

ASIA PACIFIC

TOURISM FORECASTS

2005-2007



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INTERNATIONAL TOURIST ARRIVALS TO ASIA PACIFIC MARKETS

The total set of arrivals is given in Table 3.1 for Asia Pacific in 2003 and forecasts for 2005, 2006 and 2007. Figures 3.1 to 3.5 display the results graphically by region. Care must be taken in making comparisons because of the different measurement scales (refer to Table 2.1). In particular the flows to China (PRC), Hong Kong SAR and Macau SAR are very large because they include domestic visitors. Similarly, the flows to Hawaii include domestic USA Mainland tourists. Also the issue of residence versus nationality can affect accuracy.

Table 3.1 Total Arrivals to Asia Pacific 2003-2007 in Summary

COUNTRY	2003	2005	03-05 AAGR (%)	2006	05-06 AAGR (%)	2007	06-07 AAGR (%)	03-07 AAGR (%)
Americas								
Canada	17,497,822	20,172,454	7.37	20,674,900	2.49	21,186,733	2.48	4.90
Chile	1,613,523	2,014,202	11.73	2,139,635	6.23	2,247,085	5.02	8.63
USA	34,458,358	41,771,133	10.10	44,288,756	6.03	46,445,106	4.87	7.75
Sub-Total	53,569,703	63,957,789	9.73	67,103,291	4.92	69,878,924	4.12	7.09
South Asia								
Bangladesh	244,509	300,013	10.77	321,931	7.31	343,012	6.55	8.83
India	2,726,214	3,874,953	19.22	4,237,750	9.36	4,556,370	7.52	13.70
Maldives	563,593	722,390	13.21	771,720	6.83	824,248	6.81	9.97
Nepal	338,132	370,406	4.66	394,421	6.48	418,571	6.12	5.48
Pakistan	469,047	504,018	3.66	527,137	4.59	548,709	4.09	4.00
Sri Lanka	500,642	616,320	10.95	655,266	6.32	699,300	6.72	8.71
Sub-Total	4,842,137	6,388,100	10.41	6,908,225	6.81	7,390,210	6.30	8.45
Southeast Asia								
Cambodia ¹	269,674	365,102	16.36	409,249	12.09	447,069	9.24	13.47
Indonesia	4,467,021	6,465,332	20.31	7,082,542	9.55	7,555,444	6.68	14.04
Lao PDR	636,361	926,875	20.69	988,741	6.67	1,047,448	5.94	13.27
Malaysia	10,576,915	19,105,897	34.40	20,873,714	9.25	22,588,489	8.21	20.89
Myanmar	205,610	280,345	16.77	312,549	11.49	340,464	8.93	13.44
Philippines ²	1,806,902	2,459,710	16.67	2,669,156	8.52	2,898,813	8.60	12.54
Singapore	6,127,029	9,964,535	27.53	10,827,219	8.66	11,552,951	6.70	17.18
Thailand ³	10,004,453	14,246,744	19.33	15,878,071	11.45	17,264,854	8.73	14.62
Vietnam	2,428,735	3,355,805	17.55	3,636,839	8.37	3,886,751	6.87	12.47
Sub-Total	36,522,700	57,170,345	21.07	62,678,080	9.56	67,582,283	7.77	14.66
Northeast Asia								
China (PRC)	91,662,082	117,185,674	13.07	122,448,303	4.49	127,600,397	4.21	8.62
Chinese Taipei	2,248,117	3,294,176	21.05	3,467,831	5.27	3,654,445	5.38	12.91
Hong Kong SAR	15,536,839	23,770,431	23.69	26,838,372	12.91	29,182,658	8.73	17.07
Japan	5,211,725	7,193,748	17.49	8,015,687	11.43	8,816,495	9.99	14.05
Korea (ROK)	4,753,604	6,488,200	16.83	7,169,289	10.50	7,961,386	11.05	13.76
Macau SAR	11,887,876	19,020,952	26.49	21,673,615	13.95	23,616,581	8.96	18.72
Mongolia	201,154	245,240	10.42	263,327	7.38	281,697	6.98	8.78
Sub-Total	131,501,397	177,198,421	18.43	189,876,424	9.42	201,113,659	7.90	13.42

