

HSMAI Breakfast Seminar Bangkok

4 Key Takeaways Bangkok's Destination Performance

 December 2016

Who's ForwardKeys?

"Know tomorrow's travellers"

CHARLES DE GAULLE
 JAN 14th 2017
 8.46am

NATIONALITY	Chinese
MODE	Transiting
PURPOSE	Group Travel
NEXT DEPARTURE	MIL
TERMINAL	T2-F
LENGTH OF TRIP	10 days

NATIONALITY	French
MODE	Departing
PURPOSE	Leisure
NEXT DEPARTURE	NYC
TERMINAL	T2-E
LENGTH OF TRIP	2 weeks

NATIONALITY	Thai
MODE	Returning home
PURPOSE	Business
NEXT DEPARTURE	SIN
TERMINAL	T1
LENGTH OF TRIP	3 days





1. YTD Performance: Mixed Sentiments

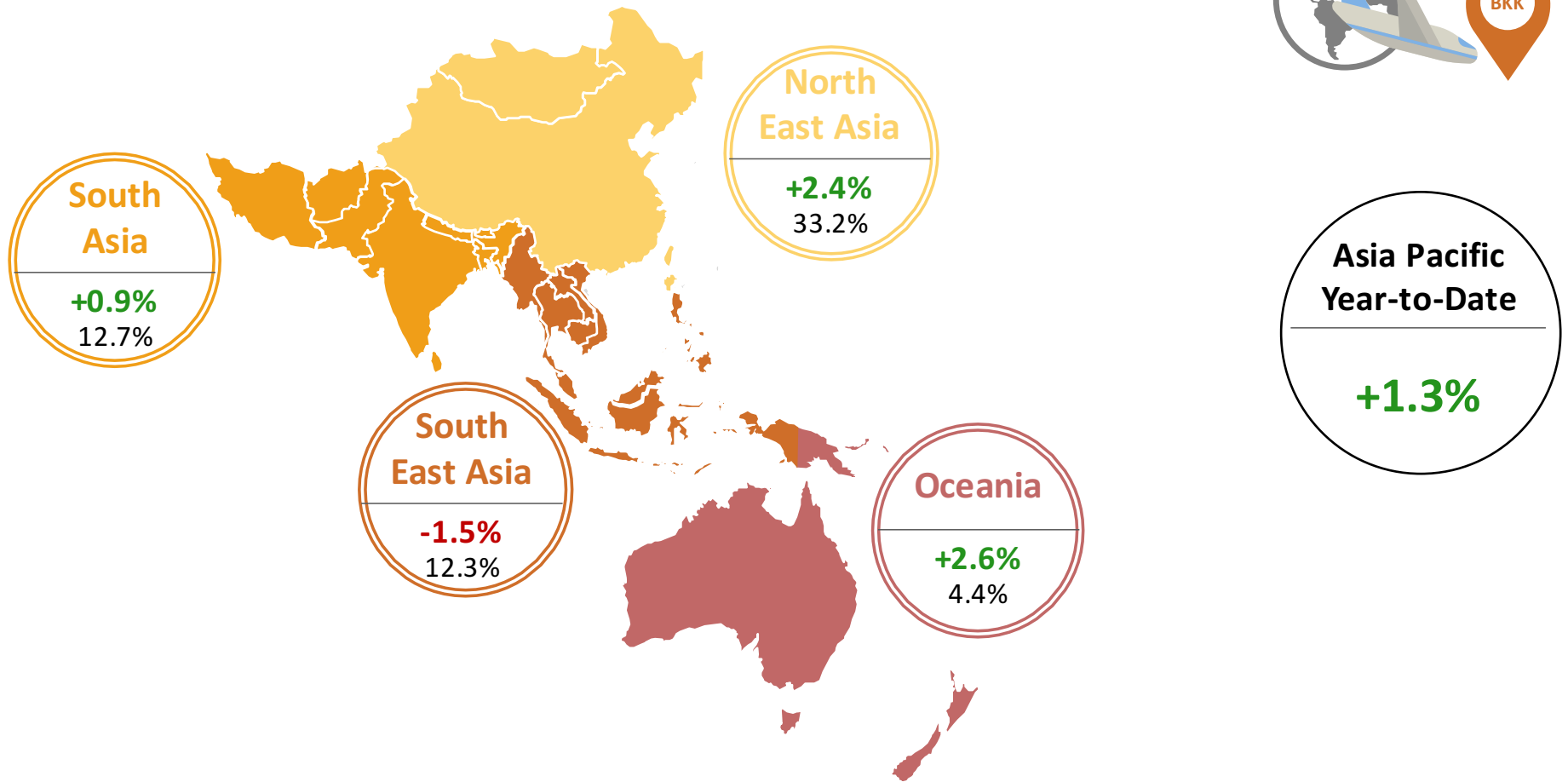
2. Forward Bookings

3. Looking at China

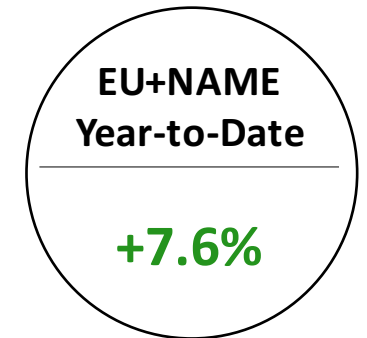
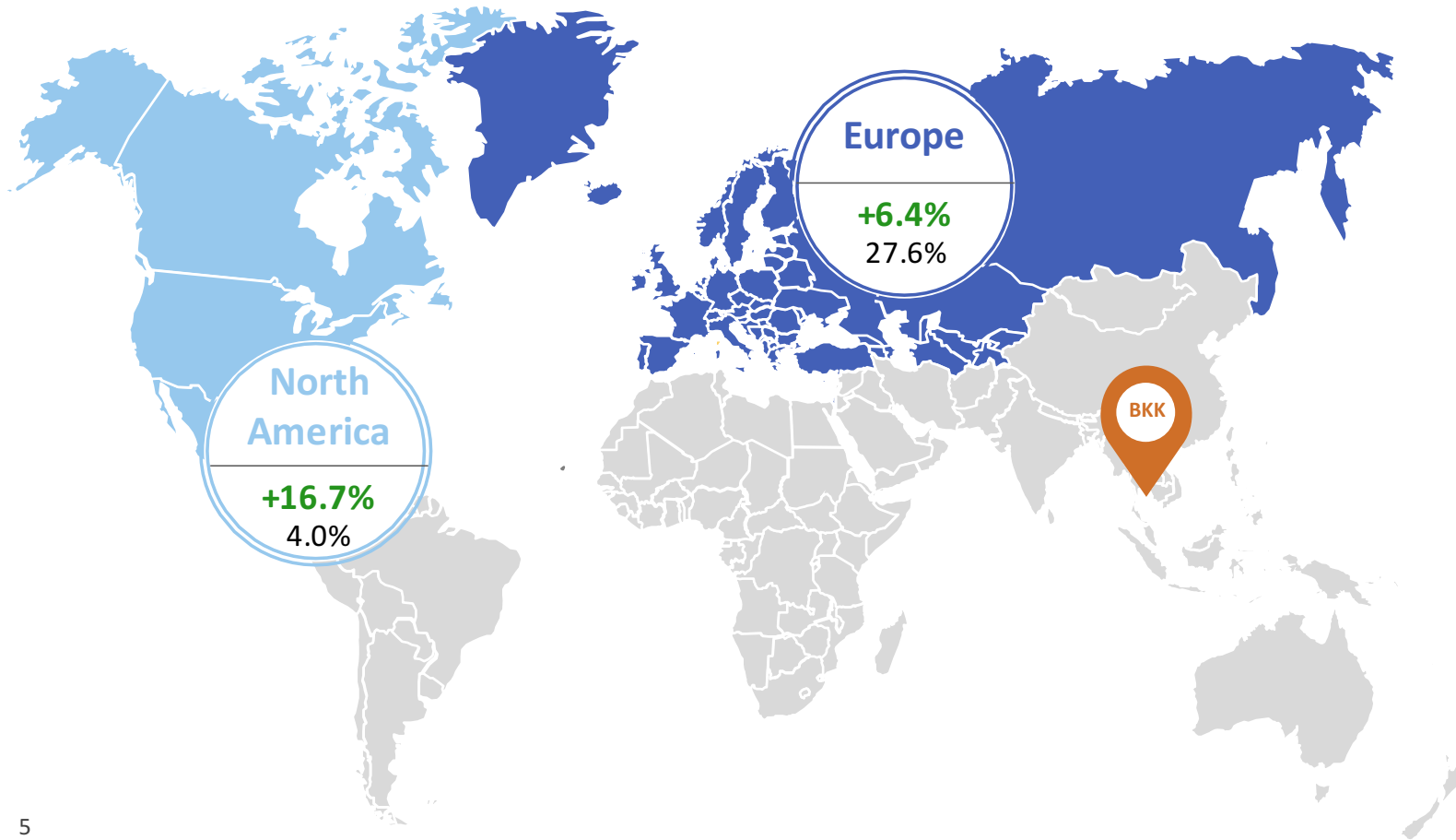
4. Russia's back

