

TRAVEL BUSINESS ANALYST

Markets • Marketing • Strategy

ASIA PACIFIC • APRIL 2013

Market Monitor

Percentage change unless noted otherwise. Latest months listed first. Sources not shown are usually relevant principals. E=estimate, P=provisional, TBA=Travel Business Analyst.

- TBA Travel Industry Index, World: 2013: Jan +4E. 2012: Dec +5P; Nov +5.6; Oct +3.7; Sep +4.8; Aug +6.7; Jul +4.9; Jun +6.3; May +5.9; Apr +6.3; Mar +7.1; Feb +7.1. TBA.
- TBA Travel Industry Index, Asia Pacific: 2013: Jan +4E. 2012: Dec +7P; Nov +8.8; Oct +6.0; Sep +6.4; Aug +8.0; Jul +6.0; Jun +8.9; May +6.9; Apr +8.5; Mar +11.7; Feb +8.3. TBA.
- TBA Travel Industry Index, US: 2013: Jan +3E. 2012: Dec +2P; Nov +3.5; Oct +2.7; Sep +1.7; Aug +4.7; Jul +2.9; Jun +4.3; May +4.4; Apr +3.3; Mar +5.9; Feb +5.4. TBA.
- World airport passengers; ttl, intl: 2012: Dec +2.0 +4.6; Nov +3.2 +5.8; Oct +2.3 +3.5; Sep +2.6 +4.7. ACI.
- World air traffic, RPKs: 2013: Jan +2.7. 2012: Dec +4.2; Nov +4.6; Oct +3.2; Sep +4.9. IATA.
- World hotel occupancy, pts: 2012: Dec +1.0; Nov -0.1; Oct +0.4; Sep -1.0; Aug +1.0. TBA.
- World travel stocks index, on 100: 2013: Feb 108; Jan 107. 2012: Dec 90; Nov 86; Oct 87. TBA.
- World visitor arrivals: 2012: Dec +4.2; Nov +4.6; Oct +3.2; Sep +4.9; Aug +4.0; Jul +1.4. WTO.
- AsPac airlines seat sales: 2013: Jan +0.9. Dec +9.7; 2012: Nov +10.3. AAPA.
- AsPac airport passengers; ttl, intl: 2012: Dec +7.2 +9.1; Nov +6.8 +11.2; Oct +4.0 +5.3; Sep +4.9 +6.5; Aug +6.8 +9.3; Jul +5.0 +6.3. ACI.
- AsPac hotel occupancy, pts: 2012: Dec +1.2; Nov +0.2; Oct +2.8; Sep -1.5. TBA.
- AsPac hotel rooms planned: 2013: Feb +4.5; Jan +8.7. 2012: Dec 8.2. Smith.
- AsPac air traffic, RPKs: 2013: Jan -0.1. 2012: Dec +6.3; Nov +6.0; Oct +1.4; Sep +1.7. IATA.
- AsPac travel stocks index, on 100: 2013: Feb 95; Jan 100. 2012: Dec 91; Nov 86; Oct 86. TBA.
- AsPac visitor arrivals: 2012: Dec +5.3; Nov +8.8; Oct +4.2; Sep +4.7; Aug +6.5; Jul +4.0. WTO.
- Air France-KLM seat sales, Asia: 2013: Jan +0.3. 2012: Dec +2.3; Nov +3.2.
- Australia resident departures: 2012: Dec +5.1; Nov +7.6; Oct +2.1; Sep +6.8. PATA.
- Australia visitor arrivals: 2012: Dec +7.1; Nov +6.9; 2012: Oct +3.2; Sep +9.4; Aug +6.2. DMO.
- Bali visitor arrivals: 2012: Sep -3.2; Aug +1.3; Jul -6.9; Jun -0.8; May +5.6. PATA.
- Bangkok airport visitor arrivals: 2013: Jan +23.7. 2012: Dec +42.3; Nov +95.6. PATA.
- British Airways seat sales, AsPac: 2013: Jan +5.8. 2012: Dec +9.2; Nov +2.7.
- Cathay Pacific seat sales: 2013: Feb +10.5; Jan -7.3. 2012: Dec +2.5; Nov +3.8.
- China citizen departures, estimates: 2012: Dec +16.1; Nov +20.0; Oct +13.3; Sep +20.7. TBA.
- China foreign visitor arrivals: 2012: Dec -4.0; Nov -2.2; Oct 9.8; Sep -4.4; Aug -1.4; Jul -4.0. PATA.

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Asean

Snapshot

Briefs from the 10 Asean destinations, presented at January's Asean Tourism Forum in Vientiane, Lao, organised by TTG Asia Media. These are largely product briefs, differing from our usual focus on market intelligence.

Initially, however, some market commentary on Asean's travel business:

- Visitor counts are distorted by different definitions (particularly Malaysia, whose comparative count is closer to 10mn than the 25mn it reported for 2012). Ignoring that, however, there were 88mn visitors in the Asean destinations in 2012.
- That was 9% growth - better than the 5% forecast/target (made at the 2012 ATF) but below the 12% growth recorded in 2011.
- For this year, we calculate that the forecast/target is another 9% growth, which would take the total to 96mn.
- Fastest growth was, to little surprise, for Myanmar, increasing 52%. That was much faster than its 25-30% forecast, and we believe its forecast for 2013, up 32%, will also be on the low side. However, the main limit on Myanmar's total may be capacity. Air capacity is growing fast, but some ground services, such as hotels, take longer to put in place.
- Singapore. Remarkably, the DMO (destination marketing organisation) still has no data for 2012 - because of a system change at the immigration department. For that reason, it does not have a firm forecast for this year. The figure in the table is our estimate.

Most of the following product information from the respective DMO:

• Brunei.

-(Unclear arrival totals. The DMO talks of an 11.5% growth this year to reach 332,000. But on (estimated) totals for 2012, it would require more than that.)

-In 2012 the long-standing DMO head retired. His replacement, appointed more quickly than we expected, is Mariani Haji Sabtu. Her predecessor was 'CEO', but her title is 'acting director of tourism development department'. She says the 'acting' prefix will go when the minister (of industry) confirms her in the post.

-The DMO's promotional budget is US\$4.1mn (at US\$1 to B\$1.23) this year - unchanged from 2012. Following substantial route restructuring at Royal Brunei Airlines, the DMO is reworking some promotional activity, including dropping some.

-US\$106mn being spent on airport modernisation. Due to be finished mid-2014.

-New products - butterfly park, bird watching, mangrove education centre, war heritage trail* (especially

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MARKET OUTLOOK

Headlines

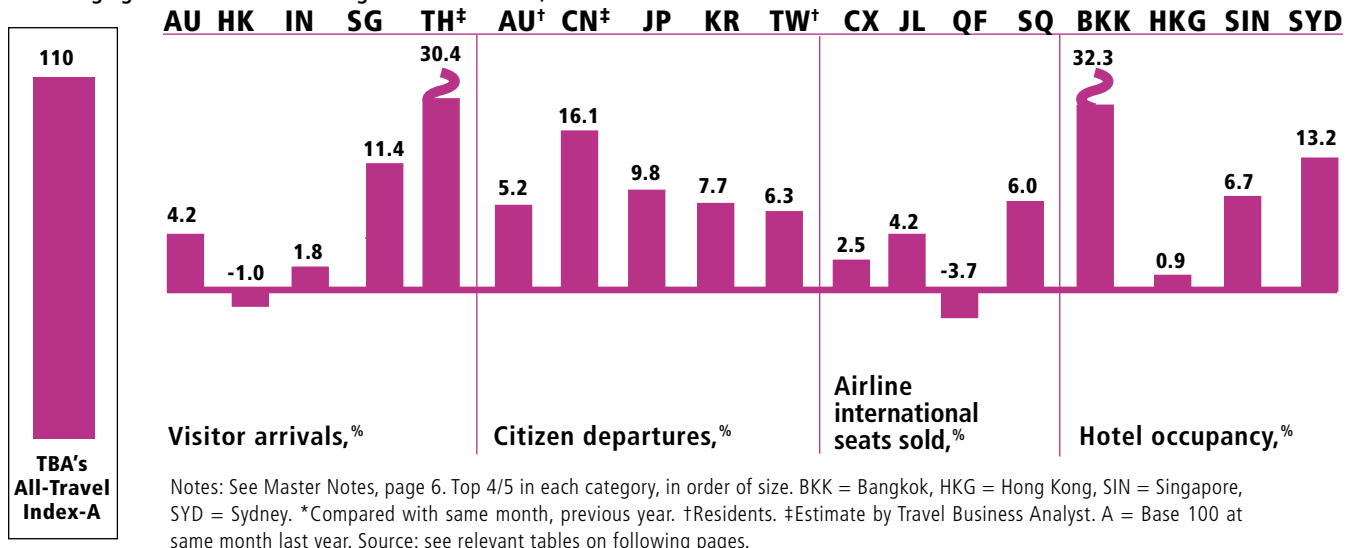
Commentary on tables

• **Inbound trends.** Forecast for next 12-month period - *China, Hong Kong, Singapore, Thailand*. Slight changes for China and Hong Kong. But Singapore tops 16mn, and Thailand adds over 2mn, but that is because floods in late-2011 caused a sizeable drop.

• **Outbound trends.** Forecast for next 12-month period – *China* (our estimates; gets to 97mn!), *Japan* (touching 20mn), *Korea* (near 15mn), *Taiwan* (near 11mn).