¹Arrivals by air to; ²Excludes Filipinos resident overseas; ³Excludes Thais resident overseas

Table 3.1 Total Arrivals to Asia Pacific 2003-2007 in Summary (continued)

COUNTRY	2003	2005	03-05 AAGR (%)	2006	05-06 AAGR (%)	2007	06-07 AAGR (%)	03-07 AAGR (%)
Oceania								
Australia	4,745,800	5,771,685	10.28	6,211,674	7.62	6,671,971	7.41	8.89
Cook Islands	78,328	92,628	8.75	97,871	5.66	101,627	3.84	6.73
Fiji	430,800	591,909	17.22	685,894	15.88	780,569	13.80	16.02
Guam ¹	857,432	1,310,360	23.62	1,460,063	11.42	1,559,724	6.83	16.13
Hawaii	6,380,439	7,406,494	7.74	8,012,548	8.18	8,333,086	4.00	6.90
New Caledonia	101,983	108,008	2.91	114,155	5.69	120,507	5.56	4.26
New Zealand	2,106,229	2,603,853	11.19	2,780,077	6.77	2,957,275	6.37	8.85
Niue	2,706	3,069	6.50	3,226	5.12	3,364	4.28	5.59
Northern Marianas	459,457	635,943	17.65	705,235	10.90	761,443	7.97	13.46
Palau	63,328	107,697	30.41	119,612	11.06	130,456	9.07	19.80
Papua New Guinea	56,185	69,381	11.12	75,873	9.36	84,620	11.53	10.78
Samoa	92,486	115,459	11.73	131,052	13.51	144,657	10.38	11.83
Tahiti	212,767	248,078	7.98	265,025	6.83	279,872	5.60	7.09
Tonga	40,110	44,107	4.86	47,158	6.92	50,204	6.46	5.77
Vanuatu	50,400	64,082	12.76	70,001	9.24	75,100	7.28	10.48
Sub-Total	15,678,450	19,172,753	12.31	20,779,464	8.94	22,054,475	7.36	10.17
Grand Total	242,114,387	323,887,408	14.03	347,345,484	7.83	368,019,551	6.67	10.55

¹Excludes 'Cruise' arrivals

Note: AAGR is Average Annual Growth Rate.

The overall average annual growth rate percent (AAGR%) is given along with the individual values for each forecast period. It can be seen that growth is forecast to range between 4.0% (Pakistan) and 20.9% (Malaysia) from 2003 to 2007. No countries/regions are projected to have negative growth. Overall forecast growth to 2007 is 10.6%.

The highest growth is projected for Malaysia (20.9%) which is seen to continue massive projected growth that started in 2000. Many countries/regions are projected to have double digit growth figures including the whole of Southeast Asia, Chinese Taipei (12.9%), Hong Kong SAR (17.1%), Japan (14.1%), Korea (ROK) (13.8%), Macau SAR (18.7%), Fiji (16.0%), Guam (16.1%), Northern Marianas (13.5%), Palau (19.8%), Papua New Guinea (10.8%), Samoa (11.9%) and Vanuatu (10.5%).

Most growth rate patterns are linear declining, with the highest growth occurring to 2005, then declining gradually to 2007. This occurs with 29 (72.5%) countries/regions primarily because of the recovery from a previous downturn (SARS, war and terror) causing an initially high growth rate that then stabilises to a significant rate but lower than the initial recovery rate. Six countries/regions (Hawaii, Nepal, New Caledonia, Pakistan, Samoa, Tonga) show growth extending to 2006 before settling back in 2007 to a lower rate. This is the first time for a significant period that Nepal and Pakistan have returned to growth. Five countries (Chinese Taipei, Korea (ROK), Sri Lanka, Papua New Guinea, Philippines) are projected to have initial growth that drops back in 2006 and then recovers again in 2007.

