pts
<b>Systemwide</b>														
Air Macau	Jul	239	15.9	294	19.3	Jul	1399	17.9	2290	16.0	1711	22.6	74.7	NA
Cathay Pacific	Sep	1303	4.6	5658	6.2	Sep	12448	8.8	66322	8.9	52979	10.1	79.9	0.8
China Southern	Aug	5032	12.8	7096	13.9	Aug	32507	11.8	63618	9.5	45897	12.8	72.1	NA
Dragonair	Aug	518	15.6	672	14.9	Aug	3652	11.5	7070	7.2	4718	11.4	66.7	2.5
Eva Air	Aug	564	2.1	2178	2.3	Aug	4167	4.6	20441	6.1	16498	6.5	80.7	0.3
Japan AL	Sep	4334	-3.3	7835	-6.8	Sep	36902	0.0	99062	0.0	68776	0.0	69.4	0.0
Malaysia AL	Aug	1249	0.0	3478	0.0	Aug	9581	-20.6	35117	-19.7	24449	-22.5	69.6	-2.5
Royal Brunei	Jun	107	3.6	348	5.7	Jun	617	13.1	2746	4.4	1987	13.2	72.4	5.6
Singapore AL	Sep	1455	3.9	7177	5.4	Sep	13210	7.9	83618	3.2	64558	8.0	77.2	3.4
Thai AW	Jul	1584	2.5	4804	5.8	Jul	10745	6.5	41570	3.1	31599	12.2	76.0	6.2
<b>International</b>														
China Southern	Aug	NA	NA	931	15.2	Aug	NA	NA	9579	6.8	6463	10.8	67.5	NA
Japan AL	Sep	1029	-10.8	5164	-10.0	Sep	9346	-5.5	64764	-10.7	46884	-5.6	72.4	3.9
Jet AW	Jul	52	60.5	289	142.9	Jul	353	NA	2305	NA	1555	NA	67.5	NA
Malaysia AL	Aug	726	-11.4	3160	-15.0	Aug	5607	-9.2	35898	-8.4	25047	-11.6	69.8	-2.5
Qantas AW*	Aug	703	-9.4	4926	1.2	Aug	6230	0.5	45368	-12.5	35135	-10.6	77.4	1.6
Thai AW	Jul	1567	4.8	7742	5.3	Jul	10213	8.6	64776	3.2	49780	8.5	76.9	3.8

Notes: See Master Notes, page 6. pts=points. \*Includes Australian in previous periods. 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.

## Low-fare airline traffic\*, 2006

Systemwide	Jetstar (AU)	Aug	Jan-Aug
SS,x1000	599	4323	
Growth,%	47.9	33.1	
SF,%	79.1	75.0	
<b>Virgin Blue</b>			
Jul			Jan-Jul
SS,x1000	1257	8122	
Growth,%	1.3	5.8	
SF,%	81.3	76.7	
<b>Air Asia</b>			
Jul			Jan-Jul
Indonesia:			
SS,x1000	171	918	
Growth,%	202.1	179.7	
Malaysia:			
SS,x1000	605	3788	
Growth,%	53.0	40.4	
Thailand:			
SS,x1000	255	1647	
Growth,%	71.4	73.7	

## 4 Airline financial results, US\$\*

Item	CX	JL	KE	QF group	SQ
	Y-Dec 05	Y-Mar 06	Y-Dec 05	Y-Jun 06	Y-Mar 06
Revenue,mn	6236	18959	7531	10417	8135
Op Profit,mn	1274	-232	429	554	740
<b>Revenue per</b>					
ASK,USc*	7.53	12.8	11.0	8.82	7.43
RPK,USc*	9.57	18.9	15.4	11.46	9.83
Pax,US\$*	404	327	347	306	479
<b>Profit per</b>					
ASK,USc*	1.54	-0.16	0.63	0.47	0.68
RPK,USc*	1.96	-0.23	0.88	0.61	0.89
Pax,US\$*	82.5	-4.00	19.8	16.3	43.5

Notes: See Master Notes, page 6. 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.