Barometer

Percentage growth in latest matching month* available; December 2012



Visitor arrival trends*, next 12 months		Official* travel industry forecasts			
Source	Number, x1000	Item	Date†	Forecast	Source
China	27,494	Air seats sold, '16	Dec	3.6b, 5.2% AAGR	IATA
Hong Kong	12,501	Air intl seats sold, '16	Dec	1.5b, 5.3% AAGR	IATA
Singapore	16,370	US tvl mkt, '13/4	Nov	+6/5%	PCW
Thailand	26,821	online	Nov	+7/7%	PCW
		China tvl mkt, '13	Nov	\$105b; \$50b '09	PCW
		online	Nov	\$15b; \$4b '09	PCW
		China online travel, '15	Nov	\$51b; \$21b '11	R&M
		Aust/NZ online bookings, '13	Nov	\$15b, +10%	PCW
		OTAs	Nov	\$3b, +8%	PCW
		Suppliers	Nov	\$12b, +10%	PCW
		US visitors fm Japan, '11-7	Nov	+1-3%	gov
		fm China	Nov	+259% sic	gov
		fm Korea	Nov	+51%	gov
		fm India	Nov	+47%	gov
		US visitors fm Pacific, '12	Nov	+7%	gov
		'11-7	Nov	+46%	gov
		US visitors fm Asia, '12	Nov	+14%	gov
		'11-7	Nov	+64%	gov
		Biz tvl spend, '15	Oct	\$1.4t +8%	GBTA
		'14	Oct	\$1.3t +8%	GBTA
		'13	Oct	\$1.2t +8%	GBTA
		Don Mueang airport pax, '13	Oct	13-14m	AOT
		World visitors, '13	Oct	+2-4%	WTO
		MI (of MICE) visitors Thailand, '13/5	Oct	415/457/503k	TCEB
		Air traffic (RPKs), '13	Oct	6.4%	ICAO
		'12	Oct	5.4%	ICAO

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

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

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for Australia and New Zealand military veterans), heritage trail, Islamic tours* with Malaysia, family fun 'edutainment'.

-There are plans for all-Borneo island tourist products – although these are currently too preliminary to elucidate*. Two noted are war heritage and Islamic.

*Brunei was a landing point for A/NZ troops during the war (although more in Sarawak, Malaysia). Alcohol is difficult to obtain openly – which might attract some visitors – and all restaurants are halal, by law. Some work has been done with Kuching and Sarawak, but not much with Indonesia.

• Cambodia.

-Arrivals in Siem Reap now 1mn.

-Cambodia and Thailand have introduced a single visa that allows visits to both; available from embassies of both countries. Not as important as officials say in that most nationalities do not need a visa for Thailand, so the problem is Cambodia. Also, it would be better to end visas.

-Sihanoukville now gets cruise ships. Reports indicate that charter flights from Russia are planned.

• Indonesia.

-New marketing slogan

- World's Heart Of Wonders. The fact that the DMO head offered to explain its meaning can be interpreted that it may not be effective.

-Investment in the visitor business (but not clear; DMO says "tourism", but not what the description includes) increased 200% in 2012. The World Economic Forum says Indonesia is now 12th in competitive terms for visitors, up four places.

-About 17 destinations in the country have been selected to promote.

-Garuda plans a second destination in Europe (London) from this November. Nonstop; the current Amsterdam flight makes a stop in Abu Dhabi.

• Lao.

-Modest growth forecast for this year. This may be on the low side, although travel to Myanmar will take some growth from Lao (as well as from Cambodia and possibly Vietnam).

-21 out of 23 arrival points now providing visa-on-arrival service.

• Malaysia.

-The DMO targets doubling its visitor count and tripling visitor spend by end-2020 - to 36mn arrivals, and US\$55.1bn (MR168bn).

The resulting US\$1530 per-person-per-visit would be about 50% above the world average. That alone would make the target seem difficult, but another market fact – the Singapore share of visitors – seem to make it near impossible. Singapore is a short-stay market; short-stay travellers generally spend more daily than long-stay, but Singapore's over-50% share of Malaysia's total would likely hold down total spend.

In addition, the DMO's target of

2014. It bills itself as a 'low-cost' airline (what we would term an NFA, no-frills-airline) but it does provide some frills – including seat-back screens, business class, baggage allowance.

-Events. This year there will be some celebrations for the 50th anniversary of what is described as Sabah and Sarawak joining Malaysia. However, historical reality is slightly different. Malaya was founded as an independent state in 1957, but Malaysia was created in 1963, comprising Malaya (the Malay peninsula), S&S, and also Singapore – which was subsequently expelled from the union in 1965.

In 2014, a less encumbered event is scheduled - Visit Malaysia Year. That said, no additional funds have been allocated to the DMO to promote VMY. Some support would always be given 'in-kind' but that is unlikely to be sufficient for a promotional program and event of this size.

Also in 2014, Malaysia is due to host that year's ATF. The minister of tourism said Malaysia did not have visitor arrival statistics when it first hosted ATF, in 1981. We can help; the total was 1,005,523, up 12.3%.

• Myanmar.

-Following our explanation to the DMO of how arrivals breakdown data by passports (its current methodology) distorts market analysis, the DMO may change.

-The Shwedagon pagoda in 2012 counted 300k foreign visitors in 2012, up 50% thus matching overall visitor growth.

-The DMO promotes 'eco-tourism', but currently this is little more than another description of its countryside.

-Reports 36 accommodation projects with 6766 rooms, of which 30/5207 finished, leaving 6/1559.

-15 airlines now operating international flights; seven more due this year, including All Nippon, Asiana, Dragonair, Eva, Korean, Qatar.

-New airport planned for north of Yangon; no clear dates.

-Tourism masterplan, launched in November 2012, was due to be finished last month.

Arrival patterns in Asean destinations

Destination	2013		2012		2012		2011	
	Tgt,mn	+/-,%	Act,mn	+/-,%	Tgt,mn	+/-,%	Act,mn	+/-,%
Brunei	0.33	36.0	0.24E	11.0	0.26	15.0	0.22	27.0
Cambodia	4.0	14.3	3.5	21.1	3.2	14.3	2.89	14.9
Indonesia	9.0E	5.0E	8.0	5.2	8.0	8.2	7.65	9.2
Lao	3.7	10.1	3.4	23.4	2.94E*	9.0*	2.72	8.4
Malaysia	26	4.0	25.0	1.2	25.0	1.2	24.7	0.6
Myanmar	1.3-1.5	32.2	0.59	52.1	0.50	25-30	0.39	25.9
Philippines	5.5	27.9	4.3	9.7	4.2	10.5	3.92	11.3
Singapore	14.7E*	6.0E*	13.5-14.5	6.3E	14.4E*	9E*	13.2	13.2
Thailand	24.5	9.9	22.3	15.9	19.5	26.0	19.1	19.8
Vietnam	7.2	5.3	6.84	13.8	6.5	8.3	5.99	18.6
All-Asean	96.3	9.2	88.2	9.2	84.5	4.6	80.8	12.1

Notes: Some forecasts are growth, others a number; we have calculated the other figure. Act = actual, E = estimate, Tgt = target or forecast. Source: DMOs, *Travel Business Analyst.

"doubling" is mathematically incorrect. Against 2012, the 2020 target represents a 44% increase – some way below 100%.

-The Singapore market fell 5% in 2012, compared with 27% growth from China, and 14% from Indonesia.

-The DMO has high hopes for the 2200sqkm Iskandar development in Johore. This giant multi-purpose development has some tourism elements – such as Legoland, which opened last September. We believe that these do not yet appear to have visitor-motivating elements such as those of Marina Bay Sands and Resorts World resorts in neighbouring Singapore.

-Flights. Air France due to restart France-Malaysia flights this month. Malindo Air (part-owned by Indonesia's troubled Lion Air) started flying Malaysia domestic routes in March. It plans Malaysia-India flights from June, then China and Hong Kong in

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• Philippines.

-The DMO has been given a 3-fold increase in spending for this year. But the previous amount, US\$10mn, was tiny and so the new US\$30mn is not game-changing. The DMO wants the visitor business to alleviate poverty, and to spread the benefits throughout the country.

-Marketing slogan launched in January 2012 – More Fun in the Philippines.

-The DMO says its intra-Asean share of visitors is low - 8% in 2012. It plans to open promotional offices in the region – no further detail – but targets an increase in share this year to 12%. Such a big increase in such a short period looks near impossible.

-Biggest market is Korea. In the past it has been China, Hong Kong, Japan, Taiwan; all four markets have been negatively affected following a particular violent attack against their nationals. An attack in 2010 killed tourists from Hong Kong, but travellers from China also turned away after that. There was actually a small, 3%, increase from China in 2012 – but given that market's potential that should have been closer to 50%.

-The DMO has talked with both Indonesia and Singapore about joint promotions, twinned destinations. It was hoping to get something established by June.

-Department of transport plans to add night-landing capability in about 14 domestic airports – timing not clear – that would create capacity. New terminal building planned for Cebu. Palawan airport being expanded.

-The DMO also has representation on the civil aeronautics board, and so visitor-market wishes get heard. The DMO wants to encourage flights to airports other than Manila.

• Singapore.

-Entertainment is about 20% of spend, and gambling is most of that.

-Promotional themes for Singapore's top markets: China (discover new places); Australia (fun – get lost); India (active); Indonesia (only in Singapore; now).

-Tourism Development Fund - to help companies develop visitor attractions and promote - started off with US\$1.6bn (at US\$1 to S\$1.23) for 10 years to get the visitor count to 17mn in 2015. But the DMO managed to get this increased, by US\$736mn for five years.