Regionally there is a distinctly higher rate of growth over the entire period (2003 to 2007) for Northeast and Southeast Asia and Oceania than for South Asia and the Americas. However, for the forecast period (2005 to 2007) growth rates tend to be more uniform from 6% to 10% except for the Americas which is a bit lower at 4% to 5%.

INTERNATIONAL TOURISM RECEIPTS IN ASIA PACIFIC MARKETS

Table 3.3 summarises the forecast receipts growth for international tourism to the extent that data limitations allow for analysis.

**Table 3.3 International Tourism Receipts Forecasts for Asia Pacific
2003-2007 (US\$ mil)**

COUNTRY	2003	2005	03-05 AAGR (%)	2006	05-06 AAGR (%)	2007	06-07 AAGR (%)	03-07 AAGR (%)
Americas								
Canada	14,700	16,947	7.37	17,369	2.49	17,799	2.48	4.90
USA	80,202	97,223	10.10	103,082	6.03	108,101	4.87	7.75
South Asia								
Maldives	388	497	13.18	531	6.84	567	6.78	9.95
Sri Lanka	378	437	7.52	466	6.64	501	7.51	7.30
Southeast Asia								
Cambodia	346	520	22.59	576	10.77	630	9.38	16.16
Malaysia	5,606	10,088	34.15	11,021	9.25	11,927	8.22	20.77
Thailand	7,454	10,615	19.33	11,830	11.45	12,864	8.74	14.62
Northeast Asia								
China (PRC)	17,406	22,253	13.07	23,252	4.49	24,230	4.21	8.62
Chinese Taipei	2,976	4,361	21.05	4,591	5.27	4,838	5.38	12.92
Hong Kong SAR	8,873	13,575	23.69	15,327	12.91	16,666	8.74	17.07
Korea (ROK)	5,241	7,153	16.83	7,904	10.50	8,778	11.06	13.76
Macau SAR	2,865	4,584	26.49	5,223	13.94	5,692	8.98	18.72
Mongolia	149	182	10.52	195	7.14	209	7.18	8.83
Oceania								
Australia	11,200	13,500	9.79	14,700	8.89	15,700	6.80	8.81
New Zealand	3,881	4,798	11.19	5,123	6.77	5,449	6.36	8.85

Note: AAGR is Average Annual Growth Rate.

There are insufficient data sources to make sum totals worthwhile. Strong receipts growth at or above 5% is forecast for all 15 countries in Table 3.3. The highest receipts growth overall is forecast for Malaysia and this reflects the continuing massive arrivals growth forecast for this country. Double digit receipts growth is forecast for most of Northeast and Southeast Asia.

Most countries reflect the arrivals trend of significant growth in the early part of the forecast period declining linearly through to 2007, as the recovery tapers back to more stable growth rates. Chinese Taipei, Korea (ROK), Sri Lanka and Mongolia are different in that the lowest growth rate is in 2006.

INTERNATIONAL OUTBOUND TRAVEL FROM ASIA PACIFIC COUNTRIES

The departures forecasts presented in Table 3.4 are the converse of the arrivals forecasts in Table 3.1 for eleven countries. These countries represent the largest outbound source markets and the newly emerging outbound markets of China (PRC), India and Thailand. Because only Asia Pacific countries have been converted into outbound flows a regional division is not presented.

As the figures in Table 3.4 are the converse of the arrivals data it makes no sense to derive total numbers, because many of the arrivals represent multiple destinations from the one departure and any sum would overestimate the number of departures. The data does represent overall demand for each destination from each of the main source markets, and the growth on an average annual basis of that demand. For example, it can be seen for Australia that although New Zealand is the primary destination for Australians the highest growth in main markets is Thailand with an overall average growth forecast of 18.6% from 2003 to 2007. Alternatively, for India the main market is Singapore for outbound travel and this is also a strongly growing outbound market at 19.8%.