***BREXIT and Asia**

Regional Markets Stabalising



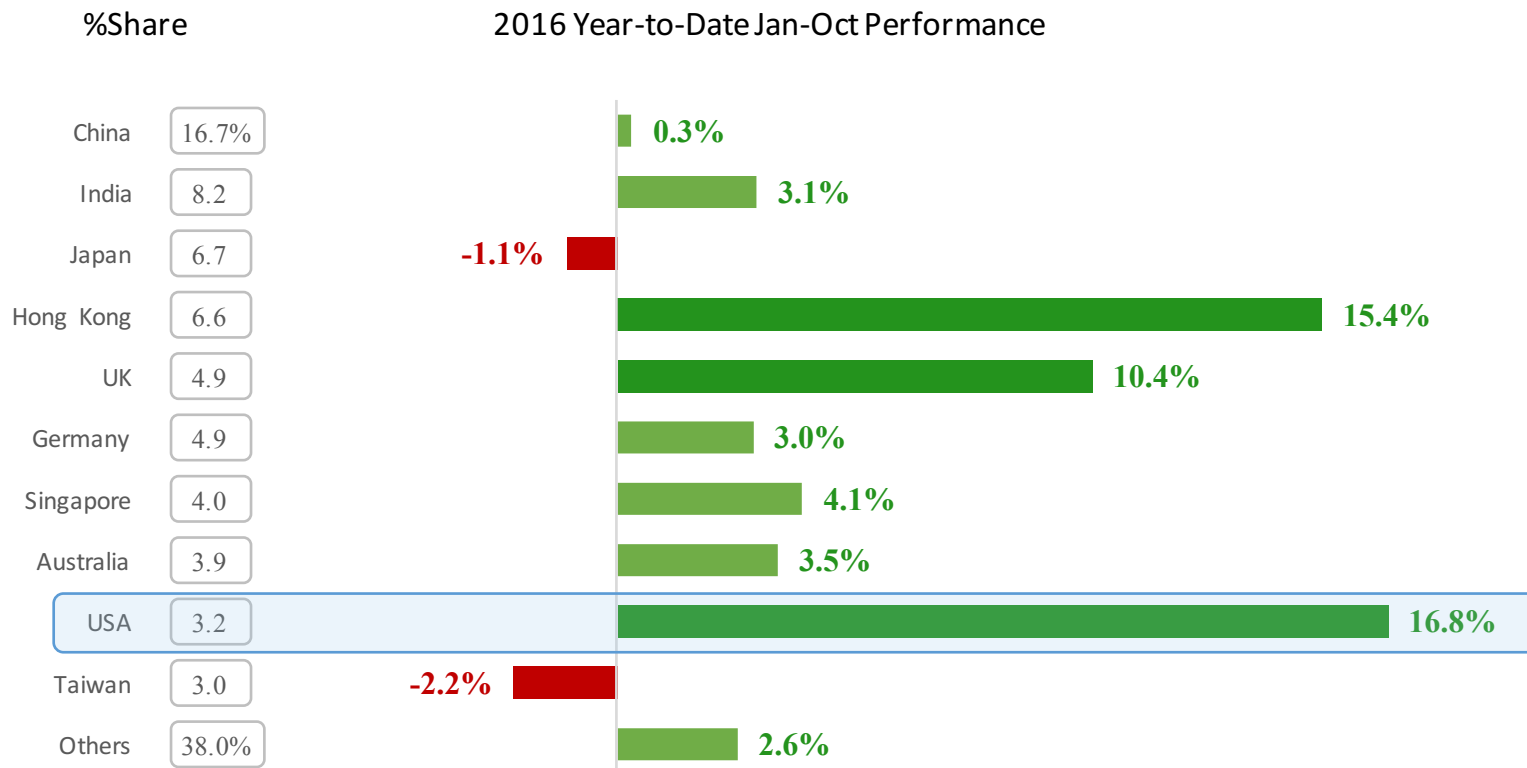
Long-haul Markets Revitalised



UK and USA Achieved Impressive Growth



Top 10 Source Countries for Bangkok Jan to Oct 2016



Arrivals from Jan 1st to Oct 31st 2016 vs. 2015

China stands for mainland only, Hong Kong, Macau, and Taiwan are excluded.