-TDF money is used for other pur-

poses as well, such as worker productivity. Singapore's labour shortage has particularly affected the visitor business, because the industry is labour intensive. The DMO wants to allow more job flexibility so, for instance, accountants may sometimes wait on hotel restaurant tables.

-Now 50k hotel rooms; 3k more are planned.

-Important openings in 2012: cruise terminal (doubled capacity; before, cruise visitor count was 1mn); Gardens by the Bay (1mn visitors in first two months); Marine Life Park at Resorts World (RW now fully open). Due next: River Safari (this year); Sports Hub (in 2014; with retractable roof). The DMO is also looking at developing Jurong Lake and Mandai area.

-Eight events planned for Travel Rave - despite the juvenile name, a serious week-long series of travel trade events. Counts 10k attendees. The F1 car race gets 404k visitors, of which about 40% are foreign.

• Thailand.

-1.5mn medical-tourist arrivals in 2012. *We think this figure is overstated; the DMO says they are counted by their stated 'purpose of visit' on arrival.*

-China and Malaysia are markets now producing more than 2mn arrivals each. Also, 1mn each from India, Japan, Korea, Russia. And Lao, hardly considered a market by most destinations, produced 900k for Thailand in 2012, and is expected to be 1mn this year.

-The DMO targets 'RICI' markets – Russia, India, China, Indonesia.

-It wants 'quality growth with quality product', but this appears to be just a marketing slogan. Among the market segments it targets are golf, medical, honeymoon, etc, because it thinks these may be more recession-proof. And it thinks it has the right products for these markets.

In fact, of course, big destinations have many products available for many market segments, and talk of 'targeting' a segment has almost no meaning. A destination will try to promote everything to all markets because some will hit their target. Otherwise, for instance, what is the point of targeting, say, adventure travel in the Australia market, when 95% of travellers will be looking for something else?

-Now China is such a large market (2.7mn in 2012 but still growing fast), the DMO wants to get higher yield and/or the FIT segment.

-Biggest development in region

has been opening of Myanmar because Bangkok is an important gateway for Myanmar. The DMO plans a workshop with Myanmar, and it wants buyers and media that who attend its Thailand Travel Mart to take a post-event tour to Myanmar.

-Infrastructure. Phuket's runway due to be extended for A380 aircraft. *Unclear, because runways need widening and strengthening for A380, and not usually lengthening. No dates on this. Fourth Thailand-Lao bridge due this year.*

-Cambodia and Thailand have introduced a visa that allows visits to both; see 'Cambodia' entry.

• Vietnam.

-Forecasts 11.5-12% AAGR in visitor arrivals over 2011-20.

-New marketing slogan – Timeless Charm. This year is Visit Vietnam Year, although not widely known.

-Tax refund service, for visitor purchases, now available at Hanoi and Ho Chi Minh City airports.

-Has two trade shows. The established ITE in HCMC, concentrating on inbound, and organised by Singapore-based Informa Exhibitions. And Vietnam International Travel Mart based in Hanoi, organised by the government, and concentrating on outbound. VITM appears to have been created because ITE did not want to move to Hanoi every two years. A show for Vietnam Outbound looks poor strategy. VITM says there are 3mn outbound travellers (of which Cambodia receives 1mn, China 1mn, Malaysia 200k, Singapore 300k, Thailand 500k, US 100k), but we estimate as much as 65% is 'fixed' – government, business, VFR, refugee-related.

-Visa fee increased this year, and at around US\$90 is the highest in Asean. Officials talk of moves to get a single visa for Asean (*due for 2015, but we believe enough countries will impose conditions that will effectively destroy the plan*), or something like the Cambodia/Thailand one-visa-for-both. *But this seems procrastinating talk, nothing else; Vietnam wants the money the visa fee brings, and the apparent fractional increase in security.*

-China is still a market weakened by sensitive politics between the two countries. There was a roadshow in a few big cities in 2012. Visitor numbers are expected to be unchanged this year, following weak growth in 2012.

-In Europe its target markets are Russia, Germany, UK, France. There was a 70% increase in Russia arrivals in 2012.

- China Southern seat sales: **2013:** Jan -5.1. **2012:** Dec +9.7; Nov +6.1; Oct +4.0; Sep +8.1.
- Dubai airport passengers: **2012:** Dec +10; Nov +10; Oct +14. *ACI*.
- Eva Air seat sales: **2013:** Feb +9.6; Jan -2.6. **2012:** Dec +11.9.
- Fiji visitor arrivals: **2012:** Dec -8.4; Nov +0.7; Oct +4.7; Sep +5.5. *PATA*.
- Hawaii visitor arrivals: **2012:** Dec +8.1; Nov +12.9; Oct +7.8; Sep +5.5; Aug +11.0; Jul +7.9. *PATA*.
- Hong Kong airport passengers: **2013:** Jan -5.1. **2012:** Dec +3.8; Nov +5.5; Oct +1.9.
- Hong Kong visitor arrivals: **2013:** Jan +11.9. **2012:** Dec +15.1; Nov +18.7; Oct +11.9. *DMO*.
- India visitor arrivals: **2013:** Jan +2.6. **2012:** Dec +1.8; Nov +8.4; Oct +2.3; Sep +3.2; Aug +2.6; Jul +2.2. *PATA*.
- Indonesia visitor arrivals: **2012:** Dec +5.9; Nov +5.9; Oct +4.9; Sep +5.2. *PATA*.
- Japan Airlines intl seat sales, total/transPacific/Southeast Asia: **2013:** Jan +3.9 +4.8 +10.8. **2012:** Dec +4.2 +9.4 +13.8; Nov +8.1 +13.3 +32.0.
- Japan citizen departures: **2012:** Dec -1.7; Nov -4.2; Oct -3.1; Sep -0.9; Aug +9.9. *PATA*.
- Japan travel agencies, outbound sales: **2012:** Nov +1.5; Oct +1.5; Sep -2.2. *Mile Post Japan*.
- Japan visitor arrivals: **2012:** Dec +20.6; Nov +17.6; Oct +14.7; Sep +22.1. *PATA*.
- Jet Airways seat sales: **2013:** Jan -7.5. **2012:** Dec -9.8; Nov -11.5.
- Jetstar Intl seat sales: **2013:** Jan +7.6. **2012:** Dec +13.9; Nov +17.1; Oct +12.2.
- Korea resident departures: **2012:** Nov +14.7; Oct +11.8; Sep +4.6; Aug +7.0; Jul +5.1. *PATA*.
- Korea visitor arrivals: **2013:** Jan +0.0. **2012:** Dec -0.9; Nov -3.2; Oct +3.8; Sep +8.8. *PATA*.
- Kuala Lumpur airport passengers: **2012:** Dec +12.2; Nov +15.2; Oct +7.6; Sep -3.5.
- Lufthansa seat sales (AsPac): **2013:** Feb -7.6; Jan -9.9. **2012:** Dec -13.0.
- Macau visitor arrivals: **2013:** Jan -6.1. **2012:** Dec -2.0; Nov -1.8; Oct -1.2. *DMO*.
- Malaysia Airlines seat sales: **2013:** Jan +6.1. **2012:** Dec +15.2; Nov +14.5; Oct +11.7.
- Malaysia visitor arrivals: **2012:** Dec +7.4; Nov +0.5; Oct +0.8; Sep -5.7; Aug +3.4. *PATA*.
- Maldives visitor arrivals: **2013:** Jan -7.6. **2012:** Dec +7.1; Nov -3.7; Oct +1.5. *PATA*.
- New Zealand visitor arrivals: **2013:** Jan -2.3. **2012:** Dec -0.1; Nov +0.8; Oct -14.7. *PATA*.
- Qantas intl seat sales: **2013:** Jan -5.9. **2012:** Dec -3.7; Nov -3.1; Oct -3.7.
- Singapore Airlines seat sales: **2013:** Jan +2.5. **2012:** Dec +6.0; Nov +9.7; Oct +7.1.
- Singapore airport passengers: **2013:** Feb +9.2; Jan +1.9. **2012:** Dec +8.6; Nov +12.2; Oct +10.0.
- Singapore visitor arrivals: **2012:** Jun +7.2; May +8.7; Apr +8.9; Mar +15.8; Feb +14.4; Jan +13.4. **2011:** Dec +7.9. *PATA*.
- Tahiti visitor arrivals: **2012:** Dec +8.2; Nov -4.7; Oct +6.9; Sep +10.7. *PATA*.

- Taiwan resident departures: **2012:** Nov +9.5; Oct +8.0; Sep -0.6; Aug +2.5; Jul +1.4. *PATA*.
- Thai Airways seat sales: **2013:** Jan +8.0. **2012:** Dec +18.4; Nov +39.0; Oct +11.2.
- Thailand visitor arrivals: **2013:** Jan +12.5. **2012:** Dec +30.4; Nov +60.6; Oct +20.5; Sep +7.9; Aug +11.5. *PATA*.
- Tokyo Haneda intl airport passengers: **2012:** Dec -0.2; Nov +2.2; Oct +2.5; Sep +5.6. *ACI*.
- Tokyo Narita intl airport passengers: **2012:** Dec +5.5; Nov +4.6; Oct +13.3; Sep +8.5. *ACI*.
- United Airlines (inc CO) RPKs, Pacific: **2013:** Feb +2.5; Jan +4.8.
- US air international passengers: **2013:** Jan +3.5. **2012:** Dec +4.6; Nov +6.6. *gov*.
- US hotel occupancy, pts: **2012:** Dec +3.2; Nov +0.8; Oct +1.3. *TBA*.
- US hotel rooms planned: **2013:** Feb +10.1; Jan +4.9. **2012:** Dec NA. *Smith*.
- US resident departures: **2012:** Nov +2.4; Oct +0.5; Sep +0.7. *PATA/gov*.
- US travel agency sales: **2013:** Feb -4.1; Jan +4.8. **2012:** Dec -3.5; Nov -0.7. *ARC*.
- US visitor arrivals: **2012:** Nov +5.1; Oct +5.5; Sep +7.7. *PATA/gov*.
- Vietnam visitor arrivals: **2013:** Jan +3.5. **2012:** Dec +3.2; Nov +7.2; Oct -3.5; Sep +60.6. *PATA*.

