

# Travel Business Analyst

Information + Knowledge + Insight + Analysis + Outlook

ASIA PACIFIC • AUGUST 2005

## Summer\* Special

This month, our shorter summer issue, without the Market Intelligence, Market Outlook, and Trends sections, but with a special report on Australia. The September issue will revert to the regular publishing pattern.

## Marketing Australia

THE following are paraphrased or summarised comments on market developments in Australia's visitor business, primarily via its NTO, Tourism Australia. Other segments of the industry are scheduled to be covered in the September issue.

### • Corporate strategy.

• New beginning. Tourism Australia (TA) was created in July 2004, replacing the Australian Tourist Commission. Funding has been set at US\$106mn (at US\$1 to A\$1.32) per year for three years, through the end of Australia's fiscal year, June 2008.

• Strategy. To become the best NTO in world. Focus on visitor spend and 'dispersal' (multi- rather than single-centre visits), not volume.

*Maintaining that focus will be difficult, not least because the comparative data is not standard – starting with Australia's peculiar system of measuring length-of-stay, which reduces its daily spend in comparison with others.*

TA notes that although Australia's growth in visitor spend in 2004 was an apparently-high 10%, that was only half Asia Pacific's overall growth. *But this is misleading because the benchmark is an extraordinary year – SARS-stained 2003.*

And there must be a fair chance that TA will fail - *although there are no published targets, so failure or success will be difficult to determine.* China, for instance, is expected to account for more than one-third of visitor growth in Australia's forecast growth to 2007/8. But in 2004 China's growth in arrivals was double growth in spend.

Targets are total visitor spend of US\$16.7bn in 2007/8; it was US\$13.3bn in 2003/4. China is expected to be third-largest, with a target of US\$1.6bn. The UK largest with US\$2.7bn, followed by Japan

Notes: \*For those in the southern hemisphere, Winter Special ...

with US\$1.7bn. Eventually China is expected to become largest; *no date, but we think minimum two years after 2007/8, maximum five.*

TA believes 54% of growth will come from Asia Pacific to 2007/8; currently it has 39% of total spend. Interestingly, spend by Asia Pacific visitors is higher among repeat visi-

Table 3

Visitor arrivals in Australia		
Year	Number	Growth*, %
1990	2,214,900	6.5
2000	4,946,196	10.9
2004	5,219,549	10.0

Notes: \*Over year earlier. Source: Tourism Research Australia.

tors; this is the opposite to other main source regions such as Europe and North America.

• Marketing. Australia is well known and liked, but that does not mean people are visiting the country. TA sees a sameness in worldwide destination marketing, adding that this creates an opportunity to do better with its own marketing.

To increase 'dispersal' of visitors TA says it needs to get the trip content right. And to make sure that price is not the main factor for travellers; "if it is, we might not do so well".

*TA plans to appoint one company for worldwide PR coverage, as in the past it appointed one advertising agency.*

TA believes there is no longer a special advantage for a destination to have China's ADS (Approved Destination Status; inter-governmental agreements allowing leisure groups from China to visit such 'approved destinations'). In 1999 Australia became the first 'western' destination to get ADS. At the time, non-western destinations were getting around 20% increase in China arrivals; in

### Main News

Recent corporate developments – big or significant.

- Hong Kong Disneyland due to open next month.
- Jetstar Asia and Valuair, two failing Singapore-based airline start-ups, merge.
- Leading Hotels and Cendant (plus a resort owner) have formed a timeshare operation, Leading Residences of the World.
- The Raffles and Swissotel hotel groups sold to Colony Capital. These are likely to be on sold, not necessarily together or complete.
- A Starwood company has bought the Taittinger group hotels, which were finally combined under a single name, Louvre Hotels, in 2003. Main brands are Concorde, Kyriad, and Campanile, but including a handful of top-end hotels such as Crillon Paris and Martinez Nice.
- Virgin Blue due to start its second non-Virgin franchise under the 'Blue' part of its name, taking over Polynesian as Polynesian Blue, this October.

Main News...1; Market Intelligence...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 – marketing Australia

its first year Australia got 28%. So success is clearly still a marketing matter.

75% of its incentive business comes from Asia - 39% from South and Southeast Asia and 61% from North Asia. The booking period for incentives from Asia can be less than a year, compared with 2-3 years in other areas. Asian companies have been looking at incentives as a cost factor; now more begin to see that they can be a profit-earning opportunity.

- **Markets.** 67% of its business comes from China, Germany, Japan, Korea, New Zealand, UK, US. 'Dispersal' is higher in some markets – usually Europe. Many Asian visitors take a guided mono-centre trip the first time in Australia, then visit more places on a second trip.

Specifics on selected main sources:

- **China.** All figures on this market's potential, says TA's management, are conservative. Official forecasts show 1mn visitors in 2013. But the main challenge is seen as quality; controls on handling leisure tours from China have been tightened.

- **Germany.** Largest potential market; Australia should be doing better than it is.

- **Korea.** Continues to grow, but more younger visitors and FITs. TA says it targets different consumers than before, but the trade is slow to see changes in consumer demand.

- **New Zealand.** Trying to increase 'holiday' travel, but big volume business already, so TA needs to change the emphasis.

