

**Global Travel Trends and China Tourism
Forecasts 2013-2015
2013-2015年全球旅行趋势
与中国旅游预测**

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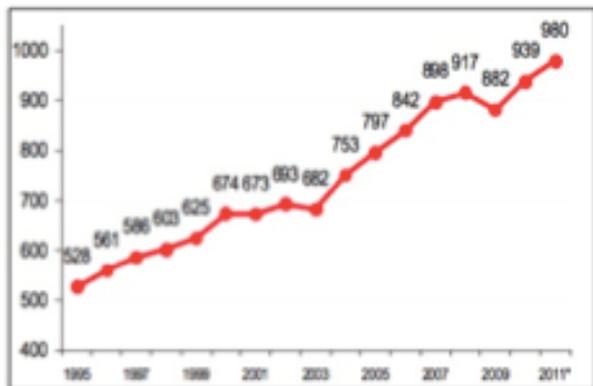
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Global Travel Trends

全球旅行趨勢

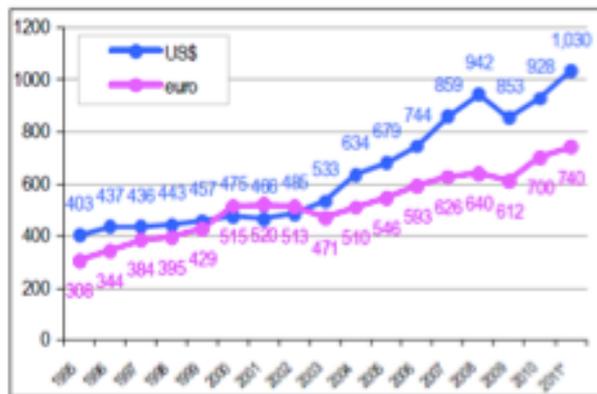
World: Inbound Tourism
International Tourist Arrivals

(million)



International Tourism Receipts

(billion)

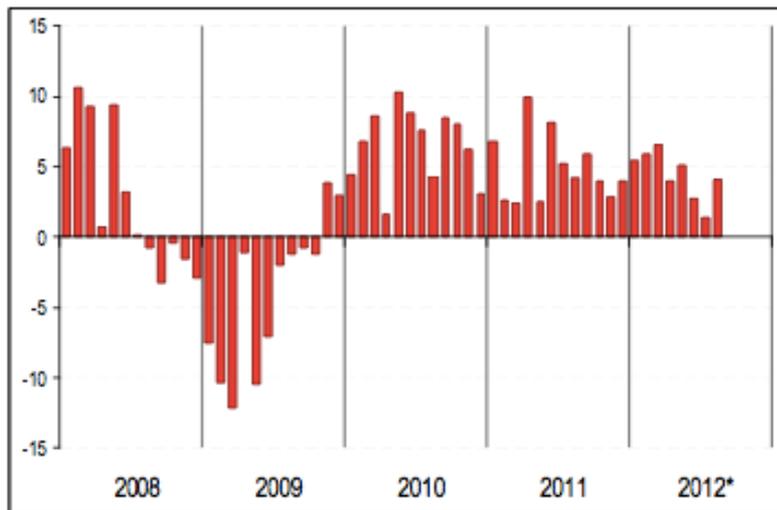


Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals, monthly evolution

World

(% change)



Source: World Tourism Organization (UNWTO) ©

数据来源：联合国世界旅游组织（UNWTO）

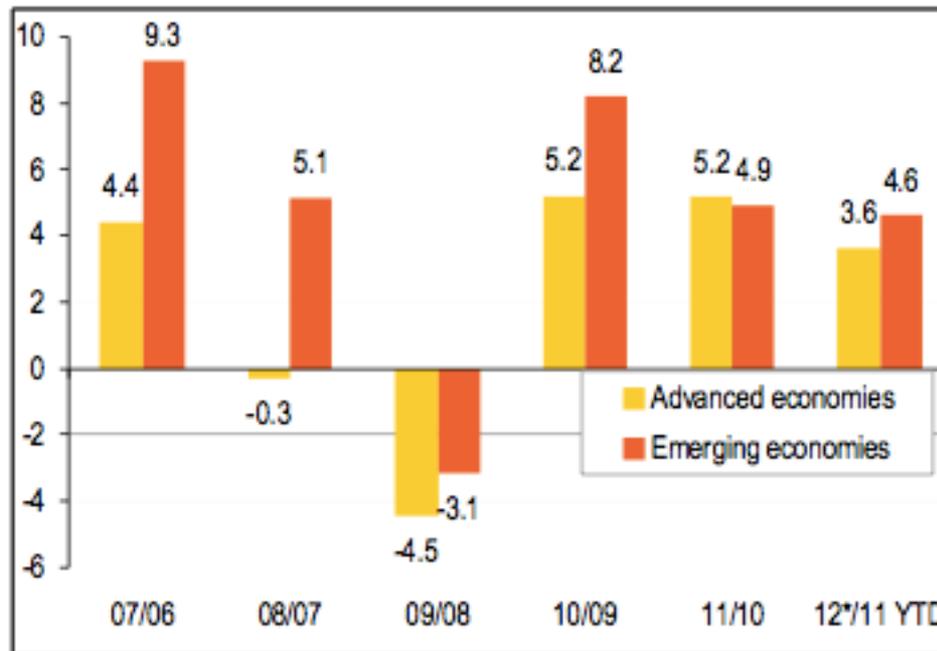
- International arrivals growing over time – a few crisis periods along the way
- 国际入境游客接待量持续增长，尽管不时有危机相伴
- Revenue (excluding the cost of international transport) is increasing as well.
- 旅游收入同时增长（不包括国际交通成本）
- The growth trend over time is still positive but it is reducing!
- 长期来看，游客接待量增长趋势依旧乐观，但增幅正在缩小

国际入境游客接待量

International Tourist Arrivals

(同比增长%)

(% change)



发达经济体
新兴经济体

Source: World Tourism Organization (UNWTO) ©

数据来源：联合国世界旅游组织 (UNWTO)

However the stronger growth in arrivals into the Emerging Economies continues to set the pace.

新兴经济体的国际入境旅游增速更快，持续引领全球入境旅游发展。

国际入境游客接待量及旅游收入

将1995年数据赋值100，除去国际交通成本

国际入境游客接待量

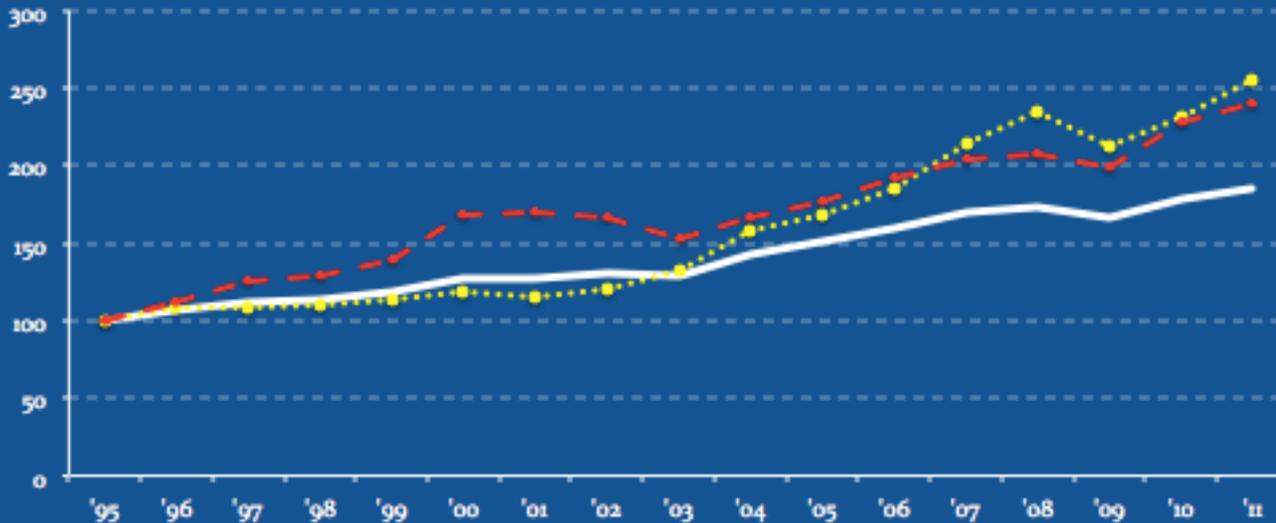
国际旅游收入（按美元统计）

国际旅游收入（按欧元统计）

Indexed Arrivals & Spend

Year 1995 = 100.0; excludes cost of international transport

— IVAs ●●● US\$ - - Euro



Expenditures are growing faster than arrivals.

旅游消费的增速高于入境游客人数。



1 BILLION TOURISTS BILLION OPPORTUNITIES

A white silhouette of a person walking with a suitcase, positioned to the right of the main text.

On 13 December 2012, the one-billionth tourist will arrive somewhere in the world.

Through simple actions, from buying locally to using their towels for more than a day, this tourist can make a real difference to the people and places they visit.

Now imagine if every one of the one billion tourists did the same. **One billion small actions, one very big impact.**

Join the UNWTO campaign at <http://1billiontourists.unwto.org/> and help us turn one billion tourists into one billion opportunities.

The world welcomed its billionth international arrival last month – the first time ever!