Market Headlines

Full-year market results. (none)

Main News Corporate

- Recent corporate developments - big or significant.
- Indonesia's Lion Air orders 234 A320s. This is not yet listed in Airbus's order book.
 - Marriott plans Moxy (sic), 3-star brand, in association with Ikea, the furniture company.

Market

Recent market developments - big or significant. (none)

Aviation

T1. City-pair results. Full-year for Kuala Lumpur +6%, Sydney +5%. **T2.** Country-pair results. Full-year for Australia +4%, UK +5%, US +7%. **T3.** Airlines traffic. First 2013 data for FSAs (full-service-airlines) systemwide Air China, Air New Zealand, Cathay (with Dragonair), China Eastern, China Southern, Eva, Japan, Jet, Malaysia, Qantas, Silk, Singapore, Thai. Full-year 2012 for All Nippon (seats sold +13%), Asiana, China, Garuda, Korean (+9%), Philippines, Royal Brunei, Vietnam. First 2013 data for FSA international routes, those airlines above plus Jetstar Intl, Virgin Australia. For NFAs (no-frills-airlines) and ex/part-NFAs, first 2013 data for Jetstar Australia, Jetstar Asia. Full-year 2012 for the Air Asia group, Air Asia X, Cebu. **T5.** Airline results by region. First 2013 data for airline members of AAPA. Full-year 2012 seat sales for airline members in the US of BTS, +3%, in Europe of AEA, +4%. **T6.** Airport passenger traffic. YTD total +10% (same for international). Most data supplied to us by Airports Council International.

Inbound. T8. Visitor arrivals. Updates, thru December, for most. Report due in next issue; meanwhile, of note: China (foreigners +2%), Hawaii +9%, Hong Kong -1%, India +5%, Japan +35%, Malaysia +1%, Singapore (still no updated data!), Thailand +16%. **T9.** Running 12-month totals through full-year 2012 for China, Hong Kong, Singapore, Thailand.

Outbound. T10. Running 12-month totals through full-year 2012 for China (our estimates), Japan, Korea, Taiwan. **T11.** Outbound travel. Full-year 2012 for Australia +10%, China (our estimates) +17%, Hong Kong +0%, Japan +2%.

Hotels. T18. First 2013 data.

Others. T12. Travel stock indices and prices; our Index for Asia Pacific 95, Europe 80, US (added for first time) 112, so World 108. **T15.** Internet bookings showing some mobile phone activity. **T16.** Economic indicators in Asia Pacific: forecast now shows 2013 and 2014. **T17.** Economic indicators for market producers: essentially flat GDP for all except Australia, US.

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MARKET DATA

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Special

Air passengers to-and-from Germany

If Germany is still considered a good source market, results are not looking so good for Asia Pacific. In 2012 the region fell 3% compared with +3% worldwide.

The longer-term trend is not so worrying - up an average 4% for both the region and worldwide since 2000. But the trend is downwards; growth over 2010 was 1% for the region, but 5% worldwide.

The long love affair (often literally) with Thailand appears to be cooling. Just ahead (1%) since 2000, but down 18% in 2012. And two big markets are weakening - China down 8% in 2012 although up 10% since 2000, and India -10% and +7%.

The other million-plus country-pair is Japan. Although the market probably assumes this is weak, it has shown constant growth - +14% in 2012, +9% over 2010, and +2% over 2000. Singapore is another good performer - +14% +7% +3%.

Air passengers between Germany and Asia Pacific, 2012

	No, x1000	Growth, %	AAGR,% over 2010	over 2000
Australia	91	-13.6	-5.5	0.7
China	1836	-8.4	6.0	10.3
Hong Kong	618	0.3	-0.3	1.5
India	1248	-10.0	-6.7	6.6
Japan	1356	14.3	9.1	2.3
Korea	655	4.8	5.9	5.7
Malaysia	135	-7.8	-2.3	-1.1
Singapore	911	13.5	6.6	3.1
Taiwan	120	-2.7	4.5	9.3
Thailand	922	-17.9	-9.9	0.5
Vietnam	221	1.8	8.9	NA
Asia Pacific*	8114	-2.7	1.4	4.2
Worldwide	155057	2.6	4.5	4.3

Notes: AAGR = annual average growth rate. *Those listed here. Source: Statistisches Bundesamt.

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

From:	Kuala Lumpur				Sydney				Tokyo*					
	Dec	+/-,%	YTD	+/-,%	Dec	+/-,%	YTD	+/-,%	Nov	+/-,%	YTD	+/-,%		
To:	12		12		To:	12		12		To:	12		12	
Bangkok	100	-17.9	1454	-1.1	Auckland	142	3.9	1366	-2.5	China	1801	-7.6	22920	7.6
Chennai	43	-3.3	479	8.1	Bangkok	51	7.8	571	4.0	Hong Kong	686	3.0	7643	26.6
Hong Kong	133	8.1	1309	0.5	Beijing	18	38.1	144	10.6	Korea	1142	-4.7	13063	6.1
Jakarta	181	16.8	1843	18.8	Denpasar	30	11.6	342	17.6	Taiwan	612	-3.6	7477	13.3
London	51	4.1	526	-10.6	Hong Kong	89	-1.0	943	0.4	Asia-other	2647	11.0	27518	4.2
Los Angeles	4	53.3	39	27.1	Kuala Lumpur	54	71.7	492	35.8	Guam	546	0.6	6875	4.8
Shanghai	39	22.0	381	0.8	London	33	-11.1	354	-20.4	Pacific	2610	10.6	29405	4.9
Singapore	313	12.2	3110	5.6	Los Angeles	78	-0.6	879	-6.2	Oceania	408	17.6	4399	12.4
Sydney	55	69.2	507	32.8	Singapore	124	16.1	1271	12.4	Europe	1405	3.7	15982	4.3
Tokyo	32	9.4	318	8.8	Tokyo	32	11.1	355	16.9					
TOTAL	2700	12.0	27612	5.8	TOTAL	1193	7.5	12367	5.4	TOTAL	11438	0.0	135003	6.4

Notes: See Master Notes, this page. Routes are selected; may not be largest. *Flights from Tokyo Narita (and actual numbers, not 1000s); double for approximate city-pair total. Source: Malaysia Airports Holdings, Department of Transport and Communications (Australia), Mile Post Japan.

2 Air passengers to and from Asia Pacific, x1000

From	Australia			France*			Germany			UK			US		
	Dec 12	YTD	+/-,†	Nov 12	YTD	+/-,†	Nov 12	YTD	+/-,†	Dec 12	YTD	+/-,†	Dec 12	YTD	+/-,†
To	+/-,%	12	%	+/-,%	12	%	+/-,%	12	%	+/-,%	12	%	+/-,%	12	%
Australia	na	na	na	na	na	na	-3.5	83	-15.1	-27.2	792	-28.1	7.8	2594	13.8
China	16.6	1433	18.0	18.4	1277	14.1	-4.7	1721	-8.5	32.5	720	8.6	14.8	3807	19.1
Hong Kong	-1.5	2110	1.5	1.8	571	-7.6	-4.7	573	0.5	-7.2	1394	-1.3	-7.9	2595	7.2
India	na	na	na	-14.4	538	-3.6	-4.8	1149	-10.0	3.0	2402	-4.6	-9.9	763	-23.3
Indonesia	-0.6	2090	3.5	na	na	na	na	na	na	na	na	na	na	na	na
Japan	19.4	830	12.7	13.0	1049	14.0	2.0	1243	15.4	4.4	720	10.3	11.5	12170	17.7
Korea	-2.6	481	2.6	3.6	443	5.8	3.2	615	5.6	29.1	377	21.0	9.2	4788	11.7
Malaysia	11.4	1960	2.0	-13.0	183	-21.3	4.8	123	-9.9	3.9	525	-5.7	na	na	na
New Zealand	2.7	5704	1.1	na	na	na	na	na	na	-4.4	211	-18.2	-7.5	688	-3.8
Philippines	21.1	268	5.2	na	na	na	na	na	na	na	na	na	1.9	814	2.4
Singapore	10.7	4601	8.1	5.1	434	3.0	-2.7	846	15.6	19.1	1269	9.3	-9.4	90	-30.6
Taiwan	-3.0	187	-6.0	-1.2	92	6.4	-0.3	112	-3.7	-29.5	98	-38.5	-1.4	1671	-6.6
Thailand	8.4	1475	3.2	34.6	381	-4.8	-17.9	848	-17.7	5.5	637	10.0	na	na	na
TOTAL	7.1	29324	4.3	0.3	71016	1.5	-0.3	145076	2.8	1.7	182926	1.0	4.6	177555	6.8

Notes: *Paris airports only; total is Sep and Jan-Sep. †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 - 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\$0.96, Y6.23, HK\$7.75, IRp54.8, ¥82.3, W1082, MR3.04, NZ\$1.21, S\$1.22, NT\$29.1, Bt30.7.