- **UK.** Despite contrary impressions, Australia is attracting holiday traffic not VFR.

- **US.** To convert like for Australia into actual travel.

- **Markets.** (Comments on selected Asia Pacific sources.)

- **Characteristics,** see Table 1. Some

Table 2

Australia visitor arrival forecasts					
Source	Made in 2005		Growth*, %	Made in 2003	Made in 2002
	for 2006	for 2005		for 2005	for 2005
	No,x1000	No,x1000		No,x1000	No,x1000
China	367	314	24	239	436
Hong Kong	159	150	2	147	174
India	69	62	12	54	56
Japan	774	727	-6	770	627
Korea	250	230	-9	250	287
Malaysia	186	175	0	175	220
Singapore	270	260	-16	301	333
<b>Total</b>	<b>5925</b>	<b>5575</b>	<b>5</b>	<b>5285</b>	<b>6217</b>

Notes: \*Over earlier forecast shown. Source: Tourism Forecasting Commission.

surprising changes (compared with pre-SARS 2002), and not all welcome.

- **China.** Stay increases, but visitors are spending less. Dispersal down, on figure that is understandably low for a new market.

- **Hong Kong.** Steady.

- **India.** Opposite of China – stay down, spend up (but low actual figure). And dispersal up.

- **Japan.** Stay up greatly (how can? growth in holiday share and fall in tour-package share?), and spend down a lot. Good growth in dispersal, despite already having the highest percentage of these markets. And yet... surprisingly-high first-visit share.

- **Korea.** Steady apart from stay. Dispersal needs improvement.

- **Malaysia.** Why such a big change in stay for such a mature market?

- **Singapore.** Fall in stay and spend; but at more than US\$100/day best to hang on to that market.

- **Forecasts,** see Table 2. Despite great expectations for China, the outlook for visitor numbers this year is still below what it was in pre-SARS 2002, and is expected to remain so in 2006.

Likewise for Hong Kong, Korea, Malaysia, Singapore. Improved outlook only for India and Japan.

In 2006 China expected to be nearly half Japan's total, but note China's

overall outbound total is nearly double Japan's. So Australia is either over-performing in the Japan market, or under-performing in the China market.

- **TA's CEO.**

(New CEO of Australia's restructured NTO, Tourism Australia, is Scott Morrison. The following is a 'soundbite' interview with Travel Business Analyst.)

- **Promotions.** Before, our campaigns were ad lead; now they are PR lead, with ad support. We can only reinforce perceptions with ads. Before we had eight campaigns; now we have global ad agency and global PR.

- **Marketing.** We will be opening a new office in north Europe. We have upgraded the Germany office. One slight difference is appointing or adding training officers for the travel trade. In some locations we are working much closer with Australia's state tourism bodies.

We are trying 'valued partnerships' with travel agencies, particularly big ones like TUI, to reward them for selling Australia. In the US we run a 2-tier system - 140 agencies in the top tier, about 1400 in the second tier.

- **Distribution.** The channels are proliferating. All the cards are thrown up in the air, but we don't know how will they fall, or if they will fall.

Table 1

Characteristics of visitors into Australia from selected Asia markets, 2004														
Item	China		Hong Kong		India		Japan		Korea		Malaysia		Singapore	
	No	+/-t,%	No	+/-t,%	No	+/-t,%	No	+/-t,%	No	+/-t,%	No	+/-t,%	No	+/-t,%
Holiday share,%	45	4	45	0	30	-4	81	11	67	-1	53	-2	53	0
Business share,%	28	6	15	4	22	3	6	1	10	-1	11	2	20	9
VFR share,%	11	0	27	7	19	3	5	1	11	1	20	4	14	3
LoS,days	44	16	30	3	29	-33	17	55	28	-10	32	23	17	-11
Daily spend,US\$*	61	-16	82	-2	66	26	76	-19	77	-1	81	1	102	-7
First visit share,%	62	12	23	-7	48	-3	65	-5	68	8	26	-6	17	-3
Tour package share,%	45	7	28	5	18	-4	70	-11	45	0	21	-3	27	4
Dispersal share‡,%	6	-2	9	-5	11	5	20	8	7	-1	8	2	8	-3

Notes: Not necessarily the largest markets. †Over 2002; points where base figure is percentage. \*Converted at US\$1 to A\$1.32. ‡% of nights beyond main destinations. Source: Tourism Australia, Tourism Research Australia.