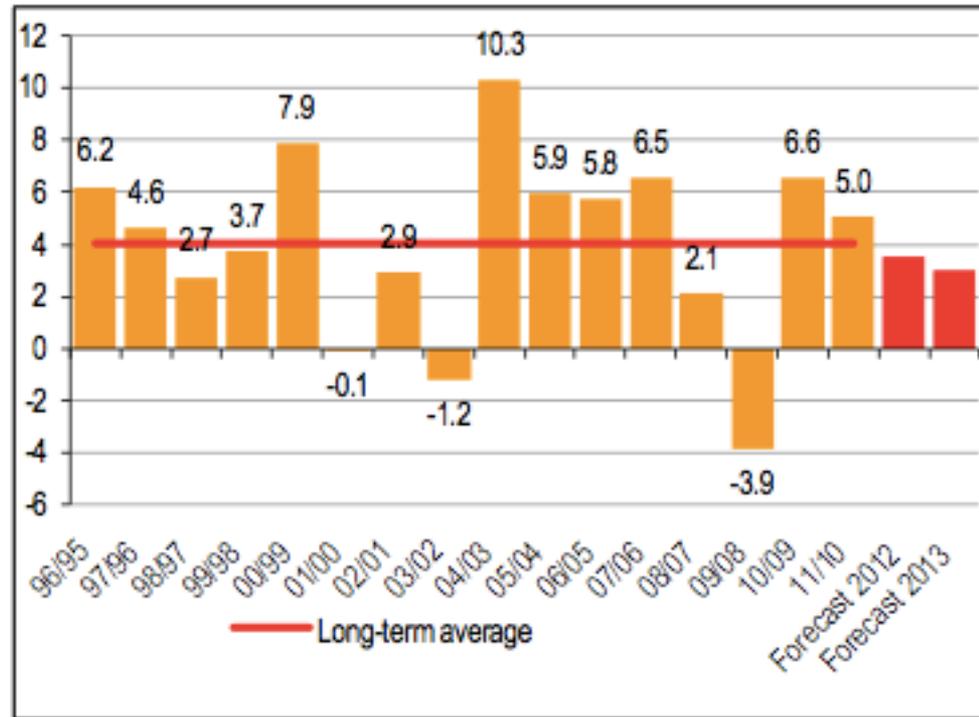
2012年12月，我们已迎来了全球第10亿位入境游客！

全球国际入境游客接待量

International Tourist Arrivals, World

(同比增长%)

(% change)



Source: World Tourism Organization (UNWTO) ©

数据来源：联合国世界旅游组织（UNWTO）

Leading us to an expected growth rate last year of just under 4%, year-on-year

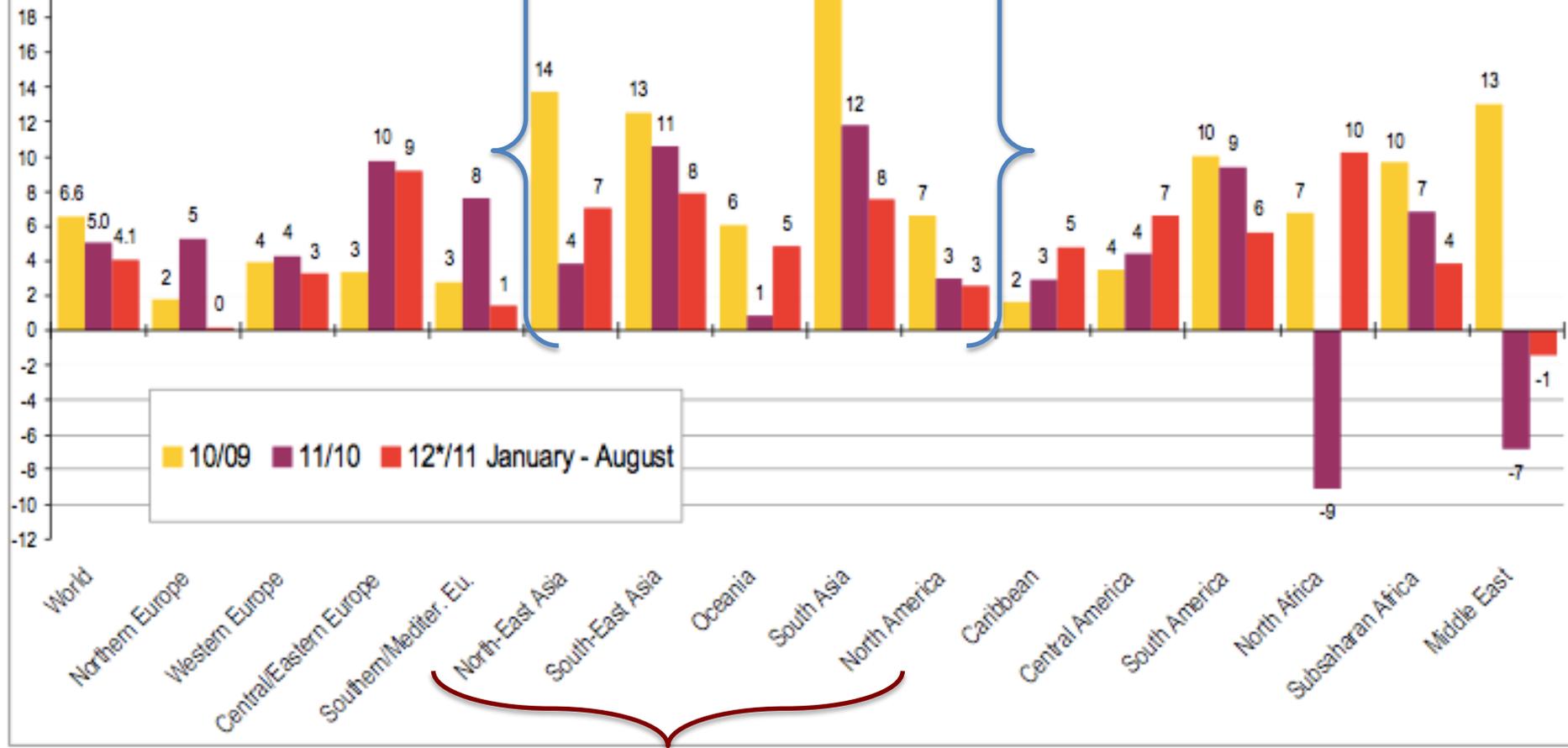
2012年，全球目的地的入境游客接待量平均增长率不及4%。

International Tourist Arrivals

全球国际入境游客接待量

(% change over same period of the previous year)

(同比增长%)



Source: World Tourism Organization (UNWTO) ©

数据来源：联合国世界旅游组织 (UNWTO)

And within that scenario, the Asia Pacific region is holding up well, although the growth rates are variable depending on the sub-region.

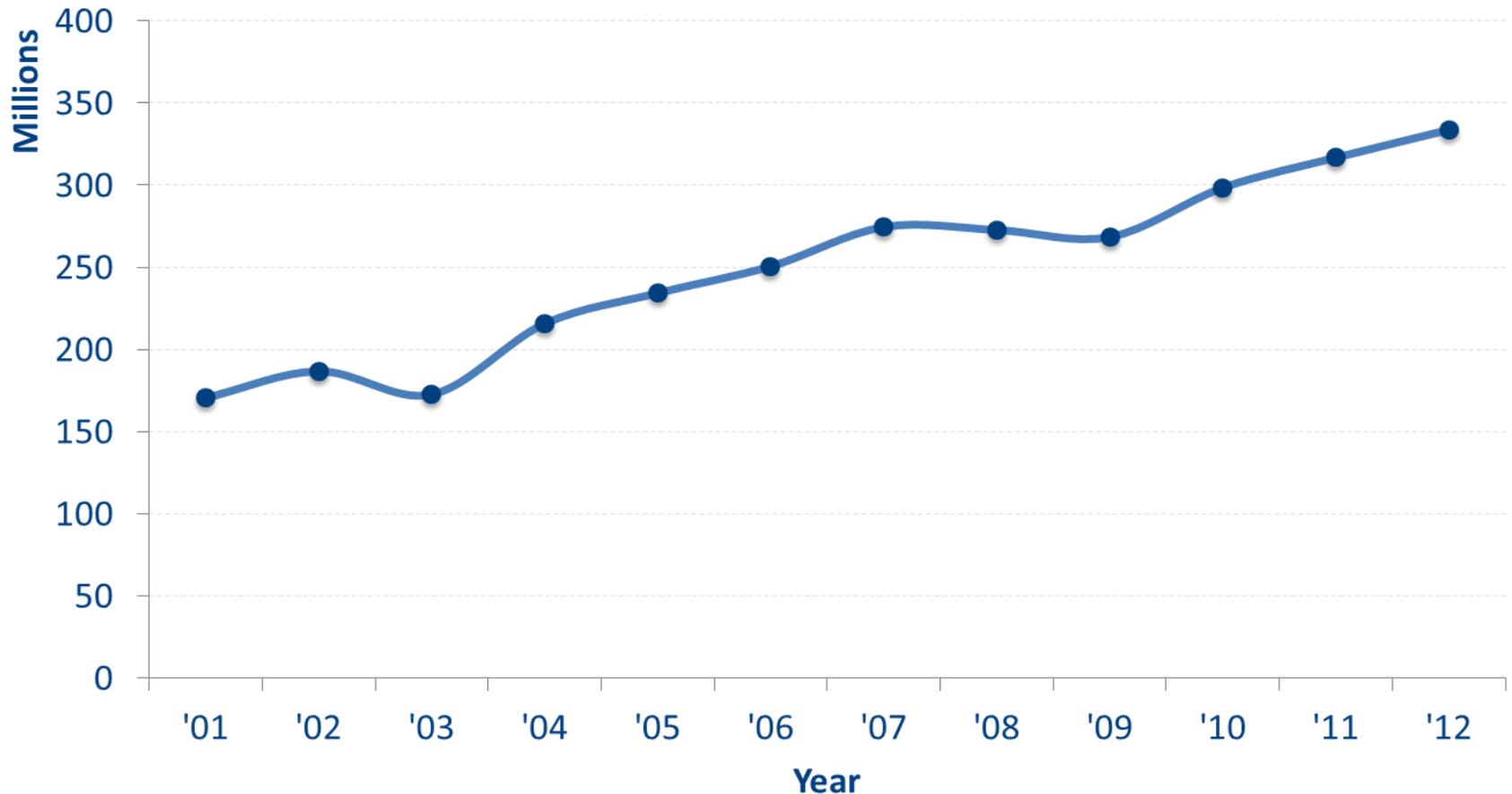
在此背景下，尽管不同次区域的表现存在较大差异，亚太地区国际旅游的总体发展状况良好。