Table 3.4 Top 5 Departures Forecasts for Asia Pacific Main Markets 2003-2007

Country	2003	2005	03-05 AAGR (%)	2006	05-06 AAGR (%)	2007	06-07 AAGR (%)	03-07 AAGR (%)
Australia to:								
New Zealand	702,162	980,650	18.18	1,061,920	8.29	1,136,580	7.03	12.80
USA	405,698	613,720	22.99	668,440	8.92	702,170	5.05	14.70
Singapore	392,864	655,090	29.13	695,163	6.12	736,495	5.95	17.01
Thailand	281,361	462,314	28.18	511,121	10.56	556,395	8.86	18.59
Indonesia	268,538	408,190	23.29	459,410	12.55	498,991	8.62	16.75
Canada to:								
USA	12,659,739	14,273,000	6.18	14,806,000	3.73	15,147,000	2.30	4.59
China (PRC)	230,326	375,511	27.68	388,130	3.36	407,534	5.00	15.33
Hawaii	204,999	211,843	1.66	214,656	1.33	218,512	1.80	1.61
Hong Kong SAR	186,809	209,624	5.93	321,148	53.20	333,669	3.90	15.61
Japan	126,065	153,693	10.42	161,981	5.39	170,781	5.43	7.89
China (PRC) to:								
Hong Kong SAR	8,467,211	13,256,300	25.12	15,361,418	15.88	16,972,411	10.49	18.99
Macau SAR	5,742,036	11,542,000	41.78	13,763,000	19.24	15,162,000	10.16	27.47
Vietnam	693,423	992,481	19.64	1,083,814	9.20	1,168,230	7.79	13.93
Thailand	624,214	1,099,930	32.74	1,332,360	21.13	1,474,200	10.65	23.97
Singapore	568,449	1,134,830	41.29	1,295,571	14.16	1,426,377	10.10	25.86
Chinese Taipei to:								
Macau SAR	1,022,830	1,380,400	16.17	1,509,200	9.33	1,776,200	17.69	14.79
China (PRC)	2,731,897	4,447,490	27.59	4,963,450	11.60	5,392,850	8.65	18.53
Hong Kong SAR	1,852,378	2,421,860	14.34	2,609,254	7.74	2,710,358	3.87	9.98
Japan	785,379	1,377,560	32.44	1,459,460	5.95	1,493,220	2.31	17.43
Thailand	521,941	734,390	18.62	800,182	8.96	863,301	7.89	13.41

Table 3.4 Top 5 Departures Forecasts for Asia Pacific Main Markets 2003-2007 (continued)