# 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

## Headlines

### Comments on tables

- 1 First quarter for Sydney and Tokyo. Strong 10% increase for Sydney, but some declines – understandable tsunami-related falls for Bali and Bangkok, and partly (as a gateway) for Singapore. Q1 total for Tokyo NA, but to be calculated for subsequent measures.
- 2 Partial figures for France restarted, with data for first quarter. Also first quarter for Australia (humming 13%), Germany (good 10%), and the UK (good 10%). First two months for the US, cancelling out any Lunar New Year distortion; up 5%.
- 3 First quarter for Thai; understandable tsunami-related fall of 10% in seats sold.
- 4 New figures for Korean Air through 2004.
- 5 Prices at the end of the first half. All airlines except Japan are down on their end-2004 prices, but both hotel groups are ahead.
- 6 Reflects slowing down of China's outbound market growth, although the figures may still look high.
- 7 New spend figures for most markets, courtesy WTO, reflecting 2004 data; important non-change is China data. Figures reflect big changes in US dollar terms, but caused by currency fluctuations. Analysis due in September issue. Q1 for Hong Kong (non-China total increases 6%), Singapore (a weak 3% growth), and Taiwan (good 7%).
- 9 Full year for Bangladesh. Q1 for Macau (up 12%), Myanmar, New Caledonia. H1 for Vietnam (storming 24% growth).
- 10 H1 for Hong Kong; up a fast 12%. Q1 for most; analysis due in September issue, but 8% growth for region. And of main airports: Bangkok manages 1%; Beijing a fast 15%; Guangzhou's new airport finally gets going, with 26% growth; Shanghai 29%; Sydney 10%.
- 12 Region looks good with 8% growth in seats sold, 7% in traffic on 5% growth in capacity.
- 13 Data now available for 2004, with other regions added. Analysis due in September issue. In the interim, Asia Pacific location growth (surprisingly) slower than Europe's, but sales growth much faster (although this is primarily a result of SARS in 2003). Decline in agency numbers in the US continues, but sales growth good for a mature market, at 7%, although this also was partly related to SARS.
- 14 Strong growth continues for Japan's leading outbound wholesalers, up 16%, but still a long way to go to catch up with years of decline.
- 18 Asia Pacific YTD occupancy increases one point to 73%, average rate up US\$12 to US\$110, pushing repvar up US\$11 to US\$81.

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

From:	Singapore				Sydney				Tokyo*					
	May	+/-	YTD	+/-	Mar	+/-	YTD	+/-	Mar	+/-	YTD	+/-		
To:	05	%	05	%	To:	05	%	05	%	To:	05	%	05	%
Indonesia	274	9.1	1353	8.1	Auckland	114	6.0	347	1.5	Pacific	3058	6.9	8946	5.9
Malaysia	205	4.9	944	1.1	Bangkok	40	2.1	119	-2.3	Oceania	575	0.9	1716	1.8
Thailand	289	8.2	1328	5.9	Denpasar	14	-1.0	41	-9.4	SE Asia	3629	5.5	10598	4.2
Hong Kong	186	25.4	847	26.8	Hong Kong	63	30.4	200	27.4	China	1851	9.1	5389	9.3
Japan	125	-0.7	648	-1.7	London	40	27.2	120	22.7	Korea	1180	0.0	3442	-0.7
UK	100	3.7	541	-0.8	Los Angeles	56	13.5	168	6.8	Europe	1471	-0.5	4242	-0.6
Australia	254	5.6	1408	5.0	Singapore	75	-3.0	239	-4.2					
US	64	5.1	300	9.2	Tokyo	40	7.0	135	10.7					
<b>TOTAL</b>	<b>2477</b>	<b>10.3</b>	<b>11954</b>	<b>7.4</b>	<b>TOTAL</b>	<b>791</b>	<b>11.2</b>	<b>2502</b>	<b>10.1</b>	<b>TOTAL†</b>	<b>11216</b>	<b>2.1</b>	<b>23648</b>	<b>3.6</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. †For month earlier. Source: Airports Authority of Thailand, New Tokyo International Airport Authority, Civil Aviation Authority of Singapore, Department of Transport and Communications (Australia).

## 2 Air passenger traffic to and from Asia Pacific, x1000

From	Australia			France			Germany			UK			US		
	Mar 05	YTD	+/-†, %	Mar 05	YTD	+/-†, %	Mar 05	YTD	+/-†, %	Mar 05	YTD	+/-†, %	Feb 05	YTD	+/-†, %
To	+/-†, %	05	%	+/-†, %	05	%	+/-†, %	05	%	+/-†, %	05	%	+/-†, %	05	%
Australia	na	na	na	na	na	na	8.3	27	-2.8	45.2	322	50.5	3.0	256	3.8
China	65.7	140	66.5	16.6	188	16.0	23.8	259	18.6	40.4	83	39.3	33.7	173	33.0
Hong Kong	31.6	425	28.2	12.8	104	7.9	16.5	135	15.9	-6.6	289	-5.8	8.0	256	11.7
India	na	17	na	20.9	140	22.8	20.1	303	18.0	42.3	418	32.4	-19.0	39	-17.3
Indonesia	3.1	175	-4.0	na	na	na	-5.1	6	1.2	na	na	na	50.0	4	44.8
Japan	10.6	478	9.3	10.8	292	7.2	4.9	236	3.3	10.3	290	7.1	2.8	1926	4.4
Korea	14.2	116	6.9	-6.2	64	-2.4	-6.9	113	-3.3	12.3	57	9.7	1.7	421	3.0
Malaysia	27.8	317	20.3	46.7	36	23.6	16.5	42	10.8	14.1	172	3.2	5.1	15	-6.1
New Zealand	12.3	1285	11.6	na	na	na	na	na	na	9.7	47	-6.7	-7.1	150	-6.7
Philippines	0.6	42	-5.5	na	na	na	-6.8	26	8.7	na	na	na	3.1	127	0.7
Singapore	6.5	857	6.0	33.1	96	23.1	2.5	171	-0.8	0.0	286	-8.1	0.5	56	2.6
Taiwan	14.6	63	17.9	NA	NA	NA	14.5	23	10.1	16.9	24	8.3	11.2	310	8.3
Thailand	-1.7	209	-5.1	NA	NA	NA	-1.1	276	-8.7	23.3	191	9.7	-19.5	13	-26.5
<b>TOTAL</b>	<b>14.9</b>	<b>5370</b>	<b>12.6</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>11.9</b>	<b>24363</b>	<b>9.7</b>	<b>12.7</b>	<b>35881</b>	<b>8.9</b>	<b>3.6</b>	<b>17509</b>	<b>5.3</b>