## 7 Overseas travel by Asia Pacific residents

Market	Jan* thru:	Departures	Growth,%	Source	Spend,US\$m*
Australia	Dec	4,754,046	8.8	PATA	9,407
	Jul†	2,718,355	2.9	PATA	9,407
China	Dec†	28,850,000	42.7	PATA	15,187
	Dec	31,026,000	7.5	PATA	15,187
Hong Kong	Aug†	50,109,386	4.4	PATA	NA
	-A	Dec	5,785,756	15.4	NTO
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
Japan-B	Jul†	9,859,431	1.3	NTO	38,103
	Korea-B	Dec	10,077,619	14.2	NTO
Korea-B	Jul†	6,393,852	10.2	NTO	9,499
	Macau	Mar†	147,748	26.0	PATA
New Zealand	Aug†	1,171,389	-0.9	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
	Jul†	5,121,279	4.5	NTO	8,170
Thailand	Feb†	469,020	13.1	PATA	3,495
UK	Jun†	31,710,000	4.9	NTO	55,930
US	Jun†	19,543,384	4.6	PATA	65,635

Notes: See Master Notes, page 6. \*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.

## 5 Stock market last-day airline and hotel closing prices

Airline/	Price, local currency					TBA 100 index*	
Hotel	Dec	Aug	Sep	Growth†,%		AL	All AL
	05	06	06	stock	market		
Air China	2.50	2.96	3.36	13.5	0.9	112	142
Air NZ	1.28	1.15	1.34	16.5	2.3	6	7
All Nppn AW	480	457	478	4.6	-0.1	24	30
Cathay P AW	13.7	14.5	16.0	9.9	0.9	201	255
China AL	15.3	13.9	14.5	4.3	4.1	29	37
Japan AL	321	224	231	3.1	-0.1	14	17
Malysn AL	2.84	3.02	3.50	15.9	1.0	36	46
Qantas AW	4.07	3.44	3.91	13.7	0.8	179	228
Singpre AL	12.7	13.2	14.6	10.6	3.5	99	126
Thai AW	43.0	44.5	47.3	6.2	-0.7	88	111
Mndrn-Orntl	0.86	1.12	1.22	8.9	3.5	na	na
Shangri-La	12.5	15.4	17.3	12.5	0.9	na	na

Notes: See Master Notes, page 6. \*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	CN†	+/-	JP	+/-	KR	+/-	TW	+/-
through		%		%		%		%
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
Jul 06	32,264	6.8	17,533	0.1	10,672	10.7	8,429	3.5

Notes: See Master Notes, page 6. †Estimates by Travel Business Analyst. Source: NTOs, Travel Business Analyst.

## 8 Running 12-month total visitor arrivals, x1000

12 mths	CN	+/-	HK	+/-	SG	+/-	TH	+/-
through		%		%		%		%
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	11,567	-1.4
Jul 06	21,042	8.7	24,697	8.1	9,465	8.6	12,991†	13.8†