IVAs to Asia 2001-2012e

In millions, source: Relevant NTOs/NSOs, PATA

2001-2012年亚洲目的地接待的国际入境游客人数（百万人次）

数据来源：国家/地区旅游局，由PATA汇编

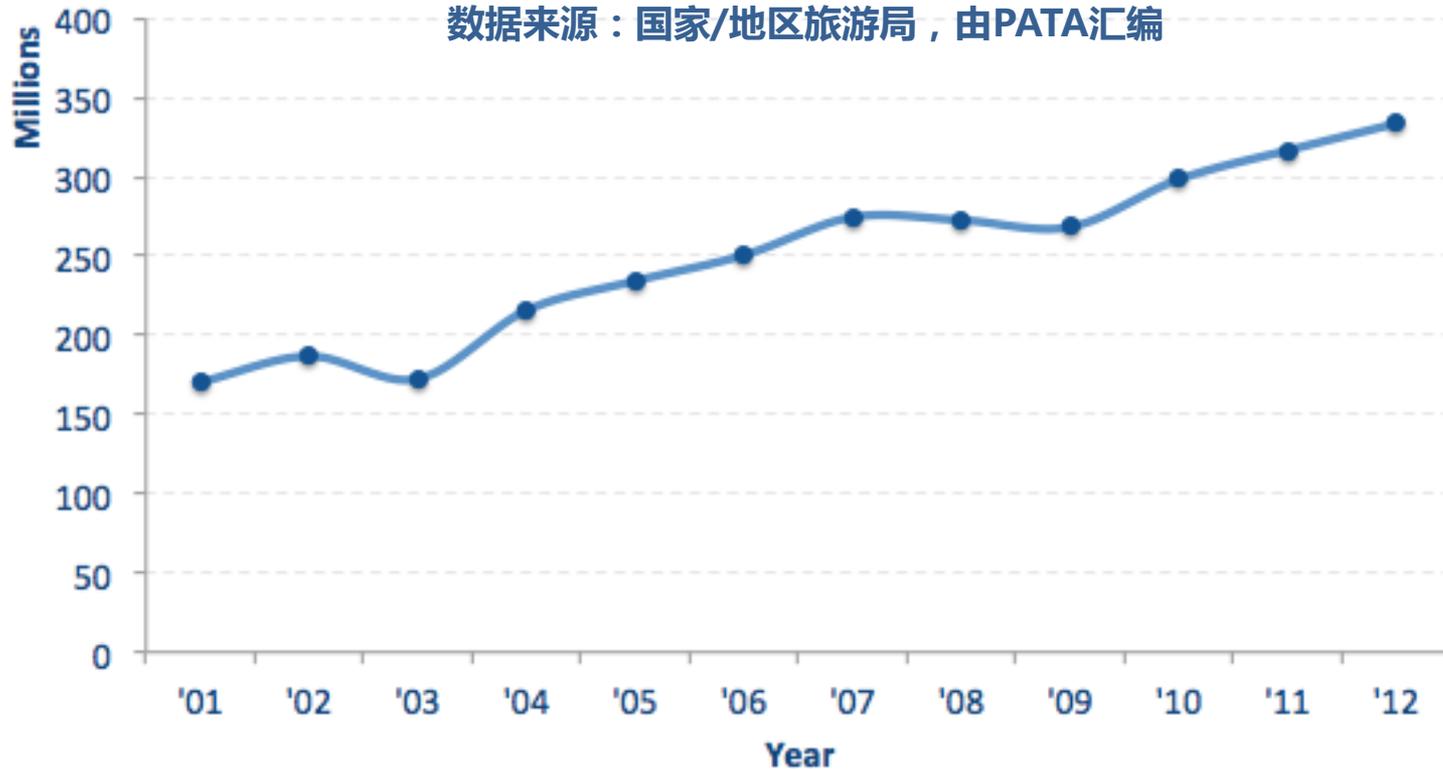


IVAs to Asia 2001-2012e

In millions, source: Relevant NTOs/NSOs, PATA

2001-2012年亚洲目的地接待的国际入境游客人数（百万人次）

数据来源：国家/地区旅游局，由PATA汇编



International Visitor Arrivals (IVAs) to Asia Pacific have followed the global trend and have generally been positive – exceptions occurring in 2003 & 2008/2009.

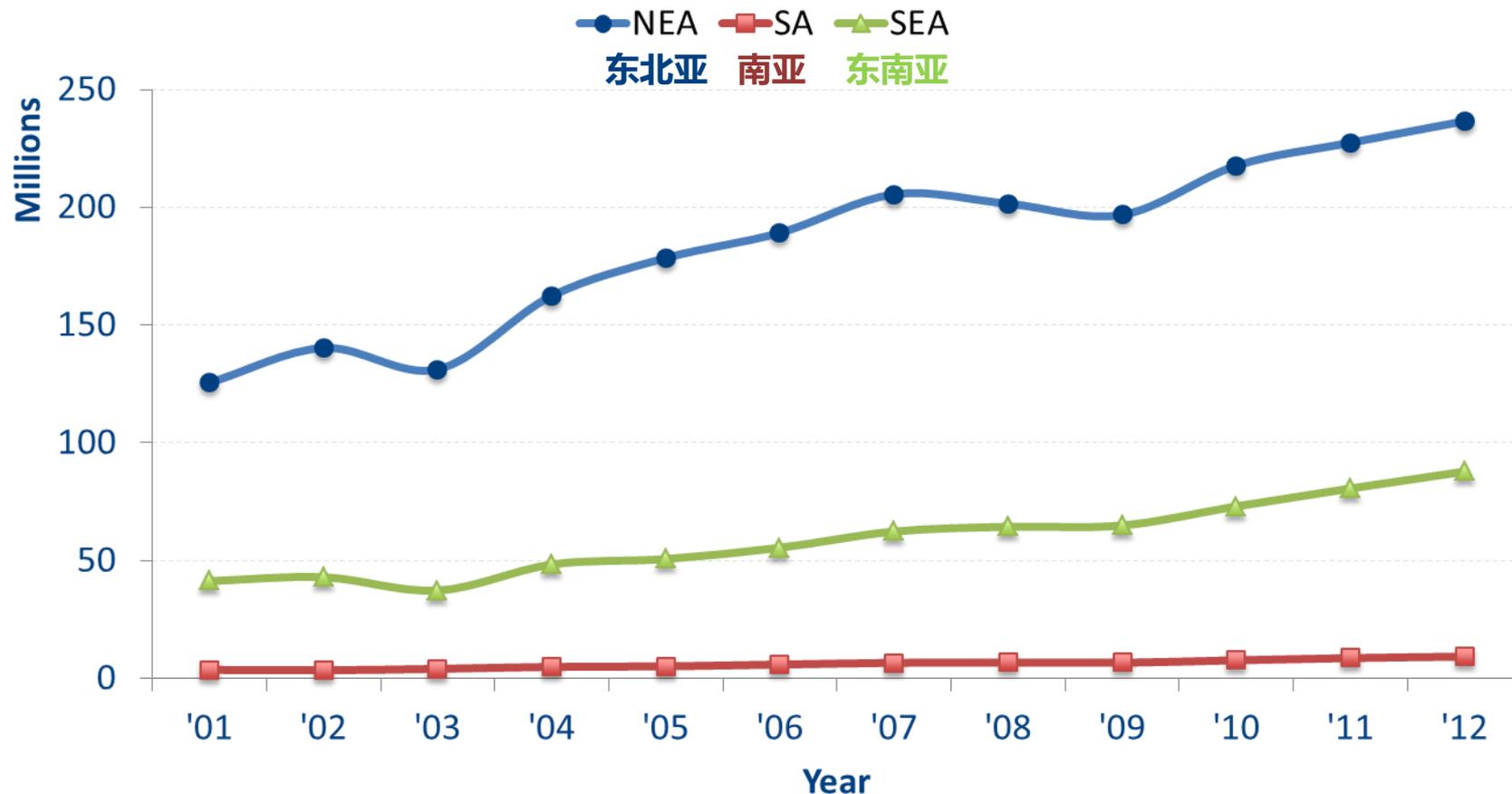
除2003和2008/2009年以外，亚太地区的国际入境游客增长趋势与全球保持一致，总体情况较好。