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, email luftverkehr@destatis.de, website www.statistik-bund.de; US (for International Trade Administration, Tourism Industries), website tinet.ita.doc.gov

Master Notes: Exchange rates (start of previous month) – US\$1 to A\$1.29, Y8.28, HK\$7.80, ¥107, W1016, MR3.80, NZ\$1.40, S\$1.65, NT\$31.5, B39.1. 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, 2005

## Low-fare airline traffic\*, 2005

Airline	Mth	SS 1000	+/- %	RPK mn	+/- %	Jan thru	SS 1000	+/- %	ASK mn	+/- %	RPK mn	+/- %	SF %	+/- pts	Low-fare airline traffic*		
															Jetstar	May	Jan-May
Air Macau*	Apr	175	10.7	203	10.7	Apr	635	23.4	1090	14.9	743	18.9	68.1	2.3	SS,x1000	380	2019
Cathay Pacific*	May	1230	15.6	5079	13.7	May	6075	15.5	32974	12.4	25628	15.8	77.7	2.3	Growth†,%	-9.1	na
China AL	Apr	779	12.1	2600	11.0	Apr	2944	10.1	13337	8.2	10018	7.9	75.1	-0.2	SF,%	69.0	72.5
Dragonair*	May	418	9.7	535	7.4	May	1966	10.6	3960	7.0	2548	10.2	64.3	1.9			
Eva Air	May	487	9.5	1891	2.1	May	2387	10.5	11909	4.4	9337	4.4	78.4	-0.0	Virgin Blue	Apr	Jan-Apr
Japan AL	May	983	-10.2	5095	-3.3	May	5367	-2.5	39592	-1.9	26571	-2.2	67.1	-0.2	SS,x1000	1081	4343
Korean Air	May	883	6.1	3685	6.3	May	4426	10.0	24924	8.7	17424	6.9	69.9	-1.2	Growth,%	17.0	16.1
Malaysia AL	May	768	24.1	3429	26.5	May	3774	18.2	24225	9.6	17404	19.2	71.8	5.8	SF,%	76.0	76.4
Qantas AW	May	627	-1.7	4131	2.6	May	3534	-0.6	29895	4.5	22856	3.8	76.5	-0.5			
Australian	May	61	-1.6	281	-9.4	May	319	6.0	2351	2.4	1557	3.6	66.2	0.8	Air Asia	Jan-Mar	Oct-Dec
Royal Brunei	Apr	84	-17.2	270	-9.9	Apr	354	-14.8	1744	-13.7	1148	-10.6	65.9	2.3	SS,x1000	1100	1126
Singapore AL	May	1293	5.0	6206	5.5	May	6498	2.9	44387	6.9	31742	3.8	71.5	-2.1	Growth†,%	-2.4	14.4
Thai AW	Mar	1100	-0.0	3923	3.7	Mar	3083	-9.5	15850	-3.2	11217	-6.9	70.8	-2.8	SF,%	71.9	74.8

Notes: See Master Notes, page 3. pts=points. \*Domestic and international. †Growth against earlier period. Source: companies.

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

Item	CX	KE	QF group	SQ	TG
	Y-Dec 04	Y-Dec 04	Y-Jun 04	Y-Mar 05	Y-Sep 04
Revenue,mn	5008	7161	7885	7325	3902
Op Profit,mn	673	1404	763	827	517
<b>Revenue per</b>					
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
<b>Profit per</b>					
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					TBA 100 index*	
	Dec 04	May 05	Jun 05	Growth†,% stock	market	AL	All AL
	Air NZ	1.64	1.45	1.45	0.0	1.7	6
All Nppn AW	361	344	338	-1.7	2.4	17	24
Cathay P AW	14.7	14.1	14.2	0.4	-0.3	178	252
China AL	18.1	18.0	17.5	-2.5	3.3	35	50
Japan AL	297	312	300	-3.8	2.4	18	25
Korean A†	182	178	176	-1.4	6.5	55	78
Malysn AL	4.42	3.54	3.50	-1.1	-2.1	36	51
Qantas AW	3.71	3.22	3.37	4.7	3.1	155	219
Singpre AL	11.4	11.5	11.2	-2.6	1.7	76	108
Thai AW	49.3	44.8	39.8	-11.2	1.3	74	104
Mndrn-Orntl	0.78	0.82	0.95	15.9	1.7	na	na
Shangri-La	11.2	11.8	12.0	2.1	-0.3	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. †x100. ‡Latest month over month earlier. Source: Wall Street Journal(s), Travel Business Analyst.