AL = Airlines, ASK = available seat kilometre, AW = Airways, BI = Royal Brunei AL, BR = Eva AW, CI = China AL, CN = China, 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 = 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 selected Asia Pacific airlines, 2012/13

		Mth		YTD					
		Mth	SS	RPK	SS	+/-	ASK	+/-	RPK
Regular airlines		+/-,%	+/-,%	1000	%	mn	%	mn	%
-Systemwide									
Air China	Jan	-2.7	-1.5	49312	1.3	118903	4.3	95940	3.0
Air New Zealand	Jan	3.1	2.2	13160	0.8	33069	2.7	27457	3.1
All Nippon AW	Dec	1.8	14.0	6325	13.0	37081	10.1	28153	16.4
Asiana	Dec	3.3	5.2	10712	4.3	40007	6.7	29838	4.6
Cathay Pacific AW*	Jan	-7.3	-10.2	28961	5.0	129595	2.6	103837	2.3
China AL	Dec	6.4	6.3	12107	6.0	42511	4.3	32864	3.4
China Eastern AL	Jan	-2.4	-1.9	73037	6.3	136484	6.9	108893	8.1
China Southern AL	Jan	-5.1	-1.1	86528	7.3	169368	12.1	135307	10.6
Eva Air	Jan	-2.6	-3.1	7525	12.9	32770	6.4	25988	8.1
Garuda	Dec	4.2	22.4	3586	11.1	17938	3.4	13045	5.9
Japan AL	Jan	-5.6	1.9	24215	-1.5	66962	-0.9	47881	6.7
Jet AW	Jan	-7.5	-10.0	17414	7.4	38559	3.3	30613	5.2
Korean Air	Dec	2.1	3.9	16525	8.6	83343	5.3	65168	6.5
Malaysia AL	Jan	6.1	4.5	13389	0.6	49755	-6.1	37170	-6.4
Philippine AL	Dec	-7.2	-7.2	3978	1.9	21986	1.0	15599	-1.4
Qantas AW*	Jan	2.9	-2.4	47718	5.6	140592	2.9	112107	3.0
Royal Brunei AL	Dec	5.9	15.4	1033	-21.0	5246	-24.3	3559	-26.4
Silk Air	Jan	-3.0	2.5	3280	11.4	6850	20.8	5127	19.2
Singapore AL	Jan	2.5	3.4	18054	6.8	117586	4.7	92944	7.6
Thai AW	Jan	8.0	6.6	20615	12.1	79231	0.9	60679	9.8
Vietnam AL	Dec	12	12	5269	11	20532	5	16294	15
-International									
Air China	Jan	-6.8	-1.2	6759	2.7	45323	4.0	36196	4.6
China Eastern AL	Jan	-5.5	-0.6	7909	9.4	36351	5.2	28989	11.3
China Southern AL	Jan	-0.7	8.3	6911	15.5	34269	23.0	25600	24.4
Japan AL	Jan	4.0	7.2	7492	11.8	44365	3.0	33673	13.5
Jet AW	Jan	-7.5	-10.9	5620	9.5	25179	2.3	20819	5.6
Jetstar	Jan	7.6	8.9	4997	15.3	18838	15.7	14242	16.4
Malaysia AL	Jan	8.7	5.2	8330	-4.6	44141	-7.3	33078	-8.5
Qantas AW*	Jan	-5.9	-7.4	5891	-1.6	60245	-3.9	49707	-2.8
Thai AW	Jun	13.6	11.2	7027	8.0	36426	-0.3	27953	7.1
Virgin Aust	Jan	-0.7	1.3	2599	5.3	15541	0.0	12076	-0.9

Low-fare-airlines

	Period	SS,		Growth, Period		SS,x		Growth, Period	
		x1000	%	1000	%	1000	%	1000	%
Air Asia-ID	Jan-Dec	5834	16.4	Q4	1600	27.5	Q3	1513	7.9
Air Asia-MY	Jan-Dec	19673	9.4	Q4	5200	7.1	Q3	4749	9.4
Air Asia-TH	Jan-Dec	8329	21.3	Q4	2300	26.3	Q3	1962	21.8
Air Asia-all	Jan-Dec	33835	13.3	Q4	9100	14.7	Q3	8224	11.8
Air Asia X	Jan-Dec	2580	2.4	Q4	670	4.7	Q3	640	3.2
Cebu Pacific	Jan-Dec	14094	18.1	Dec	1232	10.8	Nov	1150	12.4
Jetstar Asia	Jan	302	-6.8	Jan-Dec	3534	23.4	Dec	338	9.0
Jetstar,Aust	Jan	1119	11.6	Jan-Dec	11256	9.8	Dec	1070	15.6
Tiger Asia	Q4	1192	22.9	Dec	436	18.8	Nov	389	30
Tiger,Aust	Q4	714	123.1	Dec	257	125.4	Nov	239	132
Virgin,Aust	Jan	1315	-5.9	Jan-Dec	17014	4.6	Dec	1360	-4.1

Notes: See Master Notes, page 6. When Jan shown, YTD is J-D. pts = points. Air Asia issues varying data; shown are our estimates. 'Periods' are standard (ie Q1 is Jan-Mar), not airline's. *Includes in previous periods, Dragonair with Cathay. 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, Association of Asia Pacific Airlines.

5 Operating results of airline groups in Asia Pacific, US, and Europe

Item	Asia Pacific,AAPA				US,BTS		Europe,AEA	
	Jan 13	+/- %	J-D 12	+/- %	Jan-Dec 12	+/- %	Jan-Dec 12	+/- %
SS,mn	17.6	0.9	206.9	8.9	97.7	2.6	278.3	3.5
ASKs,bn	86.8	1.0	993.3	4.6	520.0	0.4	1024.2	2.1
RPKs,bn	67.6	0.5	774.1	6.8	418.5	1.5	817.1	4.4
Pax LF,%	77.9	-0.4	77.9	2.0	80.5	0.9	79.8	1.8

Notes: See Master Notes, page 6. *Points. Source: Association of European Airlines, Bureau of Transportation Statistics, Association Of Asia Pacific Airlines.

4 Airline financial results, US\$*

Item	CA	NH	CX	JL	QF	SQ
	Y-Dec 12	Y-Mar 12	Y-Dec 12	Y-Mar 12	Y-Jun 12	Y-Mar 12
Revenue,mn	16212	17151	12741	15060	16379	12080
Op Profit,mn	1320	1180	229	2563	276	232
Revenue per						
ASK,USc*	10.0	18.8	9.83	19.2	11.7	10.2
RPK,USc*	12.5	28.6	12.27	28.6	14.7	13.3
Pax,US\$*	329	382	440	421	351	609
Profit per						
ASK,USc*	0.82	1.29	0.18	3.26	0.20	0.20
RPK,USc*	1.02	1.97	0.22	4.87	0.25	0.26
Pax,US\$*	26.8	26.3	7.9	71.6	5.9	11.7

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.

6 Asia Pacific international airport passengers, 2012

City	Month*	Number	Growth %	Jan thru	Growth
				month shown	%
Auckland	Nov†	593,048	1.9	6,483,505	2.1
Bali	Mar†	280,718	-20.4	961,887	-13.1
Bangkok	Dec	3,136,984	6.4	31,417,712	9.0
	Nov†	3,737,275	70.6	36,513,373	13.8
Beijing	Dec	1,117,004	17.1	14,154,319	20.4
	Nov†	1,138,525	3.4	14,272,181	6.5
Brisbane	Nov†	361,599	-0.9	4,020,631	0.5
Chennai	Oct†	348,928	3.2	3,656,951	3.6
Colombo	Nov†	554,095	17.0	6,441,050	15.9
Delhi	Dec	954,354	15.3	10,024,769	15.0
	Nov†	958,631	-0.4	9,545,583	5.2
Guangzhou	Nov†	672,969	23.1	7,014,729	23.2
Hong Kong	Dec	4,772,000	7.5	53,878,000	5.8
	Dec†	4,954,000	3.8	56,468,000	4.8
Jakarta	Nov†	998,982	14.1	10,790,479	11.9
Kuala Lumpur	Nov†	2,427,227	15.2	24,912,027	6.0
Macau	Nov†	379,065	15.6	4,077,125	10.6
Manila	Nov†	1,124,663	5.6	12,885,436	9.5
Melbourne	Nov†	571,059	6.2	6,107,682	5.5
Mumbai	Dec	829,322	5.8	8,559,556	12.2
	Nov†	858,780	7.8	8,797,896	4.9
Nadi	Sep†	151,687	4.7	1,190,505	-0.9
Noumea	Nov†	40,327	-1.1	437,343	-1.1
Osaka KIX	Nov†	883,586	3.2	10,326,470	14.4
Papeete	Nov†	38,538	1.4	475,942	1.2
Perth	Nov†	293,318	8.5	3,220,941	6.8
Phuket	Nov†	463,541	21.3	4,499,064	15.8
Seoul	Nov†	3,403,461	9.0	38,855,625	11.1
Shanghai	Dec	1,179,867	23.1	15,067,051	29.9
	Nov†	1,315,107	1.7	16,013,785	7.2
Singapore	Dec	4,525,348	11.4	46,543,845	10.7
	Dec†	4,916,197	8.6	51,181,804	10.0
Sydney	Dec	1,102,422	3.8	11,409,131	7.3
	Nov†	1,026,993	7.9	11,047,887	5.0
Taipei	Nov†	2,156,566	10.5	23,694,526	12.1
Tokyo Haneda	Nov†	633,984	2.2	7,267,855	13.2
Tokyo Narita	Dec	2,334,162	-9.7	32,216,298	4.3
	Nov†	2,282,125	4.6	27,216,286	13.3
ASIA PACIFIC-A	Dec	101,052,781	7.8	1,171,232,331	11.5
	Nov†	105,515,803	6.8	1,188,265,087	10.1
Intl	Dec	38,388,110	7.1	429,453,267	14.2
	Nov†	39,564,047	11.2	443,871,889	10.2

Notes: See Master Notes, page 6. *2011 unless stated otherwise. †2010.

