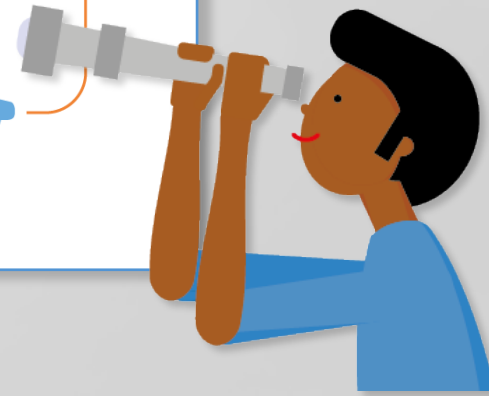
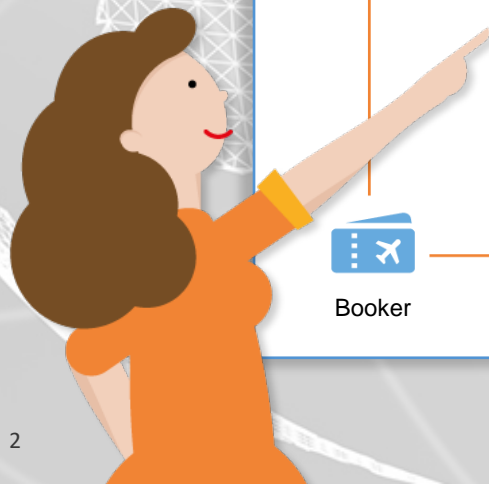
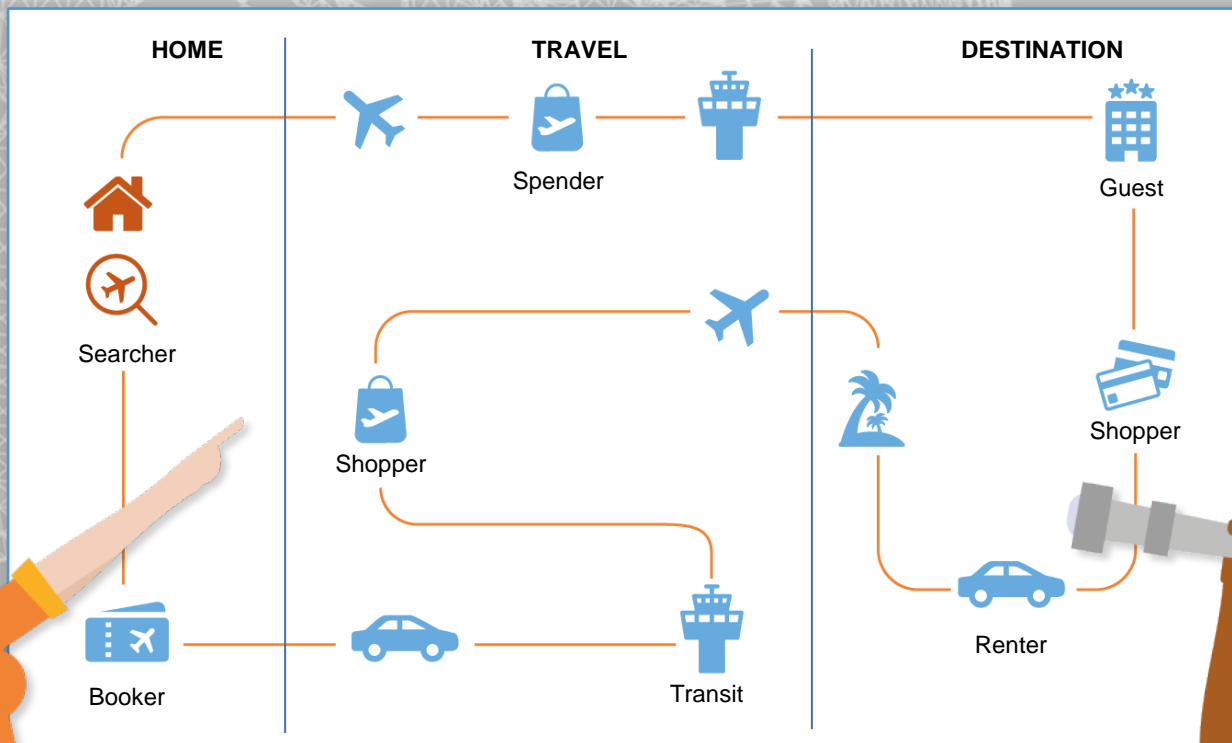