## 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 95	4,521	21.1	15,298	12.7	3,819	21.1	5,189	9.4
Dec 00	10,473	13.4	17,812	8.9	5,508	27.0	7,329	11.7
Apr 05	28,636	26.4	17,544	28.1	9,244	22.3	7,979	23.9

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	4,368,701	29.0	PATA	7,291
	Apr†	1,380,654	10.3	PATA	9,407
China	Dec†	20,221,939	21.8	NTO	13,100
	Dec	28,500,000	40.9	PATA	15,187
Hong Kong	Mar‡	17,352,104	9.7	PATA	NA
Hong Kong-A	Dec	5,013,960	13.2	NTO	11,447
	Mar‡	1,239,835	6.0	NTO	13,123
India	Dec†	4,615,376	1.1	PATA	2,255
Indonesia	Jun	1,563,292	4.8	PATA	3,082
Japan-B	Dec	16,811,290	26.5	PATA	28,971
	Apr†	5,698,890	14.7	PATA	38,103
Korea-B	Dec	8,825,442	24.5	NTO	8,136
	Apr†	3,112,558	15.5	NTO	9,499
Macau	Dec	498,437	36.1	NTO	71
New Zealand	Dec	1,733,210	26.1	PATA	1,775
	Apr†	486,076	15.0	PATA	2,360
Philippines	Dec†	1,780,454	-8.3	PATA	1,005
	Jun	1,042,858	18.7	PATA	632
Singapore-D	Dec	5,164,906	22.3	NTO	4,925
	Mar‡	1,168,702	3.1	NTO	7,744
Taiwan-B	Dec	7,780,652	31.4	NTO	6,480
	Mar‡	1,879,709	7.3	NTO	8,170
Thailand	Dec	2,709,105	25.9	PATA	3,495

Notes: See Master Notes, page 3. \*2004 unless stated otherwise. †2003. ‡2005. 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 95	5,887	13.6	10,200	9.3	7,137	3.5	6,952	12.7
Dec 00	10,160	20.5	13,059	16.5	7,686	10.5	9,579	10.7
Apr 05	18,346	48.3	22,552	29.5	8,531	28.8	11,557†	8.9†

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

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## 9 Visitor arrivals in Asia Pacific destinations

### International arrivals

Destination	Months* Jan thru:	Arrivals	Growth %	Stay days†	PVPD US\$-A
Australia	Dec	5,219,549	10.0	27.0	69.87
	Apr‡	1,878,282	9.8	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‡	496,818	54.0	5.0	200.00
China foreigners	Apr‡	38,464,360	14.1	7E	100E
	Dec	16,932,506	48.6	7E	79.13
	Apr‡	6,156,972	29.8	7E	100E
Cook Islands	Dec	83,284	6.3	5.0	115.84
Fiji	Oct‡	419,399	17.5	7.5	124.58
Guam	May‡	508,933	6.6	4.0	302.93
Hawaii	Dec	6,892,455	8.6	11.4	179.98
	May‡	2,935,680	8.0	11.4	179.98
Hong Kong	Dec	20,062,242	43.4	3.6	79.13
	Mar‡	5,469,910	10.8	3.6	79.13
India	Dec	3,367,980	22.5	27.0	46.62
	Apr‡	1,328,094	17.9	27.0	46.62
Indonesia	Apr‡	1,337,310	-1.4	10.0	231.71
Japan	Dec	6,143,000	17.9	9.4	96.95
	May‡	2,716,380	9.0	9.4	96.95
Korea	Dec	5,818,298	22.4	6.3	163
	May‡	2,441,690	10.7	6.3	163
Laos	Dec	1,144,512	80	5.0	23.03
Macau	Mar‡	2,109,092	11.7	1.2	141.65
Malaysia	Dec	15,703,406	48.5	4.8	76.95
	Apr‡	5,477,606	4.4	4.8	76.95
Maldives	Apr‡	113,594	-52.8	8.8	56.00
Marianas	May‡	218,137	-0.1	1.0E	100.00E
Mongolia	Dec†	201,153	-12.1	5.0	100.00E
Myanmar	Mar‡	72,264	0.7	7.3	70.00
Nepal	May‡	92,865	-29.0	10.0	14.09
New Caledonia	Mar‡	25,904	20.7	5.0	235.95
New Zealand	Dec	2,347,672	11.5	19.2	115.33
	May‡	1,044,569	3.3	19.2	115.33
Pakistan	Dec†	469,047	-5.8	5.0	68.06
Palau	Dec	89,161	36.2	NA	NA
PNG	Apr‡	23,322	17.6	5.0	255.48
Philippines	Apr‡	852,583	10.5	8.9	132.26
Singapore	Dec	7,671,283	40.0	2.7	327.87
	Apr‡	2,728,388	8.3	2.7	327.87
Sri Lanka	May‡	208,389	8.1	9.8	57.00
Tahiti	May‡	78,139	-2.5	5.0	223.98
Taiwan	Apr‡	1,069,387	18.5	7.3	212.10
	Dec	11,726,262	14.8	9.2	111.44
	Jan‡	857,266	-29.9	9.2	111.44
Tonga	Dec	17,959	0.8	5.0	56.87
Vanuatu	Dec	98,481	-2.3	5.0	146.17
Vietnam	Jun‡	1,757,008	24.2	5.4	200.00

