



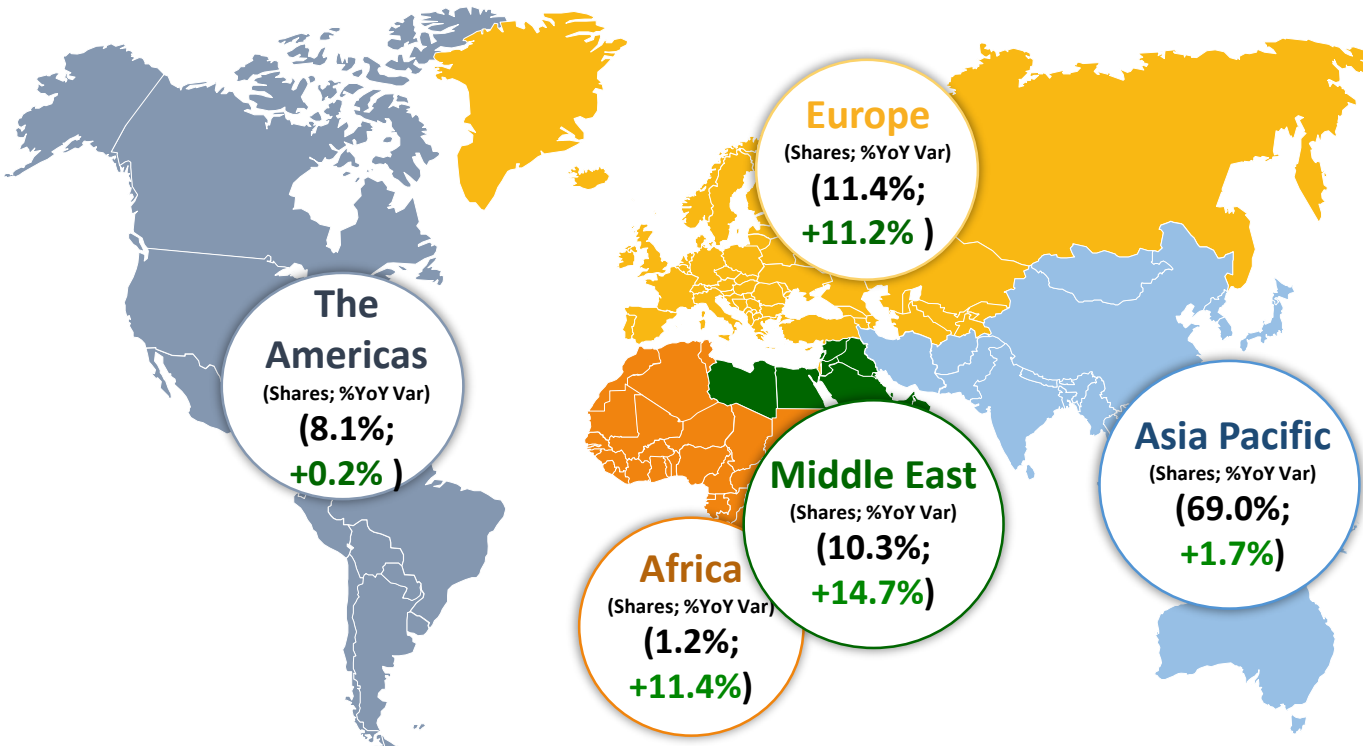
Asia Pacific Outbound Air Traveller Trends




**2017 Year to Date
& Forward looking
May to October 2017**

 May 2017

Asia Pacific outbound: Middle East welcomed a significant growth from Asia Pacific