IVAs to Asia 2001-2012e

In millions, source: Relevant NTOs/NSOs, PATA

2001-2012年亚洲目的地接待的国际入境游客人数（百万人次）

数据来源：国家/地区旅游局，由PATA汇编

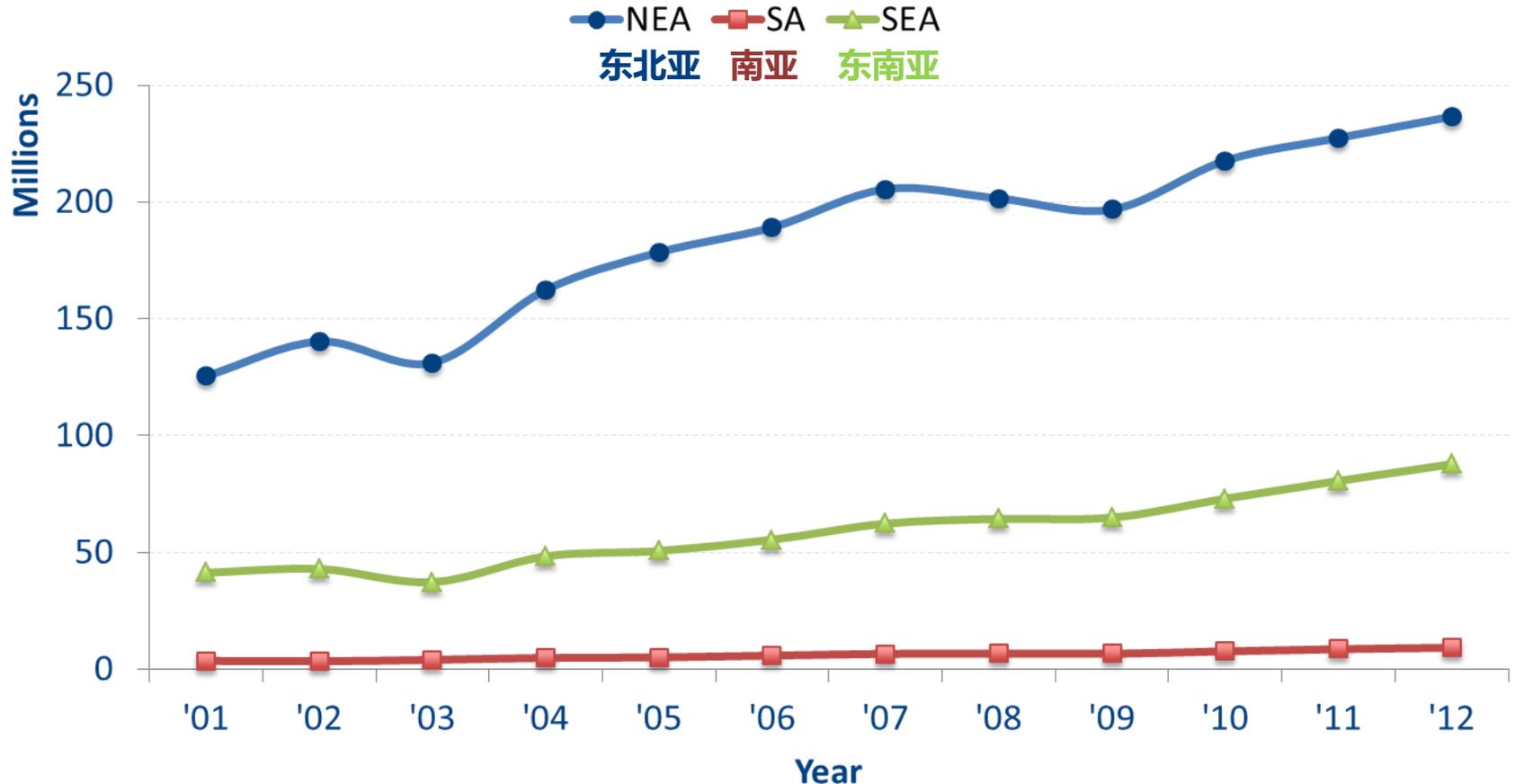


IVAs to Asia 2001-2012e

In millions, source: Relevant NTOs/NSOs, PATA

2001-2012年亚洲目的地接待的国际入境游客人数（百万人次）

数据来源：国家/地区旅游局，由PATA汇编

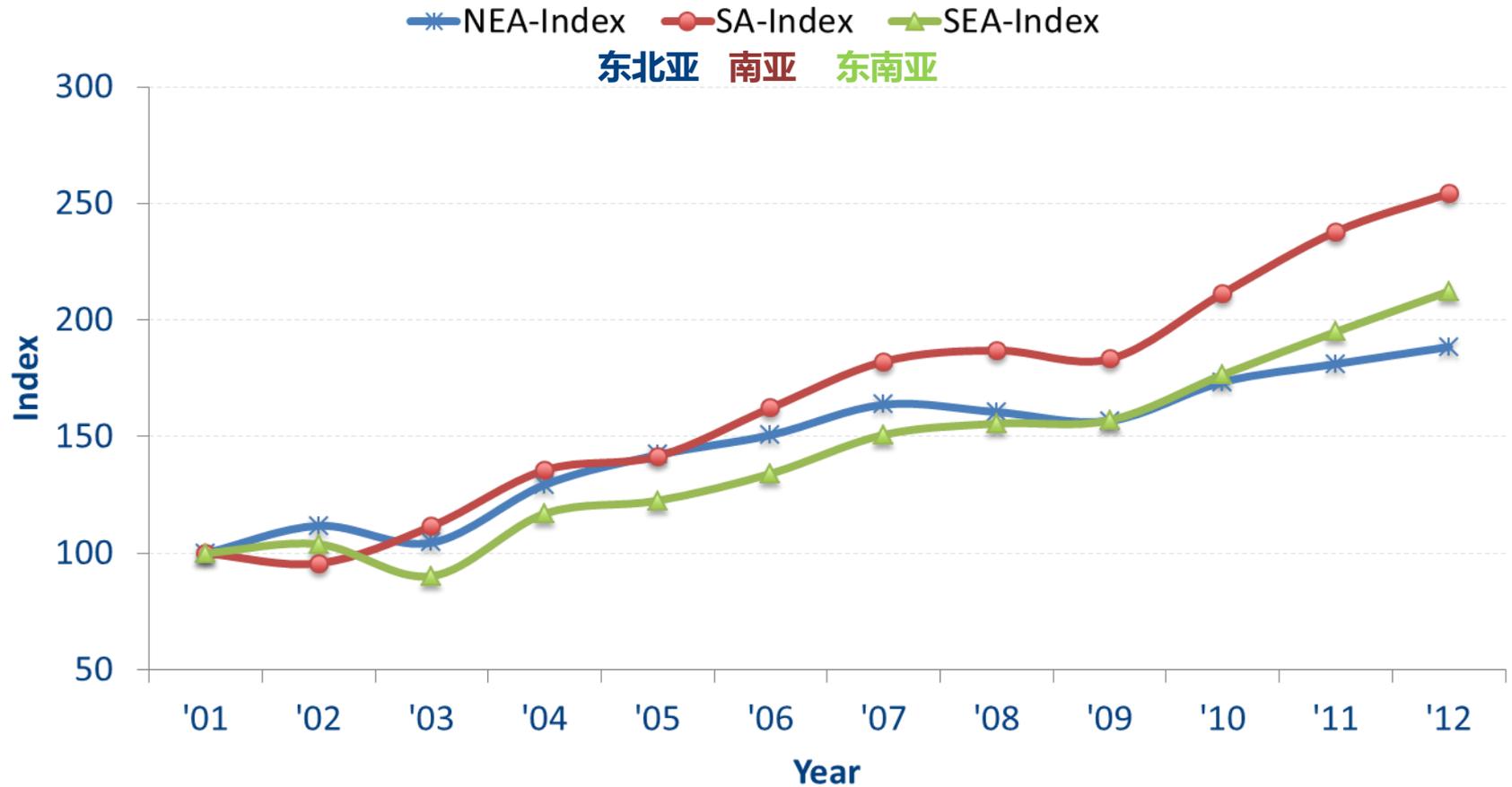


With arrivals into Northeast Asia creating the bulk of that growth.
2001-2012年，亚洲地区是推动全球入境游客增长的主要力量。

Index of IVAs to Asia

亚洲国际入境游客接待量指数

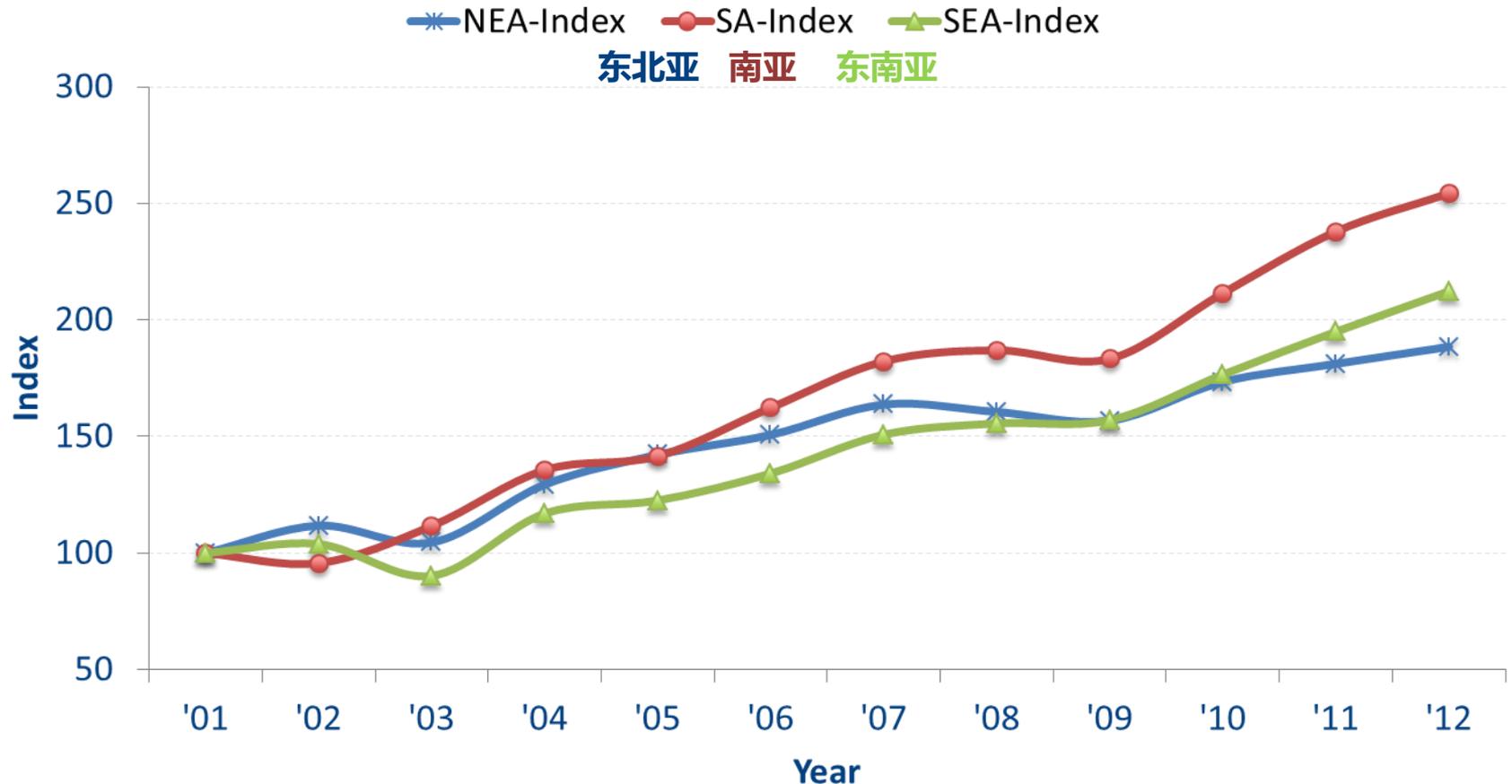
Base 100 = year 2001
将2001年数据赋值为100



Index of IVAs to Asia

亚洲国际入境游客接待量指数

Base 100 = year 2001
将2001年数据赋值为100



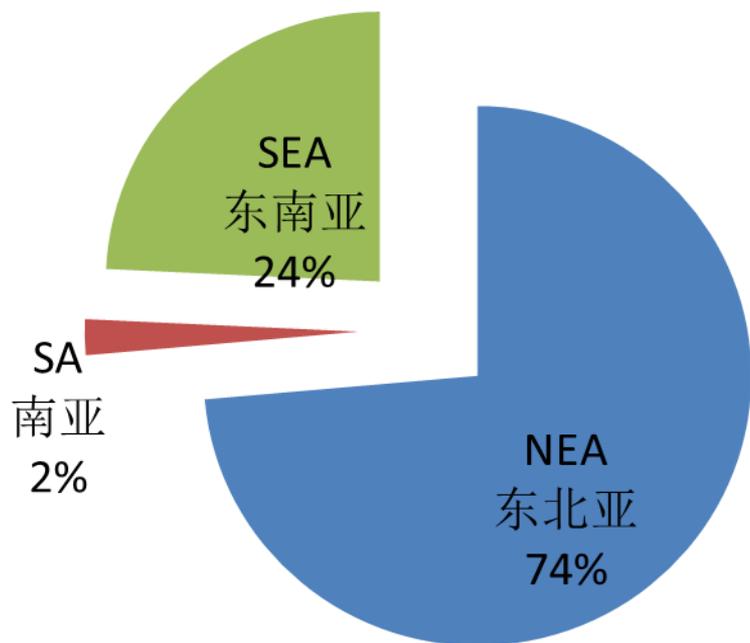
Where the relative rate of growth is highest for South Asia followed by Southeast Asia and Northeast Asia