1. YTD Performance: Mixed Sentiments

2. Forward Bookings: Focus Shift

3. Looking at China

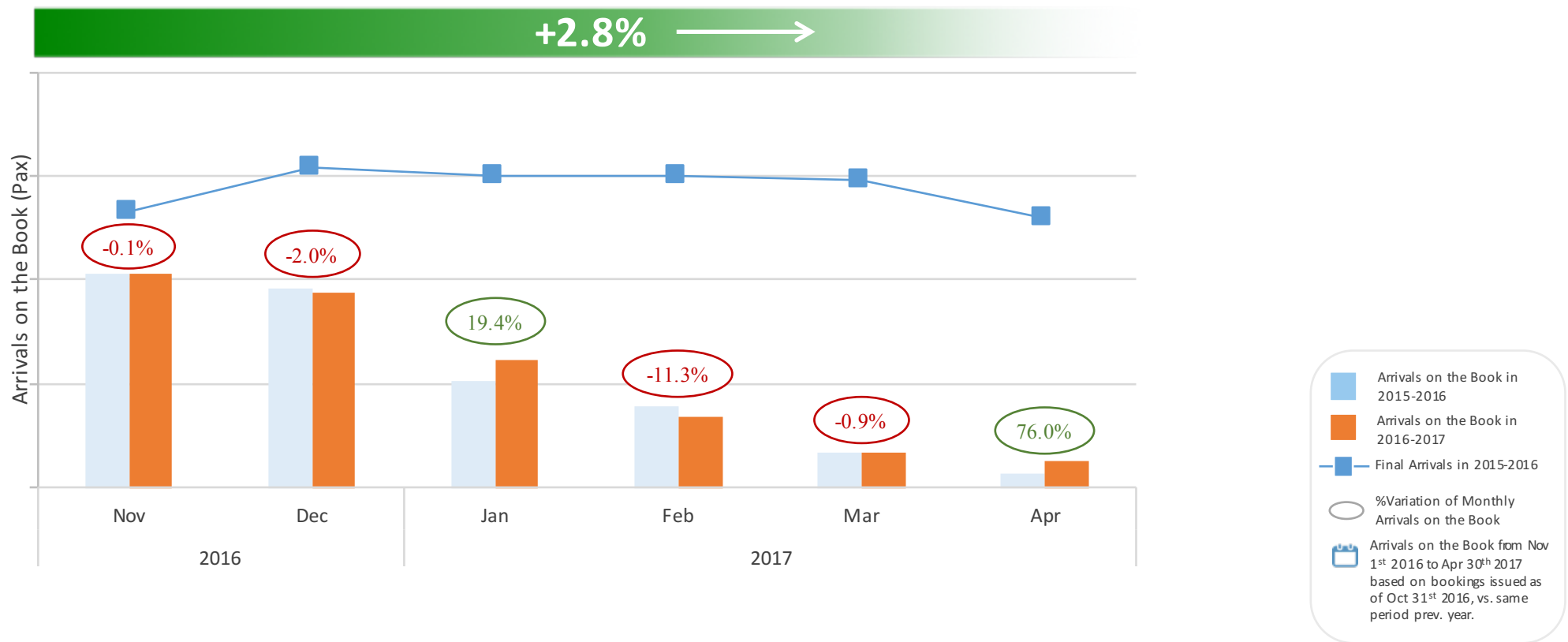
4. Russia's back

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Events Driving Travel



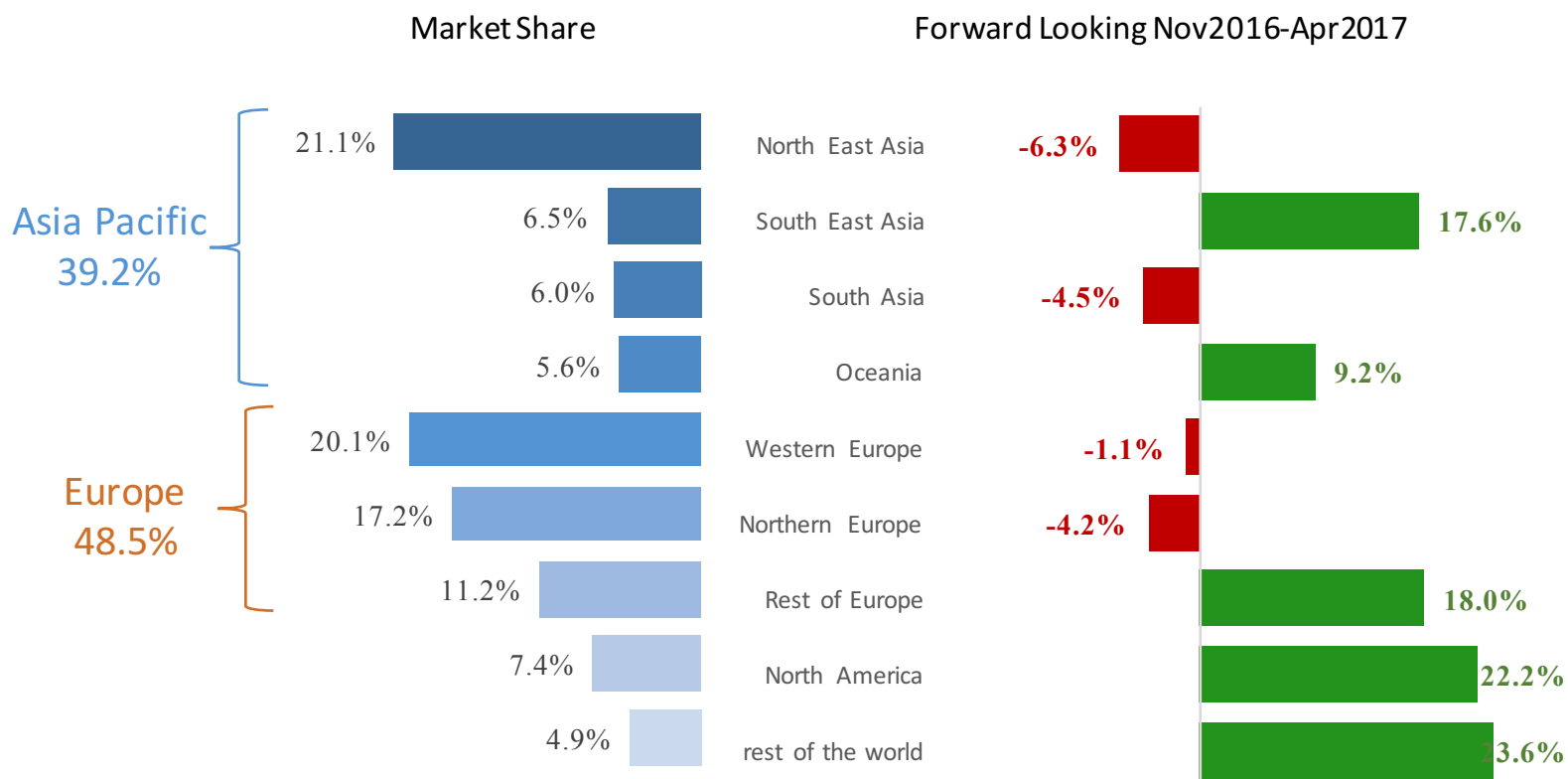
Forward Bookings for International Arrivals in Bangkok Nov2016 to Apr2017