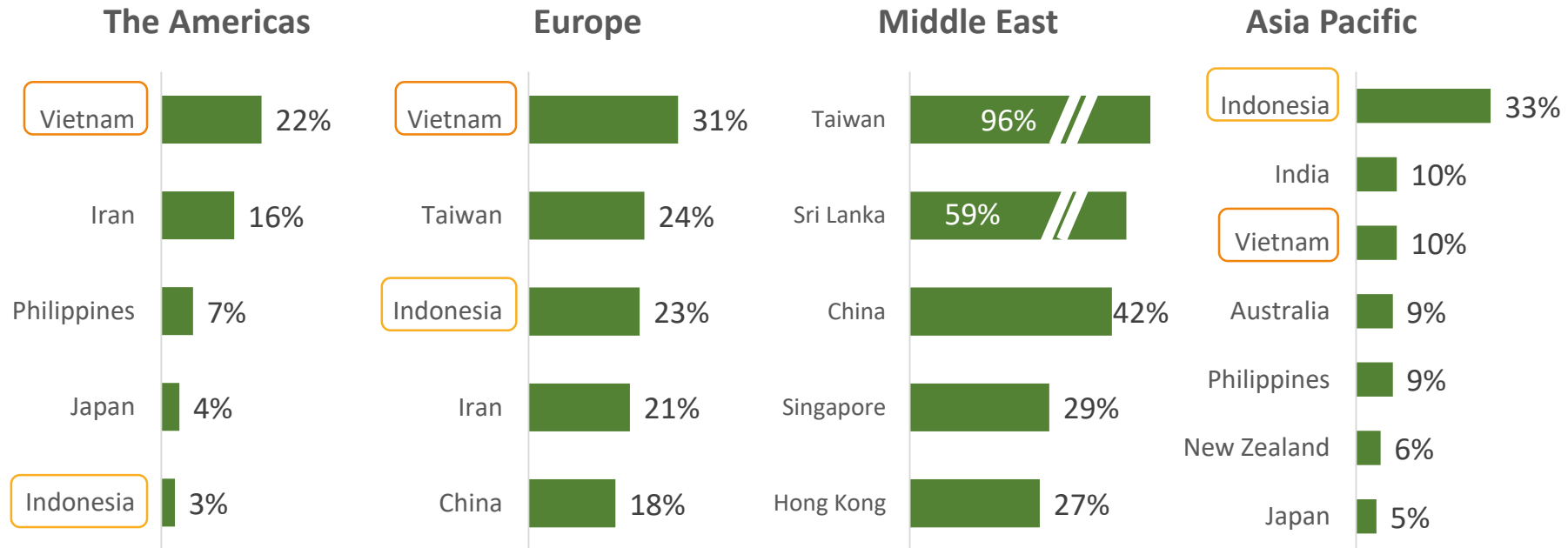
International departures from Asia Pacific to worldwide by destination region, Jan to Apr 2017YTD: YoY %variation and destination %share



-  Geography follows UNWTO definition
-  Lengths of stay at destinations is from 1 to 21 nights
-  Arrival history from January 1st to April 30th 2017 vs. Prev. Year.

Asia Pacific outbound: Vietnam & Indonesia were the rising stars

Top increasing origin markets for each destination region,
Jan to Apr 2017 YTD: YoY %variation



Arrival history from April 1st 2016 to March 31st 2017 vs. Prev. Year.



Length of stay at destinations is from 1 to 21 nights



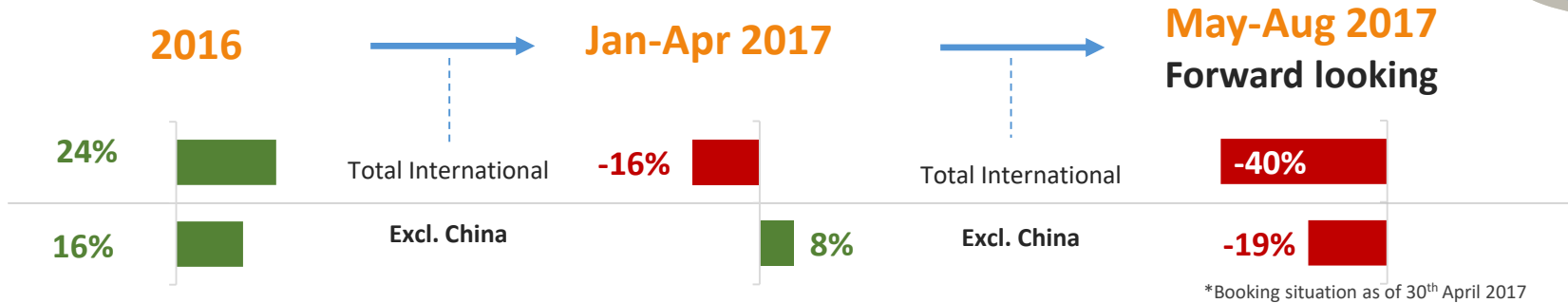
Geography follows UNWTO definition



Collapse of Chinese leisure travellers to South Korea

International arrivals in South Korea (staying 4 to 8 nights):