纵观亚洲境外游客市场，南亚市场增长率最高，其次是东南亚市场和东北亚市场

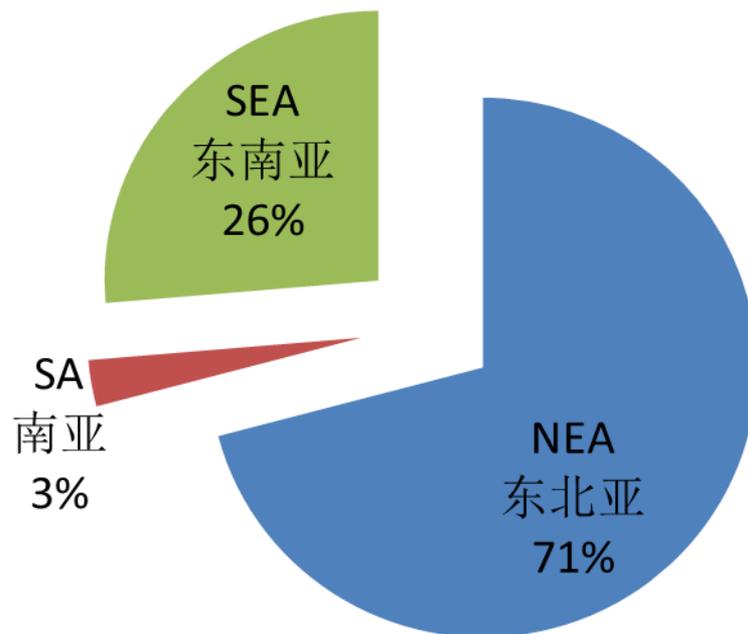
Shift in Relative Share (%) of IVAs into Asia 2001 & 2012e

2001/2012年亚太地区入境游客人数
各次区域相对市场份额对比

2001年



2012年



Early Indicators by Origin 2012

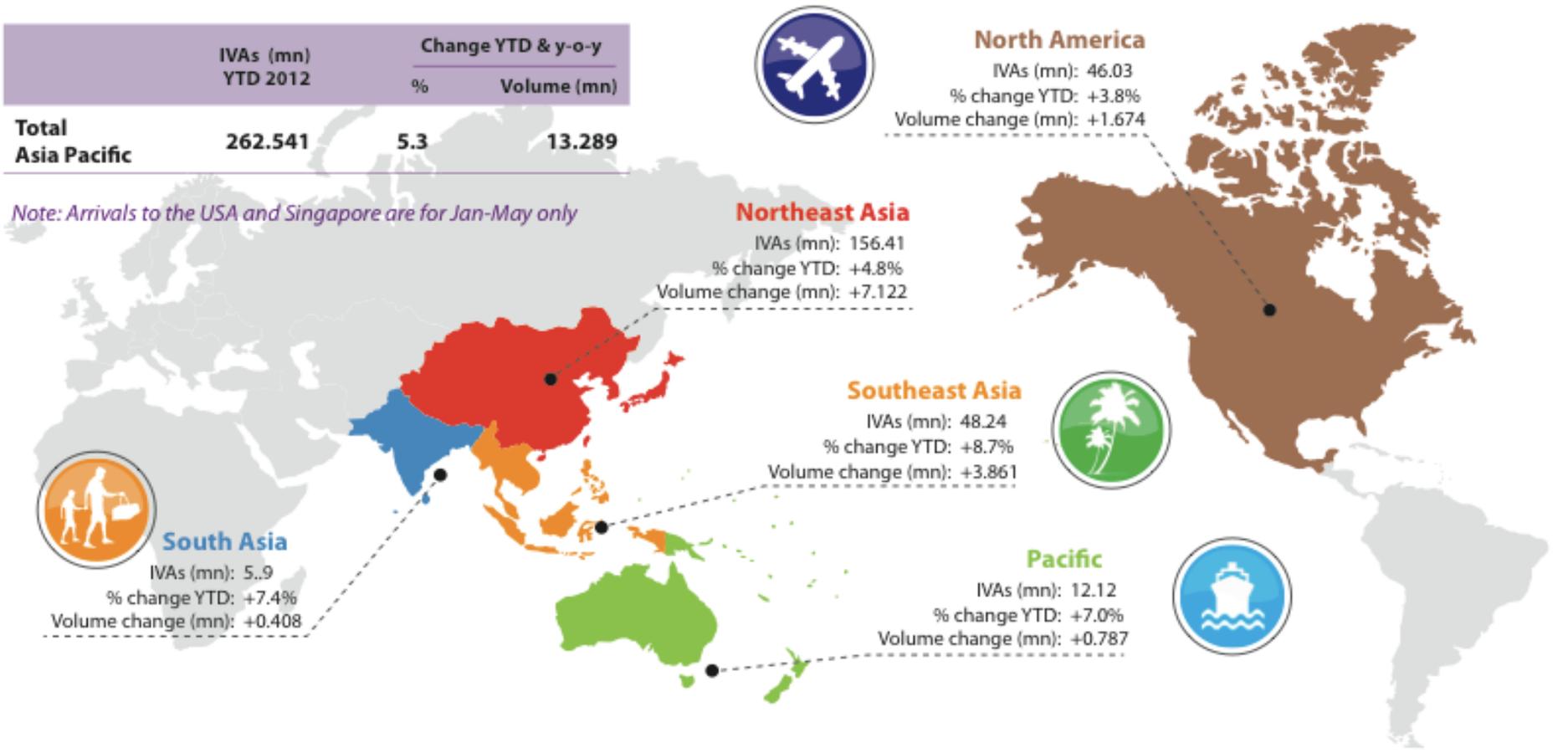
2012年初步数据

2012年按次区域划分的亚太地区入境游客人数及同比增长率

International visitor arrivals by sub-region, YTD 2012

	IVAs (mn) YTD 2012	Change YTD & y-o-y	
		%	Volume (mn)
Total Asia Pacific	262.541	5.3	13.289

Note: Arrivals to the USA and Singapore are for Jan-May only



North America

IVAs (mn): 46.03
% change YTD: +3.8%
Volume change (mn): +1.674

Northeast Asia

IVAs (mn): 156.41
% change YTD: +4.8%
Volume change (mn): +7.122

Southeast Asia

IVAs (mn): 48.24
% change YTD: +8.7%
Volume change (mn): +3.861



South Asia

IVAs (mn): 5.9
% change YTD: +7.4%
Volume change (mn): +0.408



Pacific

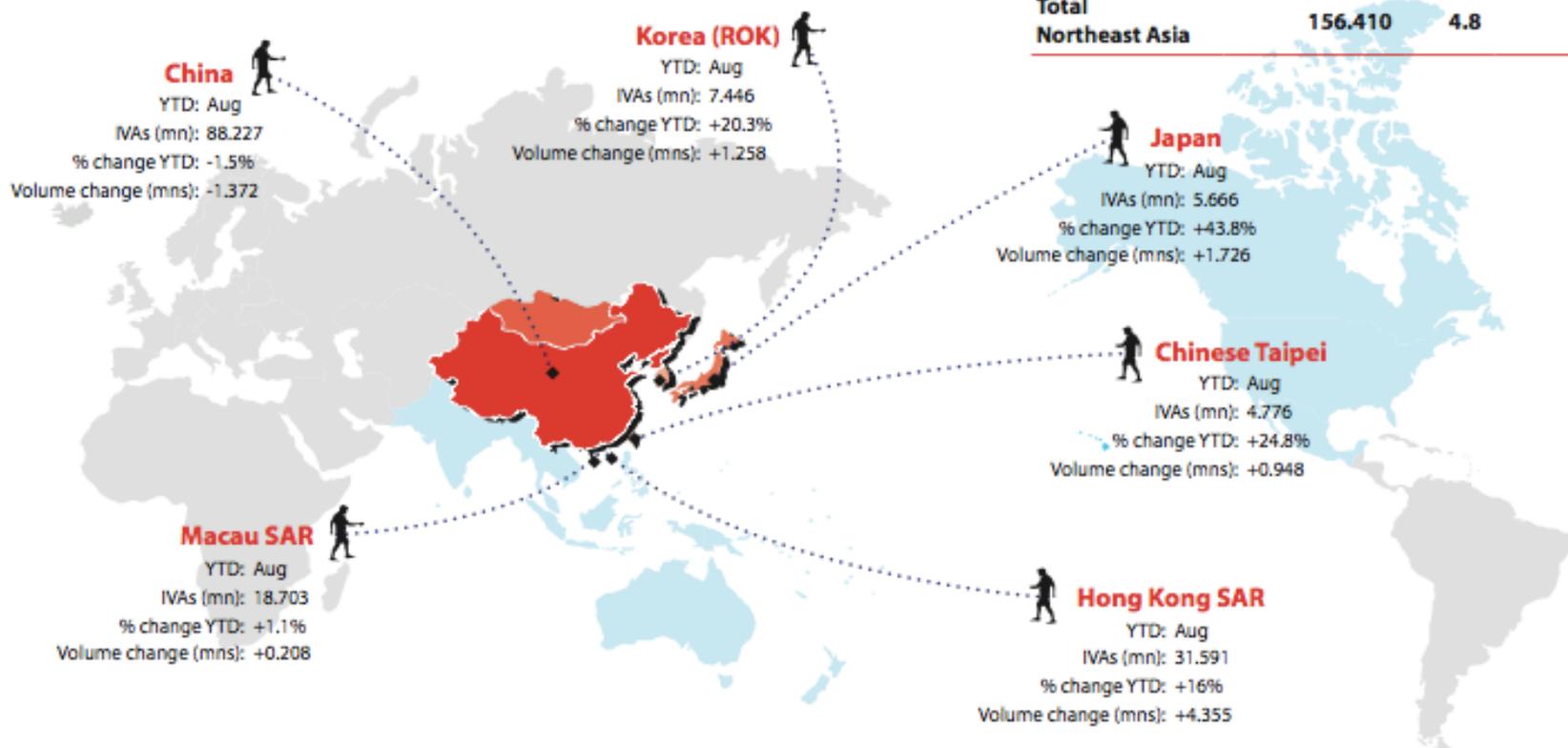
IVAs (mn): 12.12
% change YTD: +7.0%
Volume change (mn): +0.787