‡2012. A = Domestic and international; data as supplied. Source: civil aviation departments, airports, Airports Council International.

MARKET DATA

7 Standardisation of visitor arrival measurements

Destination	Ratio*	Destination	Ratio*
Australia	99	Malaysia†	24
China	14	New Zealand	99
Hong Kong	33	Philippines	98
India	65	Singapore	70
Indonesia	61	Taiwan	98
Japan	98	Thailand	83
Korea	84	Vietnam	60

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

8 Visitor arrivals in Asia Pacific destinations

International arrivals

Destination	Months*	Arrivals	Growth	Stay	PVPD
	Jan thru:		%	days‡	US\$-A
Australia	Dec	5,885,429	5.4	30.0	150.60
	Dec‡	6,139,330	4.5	30.0	150.60
Bhutan	Dec‡	43,939	17.2	8.0	200.00
Cambodia	Dec‡	3,584,307	24.4	6.5	95.00
China	Dec‡	132,405,200	-2.2	7.0	100E
foreigners	Dec	26,126,900	19.1	7.0	100E
	Dec‡	27,185,200	1.6	7.0	100E
Cook Islands	Dec‡	121,634	7.5	10.5	115.84
Fiji	Dec‡	660,590	-2.1	8.7	124.58
Guam	Dec‡	1,283,296	10.7	3.1	302.93
Hawaii	Dec	6,986,602	8.8	9.19	179.88
	Dec‡	7,837,194	9.2	9.19	179.88
Hong Kong	Dec	12,565,555	14.6	3.28	200.10
	Dec‡	12,832,887	-1.1	3.28	200.10
India	Dec	5,666,434	8.8	16.0	92.68
	Dec‡	6,649,000	5.4	16.0	92.68
Indonesia	Dec‡	8,044,462	5.2	9.09	107.70
Japan	Dec	6,219,275	-27.8	6.5	160.42
	Dec‡	8,367,872	34.6	6.5	160.42
Korea	Dec	9,794,796	11.3	6.9	163
	Dec‡	11,135,628	13.7	6.9	163
Laos	Dec‡	3,330,089	22.3	4.5	23.03
Macau	Dec‡	4,098,741	-3.7	1.36	181.80
Malaysia	Dec	24,714,324	0.6	6.2	105.67
	Dec‡	25,032,708	1.3	6.2	105.67
Maldives	Dec‡	958,027	2.9	8.5	56.00
Marianas	Dec‡	401,022	17.6	3.52	100.00E
Mongolia	Dec	627,007	12.5	NA	NA
Myanmar	Dec‡	593,381	51.7	7.0	70.00
Nepal	Dec‡	598,204	9.8	9.1	14.09
New Caledonia	Dec‡	112,204	0.3	19.1	87.09
New Zealand	Dec‡	2,564,618	-1.4	20.22	115.33
Pakistan	Dec‡	906,800	6.1	25.0	13.20
Palau	Dec‡	118,754	8.9	E4	NA
PNG	Dec‡	164,082	0.6	17.3	28.24
Philippines	Dec‡	4,272,811	9.1	11.94	82.96
Singapore	Dec	13,169,729	13.2	4.6	161.07
	Jun‡	7,082,161	11.4	4.6	161.07
Sri Lanka	Dec‡	1,005,605	17.5	10.0	79.10
Tahiti	Dec‡	168,978	3.8	13.21	150.88
Taiwan	Dec‡	7,311,470	20.1	6.52	180.52
Thailand	Dec	17,292,376	20.7	9.19	119.38
	Dec‡	22,303,065	16.0	9.19	119.38

International arrivals

Destination	Months*	Arrivals	Growth	Stay	PVPD
	Jan thru:		%	days‡	US\$-A
Tonga	Jul	24,252	2.0	5.0	56.87
Vanuatu	Dec‡	108,158	15.1	9.7	146.17
Vietnam	Dec‡	6,585,853	10.0	9.6	64.04
Asia Pacific	latest-E	304,089,802	5.3	NA	NA

International arrivals

City/region	Period	Number	Growth,%	Source	Comment
Bali	Jan-Sep 12	2,126,281	3.6	PATA	direct arrivals
Sabah	Jan-Dec 12	941,765	11.3	PATA	direct arrivals
Sarawak	Jan-Dec 12	2,634,715	12.4	PATA	direct arrivals

Domestic arrivals

Destination	Period	Number,m	Growth,%	Source	Comment
Australia	2007	73.8	0.3	PATA	spend A\$55b
China	2007	1600.0	14.8	PATA	spend Y623b '06
India	2009	650.0	15.5	PATA	(none)
Indonesia	2007	219.8	1.5	PATA	spend \$87b
New Zealand	2006	44.9	1.9	PATA	spend NZ\$7b
Taiwan	2006	107.5	16.1	PATA	spend \$6b
Thailand	2007	83.2	2.1	PATA	spend B380b

Notes: See Master Notes, page 6. *2011 unless stated otherwise. †2010. ‡2012. E = Indicative selected totals only; approx Jan-Sep/Oct data; % growth has more validity than total; criteria varies. Source: national tourist offices, PATA.

Notes: See Master Notes, page 6. 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.

9 Running 12-month total visitor arrivals, x1000

12 mths through	CN	+/- %	HK	+/- %	SG	+/- %	TH	+/- %
Dec 90	1,747	19.6	5,933	10.7	5,313	10.0	5,299	10.2
Dec 00	10,160	20.5	8,824	19.4	7,686	10.5	9,579	10.7
Dec 10	26,127	19.1	12,566	14.6	11,637	19.9	15,797	12.1
Dec 12	27,185	1.6	12,833	-1.6	14,673	11.6	22,134	15.9

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

10 Running 12-month total citizen departures, x1000

12 mths through	CN†	+/- %	JP	+/- %	KR	+/- %	TW	+/- %
Dec 90	620	24.0	10,997	13.8	1,561	28.7	2,942	39.6
Dec 00	10,473	13.4	17,812	8.9	5,508	27.0	7,329	11.7
Dec 10	57,387	20.4	16,637	7.7	12,488	31.5	9,415	15.6
Dec 12	82,567	17.5	18,491	8.8	13,666	7.7	10,184	6.3

Notes: See Master Notes, page 6. †Estimates by Travel Business Analyst for 2010-12 data. Source: NTOs, Travel Business Analyst.

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11 Overseas travel by Asia Pacific residents

Market	Jan* thru:	Departures	Growth,%	Source	Spend,US\$m*
Australia	Dec	7,795,100	9.6	PATA	26,600
	Dec†	7,795,100	9.6	PATA	26,600
China	Dec	70,250,000	22.4	PATA	72,600
	Dec‡	82,539,117	17.4	TBA	72,600
Hong Kong	Dec	84,442,451	3.0	PATA	19,100
	Dec‡	84,815,917	0.4	PATA	19,100
India	Dec	14,210,000	9.4	PATA	13,700
Indonesia	Dec	6,594,231	5.8	PATA	6,300
Japan-B	Dec	16,993,071	2.1	DMO	27,200
	Dec‡	16,994,200	2.1	DMO	27,200
Korea-B	Dec	12,693,733	1.6	DMO	19,500
	Nov‡	12,567,006	7.7	DMO	19,500
Macau	Sep‡	932,190	41.4	PATA	NA
Malaysia	Dec 03	32,200,550	7.8	PATA	10,800
New Zealand	Nov‡	1,952,367	4.2	PATA	3,400
Philippines	Dec 08	3,354,857	9.4	PATA	3,600
Singapore-D	Sep‡	5,622,575	2.8	PATA	21,100
Taiwan-B	Dec	8,893,130	2.4	DMO	10,100
	Nov‡	9,486,320	6.3	DMO	10,100
Thailand	Dec	5,397,248	1.1	PATA	5,700
Asia Pacific	latest-E	122,539,126	4.0	various	NA

Notes: See Master Notes, page 6. *2011 unless stated otherwise. †2010. ‡2012. A = Excludes travel to China and Macau. B = Citizens. D = Excludes departures by land. E = Indicative selected totals only; approx Jan-Sep/Oct data; % growth has more validity than total; criteria varies. 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.

12 Stock market last-day airline and hotel closing prices

Airline/ Hotel	Price, local currency			Indices‡		Region	Feb 2013
	Feb 2013	Growth†,%	stock market	TBA 100 index* AL/HO All	Feb 2013		
Air Asia	2.83	1.6	1.9	173	192	Asia Pacific	95
Air China	6.35	-4.4	-4.2	212	234		
Air NZ	1.39	9.3	2.1	1	1		
All Nppn AW	184	1.9	7.3	47	52		
Cathay P AW	13.7	-9.2	-4.2	95	105	Europe	80
China AL	12.3	-4.5	0.5	63	69		
Malysn AL	0.72	4.7	1.9	20	22		
Qantas AW	1.65	7.1	-0.3	47	52		
Singpre AL	10.9	-1.8	0.1	63	70	World	112
Thai AW	24.6	6.3	-0.3	77	85		
Mndrn-Orntl	1.61	-2.6	0.1	na	na		
Shangri-La	16.6	-9.7	-4.2	196	217		

Notes: See Master Notes, page 6. *100 base on Dec 00 prices except Dec 04 for AK and CA. †Latest month over month earlier. ‡Base is last trading day in December 2006; *World* comprises Asia Pacific (10 stocks), Europe(12), US (8). Source: various.