Markets with Heavy Market Shares Behind Last Year

Int'l Arrivals in Bangkok on the Book by Origin Continent, Nov2016-Apr2017



Total Int'l On the Book

+2.8%

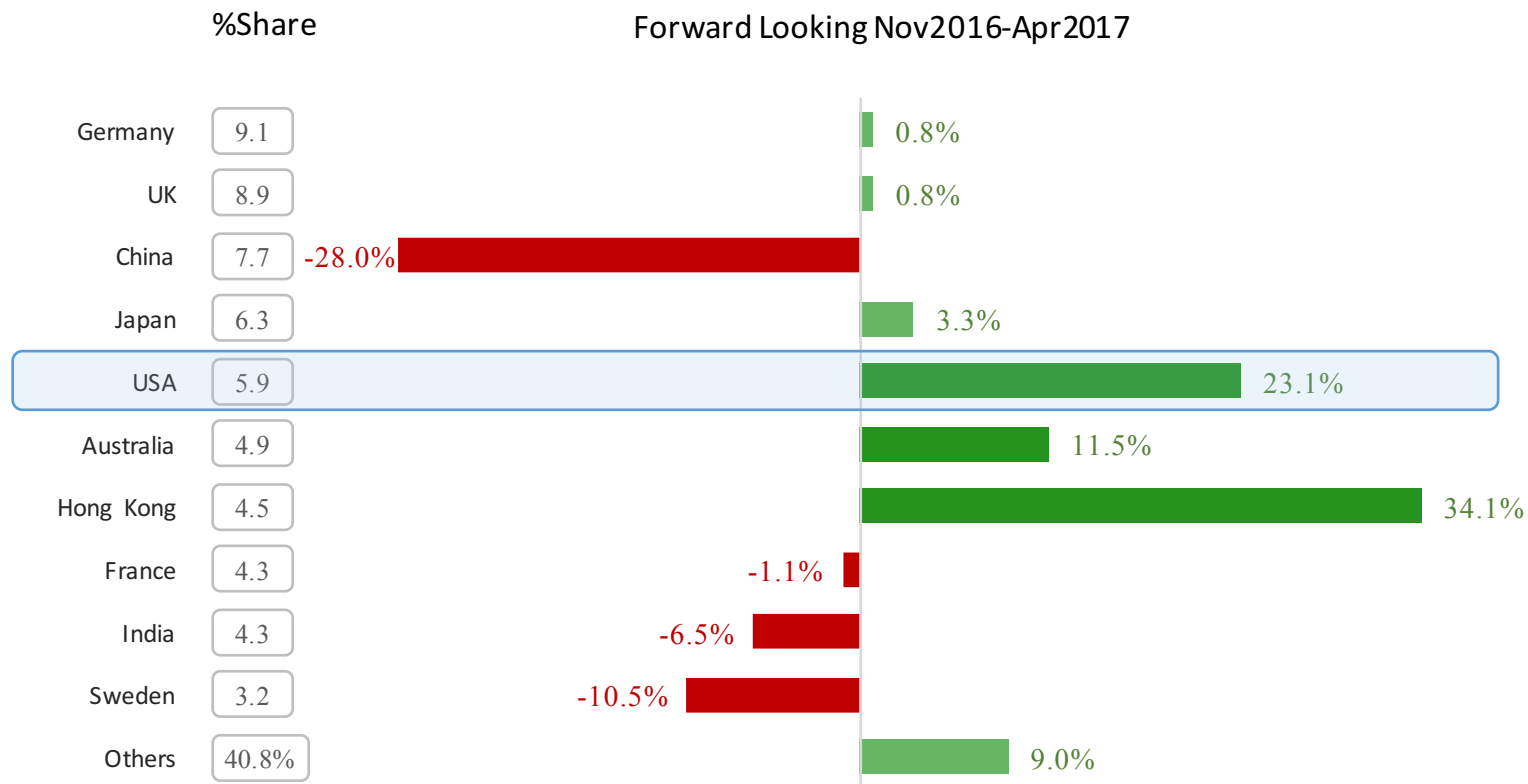
Arrivals on the Book from Nov 1st 2016 to Apr 30th 2017 based on bookings issued as of Oct 31st 2016, vs. same period prev. year.

Geographical categories follow UNTWO definitions

Lack of Group Bookings Depressing the Outlook for China



Int'l Arrivals in Bangkok on the Book Top 10 Source Countries, Nov2016-Apr2017



**Total Int'l
On the Book**

+2.8%

Arrivals on the Book from Nov 1st 2016 to Apr 30th 2017 based on bookings issued as of Oct 31st 2016, vs. same period prev. year.

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1. YTD Performance: Mixed Sentiments

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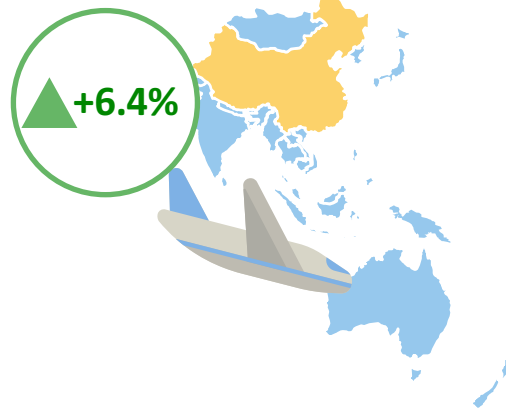
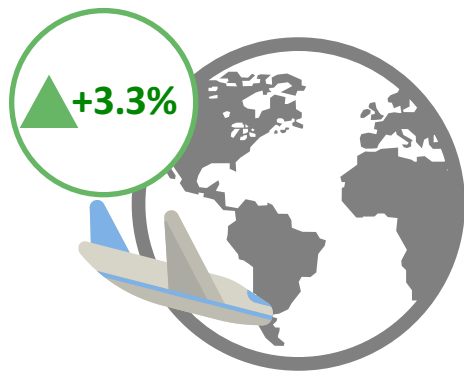
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Chinese Arrivals YTD Performance: Chinese Scattered in Other Thai cities



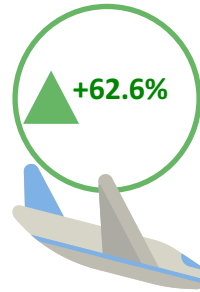
Chinese to Worldwide vs. Asia Pacific vs. Thailand vs. Thai cities Jan-Oct 2016