NORTHEAST ASIA

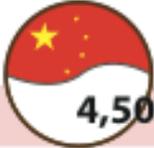
International visitor arrivals to Northeast Asia by destination, 2012 YTD
2012年按目的地划分的东北亚入境游客人数及同比增长率

Northeast Asia	IVAs 2012 YTD (mn)	Change YTD & y-o-y	
		%	Volume (mn)
Total Northeast Asia	156,410	4.8	7,122

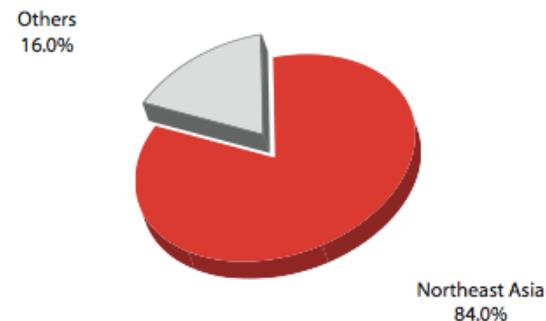


2012年上半年按入境接待增量统计的东北亚5大客源地

Top 5 origin markets to Northeast Asia by volume gain, 1H12

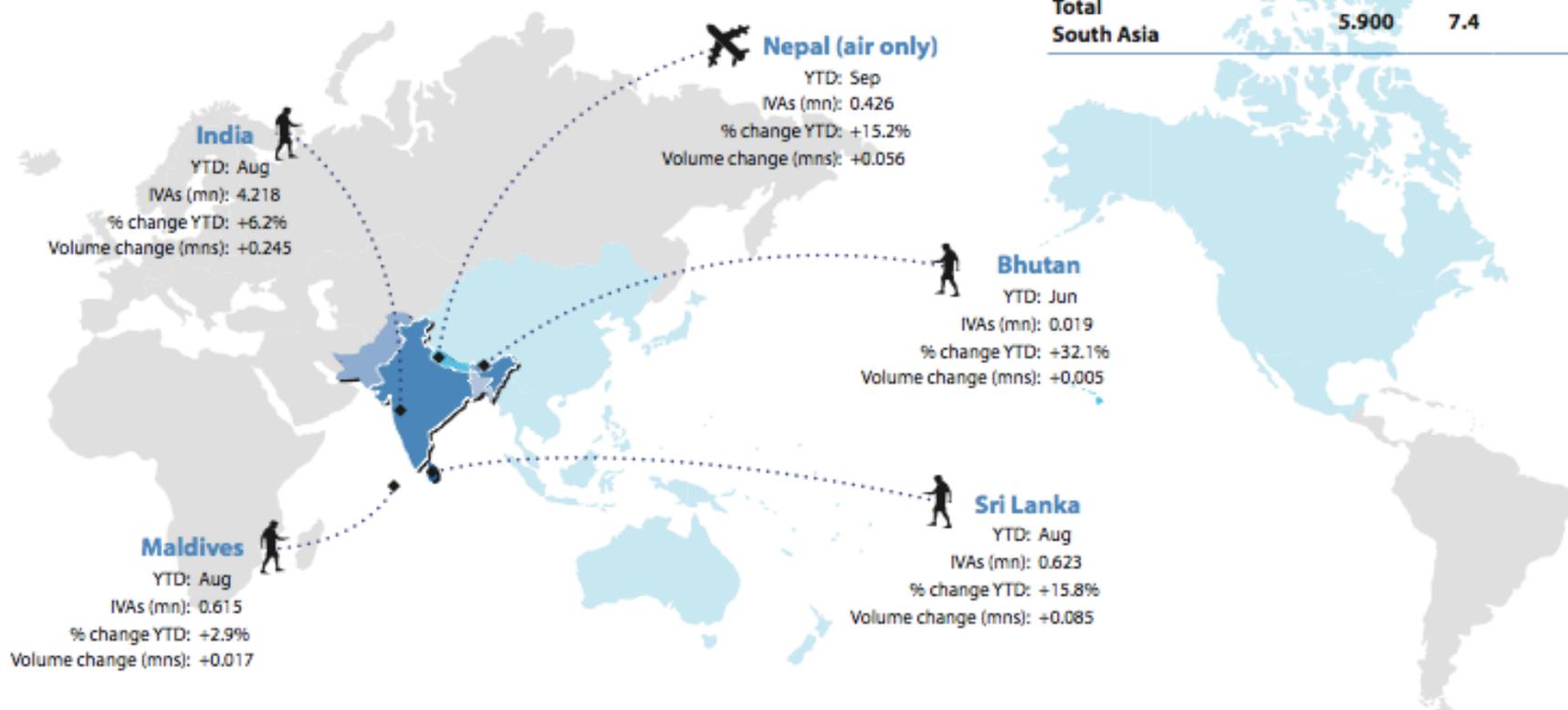
Rank	Origin market	Additional arrivals in 1H12
1	China	 4,501,000 
2	Japan	 831,000 
3	Chinese Taipei	 245,000 
4	USA	 177,000 
5	Philippines	 144,000 

Main sub-regional share (%) of arrivals to Northeast Asia



SOUTH ASIA

International visitor arrivals to South Asia by destination, 2012 YTD 2012年按目的地划分的南亚入境游客人数及同比增长率



South Asia	IVAs 2012 YTD (mn)	Change YTD & y-o-y	
		%	Volume (mn)
Total South Asia	5.900	7.4	0.408

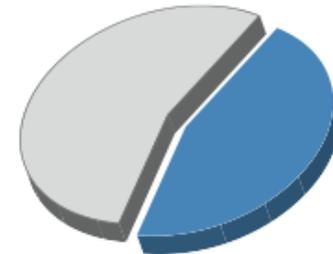
2012年上半年按入境接待增量统计的南亚5大客源地

Top 5 origin markets to South Asia by volume gain, 1H12

Rank	Origin market	Additional arrivals in 1H12
1	India	 24,000 
2	China	 19,000 
3	Germany	 17,000 
4	Russian Federation	 9,000 
5	Switzerland	 8,000 

Main sub-regional share (%) of arrivals to South Asia

Others
55.3%

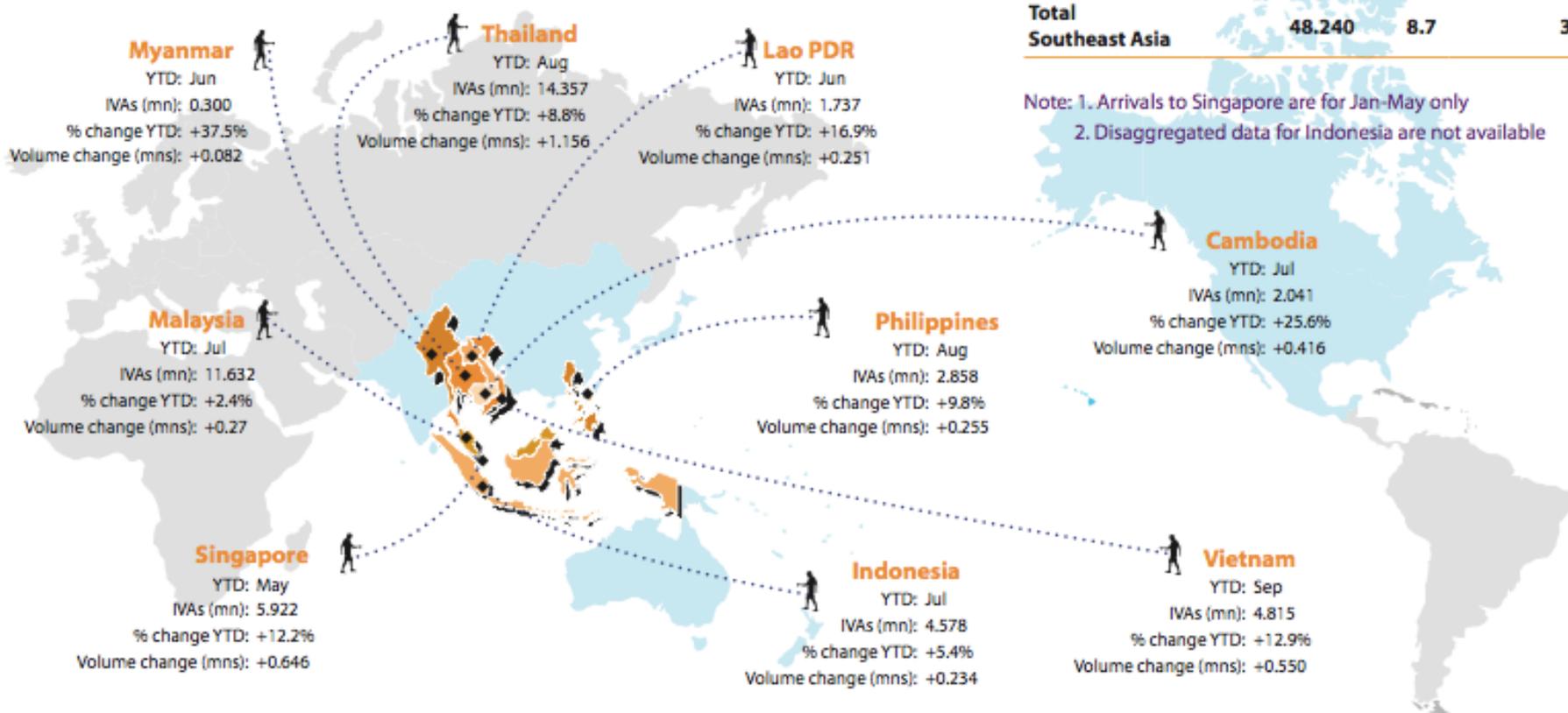


Europe
44.7%

SOUTHEAST ASIA

International visitor arrivals to Southeast Asia by destination, 2012 YTD

2012年按目的地划分的东南亚入境游客人数及同比增长率



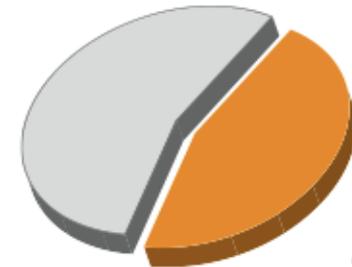
2012年上半年按入境接待增量统计的东南亚5大客源地

Top 5 origin markets to Southeast Asia by volume gain, 1H12

Rank	Origin market	Additional arrivals in 1H12
1	China	 826,000 
2	Indonesia	 341,000 
3	Korea (ROK)	 284,000 
4	Japan	 245,000 
5	Vietnam	 224,000 