Notes: See Master Notes, page 6. †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
	Jul‡	3,080,371	-1.1	27.0	69.87
Bangladesh	Dec	207,662	-23.4	5.0	50.00
Bhutan	Dec	13,626	47.3	5.0E	230.19E
Cambodia	Jun‡	813,392	19.2	5.0	200.00
China foreigners	Jul‡	70,636,041	2.3	7E	100E
	Dec	20,255,178	19.6	7E	100E
	Jul‡	12,126,512	6.9	7E	100E
Cook Islands	Jun‡	38,994	3.3	5.0	115.84
Fiji	Apr‡	154,218	-3.8	7.5	124.58
Guam	Jun‡	608,955	0.3	4.0	302.93
Hawaii	Dec	7,379,635	7.1	11.4	179.98
	Aug‡	5,052,065	0.7	11.4	179.98
Hong Kong	Dec	23,359,417	7.1	3.6	79.13
	Jul‡	14,382,855	10.3	3.6	79.13
India	Dec	3,915,324	13.2	27.0	46.62
	Aug‡	2,785,328	13.5	27.0	46.62
Indonesia	Jul‡	2,256,812	-8.0	10.0	231.71
Japan	Dec	6,730,519	9.7	9.4	96.95
	Jul‡	4,237,064	7.8	9.4	96.95
Korea	Dec	6,021,764	3.5	6.3	163
	Jul‡	3,452,912	1.5	6.3	163
Laos	Apr‡	429,040	15.0	5.0	23.03
Macau	Jun‡	4,994,411	18.1	1.2	141.65
Malaysia	Dec	16,431,055	4.6	4.8	76.95
	Jun‡	8,564,221	4.9	4.8	76.95
Maldives	Aug‡	390,394	69.9	8.8	56.00
Marianas	Aug‡	300,987	-14.5	1.0E	100.00E
Myanmar	Jul‡	138,910	7.3	7.3	70.00
Nepal	Aug‡	165,312	5.2	10.0	14.09
New Caledonia	May‡	36,597	-3.4	5.0	235.95
New Zealand	Dec	2,382,950	1.5	19.2	115.33
	Aug‡	1,519,438	-0.1	19.2	115.33
Pakistan	Dec	798,260	23.2	5.0	68.06
Palau	Dec	40,425	-6.8	NA	NA
PNG	Jul‡	41,333	-1.2	5.0	255.48
Philippines	Jul‡	1,671,924	9.9	8.9	132.26
Singapore	Dec	8,932,991	7.3	2.7	327.87
	Aug‡	6,462,157	10.1	2.7	327.87
Sri Lanka	Jul‡	352,556	13.4	9.8	57.00
Tahiti	Jun‡	99,396	4.8	5.0	223.98
Taiwan	Jul‡	2,008,952	4.9	7.3	212.10
Thailand	Dec	11,567,341	-1.4	9.2	111.44
	Feb‡	2,449,590	39.5	9.2	111.44
Tonga	Mar‡	8,025	19.1	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
	Aug‡	2,417,233	5.3	5.4	200.00

### International arrivals

City/region	Period	Number	Growth,%	Source	Comment
Bali	Jan-Jul 06	674,561	-20.4	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	2004	74.3m	0.9	PATA	(none)
India	2004	367.6m	19.0	PATA	(none)
China	2004	1102m	26.7	PATA	(none)
Vietnam	2005	16m	10.3	NTO	1995: 6.9m