### International arrivals

City/region	Period	Number	Growth,%	Source	Comment
Bali	Jan-Apr 05	435,990	9.2	PATA	direct arrivals
Jakarta	2002	1,267,106	14.0	CTO	none
Sabah	Jan-Oct 04	629,618	41.5	PATA	direct arrivals
Sarawak	Jan-Dec 03	1,668,005	NA	PATA	direct arrivals

### Domestic arrivals

Destination	Period	Number	Growth,%	Source	Comment
Australia	2002	75.3mn	1.0	NTO	overnights
Malaysia	2001	15.8mn	NA	NTO	1998 8.32mn
Thailand	2001	60mn	NA	NTO	2% growth in 2002

Notes: See Master Notes, page 3. \*2004 unless stated otherwise. †2003. ‡2005. 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	Mar‡	246,802	25.8	702,872	12.4
Bangkok	Dec†	2,456,834	9.6	25,825,064	21.5
	Mar‡	2,249,004	14.2	6,303,479	1.0
Beijing	Dec†	654,396	12.4	8,322,625	53.8
	Mar‡	703,183	23.0	1,906,413	14.6
Brisbane	Mar‡	284,860	20.6	865,434	15.8
Chennai	Mar‡	182,902	7.5	564,335	4.2
Colombo	Mar‡	337,676	8.5	924,779	-3.4
Delhi	Mar‡	470,906	17.3	1,364,312	14.8
Guangzhou	Mar‡	253,276	19.4	725,400	25.7
Hong Kong	Dec†	3,346,000	11.5	37,125,000	35.3
	Jun‡	3,303,000	6.9	19,388,000	12.1
Jakarta	Mar‡	437,891	3.9	1,392,217	3.7
Kuala Lumpur	Mar‡	1,309,651	38.5	3,376,533	19.7
Macau	Mar‡	321,953	17.5	960,377	24.7
Male	Mar‡	85,781	-38.9	216,211	-48.1
Manila	Mar‡	802,999	14.0	2,262,877	8.8
Melbourne	Mar‡	360,309	14.7	1,111,757	14.3
Mumbai	Mar‡	466,124	8.0	1,513,069	10.8
Nadi	Mar‡	91,434	16.6	279,850	17.8
Noumea	Mar‡	30,890	18.7	113,315	14.5
Osaka KIX	Dec†	913,300	-2.0	10,792,359	26.3
	May‡	849,400	0.3	4,526,900	9.9
Papeete	Feb‡	42,299	-5.8	96,914	2.1
Perth	Mar‡	175,206	20.0	520,610	12.9
Phnom Penh	Mar‡	71,117	14.3	214,144	8.3
Phuket	Mar‡	83,422	-41.9	158,659	-70.0
Seoul	Dec†	2,081,374	11.5	24,235,807	24.7
	Mar‡	2,059,422	18.8	6,309,672	13.4
Shanghai	Dec†	1,172,699	27.3	12,856,218	54.8
	Mar‡	1,222,698	28.0	3,471,324	29.4
Singapore	Dec†	2,956,668	9.4	30,352,290	23.1
	May‡	2,608,397	9.8	12,637,740	7.1
Sydney	Dec†	881,147	7.6	8,942,420	11.9
	Mar‡	790,634	11.2	2,502,275	10.1
Taipei	Dec†	1,429,043	10.8	17,721,939	30.3
	Mar‡	1,475,979	8.5	4,401,772	9.3
Tokyo Narita	Dec†	2,489,994	4.9	30,081,752	17.7
	May‡	2,347,405	-1.0	12,272,224	5.1
<b>ASIA PACIFIC-A</b>	<b>Dec†</b>	<b>66,671,662</b>	<b>11.5</b>	<b>781,831,223</b>	<b>20.8</b>
	<b>Mar‡</b>	<b>68,836,371</b>	<b>9.6</b>	<b>197,213,262</b>	<b>8.1</b>

Notes: See Master Notes, page 3. \*2003 unless stated otherwise. †2004. ‡2005. A = Domestic and international. Source: civil aviation departments, airports, Airports Council International.