Bangkok



Chiang Mai



Koh Samui



Phuket



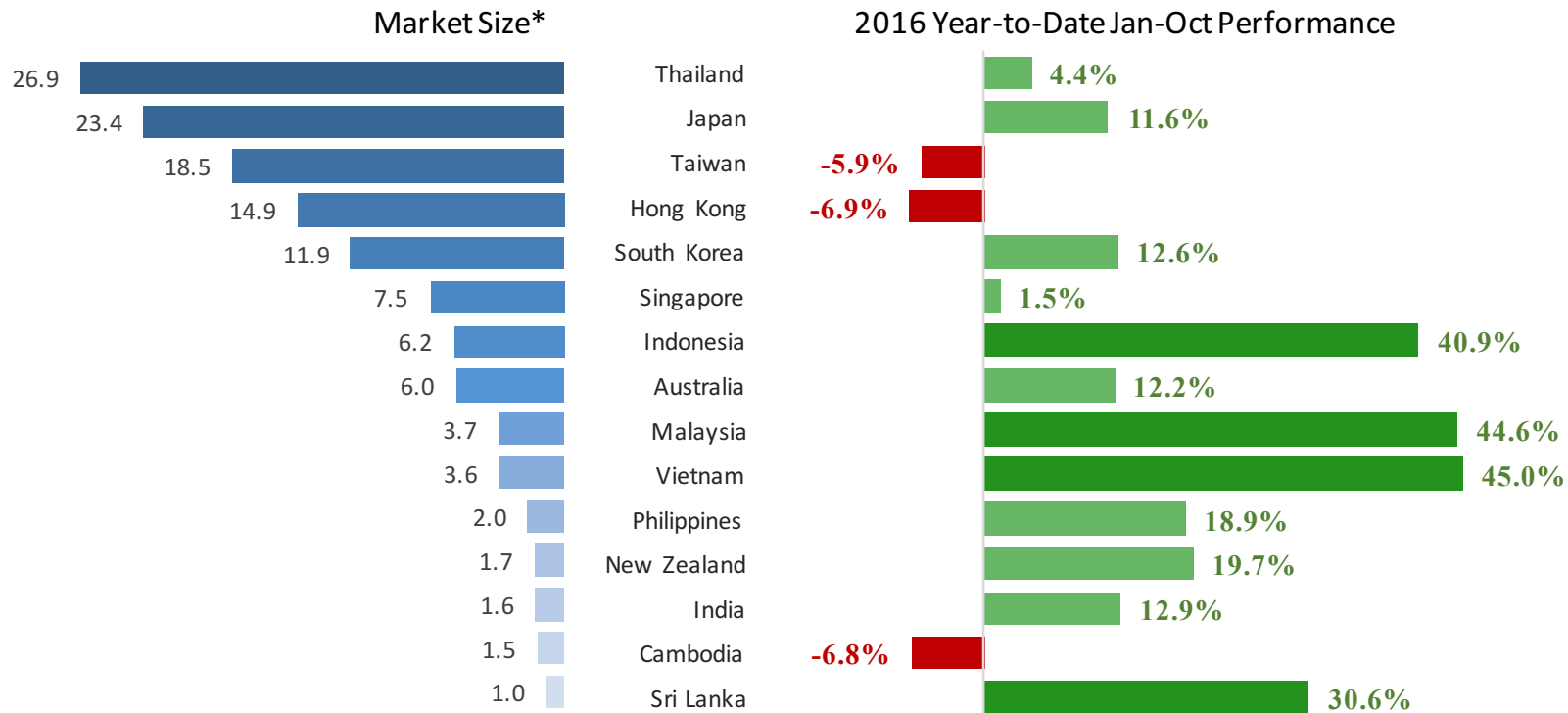
Arrivals on the Book from Nov 1st 2016 to Apr 30th 2017 based on bookings issued as of Oct 31st 2016, vs. same period prev. year.



Chinese Arrivals YTD in APAC: Indonesia, Malaysia, & Vietnam Rising Popularity



Chinese Arrivals in its Top 15 Destinations in Asia Pacific Jan-Oct 2016



Arrivals from Jan 1st to Oct 31st 2016 vs. 2015

Geographical categories follow UNTWO definitions

China stands for mainland only, Hong Kong, Macau, and Taiwan are excluded.

*Market size is calculated based on Chinese Arrivals in Sri Lanka.

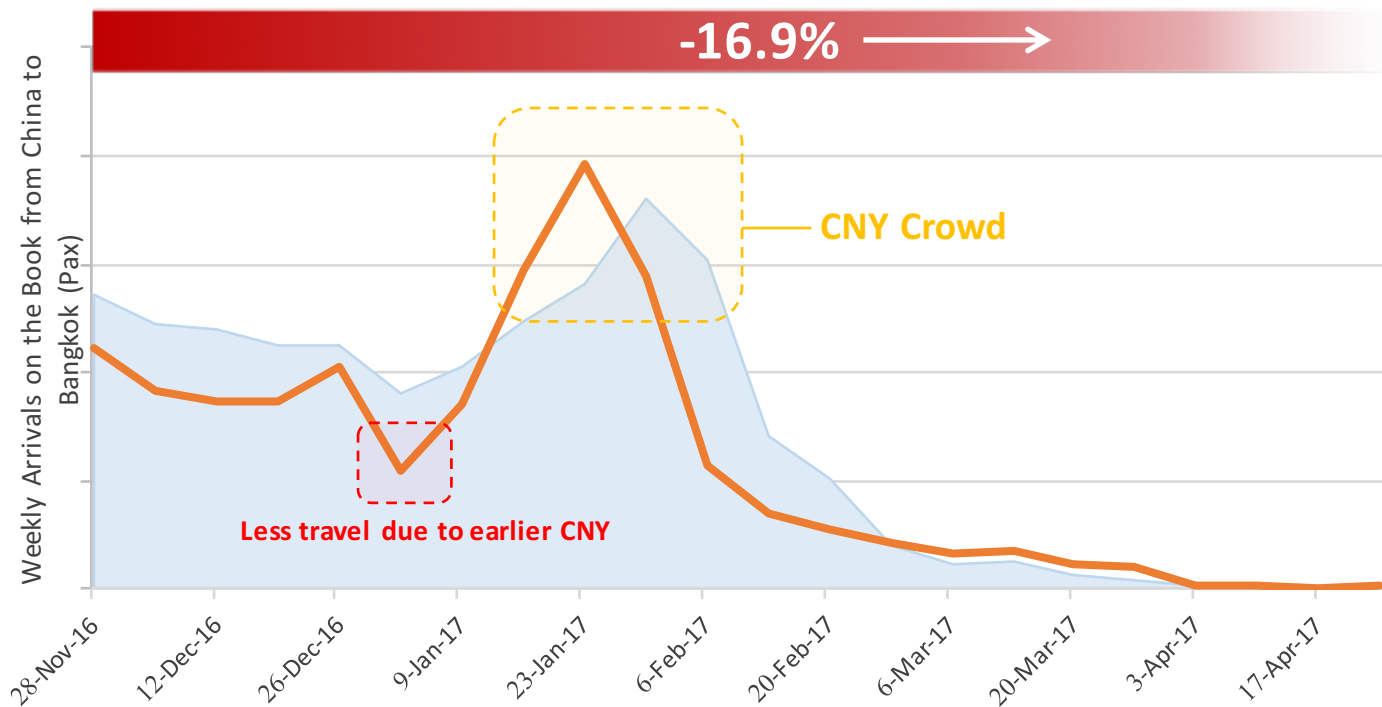


Lack of Group Tourists Gloom the Outlook in General & Chinese New Year Period



Forward Looking Chinese Arrivals in Bangkok 28-Nov-2016 to 30-Apr-2017 as of 28-Nov-2016

Forward Bookings for 28-Nov-2016 - 30-Apr-2017:



Forward Bookings for Chinese New Year

-6.6%

2016 Feb7-13
2017 Jan27-Feb2

■ Arrivals on the Book in 2015-2016
— Arrivals on the Book in 2016-2017

■ Arrivals on the Book from November 28th 2016 to Apr 30th 2017 based on bookings issued as of November 28th 2016, vs. same period prev. year.