YoY Var. of 2016 vs. 2015, 2017YTD vs. prev. year, forward looking May to Aug 2017



 **2016**
China to South Korea
flight capacity: **+12%**

 **Jan-Apr 2017**
China to South Korea
flight capacity: **-8%**

 **May-Aug 2017**
China to South Korea
flight capacity: **-26%**

-  **January:** Charter flights were not authorised to operate during the Chinese New Year
-  **March:** Travel agencies stopped selling tour packages

Capacity information provided by 



Arrival history from January 1st 2016 to April 30th 2017 vs. Prev. Year.



Length of stay at destination South Korea is from 4 to 8 nights

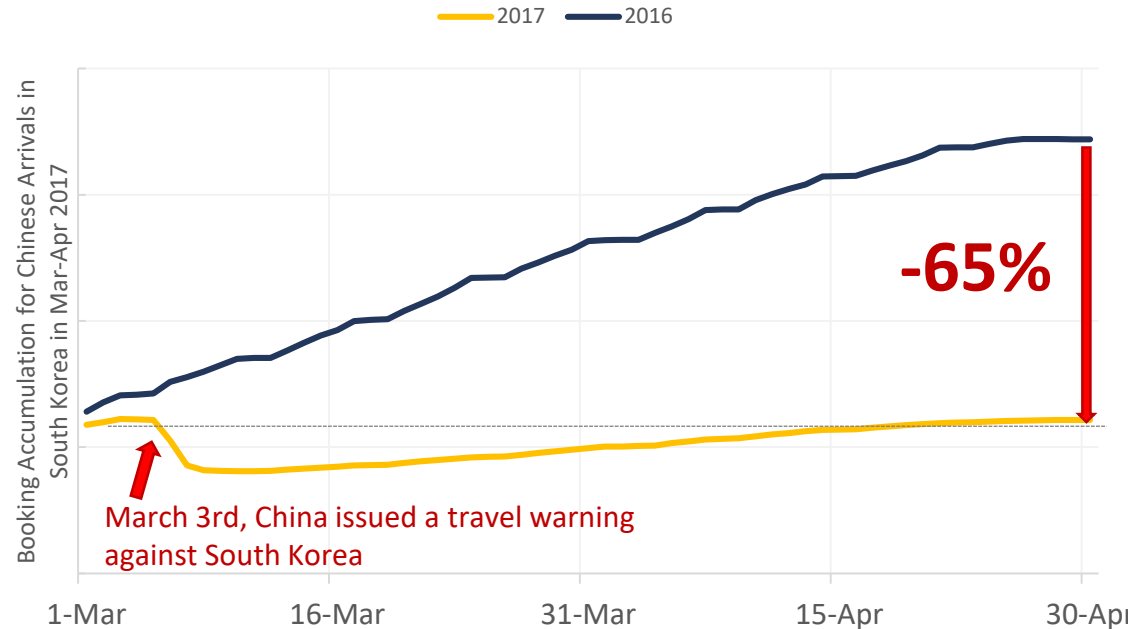





Arrivals on the book for May 1st to August 31st 2017 with issued bookings as of April 30th 2017 vs. same period prev. year.