Notes: See Master Notes, page 6. \*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	May‡	157,393	-39.2	893,879	-26.1
Bangkok	Dec	2,509,289	2.1	26,821,227	3.9
	May‡	2,295,177	12.3	12,437,693	17.7
Beijing	Dec	750,632	14.7	9,367,303	12.6
	May‡	932,539	21.7	4,184,387	21.4
Brisbane	Jun‡	303,108	1.8	1,740,102	2.4
Chennai	May‡	236,811	11.1	1,117,869	16.1
Colombo	May‡	367,218	3.9	2,072,752	27.6
Delhi	May‡	447,058	19.8	2,517,512	18.5
Guangzhou	May‡	283,056	16.8	1,433,206	15.6
Hong Kong	Dec	3,580,000	7.0	40,743,000	9.7
	Aug‡	4,083,000	8.7	29,511,000	9.6
Jakarta	May‡	495,291	13.5	2,360,815	5.0
Kuala Lumpur	May‡	1,186,988	2.4	6,103,254	7.7
Macau	May‡	399,743	12.4	1,904,622	13.1
Male	May‡	108,357	51.9	657,230	77.2
Manila	May‡	900,743	5.8	3,950,646	0.3
Melbourne	Jun‡	344,717	6.5	2,100,443	1.4
Mumbai	May‡	566,425	7.7	2,695,396	8.2
Nadi	May‡	92,033	0.7	464,684	0.7
Noumea	May‡	29,349	2.3	168,860	-0.0
	Dec	898,900	-1.6	11,169,200	3.5
	Jul‡	973,900	0.3	6,389,100	0.0
Papeete	May‡	53,519	10.2	257,342	6.3
Perth	Jun‡	152,911	-5.8	961,409	-2.7
Phnom Penh	May‡	80,287	27.4	421,327	21.5
Phuket	May‡	88,312	93.3	715,784	175.9
Seoul	Dec	2,190,799	5.3	26,535,623	9.5
	May‡	2,203,778	5.3	11,248,035	7.5
Shanghai	Dec	1,178,681	0.5	14,548,377	13.2
	May‡	1,286,483	10.1	6,254,002	6.4
Singapore	Dec	2,801,076	3.3	29,327,699	7.0
	Aug‡	2,957,866	6.4	23,033,782	9.0
Sydney	Dec	902,372	2.4	9,507,538	6.0
	Jun‡	748,302	4.9	4,791,646	3.3
Taipei	Dec	1,483,804	3.8	19,213,399	8.4
	May‡	1,651,288	3.0	8,116,845	6.9
Tokyo Narita	Dec	2,487,338	-0.1	30,409,471	1.1
	Jul‡	2,707,341	1.5	17,565,180	0.8
ASIA PACIFIC-A	Dec	73,114,213	8.2	831,555,667	6.5
	Jun‡	75,691,474	7.6	449,696,095	9.4

Notes: See Master Notes, page 6. \*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				
	Jul 06	+/-,%	YTD 06	+/-,%	Jul 06	+/-,%	YTD 06	+/-,%
BI	90	1.1	612	NA	375	4.4	2355	11.6
BR	579	5.7	3602	5.0	2269	8.6	14313	7.2
CI	922	1.8	5616	2.3	3031	-2.0	19236	2.5
CX	1513	4.9	9657	10.0	6425	7.4	41058	11.4
GA	239	3.0	1339	-0.2	758	0.2	4216	2.9
JL	1019	-7.5	6841	-7.6	5323	-7.5	35202	-6.1
KE	1013	-0.3	6523	3.6	4173	-4.7	26615	3.8
MH	739	-9.1	4881	-8.3	3308	-11.6	21887	-11.1
NH	329	6.1	2227	6.1	1562	5.1	10545	5.0
OZ	664	14.1	4244	10.3	1807	13.8	11281	8.8
PR	255	-2.7	1892	2.6	1156	-5.5	8246	-2.6
MI	135	37.8	868	45.6	226	28.7	1461	31.6
SQ	1569	5.0	10231	8.8	7762	5.5	49901	9.4
TG	1192	6.5	7799	9.8	4593	6.3	29904	12.9
VN	255	6.7	1707	11.6	798	15.7	4973	18.4

Notes: See Master Notes, page 6. Source: Association Of Asia Pacific Airlines.

## 12 Operating resultst of AAPA member airlines

Item	May 06	+/-,%	Jun 06	+/-,%	Jul 06	+/-,%	YTD 06	+/-,%
SS,mn	10.0	4.7	11.0	4.1	11.2	2.7	72.7	3.5
ASKs,bn	55.9	1.6	59.8	0.2	56.6	-0.7	388.8	-0.1
RPKs,bn	39.7	4.3	46.3	4.2	44.5	1.5	291.4	2.6
Pax LF,%	71.0	1.9*	77.4	3.0*	78.7	1.7*	75.0	2.0*

Notes: See Master Notes, page 6. \*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\$mn*	Growth %	Per agency US\$mn*	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
<b>Asia Pacific</b>	<b>13,116</b>	<b>1.7</b>	<b>42,185</b>	<b>26.6</b>	<b>3.22</b>	<b>28.4</b>
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\$mn\*