Asia Pacific Air Travel Trends 2018

THE TRAVELLER - A DIFFERENT ECONOMIC AGENT AT DIFFERENT STAGES OF HIS JOURNEY

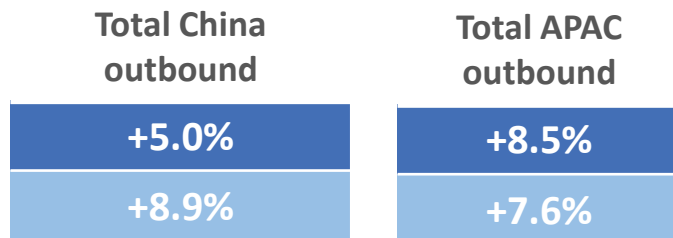




#1 China Outbound Travel Trends



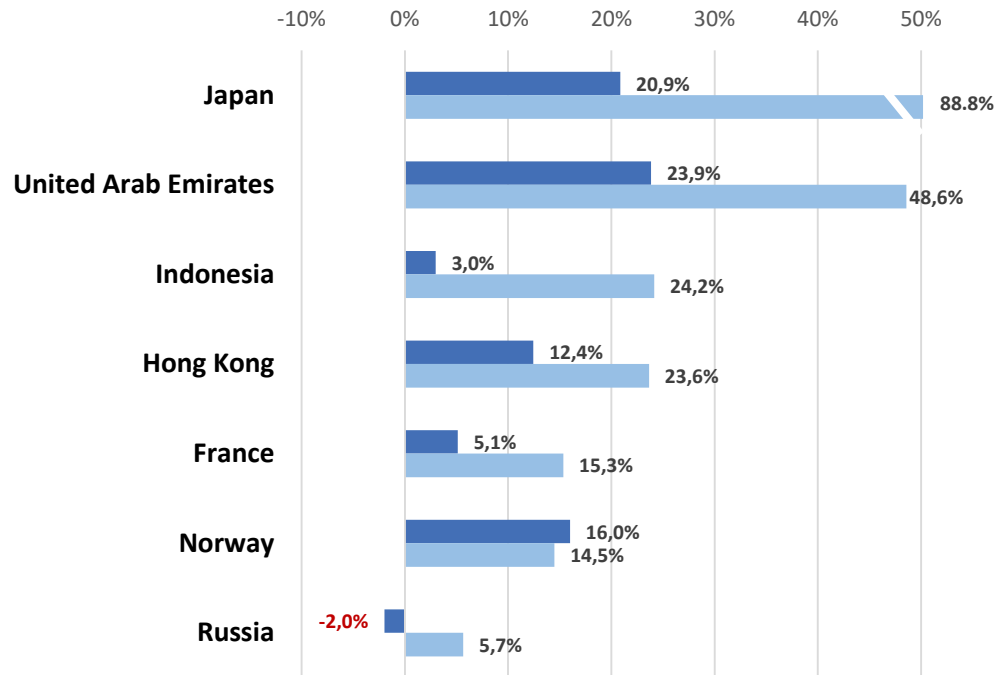
China outbound: Japan, UAE lead Chinese visitor's growth



Moving year
(May'17 to Apr. '18)

Next 3 months
(May to Jul. '18)