No new net bookings from China to South Korea since the travel warning

Booking Pickup of Chinese arrivals in South Korea
 (stayed 4 to 8 nights at the destination) Mar to Apr 2017:



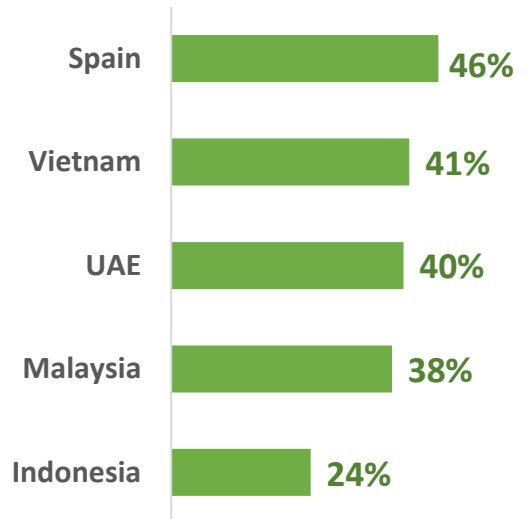
-  China issued travel warning on March 3rd.
-  Length of stay at destinations is from 4 to 8 nights
-  Arrival history from March 3rd to April 30th 2017 vs. March 4th to May 1st 2016.



Which countries welcomed significant growth while South Korea was suffering?

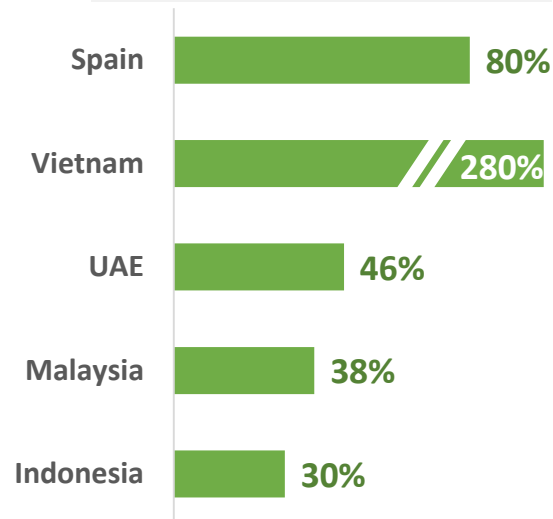
Top 5 most growing destinations for Chinese arrivals
(stayed 4 to 8 nights at one city) Mar to Apr 2017:

%Var. of total Chinese arrivals






Total Chinese arrivals worldwide
Excl. South Korea: **+1%**

%Var. of total group arrivals
(6+ persons per booking)



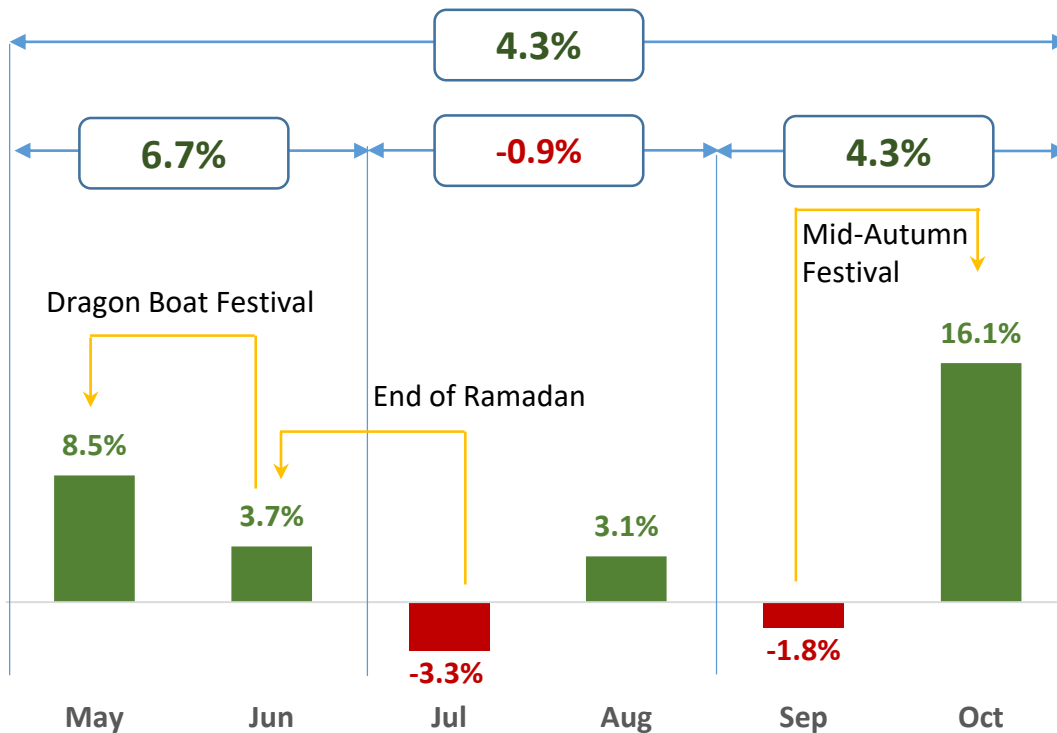
Total Chinese group arrivals worldwide
Excl. South Korea: **-15%**