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## 11 Operating results of AAPA airlines, 2005

AL	SS,x1000			RPK,mn				
	Apr 05	+/-,%	YTD	+/-,%	Apr 05	+/-,%	YTD	+/-,%
BI	69	-31.7	300	-27.9	270	-10.3	1147	-10.9
BR	492	12.3	1901	10.7	1841	5.5	7446	5.0
CI	779	12.1	2943	10.1	2600	11.0	10018	7.9
CX	1217	10.7	4845	15.4	5039	12.3	20549	16.4
GA	179	-4.3	720	0.8	534	-14.1	2169	-11.4
JL	953	0.7	4286	9.2	4790	-2.2	21161	4.5
KE	867	16.1	3506	11.7	3426	12.7	13630	9.7
MH	749	16.8	3006	16.8	3422	16.8	13975	17.5
NH	282	3.3	1223	13.2	1347	-1.2	5732	5.3
OZ	548	12.5	2183	12.2	1477	6.6	5798	4.9
PR	272	5.8	1044	8.4	1227	4.8	4749	6.7
MI	84	5.0	321	3.5	159	9.5	596	10.3
SQ	1313	4.4	5204	2.4	6360	5.8	25272	2.3
TG	1013	-7.7	4023	-9.1	3805	-1.9	14882	-6.5
VN	199	32.7	NA	NA	569	36.7	NA	NA

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

## 12 Operating resultst of AAPA member airlines

Item	Feb 05	+/- %	Mar 05	+/- %	Apr 05	+/- %	YTD 05	+/- %
SS,mn	9.1	9.8	9.8	13.0	9.6	6.9	37.9	7.7
ASKs,bn	49.4	4.0	53.3	7.2	53.0	5.6	215.8	5.4
RPKs,bn	35.7	6.7	38.7	11.3	37.7	6.3	156.8	6.5
Pax LF,%	72.3	1.8*	72.7	2.7*	71.1	0.5*	72.7	0.7*

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, 2004

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
<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\$m\*

Agency	Mar 05	+/-t,%	Apr 05	+/-t,%	YTD	+/-t,%
JTB	308	19.1	287	15.8	1116	15.0
Other JTB	212	109.2	224	17.1	806	72.7
Hankyu	184	34.1	209	30.1	682	31.9
HIS	189	17.7	159	23.8	650	17.9
KNT	140	4.5	127	14.1	476	4.3
NTA	107	13.4	109	13.0	425	13.2
NEC	124	12.5	58	1.2	333	7.7
Jalpak	78	11.8	77	1.8	311	6.3
Tokyu	36	-3.2	31	0.8	125	0.4
<b>Top 50</b>	<b>1864</b>	<b>23.7</b>	<b>1726</b>	<b>14.3</b>	<b>6656</b>	<b>15.8</b>

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 ¥103. †Over same period, year earlier. Source: Travel Journal International.

## 15 Internet bookings/sales of selected companies/markets

Company,item	Period	Number	Previous
JTB online sales	2006	\$943m	up 43%
Expedia bookings	Q1 2005	\$3.4b	up 29%
Hotels.com bookings	Q1 2005	\$483m	down 2.2%
Ctrip revenue	2004	\$43m	up 94%
Elong revenue	2004	\$17m	up 86%
US hotels revenue loss due to internet (PwC)	2005	\$1.7b	\$1.3b '03
Merchant hotels on Travelocity	current	10k	NA
Merchant hotels on Gullivers/Octopus	current	20k	NA

Notes: See Master Notes, page 3, and Net Value. Source: various.

## 16 Economic indicators of major countries in Asia Pacific

Country	Forecast 2005	GDP growth*†,%	Period	GDP per capita,US\$	Inflation period	Growth*†,%
Australia	2.6	2.7	Q1:	1.9	19,070	Q1: 2.4
China	8.7	8.0	Q2:	9.5	900	Jun: 1.6
Hong Kong	4.6	4.6	Q1:	6.0	23,260	Apr: 0.5
India	6.7	6.8	Q1:	7.0	470	May: 3.7
Indonesia	5.1	5.5	Q1:	6.4	680	May: 7.4
Japan	-0.1	0.2	Q1:	1.3	32,520	May: 0.2
Korea	3.6	4.5	Q1:	2.7	23,260	May: 3.1
Malaysia	4.8	5.3	Q1:	5.7	3,890	Jun: 3.2
Philippines	4.7	5.0	Q1:	4.6	23,260	Apr: 8.5
Singapore	3.8	4.7	Q2:	3.9	20,850	May: 0.0
Taiwan	4.1	4.2	Q1:	2.5	23,260	Apr: 1.6
Thailand	4.8	5.6	Q1:	3.3	1,800	Jun: 3.8

Notes: See Master Notes, page 3. F=forecast. GDP=gross domestic product. \*Over period year earlier. †Official and other estimates. Source: The Economist, Wall Street Journal(s).

## 17 Economic indicators of major visitor-producing countries for Asia, 2005

Country	GNP/GDP	Retail sales	Consumer prices	Wages/earnings
Australia	1.9 Q1	1.8 Q1	2.0 Q1	5.0 Q1
Germany	1.1 Q1	2.7 May	1.7 Jun	1.9 May
Japan	1.3 Q1	3.6 Apr	-0.5 May	2.2 May
UK	2.7 Q1	2.3 Apr	1.2 Apr	5.1 Mar
US	3.7 Q1	4.3 May	3.3 Jun	2.0 Jun
Euroland	1.4 Q1	2.0 May	2.4 Jun	3.0 Q1