Agency	Jun 06	+/--t,%	Jul 06	+/--t,%	YTD 06	+/--t,%
JTB	376	10.7	346	1.2	2118	6.6
Other JTB	235	11.5	264	15.2	1565	12.9
HIS	191	23.1	220	17.5	1249	16.2

Hankyu	226	-5.8	175	3.6	1220	-0.6
KNT	168	16.2	130	13.0	835	3.7
NTA	129	11.7	146	11.7	796	8.5
NEC	94	5.3	94	-0.2	569	0.7
Jalpak	63	-14.5	72	-10.0	452	-10.4
Tokyu	41	4.7	31	0.3	220	2.6

Top 50 2053 8.7 1990 7.8 12120 6.1

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 Networks of computer reservations systems

System	Country
<b>Abacus</b>	Ww: A11000† S23300. Australia: A250. Brunei: A28 S95. HK: A870 S3210. ID: A149 S400. IN: A120 S240†. KR: A1300 S1600. MY: A533 S1636. PH: A194 S291. SG: A410 S1500. TW: A543 S1026. TH: A10.
<b>Amadeus</b>	Ww: A62000 S269000. Ap: A11077 S34658. Eu: A37567 S125299. Na: A5066 S11551. CN**: A7000 S28000. HK: A100. IN: A1200† S700. NP: A50. PH: A150. TH: A500† S636. B: 386mn.
<b>Galileo</b>	Ww: A43000† S176100. Ap: A7250† S20708. Eu: A18300† S38596. Na: A14200† S62125. IN: A574 S717. SG: A100 S200. TH: A170 S250. B: \$345mn.
<b>Sabre‡</b>	Ww: A56000† S124828. Ap: A11771† S4500. Eu: A5783† S13428. Na: A17478. B: \$467mn.
<b>Worldspan</b>	Ww: A20000† S49500. Ap: 714. Eu: A10208† S11000. Na: A35106. US: A8560.

Notes: See Master Notes, page 6. Latest figures available; A and S dates may not be the same; †denotes later figure if not same date. ‡With Abacus. \*\*Travel Sky Technology. A-Agencies/other outlets, Ap-Asia Pacific, B-bookings (in numbers or US\$), Eu-Europe, Na-North America, S-Screens, Ww-worldwide. Source: companies.

## 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			
Australia	3.0	2.8	Q1: 3.1	19,070	Q2: 4.0
China	8.7	8.0	Q2: 11.3	900	Aug: 1.3
Hong Kong	4.6	4.6	Q2: 5.2	23,260	Jul: 2.3
India	6.7	6.8	Q1: 9.3	470	Jul: 6.7
Indonesia	5.1	5.5	Q2: 5.2	680	Jul: 15.2
Japan	0.4	0.8	Q2: 2.5	32,520	Jul: 0.3
Korea	3.6	4.5	Q2: 5.3	23,260	Jul: 2.3
Malaysia	4.8	5.3	Q2: 5.9	3,890	Aug: 3.3
Philippines	4.7	5.0	Q1: 5.5	23,260	Jul: 6.4
Singapore	3.8	4.7	Q2: 7.5	20,850	Jun: 1.4
Taiwan	4.1	4.2	Q2: 4.6	23,260	Jul: 0.8
Thailand	4.8	5.6	Q2: 4.9	1,800	Aug: 3.8

Notes: See Master Notes, page 6. 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	3.6 Q2	2.5 Q2	5.8 Q2
Germany	2.4 Q2	0.0 Jul	1.9 Aug	1.3 Jul
Japan	2.5 Q2	-1.0 Jul	0.3 Jul	2.5 Jul
UK	2.6 Q2	4.0 Jul	2.3 Jul	4.1 Jun
US	3.6 Q2	2.5 Jul	3.6 Aug	2.7 Aug
Euroland	2.4 Q2	2.5 Jul	2.2 Aug	2.5 Q2