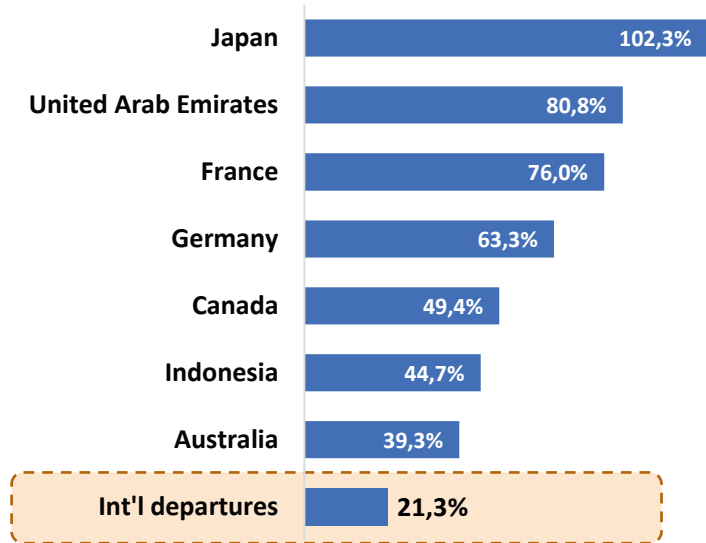
Fastest growing destinations in the next 3 months, YoY





China outbound: Dragon Boat Festival 2018 outlook

Destinations with largest booking increases vs. Dragon Boat Festival period in 2017, YoY






Dragon Boat Festival
Monday 18th June 2018

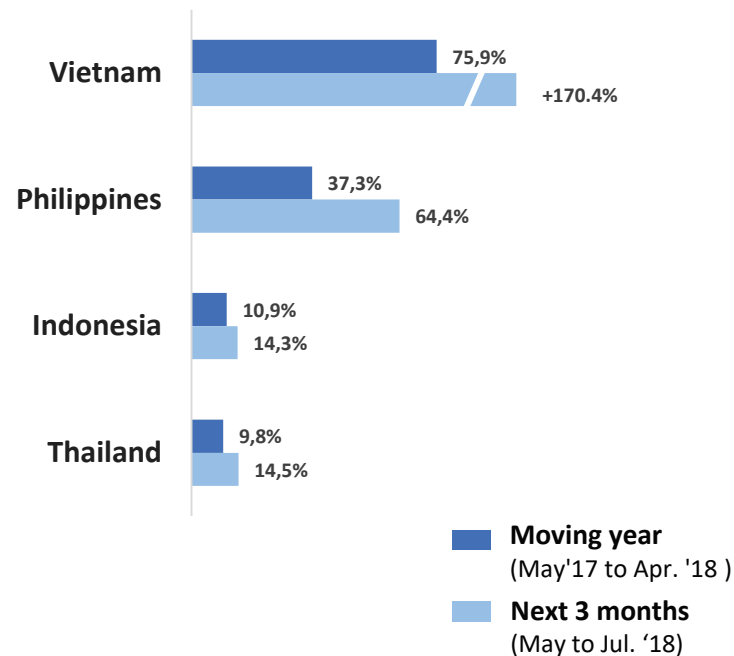
Dragon Boat Festival 2018: Busiest airports for Chinese pax return home flights (11th to 24th June)

Airports	Multiplying factor
Bangkok (BKK)	x1.0
Osaka (KIX)	x3.3
Tokyo (NRT)	x2.9
Hong Kong (HKG)	x2.7
Phuket (HKT)	x1.9
Tokyo (HND)	x2.8

South Korea inbound: One year after China group travel ban

	 Total Chinese visitors	 Chinese F.I.T.	 Chinese Group travellers	Total international
2018 moving year (May 2017 to Apr. 2018)	-49.1%	-4.9%	-88.4%	-20.6%
Next 3 months (May to Jul. 2018)	-14.7%	+90.1%	-48.8%	+8.5%

2018 Moving Year Fastest Growing Markets





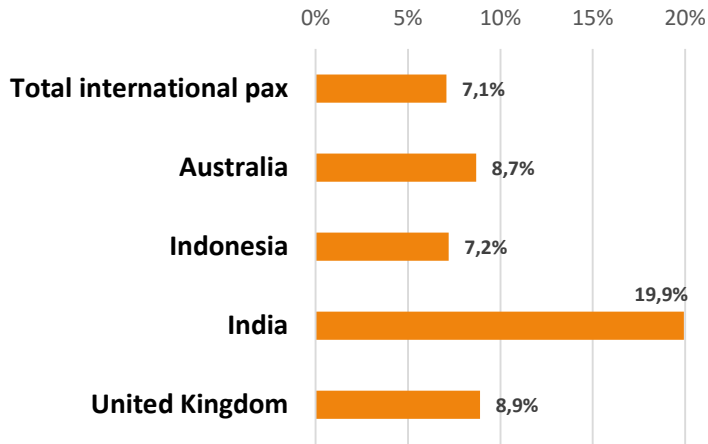
#3 Airport Highlight (SIN)