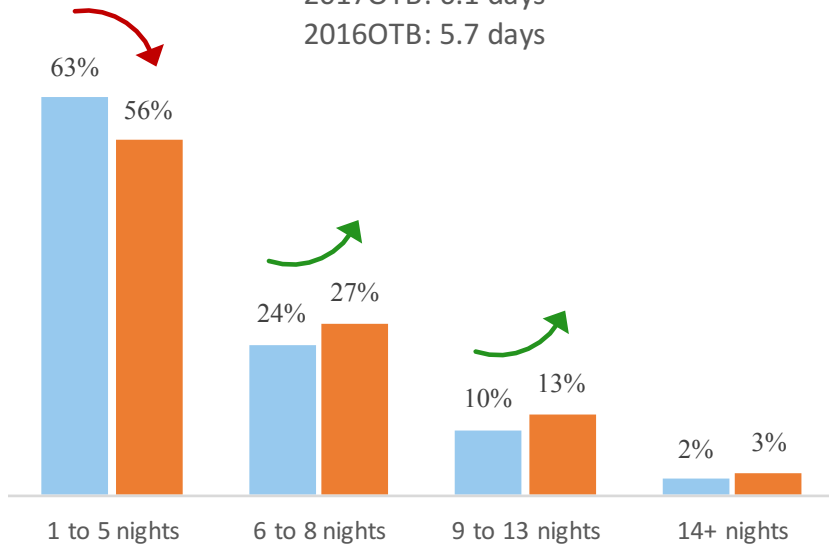
Lack of Group Tourists Gloom in General, but, CNY Outstanding



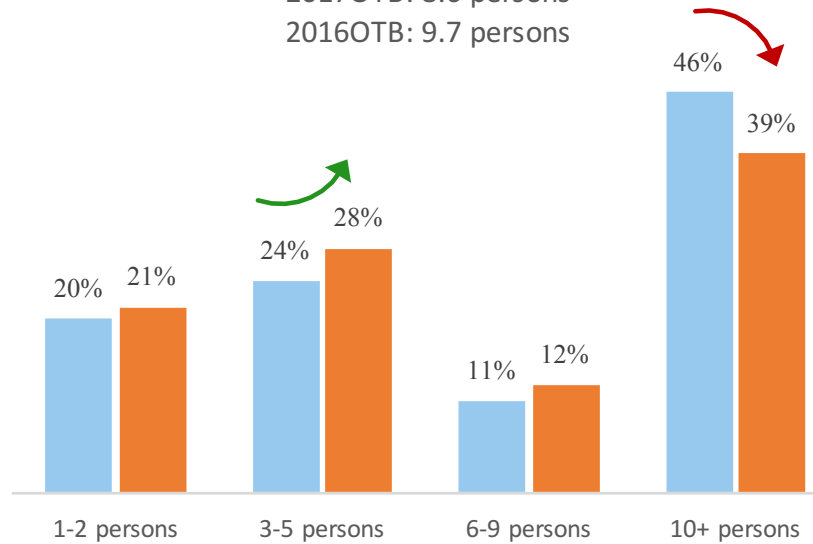
Chinese Traveler Profile on the Book for Bangkok 28-Nov-2016 to 30-Apr-2017 as of 28-Nov-2016






Average Length of Stay:
2017OTB: 6.1 days
2016OTB: 5.7 days



Average Pax per Booking:
2017OTB: 8.6 persons
2016OTB: 9.7 persons



 Arrivals on the Book in 2015-2016
 Arrivals on the Book in 2016-2017

 Arrivals on the Book from November 28th 2016 to Apr 30th 2017 based on bookings issued as of November 28th 2016, vs. same period prev. year.

* Official dates have not announced yet.

** Chinese New Year period is defined with one week each before and after Golden Week



1. YTD Performance: Mixed Sentiments

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4. Russia's back

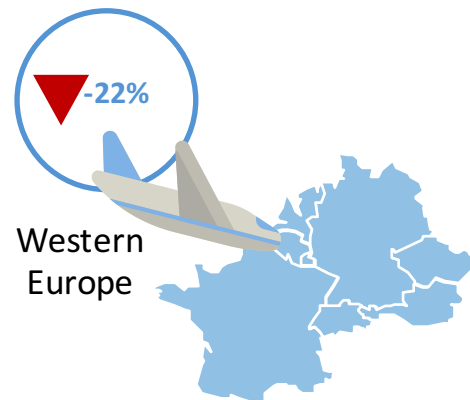
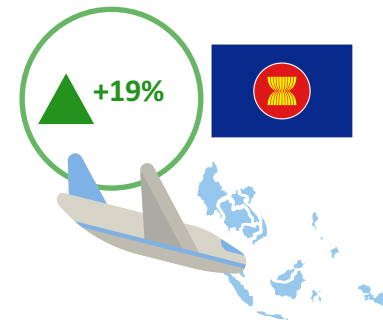
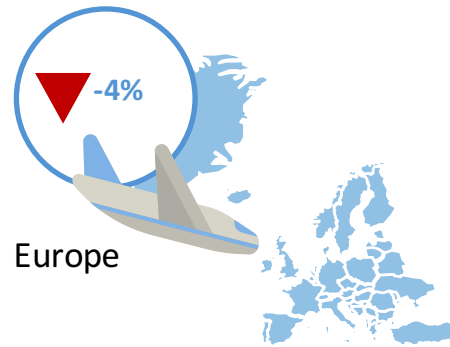
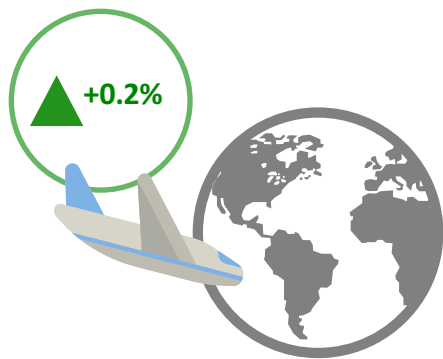
*BREXIT and Asia