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

# MARKET DATA

## 18 Hotels† measures in Asia Pacific, May

Location	Occupancy,%				Average room rate, local				Revspar, US\$*				
	2005		2004		2005		2004		2005		2004		
	Mth	YTD	Mth	YTD	YTD	Mth	YTD	Mth	YTD	Mth	YTD	Mth	YTD
Auckland	68.2	80.9	77.2	85.6	164.43	113.18	116.93	86.73	96.47	77.15	94.63	66.91	82.56
Bali	60.0	54.9	62.2	56.1	737633	81.14	78.52	69.48	70.39	48.68	43.07	43.20	39.47
Bangkok-all	72.2	74.9	NA	NA	3957.53	92.06	100.97	NA	NA	66.43	75.62	NA	NA
U-4	69.5	71.6	67.8	69.3	2869.76	71.38	73.21	55.68	69.25	49.59	52.43	37.75	48.00
5-star	75.2	78.0	71.9	75.7	5522.42	123.50	140.89	115.71	128.73	92.82	109.95	83.23	97.49
Beijing-all	79.6	73.0	NA	NA	925.79	119.46	111.86	NA	NA	95.12	81.62	NA	NA
L-4	85.0	78.3	76.8	78.0	606.82	79.10	73.32	71.70	65.29	67.25	57.43	55.05	50.91
U-4	77.3	71.0	66.1	60.9	1057.64	138.23	127.79	119.51	111.57	106.92	90.67	79.02	67.97
Fiji	73.6	68.1	69.7	62.2	204.14	128.33	123.44	104.24	107.15	94.46	84.10	72.64	66.67
Ho Chi Minh City	60.1	70.2	50.0	53.8	1134492	73.14	71.73	69.15	67.44	43.97	50.34	34.57	36.27
Hong Kong-all	80.7	82.1	NA	NA	1150.24	133.17	147.66	NA	NA	107.51	121.26	NA	NA
3-star	73.3	82.9	85.1	85.9	629.18	69.27	80.77	53.56	67.28	50.80	66.95	45.61	57.77
U-4	81.0	80.8	74.9	82.1	1106.64	134.86	142.06	123.32	121.07	109.21	114.71	92.32	99.40
5-star	77.0	78.2	72.3	73.1	1988.39	232.34	255.26	205.79	214.03	178.92	199.62	148.73	156.55
Jakarta U-4	54.6	54.3	47.3	47.7	718439	74.46	76.48	65.70	69.45	40.66	41.52	31.09	33.11
Kuala Lumpur-all	67.1	72.5	69.3	72.3	269.09	70.19	70.81	65.45	65.12	47.12	51.32	45.35	47.09
U-4	64.6	70.5	NA	NA	335.72	88.42	88.35	NA	NA	57.16	62.32	NA	NA
Macau	77.2	71.8	74.7	73.5	727.66	81.61	90.89	75.83	74.35	63.02	65.27	56.62	54.63
Manila-all	78.5	79.9	71.1	75.0	3843.51	70.31	70.39	63.73	64.60	55.20	56.25	45.29	48.45
U-4	77.2	78.5	NA	NA	4266.73	78.29	78.14	NA	NA	60.41	61.37	NA	NA
Melbourne	70.2	77.0	75.6	76.0	193.11	131.65	149.83	117.88	134.66	92.43	115.32	89.11	102.39
Pattaya	56.7	72.3	57.9	66.6	2348.30	51.95	59.91	46.30	51.02	29.47	43.32	26.81	33.96
Penang	42.3	47.4	55.9	57.7	185.43	45.56	48.80	49.12	51.97	19.26	23.12	27.47	30.01
Phuket	37.3	44.2	63.0	68.3	2829.16	60.55	72.18	55.35	91.87	22.61	31.88	34.89	62.76
Seoul	73.4	72.8	74.5	70.7	178326	175.04	176.59	158.39	151.71	128.48	128.59	118.06	107.30
Shanghai	69.3	71.8	79.1	75.5	1062.71	141.13	128.40	115.93	110.27	97.85	92.14	91.75	83.29
Shenzhen	66.4	73.1	77.0	76.9	650.61	78.92	78.61	71.08	73.59	52.37	57.47	54.73	56.57
Singapore-all	79.3	79.1	NA	NA	161.48	98.83	98.29	NA	NA	78.34	77.70	NA	NA
U-4	84.5	83.1	77.7	75.8	197.05	122.87	119.94	97.54	96.89	103.81	99.69	75.80	73.43
5-star	68.9	70.1	69.2	71.5	233.26	141.93	141.98	116.41	121.75	97.73	99.49	80.58	87.02
Sydney	69.0	80.7	75.3	80.0	186.80	137.92	144.93	117.33	123.13	95.19	117.00	88.36	98.48
Taipei	83.7	74.3	67.8	69.9	4165.97	143.27	132.73	106.93	109.10	119.92	98.67	72.53	76.28
Tokyo	74.9	73.6	76.1	73.3	23037	208.13	218.16	212.14	219.64	155.79	160.46	161.52	160.97
Asia Pacific-total	70.4	72.6	70.8	71.7	na	106.23	109.52	92.80	97.11	76.94	80.92	66.67	70.32
<b>Others</b>													
London	76.7	73.6	75.8	67.4	129.44	244.23	243.97	274.56	246.17	187.31	179.52	208.01	165.82
New York	85.9	84.0	83.7	81.3	197.70	207.60	197.70	185.98	177.16	178.33	166.03	155.67	143.98

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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