Country	2003	2005	03-05 AAGR (%)	2006	05-06 AAGR (%)	2007	06-07 AAGR (%)	03-07 AAGR (%)
Hong Kong SAR to:								
China (PRC)	58,770,063	70,884,000	9.82	73,722,000	4.00	76,544,000	3.83	6.83
Macau SAR	4,623,162	5,206,000	6.12	5,426,700	4.24	5,621,900	3.60	5.01
Thailand	649,920	724,221	5.56	766,780	5.88	791,440	3.22	5.05
Chinese Taipei	323,178	460,011	19.31	473,742	2.98	485,161	2.41	10.69
Japan	260,214	313,450	9.75	317,160	1.18	323,989	2.15	5.63
India to:								
Singapore	309,423	553,456	33.74	590,106	6.62	636,954	7.94	19.78
China (PRC)	219,097	351,993	26.75	357,658	1.61	367,260	2.68	13.78
USA	272,161	321,900	8.75	349,190	8.48	364,170	4.29	7.55
Thailand	230,316	384,178	29.15	423,500	10.24	447,010	5.55	18.03
Hong Kong SAR	178,130	281,652	25.74	322,557	14.52	369,610	14.59	20.02
Japan to:								
USA	3,169,682	4,861,610	23.85	5,289,100	8.79	5,572,820	5.36	15.15
China (PRC)	2,254,800	3,769,560	29.30	4,023,028	6.72	4,553,132	13.18	19.21
Korea (ROK)	1,802,542	2,730,470	23.08	3,029,420	10.95	3,361,880	10.97	16.86
Hawaii	1,340,034	1,714,654	13.12	1,867,681	8.92	1,936,822	3.70	9.65
Thailand	1,014,513	1,331,100	14.55	1,417,470	6.49	1,481,131	4.49	9.92
Korea (ROK) to:								
China (PRC)	1,945,484	3,260,610	29.46	3,558,190	9.13	3,914,890	10.02	19.10
Japan	1,459,333	1,925,260	14.86	2,408,740	25.11	2,938,580	22.00	19.12
Thailand	694,340	1,105,543	26.18	1,285,480	16.28	1,478,391	15.01	20.80
USA	617,573	671,640	4.29	690,910	2.87	736,318	6.57	4.49
Hong Kong SAR	368,176	588,522	26.43	660,869	12.29	750,045	13.51	19.47
New Zealand to:								
Australia	839,100	1,152,470	17.19	1,273,050	10.46	1,421,414	11.65	14.08
USA	107,214	138,880	13.81	157,670	13.53	171,299	8.64	12.43
Singapore	73,490	128,939	32.46	137,600	6.72	143,060	3.97	18.12
Thailand	60,005	78,526	14.40	83,508	6.34	87,745	5.07	9.97
Hong Kong SAR	48,490	77,005	26.02	79,040	2.64	80,760	2.18	13.60
Singapore to:								
Malaysia	5,922,306	11,390,700	38.69	12,227,000	7.34	13,147,000	7.52	22.06
Indonesia	1,469,282	2,102,970	19.64	2,293,570	9.06	2,429,430	5.92	13.40
Thailand	629,103	939,040	22.17	1,074,210	14.39	1,155,161	7.54	16.41
China (PRC)	378,074	708,867	36.93	725,076	2.29	743,028	2.48	18.40
Hong Kong SAR	265,729	487,863	35.50	518,475	6.27	543,707	4.87	19.60

Table 3.4 Top 5 Departures Forecasts for Asia Pacific Main Markets 2003-2007 (continued)

Country	2003	2005	03-05 AAGR (%)	2006	05-06 AAGR (%)	2007	06-07 AAGR (%)	03-07 AAGR (%)
Thailand to:								
Malaysia	1,152,296	1,747,400	23.14	1,880,500	7.62	2,056,200	9.34	15.58
Lao PDR	377,748	508,660	16.04	525,932	3.40	544,521	3.53	9.57
China (PRC)	275,429	572,205	44.14	601,034	5.04	618,225	2.86	22.40
Singapore	235,787	401,433	30.48	459,245	14.40	485,853	5.79	19.81
Hong Kong SAR	185,398	347,910	36.99	361,685	3.96	378,733	4.71	19.55
USA to:								
Canada	14,195,894	15,874,300	5.75	16,158,400	1.79	16,461,600	1.88	3.77
Hawaii	4,263,219	4,840,940	6.56	5,250,130	8.45	5,459,540	3.99	6.38
China (PRC)	822,511	1,685,810	43.16	1,786,650	5.98	1,907,040	6.74	23.40
Hong Kong SAR	683,791	1,037,491	23.18	1,263,041	21.74	1,416,457	12.15	19.97
Japan	655,821	820,320	11.84	848,810	3.47	862,700	1.64	7.09

Note: AAGR is Average Annual Growth Rate.

Each of the outbound countries is presented graphically in Chapter 7. The most notable feature of Table 3.4 is the similarity between the destinations of the major source countries. For example, Hong Kong SAR is one of the top five destinations in each of the top outbound markets except for Australia and Japan. China (PRC) and Thailand are also very popular destinations.



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