Forward Looking: Russians choosing Asian Destinations



Forward Looking Russian Market Nov2016 to Apr2017



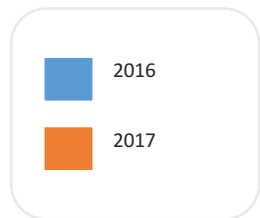
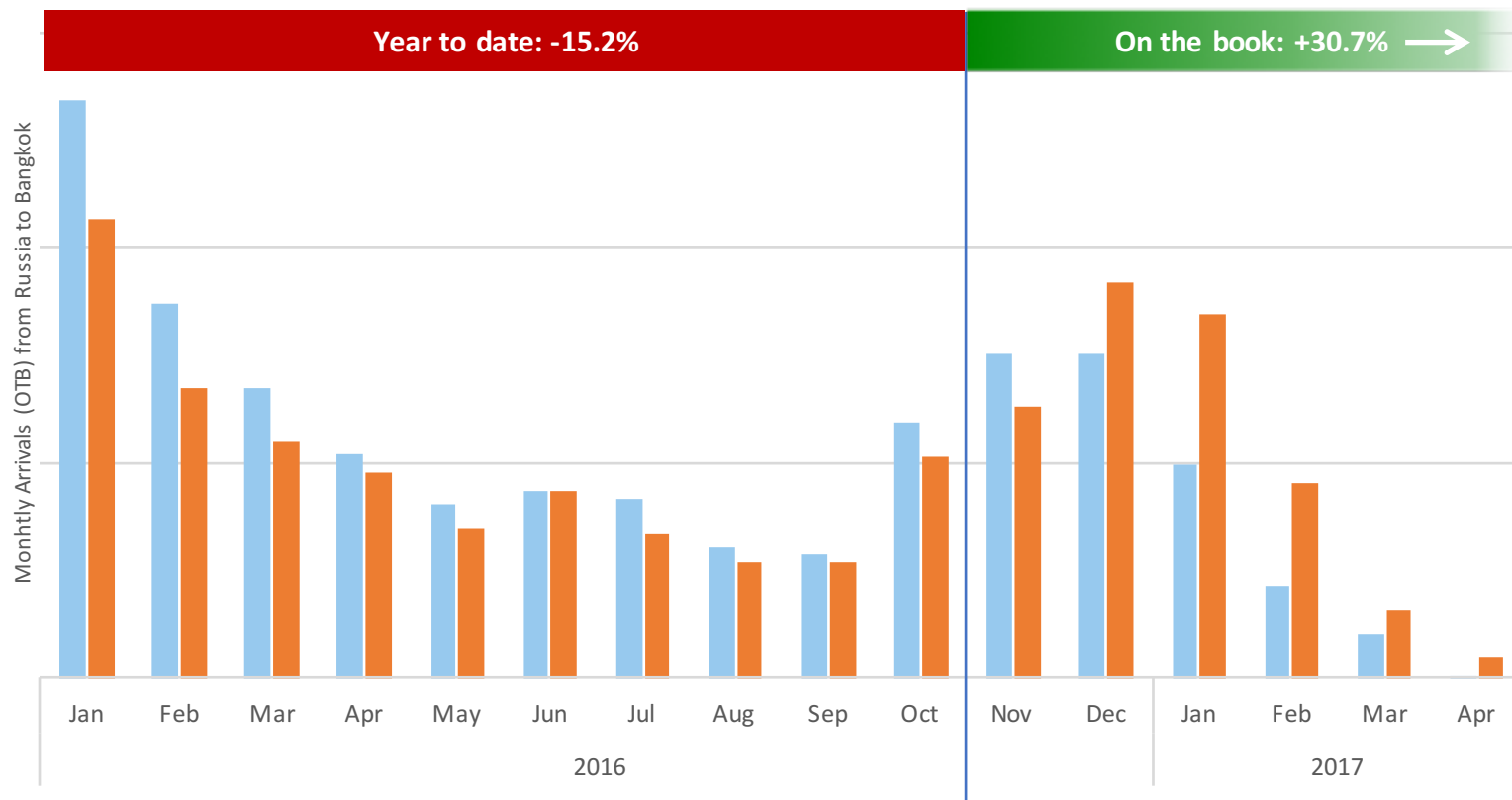
 Arrivals on the Book from Nov 1st 2016 to Apr 30th 2017 based on bookings issued as of Oct 31st 2016, vs. same period prev. year.



Russian Bookings Strong for December & Beginning of 2017



Russia to Bangkok, Year to Date Jan-Oct2016 & Forward Looking Nov16-Apr17





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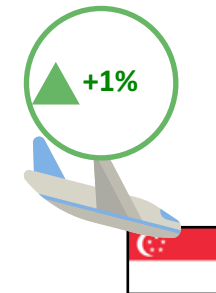
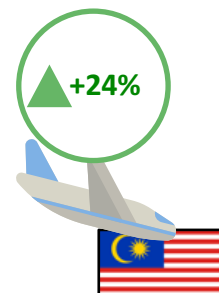
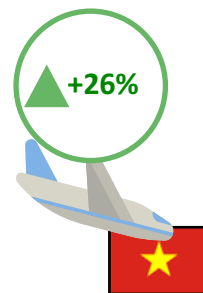
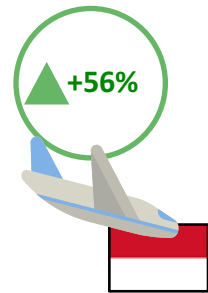
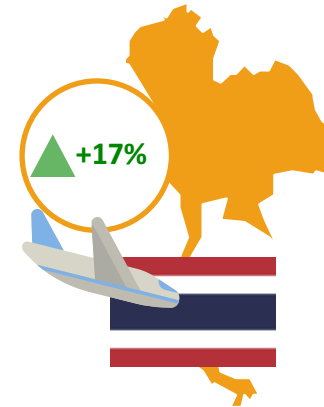
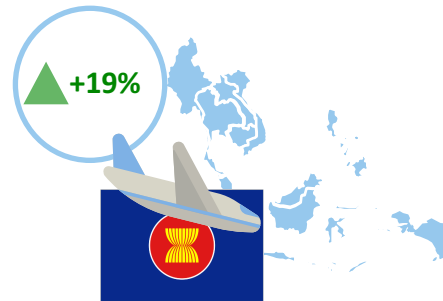
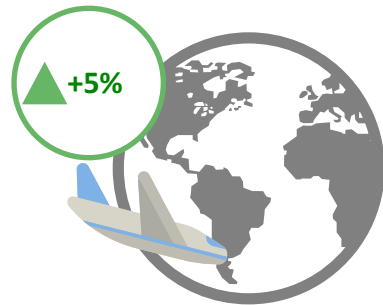
***BREXIT and Asia**