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

# MARKET DATA

## 18 Hotels measures in Asia Pacific, August

Location	Occupancy,%				Average room rate,				Revpar,				
	2006		2005		local	US\$*	2005		US\$*		2005		
	Mth	YTD	Mth	YTD	2006	2006	Mth	YTD	Mth	YTD	Mth	YTD	
Auckland	77.8	76.4	61.3	76.3	155.53	95.05	106.55	105.94	113.09	73.98	81.44	64.97	86.31
Bali	61.9	48.8	73.8	58.0	773071	101.50	85.64	100.15	84.93	62.83	41.77	73.92	49.26
Bangkok-all	79.5	77.9	77.7	74.7	3973.80	94.93	103.57	84.54	92.37	75.44	80.65	65.71	68.99
U-4	78.5	76.7	75.4	70.7	3184.49	77.39	83.00	65.23	69.71	60.76	63.70	49.18	49.31
Beijing-all	77.9	72.8	78.6	75.9	979.53	117.34	122.54	101.16	106.63	91.40	89.24	79.47	80.95
U-4	72.9	68.5	74.3	70.5	911.98	114.22	114.09	97.23	100.07	83.32	78.10	72.25	70.51
Delhi	63.0	76.8	72.3	81.1	8521.06	159.48	187.46	121.93	144.44	100.52	143.89	88.17	117.14
Fiji	67.7	59.8	85.0	74.8	237.99	142.84	136.33	129.03	125.58	96.75	81.56	109.69	93.92
Hanoi	60.4	74.9	NA	NA	1881271	130.12	117.85	NA	NA	78.59	88.29	NA	NA
Hong Kong-all	85.0	85.5	80.6	81.6	1188.69	133.30	153.12	128.56	145.72	113.33	130.97	103.64	118.92
U-4	85.4	84.6	80.2	80.6	1187.68	134.42	153.00	120.71	135.86	114.81	129.41	96.81	109.49
Jakarta U-4	61.8	57.0	56.9	55.2	668193	75.37	74.02	73.59	78.55	46.59	42.21	41.86	43.35
Kuala Lumpur-all	84.5	76.0	87.8	77.5	303.84	85.97	82.72	75.63	73.41	72.66	62.87	66.43	56.86
U-4	80.5	74.3	87.8	76.5	372.66	117.37	101.45	88.73	88.05	94.47	75.43	77.92	67.36
Macau	83.7	73.6	78.0	73.1	786.13	101.99	98.42	92.68	91.13	85.33	72.40	72.27	66.58
Maldives	78.0	76.6	NA	NA	6760.10	536.27	527.10	NA	NA	418.54	403.86	NA	NA
Manila-all	68.4	74.0	68.4	76.0	4278.78	85.17	82.42	64.70	66.49	58.22	61.03	44.28	50.54
U-4	66.0	71.9	65.9	73.6	4949.51	98.40	95.34	73.29	76.34	64.95	68.50	48.33	56.20
Melbourne-all	86.2	82.4	78.5	78.1	196.13	142.12	147.04	127.38	136.05	122.44	121.18	99.93	106.20
U-4	86.8	83.0	NA	NA	196.56	143.50	147.36	NA	NA	124.59	122.30	NA	NA
Mumbai	65.5	75.1	62.1	72.7	8088.00	167.32	177.93	128.32	140.38	109.56	133.55	79.62	102.11
Pattaya	66.1	74.6	55.5	66.7	2072.92	58.06	54.03	51.27	55.39	38.38	40.30	28.47	36.97
Penang	74.9	65.0	69.5	54.4	186.85	58.44	50.87	47.95	49.34	43.80	33.08	33.33	26.83
Phuket-all	71.2	62.8	51.2	43.4	3712.86	77.08	96.77	59.33	64.01	54.87	60.73	30.35	27.77
U-4	76.2	63.1	NA	NA	4634.28	86.97	120.79	NA	NA	66.27	76.19	NA	NA
Seoul	67.0	63.9	65.0	69.4	186196	193.92	194.37	168.42	179.48	129.85	124.26	109.41	124.54
Shanghai-all	62.3	67.1	71.2	73.6	1199.50	127.45	150.05	116.01	132.35	79.43	100.75	82.64	97.36
U-4	60.9	64.9	70.5	73.4	1114.68	119.86	139.44	100.98	115.97	73.03	90.51	71.23	85.12
Singapore-all	82.7	81.1	82.1	81.4	218.32	131.57	136.98	99.40	102.52	108.80	111.09	81.64	83.49
U-4	84.6	82.1	85.9	84.9	210.64	112.32	132.16	113.08	117.18	95.01	108.52	97.17	99.44
Sydney-all	77.6	73.2	80.6	77.5	205.94	162.65	154.39	149.54	143.36	126.17	112.94	120.52	111.10
U-4	73.5	71.1	NA	NA	223.69	176.09	167.70	NA	NA	129.47	119.31	NA	NA
Taipei	76.0	75.7	72.2	76.7	4201.26	119.15	129.99	109.28	124.54	90.52	98.39	78.92	95.50
Tokyo-all	77.3	75.9	77.4	77.7	22544	189.86	195.75	199.89	219.26	146.78	148.62	154.66	170.43
4-star	77.9	76.4	NA	NA	19414	163.65	168.58	NA	NA	127.52	128.85	NA	NA
<b>Asia Pacific-total</b>	<b>73.2</b>	<b>71.3</b>	<b>71.7</b>	<b>71.5</b>	<b>na</b>	<b>113.53</b>	<b>118.52</b>	<b>102.40</b>	<b>107.81</b>	<b>83.20</b>	<b>85.64</b>	<b>74.65</b>	<b>79.03</b>