More leisure travellers from Australia and India using Changi Airport

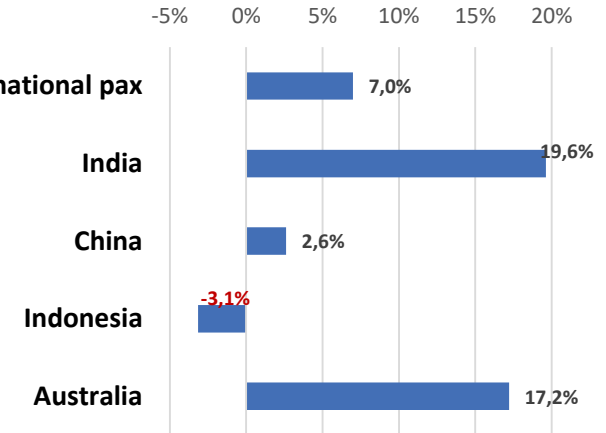
Top international markets departing from Changi Airport (SIN), 2018 moving year (May 2017 to Apr. 2018) YoY

Top origin markets **TRANSFERRING** in Changi



56% share

Top origin markets **VISITING** Singapore and departing from Changi



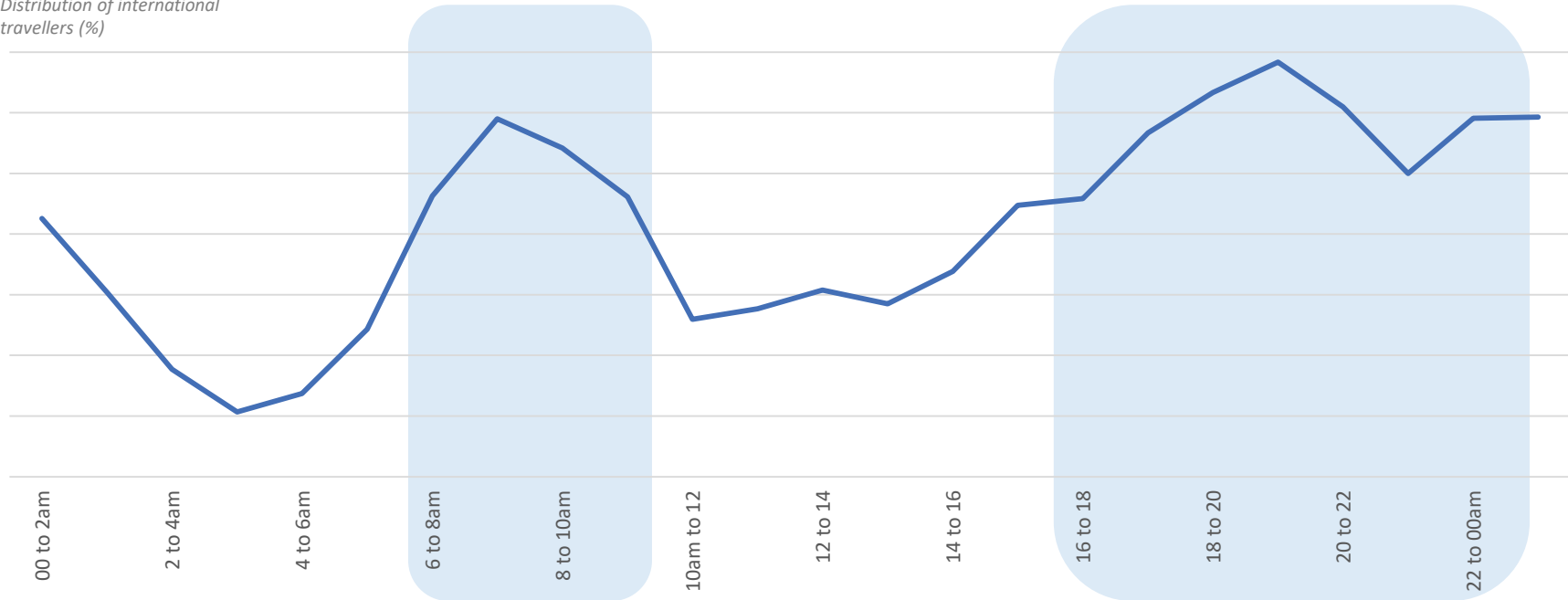