Main sub-regional share (%) of arrivals to Southeast Asia

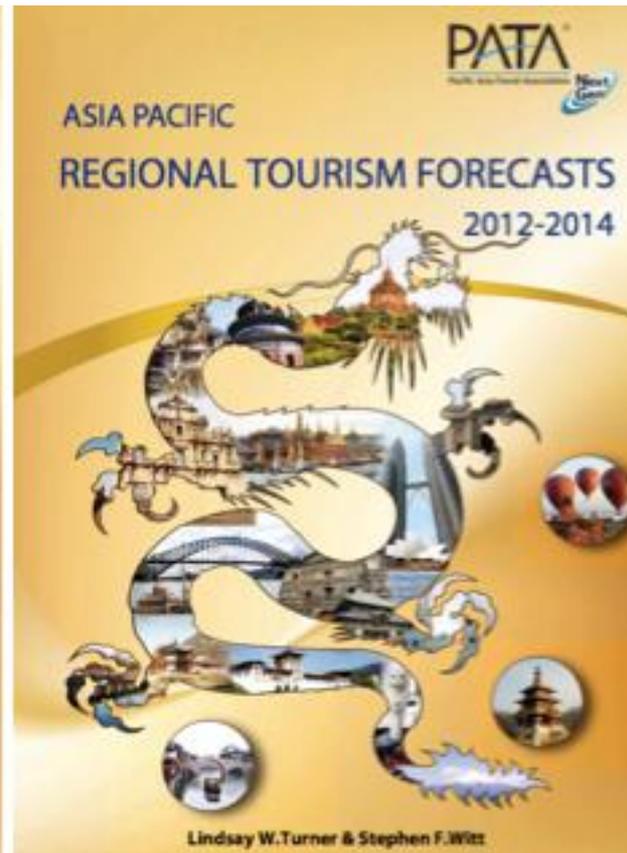
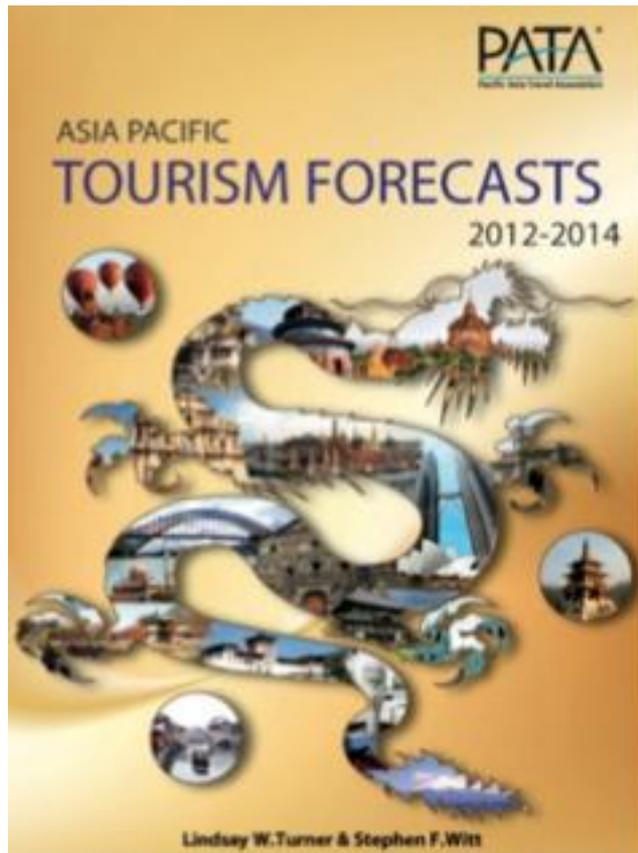
Others
55.7%



Southeast Asia
44.3%

《PATA亚太地区旅游业预测 2012-2014》

《PATA亚太地区区域旅游业预测 2012-2014》



Forecasts vs Actual 2012

2012年预测值与实际数据

Source: Turner & Witt (2012) PATA
数据来源：亚太旅游协会 (PATA)

Destination 目的地	CY 2012 (mns) (百万人次)		
	Likely 实际值	Forecast 预测值	L/F 偏差率 (%)
Northeast Asia 东北亚	236.6	235.2	0.6
South Asia 南亚	9.3	9.2	1.1
Southeast Asia 东南亚	87.8	90.7	-3.2
Asia 亚洲	333.7	335.1	-0.4

Forecasts to 2014

2012-2014年中国入境旅游接待量预测

Source: Turner & Witt (2012) PATA

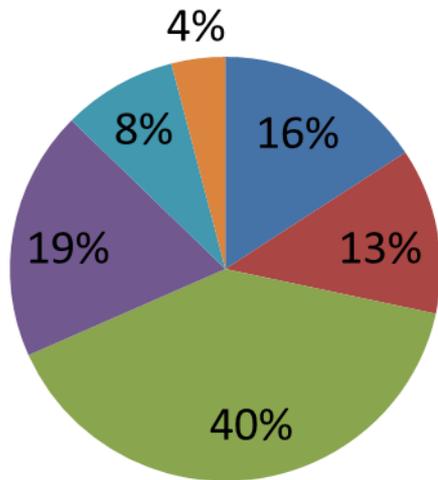
数据来源：亚太旅游协会 (PATA)

China (mns) (百万)	2011年	2012年	2013年 (预测)	2014年 (预测)
Total 总计	135.4	132.7	142.3	145.7
Foreigners 外国人	26.8	27.3	29.5	30.7