Notes: See Master Notes, page 6. 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. jUnrepresentative 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.

## Travel and the environment

More companies seem to be selling their environmental attributes. From around the world:

- Projects at **Brisbane** airport include a man-made freshwater lake, on-airport recycled water treatment plant, and a recycled water pipeline.

The airport has halved water consumption over the past 12 months and targets another half over the next year.

- Amazon Nature Tours, a **Brazil**-based tour operator, has launched Expedition Cruises. This is a 7-day cruise within a new reserve in the centre of the Amazon – created by the Institute for the Environment by combining smaller ones. It is large enough to preserve the biological diversity of this still-undeveloped part of the Amazon.

Customers explore the rainforest on foot and from the ship's launches to discover plants and animals, as well as navigating in unmapped territory. Groups of up to 18 will be led by naturalist guides.

- World Wildlife Fund in **Canada** has teamed up with Canadian tour operator Horizon – which specialises in luxury travel – to develop a formal travel programme for donors and others interested in travel experiences that would bring them closer to nature and the work of the WWF.

The proposed line-up for 2007 includes the Arctic, Newfoundland, and British Columbia in Canada, and internationally to Cuba and Mexico.

- **France's** railway company, SNCF, has introduced an 'eco-indicator' – which not only compares fares and time for a trip on a train, plane, or car, but also a pollution index.

For example, Paris-London by train costs US\$88, takes 100 minutes, and has a 'CO2 index' of 3.7. A flight is US\$137, 80mins, and 103 CO2; a car is US\$158, 300mins, and 161 CO2.

- Taj Hotels and Conservation Corporation Africa have formed a joint-venture to develop luxury lodges in wildlife and natural parks in **India**.

The first opens this month – Mahua Kothi in the Bandhavgarh national park. Then Baghvan on the edge of the Pench national park, due next January or February, then others in Corbett, Kanha, and Panna tiger reserves.