-  China issued travel warning against South Korea on March 3rd.
-  Length of stay at destinations is from 4 to 8 nights
-  Arrival history from March 3rd to April 30th 2017 vs. March 4th to May 1st 2016.

Looking forward May-Oct 2017: pre-summer boosted by holiday travel



Forward looking Asia Pacific departures on the book,
May to Oct 2017: YoY %variation and origin %share



Dragon Boat Festival	2016: June 9 th 2017: May 30 th
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Ramadan	2016: Jun 6 th to Jul 5 th 2017: May 26 th to Jun 24 th *
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Mid-Autumn Festival	2016: Sep 15 th 2017: Oct 4 th
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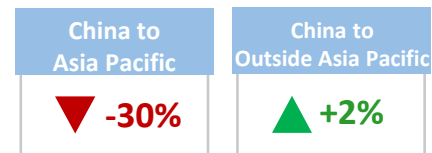
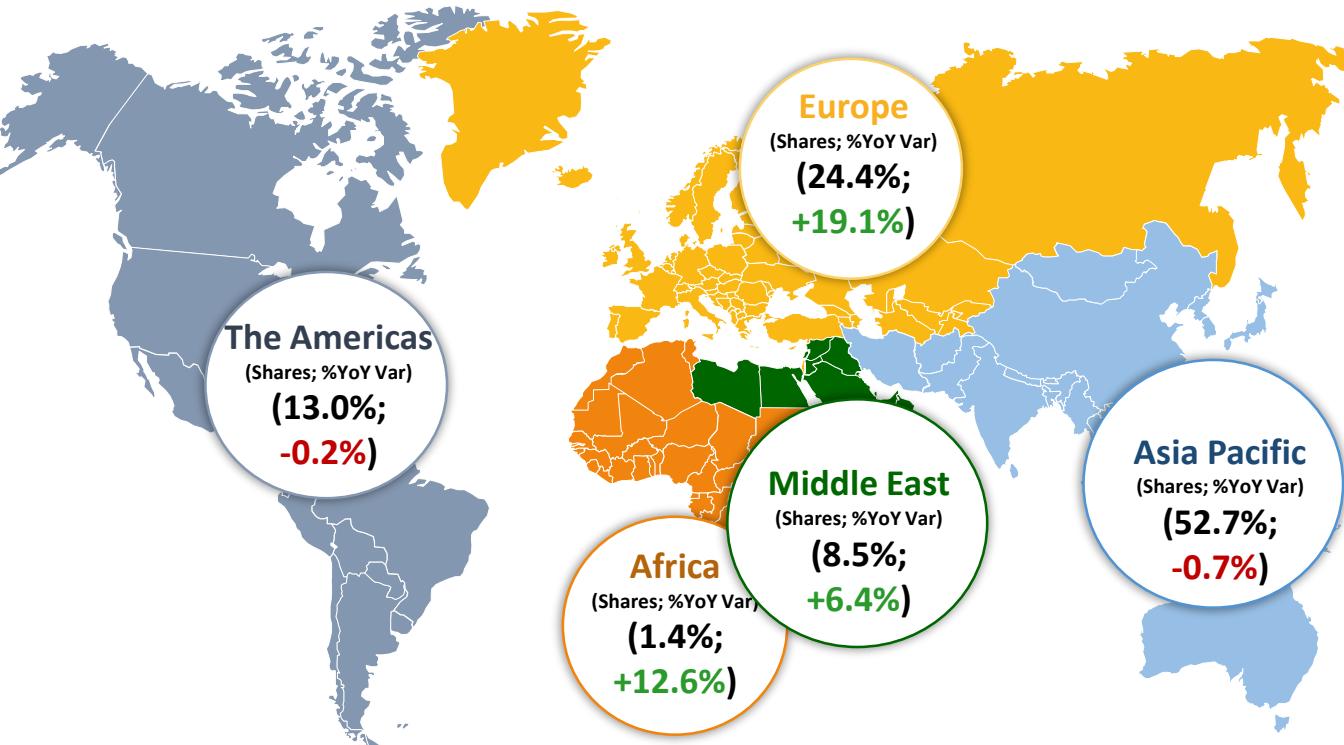
Length of stay at destinations is from 1 to 21 nights