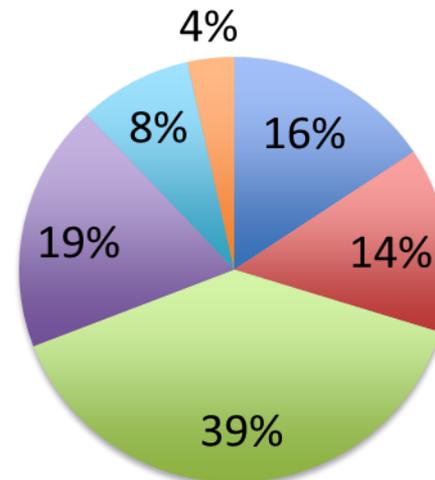
2010 Actual & 2014 Forecast

2010年实际值与2014年预测值对比

2010年



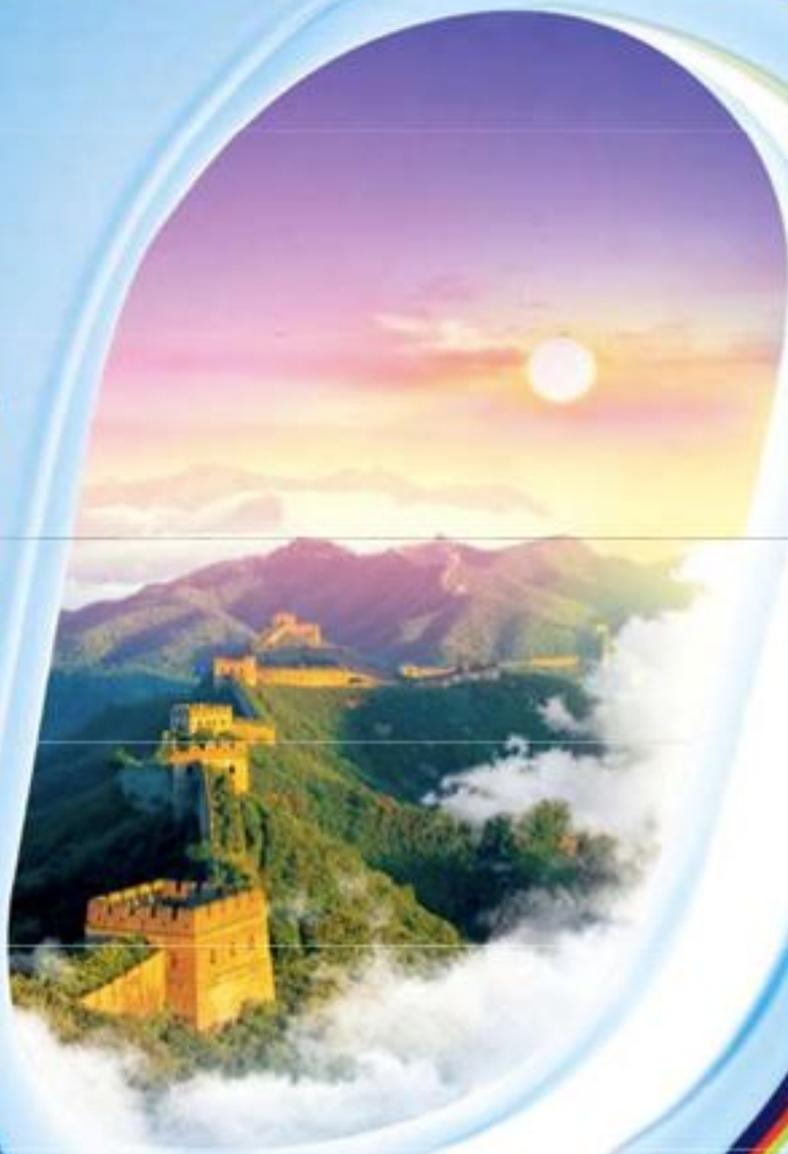
2014年





中国市场 预测

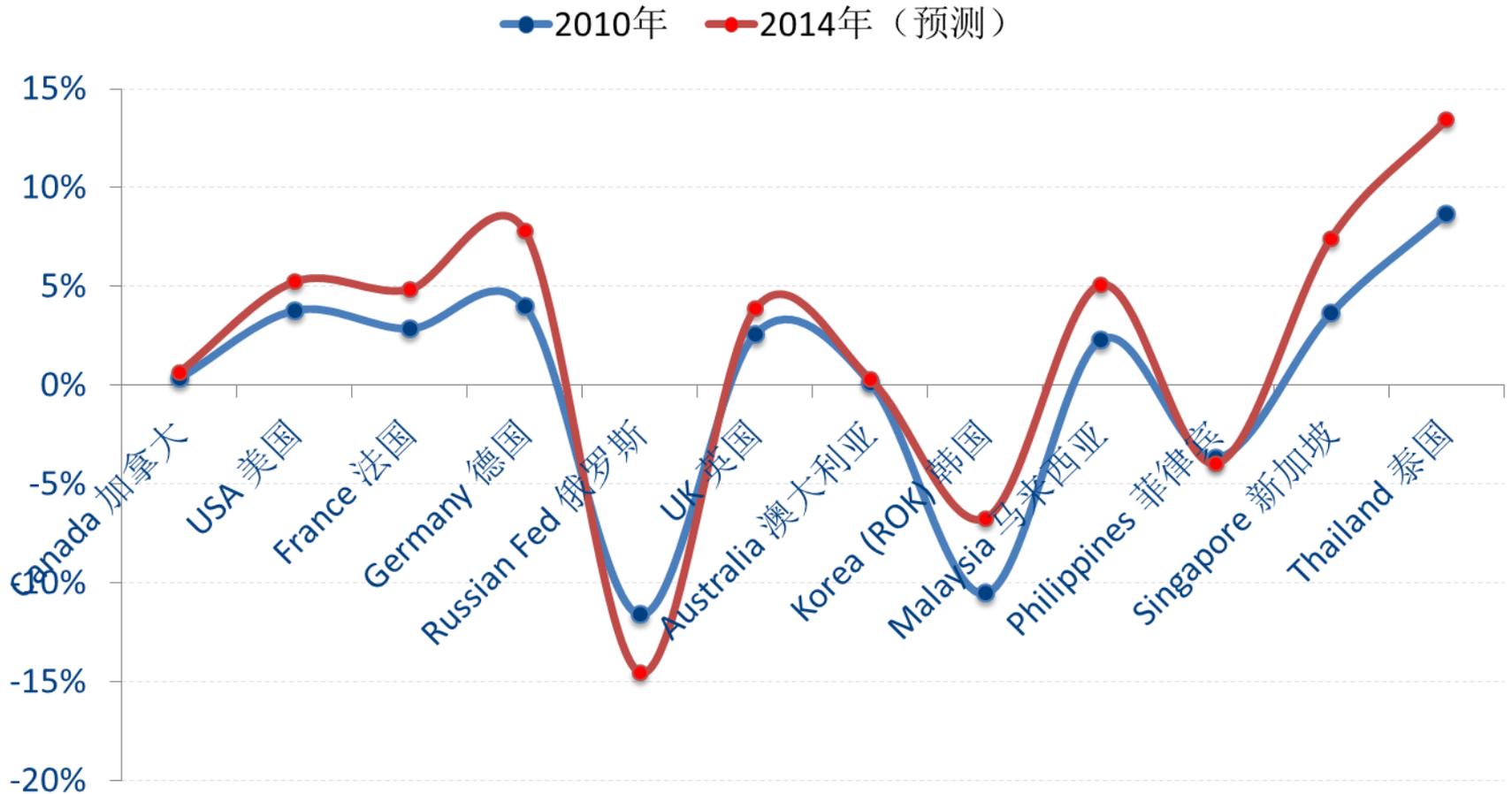
兰迪·廷塞斯
市场营销副总裁
波音民用飞机集团
2012年9月



Relative Difference Southwest vs China

2010/2014年主要客源国向西南地区 输送旅客人数占中国份额对比

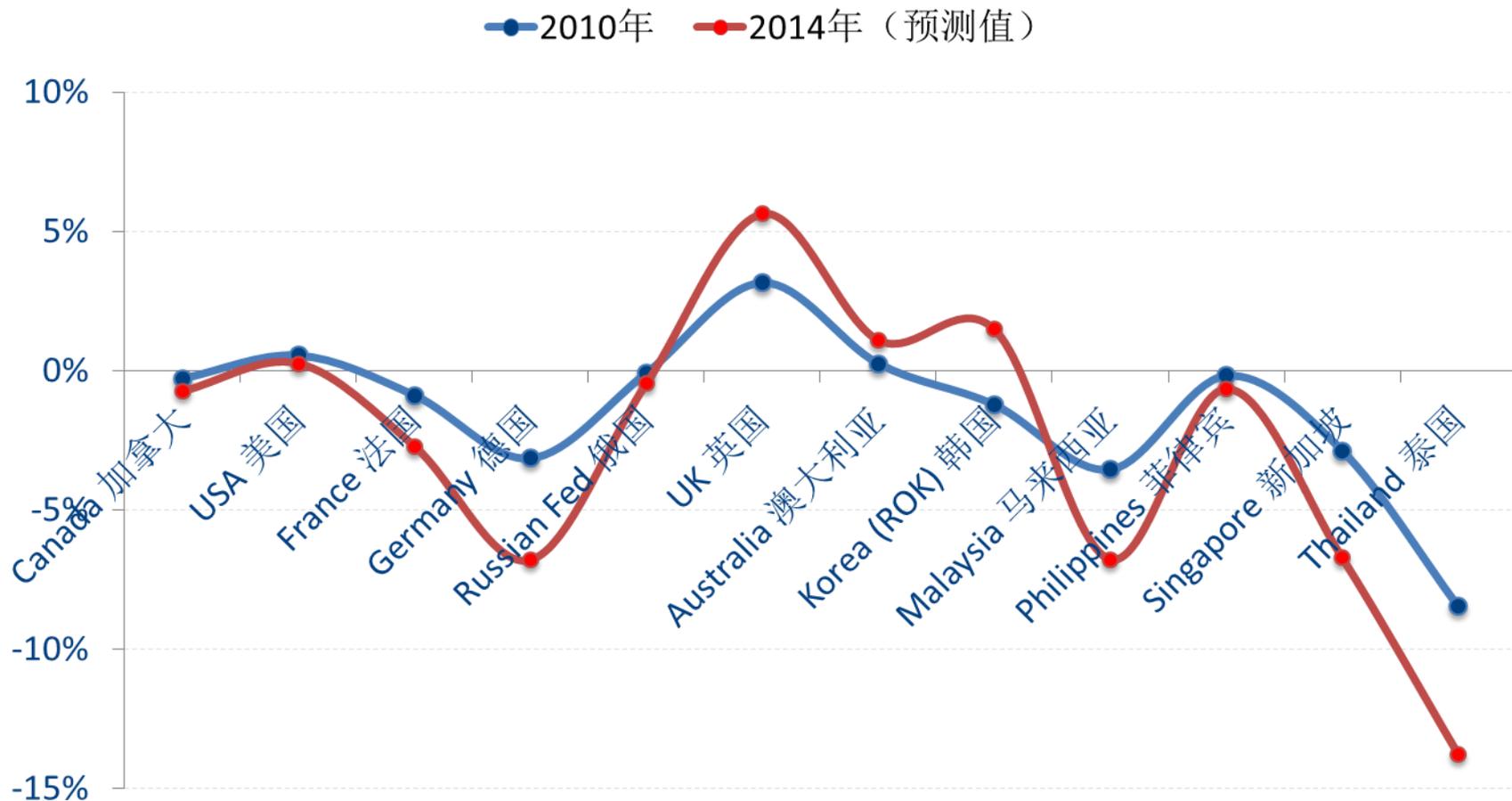
Percentage Points, 2010 and 2014 (forecast)



Relative Difference Sichuan vs Southwest

2010/2014年主要客源国向四川 输送旅客人数占西南地区份额对比

Percentage Points, 2010 and 2014 (forecast)



For the Global Economy in 2013, Happy Days Are Not Quite Here Again

Published : January 16, 2013

The worst of the financial crisis is past. The U.S. economy is slowly recovering, home prices are rising and the stock market has had a strong run. But two Wharton faculty members warn that there is still plenty to worry about -- in the U.S., Europe and the emerging markets.

vavavavavavaav



对2013年全球经济而言，好日子尚未到来
(2013年1月16日)

金融危机的阴影正离我们远去，美国经济正在缓慢恢复，住房价格和证券市场股市强势复苏。但沃顿商学院教授们却发出了这样的警告：美国、欧洲和新兴市场的担忧情绪尚未消除。

- Raising taxes on the wealthy will not produce enough new revenue to solve the problems in the USA, nor will counting on an economic rebound.
- 加强对富裕阶层征税的力度，增加的财政收入不足以解决美国的现存问题，也无力提振经济。
- Instead, the U.S. will have to look at painful options like raising taxes on the middle class or trimming entitlement benefits, or both.
- 与之相反，美国将不得不考虑实施诸如加强对中产阶级征税，或削减公民权益，甚至兼而有之。
- Europe's debt crisis is a long way from being over -- a problem likely to dampen economic growth worldwide.
- 欧债危机远未结束，很可能抑制全球经济增长。
- Emerging markets such as India, China and Brazil are not the growth engines they were a few years ago.
- 与前几年相比，印度、中国、巴西等新兴市场的增长引擎作用有所减弱。
- The world is in better shape than it was during the depths of the financial crisis, but is not likely to see a dramatic recovery in 2013.
- 与金融危机时相比，全球经济状况有所改善，但在2013年难以实现全面复苏。

谢谢！

THANK YOU!

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