13 IATA travel agencies in Asia Pacific, 2011

Country	Locations	Growth %	Net Sales US\$m*	Growth %	Per agency US\$m*	Growth %
Australia†	1,852	40.3	12,906	28.6	6.97	-8.3
China	3,995	222.4	23,231	13.0	5.82	-65.0
Hong Kong	306	-4.1	3,542	11.1	11.57	15.8
India	3,123	3.4	7,144	5.8	2.29	2.3
Indonesia	660	28.2	2,110	27.5	3.20	-0.5
Japan	769	50.8	19,457	11.9	25.30	-25.8
Korea	677	-4.4	6,272	12.7	9.26	17.9
Malaysia	679	1.8	1,648	12.9	2.43	10.9
New Zealand†	512	-5.7	1,799	14.8	3.51	21.7
Philippines	216	-0.9	1,003	7.2	4.64	8.2
Singapore	278	3.3	3,260	13.3	11.73	9.6
Taiwan	365	0.3	2,943	13.8	8.06	13.5
Thailand†	382	0.0	1,142	-13.4	2.99	-13.4
Asia Pacific	10,981	6.7	58,896	14.7	5.36	7.6
World	49,087	-4.4	232,409	11.4	4.73	16.4

Special: Following restatements of some data by IATA (which followed queries from TBA), some growths appear mis-stated. We await corrections for Australia and China; our experience is that this could be months. Notes: IATA = International Air Transport Association. *Quoted in US\$. †Includes, in order as shown: Kiribati, Fiji, Cambodia. Source: IATA Billing & Settlement Plan, ‡Airlines Reporting Corporation.

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

Agency	Oct 12	+/-†,%	Nov 12	+/-†,%	YTD 12	+/-†,%
JTB	542	-2.8	498	1.8	5745	14.2
HIS	322	-4.2	308	1.0	4026	9.0
Hankyu	254	-0.6	245	-5.9	3008	17.2
NTA	168	-2.6	163	9.4	1578	1.2
KNT	142	-12.3	132	-10.7	1575	2.5
Jalpak	76	2.0	63	2.6	794	17.3
NEC	47	8.8	43	-31.6	646	4.5
Club Tourism	76	-9.6	43	-23.3	628	0.6
Travel Plaza	44	0.3	43	4.2	510	22.4
Nissin	47	-2.4	44	-3.8	498	8.3
Top 59	2468	-3.2	2287	-2.5	27174	9.5

Notes: Certain months are calculations by TBA. JTB = (originally Japan Travel Bureau; all 14 companies), HIS = (originally Hideo's International Services), KNT = Kinki Nippon Tourist, NEC = Nippon Express Company, NTA = Nippon Travel Agency. *Converted at US\$1 to ¥80. †Over same period, year earlier. Source: Adrian Mangiboyat (Japan), Travel Business Analyst.

15 Internet bookings/sales of selected companies/markets

Company	Item	Period	Number	Previous	Source
Mobile phone activity	Share,%				
Get boarding pass	CN UK US	2013	50 45 55	NA	IATA
Check-in	CN UK US	2013	50 45 55	NA	IATA
Check baggage delivery	CN UK US	2013	51 38 51	NA	IATA
Pay for items purchased	CN UK US	2013	53 44 50	NA	IATA
Research flights	CN UK US	2013	44 43 46	NA	IATA
Book flights	CN UK US	2013	47 36 46	NA	IATA
Mobile bookings	Last minute	current	70% sh	NA	PCW

Notes: See Master Notes, page 6, and Net Value. All \$s are US\$. Source: various.

16 Economic indicators of major countries in Asia Pacific

Country	Forecast GDP growth*†,%		Actual GDP growth*,%	GDP/PPP per person,US\$	Inflation per period	Growth*,%
	2013	2014				
Australia	2.6	3.1	Q4: 3.1	44,390	Q4:	2.2
China	8.4	7.8	Q4: 7.9	10,410	Feb:	2.1
Hong Kong	3.1	4.2	Q4: 2.5	52,830	Dec:	3.8
India	6.5	7.2	Q4: 4.5	4,270	Feb:	10.9
Indonesia	6.3	6.1	Q4: 6.1	5,240	Dec:	4.3
Japan	1.3	1.3	Q4: 0.5	37,430	Feb:	-0.6
Korea	2.9	3.8	Q4: 1.6	33,310	Dec:	1.6
Malaysia	4.6	5.3	Q4: 6.4	17,980	Feb:	1.5
Singapore	2.3	3.7	Q4: 1.1	49,350	Dec:	4.3
Taiwan	3.2	4.0	Q4: 3.4	45,220	Feb:	1.4
Thailand	4.4	4.6	Q4: 19.5	10,010	Dec:	2.7
Vietnam	5.2	5.9	'12: 5.0	3,850	Dec:	7.1

Notes: See Master Notes, page 6. GDP = gross domestic product, PPP = purchasing power parity. *Over period year earlier. †Official and other estimates. Source: Central Intelligence Agency, The Economist.

17 Economic indicators of major visitor-producing countries for Asia, 2012/3

Country	GNP/GDP	Retail sales	Consumer prices	Wages/earnings
Australia	3.1 Q3	2.6 Q4	2.2 Q4	3.7 Q2
Germany	0.4 Q4	-4.7 Dec	1.5 Feb	2.8 Nov
Japan	0.5 Q4	na	-0.3 Jan	-2.3 Dec
UK	0.0 Q4	0.3 Dec	2.7 Dec	1.4 Nov
US	1.6 Q4	4.2 Dec	2.0 Feb	1.8 Dec
Euroland	-0.9 Q4	-3.4 Dec	1.8 Feb	2.5 Q3

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

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18 Hotels measures in Asia Pacific, January