ASEAN Competitors Performed Better for UK Market



UK to Worldwide vs. South East Asia vs. Thailand vs. more Jan-Oct 2016



Indonesia

Philippines

Vietnam

Malaysia

Singapore



Arrivals from Jan 1st to Oct 31st 2016 vs. 2015



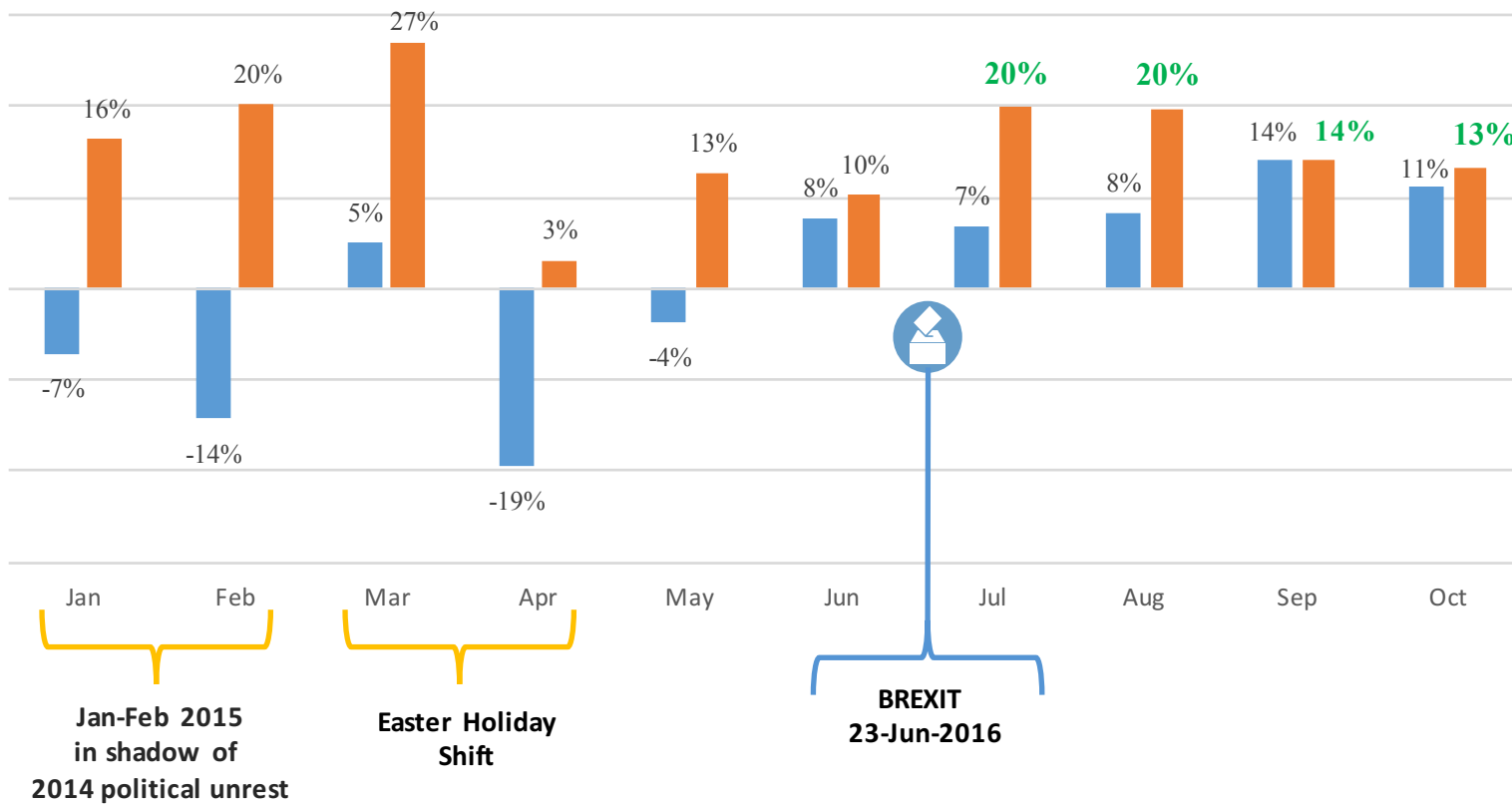
Geographical categories follow UNTWO definitions



BREXIT Helped Boost Shoulder Season?



%Variation of Monthly Arrivals from UK in Bangkok Jan-Oct 2016 vs. Jan-Oct 2015





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4. Russia's back



Thank you for your attention!

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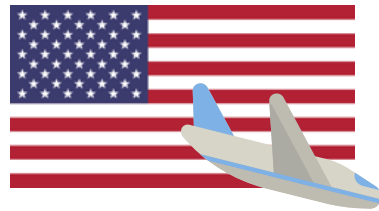
US YTD Performance: Booming Trans-Pacific Capacity Benefiting Bangkok



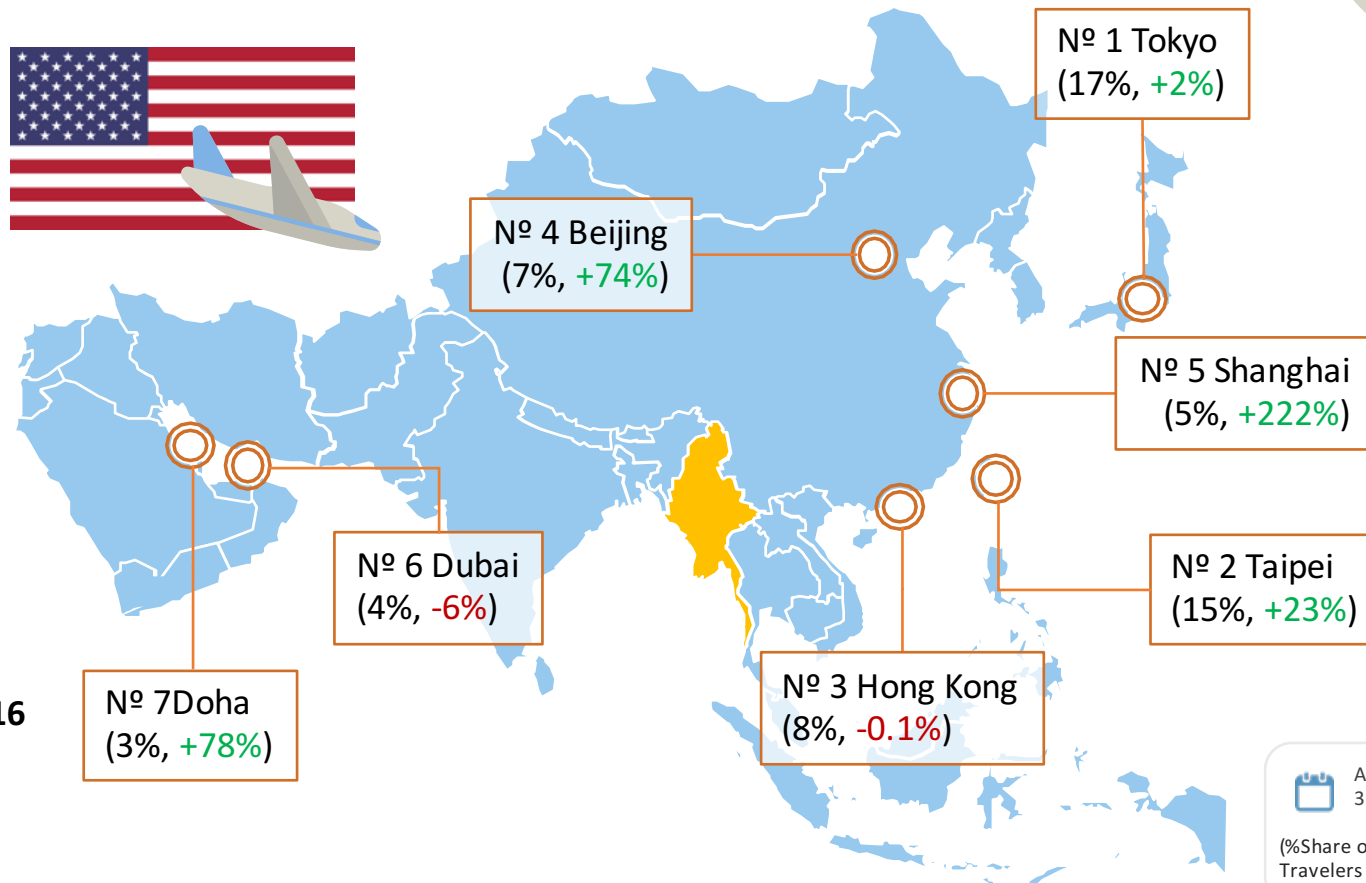
Connectivity for US Travelers to Bangkok: Top 7 Transit Hubs Jan-Oct 2016



No Nonstop Flight;
No Direct Flight from
Nov2016.



Delta: LAX-NRT-BKK
Started in Oct2015
Stopped from **Nov2016**



Arrivals from Jan 1st to Oct 31st 2016 vs. 2015
(%Share of Total Prev. Steps of US Travelers to Bangkok; %Var. vs. Prev. Year)