44% share



Changi Airport Shoppers: Busiest in the early morning and evening

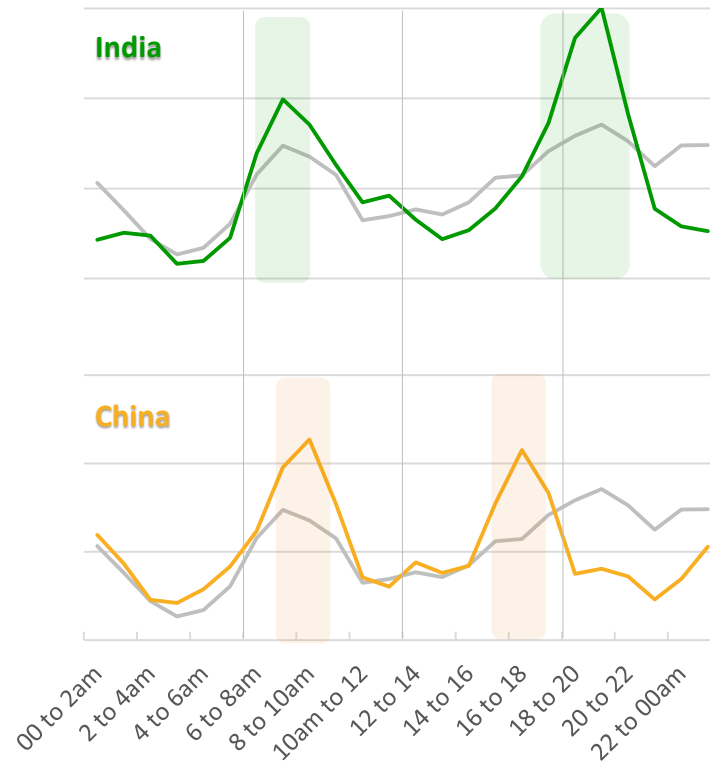
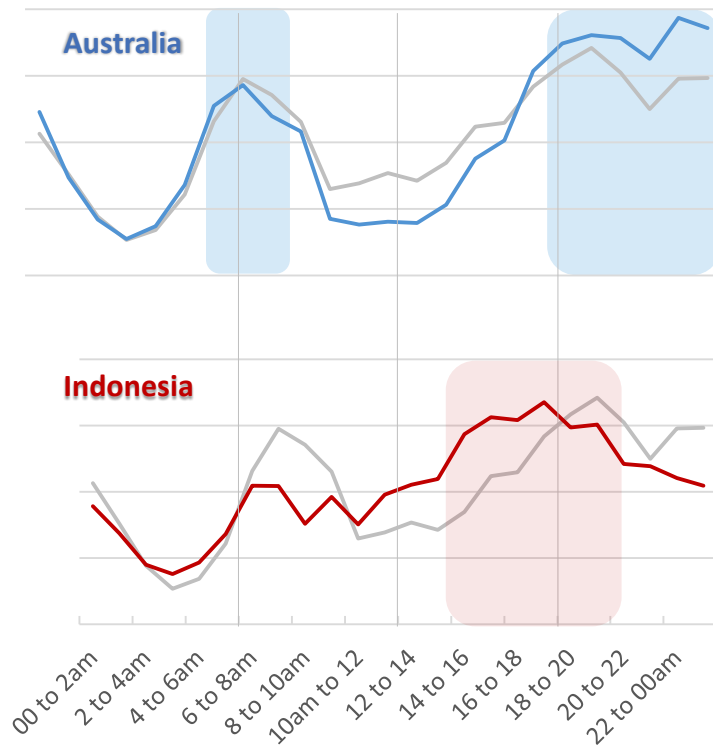
2018 Moving Year time of day peak dwelling travellers

Distribution of international travellers (%)





Changi Airport Shoppers: By Nationality





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