Location	Occupancy, %				Average room rate, local				Revpar, US\$*				
	2013	2012	2012	2011	2012	2013	2012	2012	2011	2013	2012	2012	2011
	Mth	J-D	Mth	J-D	J-D	Mth	J-D	Mth	J-D	Mth	J-D	Mth	J-D
Bali-all	62.3	71.9	80.5	75.7	1631538	188.42	176.27	176.72	155.28	117.44	126.71	142.18	117.57
U-4	58.9	66.2	84.3	79.6	836414	78.45	90.36	125.30	126.01	46.17	59.82	105.57	100.37
5-star	64.4	74.4	78.0	74.4	2007105	248.78	216.84	235.23	196.65	160.25	161.39	183.48	146.38
Bangkok-all	77.7	69.3	65.6	61.2	3651	128.45	119.74	117.38	107.73	99.80	82.96	77.05	65.91
L-4	81.0	69.3	63.2	60.4	1955	62.24	64.11	65.53	66.12	50.40	44.42	41.44	39.92
U-4	80.6	70.0	66.9	61.2	2981	100.35	97.77	92.14	88.28	80.84	68.41	61.61	54.03
Beijing-all	66.3	69.7	48.6	70.4	669	94.88	106.72	97.45	96.85	62.89	74.42	47.33	68.14
L-4	71.0	71.8	49.2	73.5	455	73.31	72.57	70.87	72.59	52.02	52.11	34.86	53.37
U-4	64.4	71.6	50.6	68.7	732	106.86	116.90	102.80	111.21	68.78	83.73	52.05	76.37
Colombo	63.4	73.4	70.7	64.5	17158	150.90	142.10	133.73	129.08	95.70	104.34	94.57	83.21
Delhi	66.8	67.5	72.8	67.6	10016	170.70	194.80	222.76	209.20	114.07	131.40	162.13	141.48
Fiji	59.6	68.1	70.0	72.1	255	161.16	146.42	139.82	120.70	96.05	99.66	97.93	87.01
Goa	NA	86.0	89.1	53.1	8226	NA	159.98	240.17	147.43	NA	137.61	214.07	78.22
Guangzhou	57.7	61.9	41.5	62.1	611	83.78	97.58	79.21	96.17	48.31	60.35	32.90	59.75
Hanoi	69.4	62.2	51.9	57.9	2045256	84.92	98.11	125.56	112.41	58.96	61.00	65.14	65.08
Ho Chi Minh City	76.1	68.8	60.6	69.8	2516165	106.44	120.70	119.48	120.61	80.98	82.99	72.36	84.16
Hong Kong-all	81.6	83.2	79.4	85.4	1867	226.44	240.83	238.59	217.37	184.68	200.32	189.53	185.65
3-star	89.7	91.6	87.4	90.4	959	113.54	123.63	117.48	104.88	101.88	113.21	102.66	94.76
L-4	83.4	80.7	82.7	88.4	1563	195.33	201.55	202.49	186.60	162.82	162.67	167.43	165.00
Jakarta-all	56.7	68.9	59.2	70.1	1034192	117.13	111.73	103.64	86.06	66.46	76.93	61.36	60.36
U-4	58.7	68.7	57.6	68.0	764386	91.21	82.58	78.87	67.32	53.55	56.73	45.46	45.75
Kuala Lumpur-all	63.8	71.5	63.7	71.5	371	126.79	123.04	116.38	110.98	80.92	87.99	74.17	79.40
L-4	58.0	74.8	67.5	73.3	232	80.43	77.00	69.55	68.53	46.66	57.57	46.94	50.25
Macau-all	83.7	79.7	70.0	83.4	1456	179.05	185.87	218.21	183.22	149.86	148.16	152.75	152.87
casino hotels	81.5	77.3	66.6	82.0	1592	194.41	203.16	237.95	203.64	158.41	157.07	158.52	167.01
Maldives-all	69.9	68.9	81.8	69.2	8327	828.64	547.46	1025.46	581.04	578.97	377.33	838.82	401.93
U-4	71.4	70.8	82.8	73.5	5875	633.73	386.26	725.15	378.46	452.72	273.38	600.27	278.07
Manila-all	78.6	76.3	72.5	72.3	4485	111.14	106.86	101.42	106.77	87.39	81.59	73.51	77.18
L-4	82.0	78.4	79.0	76.1	3113	77.90	74.18	66.14	70.20	63.90	58.13	52.29	53.45
Melbourne-all	74.4	78.6	73.2	80.3	207	227.72	219.80	219.16	203.81	169.44	172.67	160.39	163.70
L-4	78.3	79.4	76.4	76.8	164	166.52	174.29	176.42	172.97	130.39	138.31	134.79	132.81
Mumbai	76.5	52.2	64.2	59.6	9534	127.18	185.42	205.72	176.86	97.33	96.86	132.10	105.38
Pattaya	87.1	78.5	84.4	76.1	3132	133.74	102.70	99.13	78.64	116.50	80.60	83.62	59.86
Penang	60.0	60.7	71.0	65.2	280	96.68	92.74	94.96	70.98	57.97	56.31	67.41	46.29
Phuket-all	88.2	77.5	89.5	73.1	4520	269.67	148.23	240.80	127.00	237.76	114.94	215.51	92.81
L-4	92.1	82.6	91.7	75.6	3942	233.93	129.28	206.30	119.01	215.48	106.73	189.19	90.00
Seoul-all	73.8	78.2	64.4	83.0	256692	180.57	232.60	179.14	188.56	133.32	182.00	115.39	156.43
U-4	NA	73.9	63.7	83.3	216008	NA	195.74	156.12	166.08	NA	144.63	99.51	138.33
5-star	73.8	82.1	65.8	82.3	289142	180.57	262.01	223.73	234.92	133.32	215.12	147.14	193.30
Shanghai-all	51.2	59.3	38.3	58.7	618	86.99	98.61	90.69	112.02	44.50	58.50	34.75	65.81
L-4	46.9	56.2	37.7	57.6	452	69.13	72.09	65.33	71.55	32.45	40.49	24.60	41.21
U-4	59.0	64.1	41.3	61.9	734	102.13	117.08	110.99	137.47	60.28	75.02	45.80	85.08
5-star	NA	50.9	23.8	44.6	1092	NA	174.23	138.47	269.11	NA	88.62	33.01	119.90
Shenzhen	70.2	63.3	41.1	65.4	740	111.66	118.07	121.16	125.00	78.40	74.76	49.79	81.72
Singapore-all	85.9	86.4	83.8	85.6	278	220.94	225.11	201.66	210.14	189.73	194.43	169.08	179.92
L-4	84.7	85.5	81.7	87.4	206	158.70	166.32	165.15	168.23	134.39	142.17	134.89	146.99
U-4	86.1	86.8	84.3	85.9	278	214.78	224.84	211.08	219.02	184.85	195.06	178.00	188.03
Sydney-all	85.3	85.6	80.5	85.6	224	231.74	238.40	218.33	213.35	197.65	204.05	175.75	182.64
L-4	83.3	84.9	76.8	84.8	165	159.26	175.01	173.34	174.14	132.74	148.55	133.14	147.63
U-4	90.4	88.8	87.9	88.7	251	251.67	266.70	256.22	242.59	227.59	236.74	225.12	215.29
Taipei	62.2	73.6	65.2	71.4	4913	158.40	167.84	136.03	145.22	98.48	123.55	88.76	103.65
Tokyo-all	61.0	72.7	58.4	62.1	21755	280.63	268.21	280.11	269.77	171.28	194.98	163.62	167.40
L-4	68.0	80.7	65.0	77.1	19349	243.42	238.55	233.44	227.75	165.61	192.51	151.73	175.65
U-4	NA	69.0	55.3	58.0	23041	NA	284.06	305.92	284.92	NA	196.11	169.21	165.17
OTHERS													
Dubai	79.3	84.3	89.4	77.4	536	170.74	145.87	169.46	129.94	135.43	122.97	151.57	100.58
London	63.2	81.3	72.5	85.3	210	252.96	335.82	248.44	290.25	159.91	272.89	180.13	247.56
New York	73.8	73.8	66.7	66.7	197	196.59	196.59	188.05	188.05	145.17	145.17	125.44	125.44
Asia Pacific-total	71.3	71.3	65.7	71.5	na	152.58	155.60	157.14	147.86	111.34	113.17	106.88	107.13
US-total	51.0	51.0	49.4	49.4	106	105.96	105.96	100.74	100.74	54.02	54.02	49.78	49.78
Europe-total	57.1	72.0	58.4	74.8	na	225.06	241.71	218.13	253.70	129.66	175.61	129.32	190.78
World	59.8	64.7	57.8	65.2	na	161.20	167.76	158.67	167.43	98.34	114.27	95.33	115.90

Notes: See Master Notes, page 6. Asia Pacific total excludes Maldives. 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, Europe, Dubai - Travel Business Analyst Europe; US - Smith Travel Research.

ZERO

An occasional column/section/report on the travel business and the environment

Sustainable Swiss

Swissotel has produced its first sustainability report, misleadingly dated 2009-11 - even though it was released at the start of this year.

We find the report a mix of PR-emptiness and worthwhile measurement. The worthwhile part, the environmental section, represents only half of the report and is in the second half, risking the possibility that serious users will not get that far.

Notes:

- Management responsibility is cumbersome - around 13 senior executives starting with the company's president.

- Certain management regions have a 'sustainability ambassador', a term which to us indicates a superficial post, not active.

- Guest satisfaction, security, staff management, health, are included as indicators of the company's commitment to sustainability. Surely these have only a tenuous link to sustainability?

- Misleading inclusions. Such as the 'marathon' run up the 73 floors of the Swissotel Singapore. True the funds raised went to beneficial causes, but Swissotel inherited this event from a previous management company - Starwood's Westin. And, as above, is this a 'sustainable' event?

- The company seeks to buy more goods from local sup-

pliers (within 75km of hotel). Share has grown from 80% in 2009 to 85% in 2011 (latest available) but it does not explain why China and the Americas have fallen, nor how Europe managed a jump from 42% to 70%, nor why Asia Pacific (excluding China) has been at (a suspiciously-high?) 99% for the three years covered. Nor is the measure shown; is the percentage derived from one bottle of champagne compared with one potato, or their value (and what value)?

- Each hotel has to file an example of its sustainable work. Some examples are basic and may not warrant highlighting, such as tree planting, and giving used clothes to local charities - but may be valuable in that they increase awareness.

Swissotel environmental profile, 2011*

Item	Measure	No	Growth†,%
Water consumption	m3 mn	2.4	0.0
Water per guestnight	litre	720	-1.9
Gas	GWh	101	-2.8
Oil	GWh	1.26	-75
Heat supplied	GWh	28.5	0.5
Electricity consumption	GWh	176	1
Cooling supplied	GWh	0.95	2.2
Total energy consumption	GWh	308	-1.5
Energy per area	m2 kWh	246	-3.1
Energy per guestnight	kWh	94	-3.1
CO2 direct energy	tonne	20,301	-7.3
CO2 supplied energy	tonne	103,274	1.8
Total CO2 emissions	tonne	123,575	0.2
CO2 / guestnight	kg	37.8	-1.6

Notes: CO2 = carbon dioxide, GWh = gigawatt hours, kWh = kilowatt hours. *Latest available. †Over 2010. Source: company.

- A list of "achievements" is PR hype. It includes 'best business hotel' type of award - which are mainly ignored by all except the giver and the receiver. We presume Swissotel wants to list all its hotels - to encourage them?

- A 'sustainability roadmap' is a bit cumbersome. We did not read it all, as we suspect most do not, but it may be necessary in a bigger organisation to help participants

know the direction.

Conversely, we salute the precision of Swissotel's environmental measurements (all figures 2011 compared with 2009) in the second half of the report:

- Water consumption down from 813 litres to 720 per guestnight. All regions falling (China from 1247 to 922), except the Americas (407 547). Swissotel gives no target for the future.

- CO2 emissions. Decreased from 33.4kg to 37.8 per guestnight.

- Energy consumption. Decreased from 107.7kWh to 94.1 per guestnight.

- Type of fuel. Renewables increased from a 15% share to 20%, but coal use unchanged at 28%.

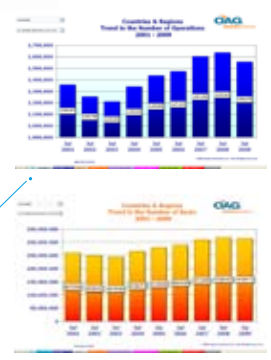
- Case Study, Singapore. In 2011, the Swissotel bought a food waste recycling machine,

converted waste oil to bio-diesel, installed waste recycling stations. Waste-related cost savings increased 43%, food waste reduction increased 11% (although we note that this be an arbitrary figure because it is not practically possible to measure), and recycled 34 tonnes of products.

- This year Swissotel is due to set targets on (among other things) energy, waste, water consumption. We believe this should have been

earlier, although it nevertheless sets a good example.

- Plans to be carbon neutral (but by offsetting) not due until 2015. Again, we think this is late, but accept that it takes time in a big company. We do add, however, that offsetting is not a solution - it simply moves the problem somewhere else, even if it may be better than doing nothing.



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