Asia Pacific departures on the book from May 1st to October 31st 2017 vs. 2016 with issued bookings as of May 1st 2017 vs. same period prev. year.

Looking forward May-Oct 2017: Asia Pacific travellers booking long-haul more in advance

Forward looking Asia Pacific departures on the book, May to Oct 2017:
Destination region YoY %variation and %share



i Geography follows UNWTO definition

🌙 Lengths of stay at destinations is from 1 to 21 nights

📅 Asia Pacific departures on the book from May 1st to October 31st 2017 vs. 2016 with issued bookings as of May 1st 2017 vs. same period prev. year.

Looking forward May-Oct 2017: BRIC are back, European destinations can count on them

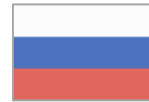
Forward looking Forward bookings for departures from Brazil, Russia, and India, May to Oct 2017: YoY %Var. of total departures and Top 5 increasing destinations on the book



+42%



Positive since Sep 2016



+31%



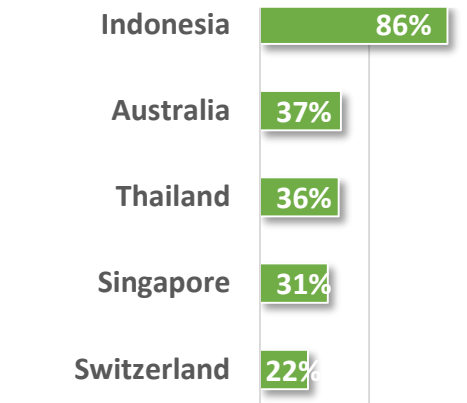
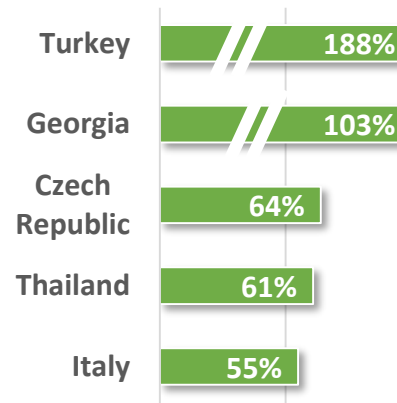
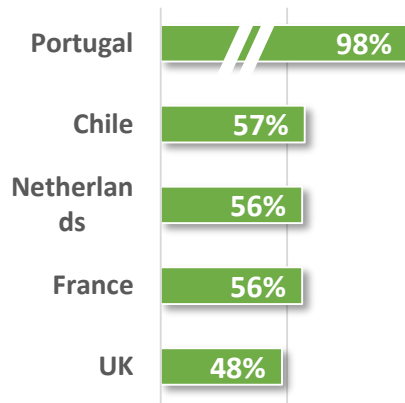
Positive since Dec 2016



+15%



Steadily growing 40 months



Asia Pacific departures on the book from May 1st to October 31st 2017 vs. 2016 with issued bookings as of May 1st 2017 vs. same period prev. year.



Length of stay at destinations is from 1 to 21 nights



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