The maxim, says Taj, is to "leave the lightest footprint" by using local materi-

als. CC Africa will train and monitor the naturalist guides.

- Kenya-based Governors' Camp Group is building a luxury gorilla-watching lodge in **Rwanda**. The Sabyinyo Silverback Lodge, with six cottages and two suites, located by the Parc National des Volcans, is due to open early 2007.

The project has followed environmental and ecological guidelines, and has involved establishing a community trust that benefits some 5000 families living in the surrounding area.

The African Wildlife Foundation, the International Gorilla Conservation Programme, and the Rwanda Office of Tourism and National Parks, are working to ensure the lodge will have a positive impact on the area.

## 10 Movenpick hotels in Dubai?!

Movenpick is adding as many hotels in Dubai as some are adding in the whole of the Middle East. Planned so far (L = location; NA = not available; O = opening; R = rooms):

- Deira: R-245, O-2007, L-Deira.

- Ibn Battuta: R-369, O-Q4 2007, L-Sheikh Zayed Road, by Ibn Battuta shopping mall.

- Jumeirah Beach Residence: R-294, O-2007, L-Jumeirah beach.

- Laguna Tower: R-NA, O-2008, L-centre.

- Oceana Palm Jumeirah: R-248, O-Q4 2007, L-on the 'trunk' of the Palm Jumeirah development.

- Palm Jumeirah: R-293, O-Q4 2007, L-on the outer palm crescent of the Palm Jumeirah development.

- Pearl: R-NA, O-2009, L-centre.

Negotiations are reportedly underway for two more hotels, in Dubailand and in the Sheikh Zayed Road/Business Bay area.

## Briefs

### • US update

- Fearing stricter border rules for travel, more US citizens are applying for **passports**. The government says it is receiving 225,000-250,000 applications a week, a 70% increase over what it was two years ago.

In 2005, about 7mn passports were issued. The government expects that about 12.2-12.3mn were issued in the year through September.

Currently about 26% of American citizens have passports.

- The TIA (Travel Industry Association of America) forecasts 6.1% growth in **visitors** to the US for this year. That would finally take it past 2000, the peak – 51.2mn visitors – with 52.05mn.

In 2007, arrivals are forecast to increase 5.3% to 52.3mn.

But domestic travel is not doing so well. Leisure trips this year are expected to grow 2%, to just under 1bn (999.8mn). Growth in 2005 was 4%. Domestic business trips are expected to grow 1-2% this year.

- Hotel group SAS **Rezidor** – which owns the franchise in Europe and some other destinations in the Middle East and Africa to develop hotel brandnames that include Radisson and Regent – is changing its name to the Rezidor Hotel Group.

This is in connection with the company's planned listing on the Swedish stock exchange before year-end, and the sale of SAS's 75% shareholding.

The other partner in the joint-venture, US-based Carlson Hotels (which owns the brands Country Inn, Park Inn, Radisson, Regent) plans to increase its share of Rezidor from 25% to 35%.

- Marriott expects to be adding 85,000-100,000 rooms worldwide between 2007 and 2009 – which would be an annual growth of 5-6%. By the end of 2009, its portfolio would then be almost 600,000 rooms.

Growth is expected to be quicker outside North America, with 30,000 more rooms being added in the 2-year period – 9-10% annual growth.

That would give it about 120,000 rooms outside North America by end-2009. That said, the actual growth in room numbers will be greater in North America. Target growth would result in 58,000-69,000 more rooms – partly driven by conversions and new construction of self-service facilities.

Of the 30,000 outside North America, Marriott's EMEA division (Europe, Middle East, and Africa), would account for 12,000 – from 48,000 to 60,000. Asia Pacific growth would be 11,000-12,000 more rooms – an impressive quarter of those likely to be under its Ritz-Carlton brand. For Marriott's Caribbean/Latin America division, there are expected to be 4,000-5,000 new rooms in the next two years.

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