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UN Tourism

Travel Insights 2025

Focus on Asia
& the Pacific

February 2024-March 2025

Message from UN Tourism

It is a great honour to present the first “Travel Trends 2025 - Focus on Asia and the Pacific” report, the outcome of a joint effort by Amadeus and UN Tourism.

The competitiveness of our sector increasingly lies in up-to-date, actionable data-driven market analysis. At UN Tourism, we are committed to strengthening the capacity of our Members to access relevant and reliable market intelligence and create tools that enable better tourism management and planning.

That is why we are pleased to collaborate once again with Amadeus, one of our valuable Affiliate Members, in making this report a reality. It covers key trends for the first four months of 2025 and provides critical insights based on different sources, as well as indicators such as airline bookings, destination searches and hotel occupancy rates.

Asia and the Pacific is a hugely dynamic and innovative region. Here, tourism is strongly consolidating its recovery from the severe impact of the COVID-19 pandemic. In 2024, the region welcomed 316 million international tourist arrivals, 33% more than in 2023, making it the second most visited destination in the world, after Europe.

I trust this report and its valuable insights will contribute to a better understanding of the market dynamics of the region and inform more effective decision-making by both the tourism public and private sectors.

Zurab Pololikashvili

Secretary-General

World Tourism Organization (UN Tourism)



Unlocking Asia-Pacific's travel potential through data and collaboration

The Asia-Pacific (APAC) region is entering a pivotal era for travel and tourism. The return of outbound and inbound travel, reaching or surpassing pre-pandemic levels, signals more than a recovery — it reflects a structural shift in global tourism. Visa-free travel and tourism investments are further fueling increased visitor flows, and evolving traveller expectations are reshaping the market.

At Amadeus, we believe that the most impactful decisions stem from a clear understanding of these shifts. As this report reveals, data-driven insights can shed light on everything from passenger traffic and hospitality performance to destination trends and emerging route opportunities. Such intelligence is not only informative, it's foundational for shaping resilient, forward-looking strategies.

APAC's travel recovery is not just about bouncing back — it's about reimagining what's possible. Whether it's adapting to new demand patterns, identifying high-growth markets, or unlocking the potential of under-tapped routes, the insights in this report offer a roadmap to thrive in the next chapter of travel.

Amadeus is pleased to partner with UN Tourism to produce this report, a collaboration to support member destinations in achieving their goals backed by comprehensive industry-leading insights. We hope destinations will find the information indispensable as they build an effective strategy to prepare to welcome travellers.

We remain committed to fostering partnerships and providing the tools that enable progress — for travellers, for communities, and for the future of tourism across the APAC region.

Sincerely,

Paul Wilson

Vice President Hospitality, Asia and Pacific

amadeus





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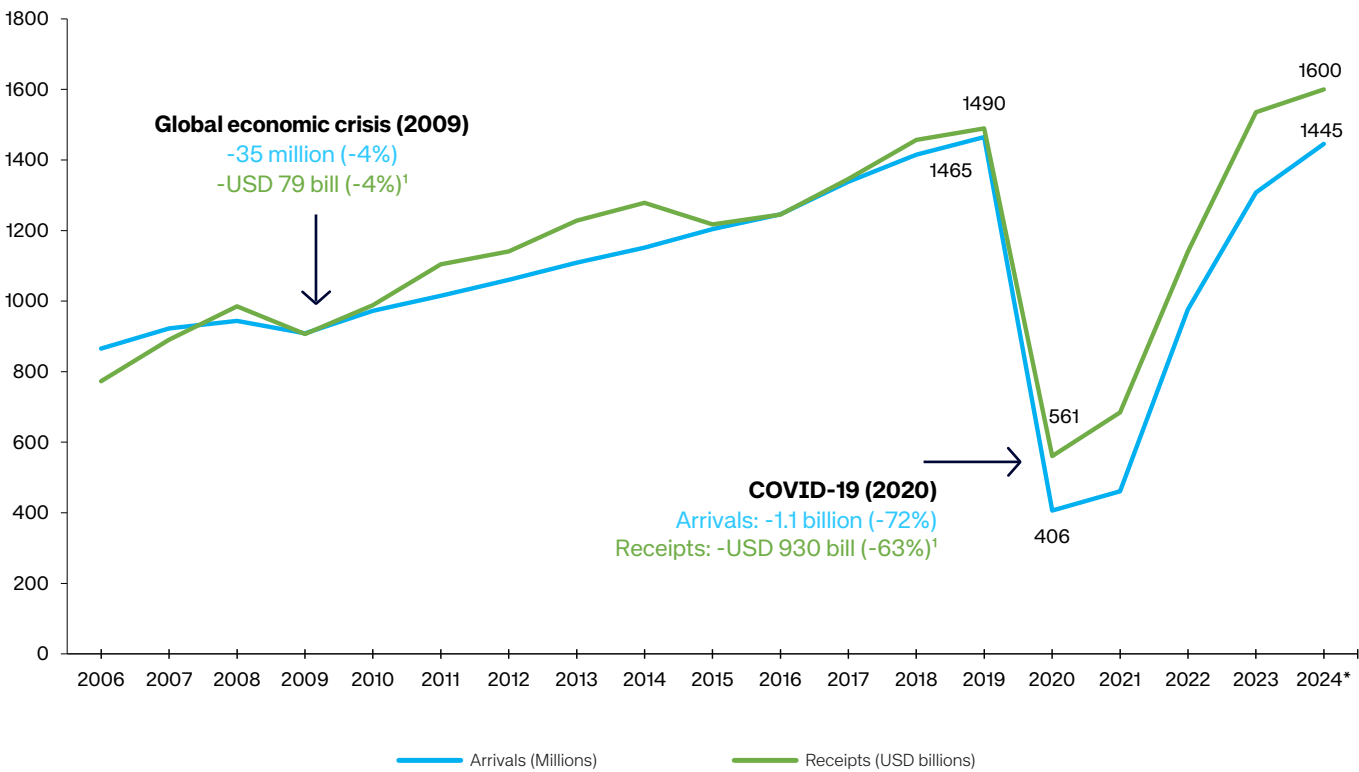
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The background of the slide features a series of overlapping, curved, blue shapes that create a sense of depth and movement. These shapes are in various shades of blue, from a deep navy to a lighter, almost white blue, and they curve towards the right side of the frame. On the right side, there is a solid dark blue rectangular area that serves as a backdrop for the text.

Global tourism indicators

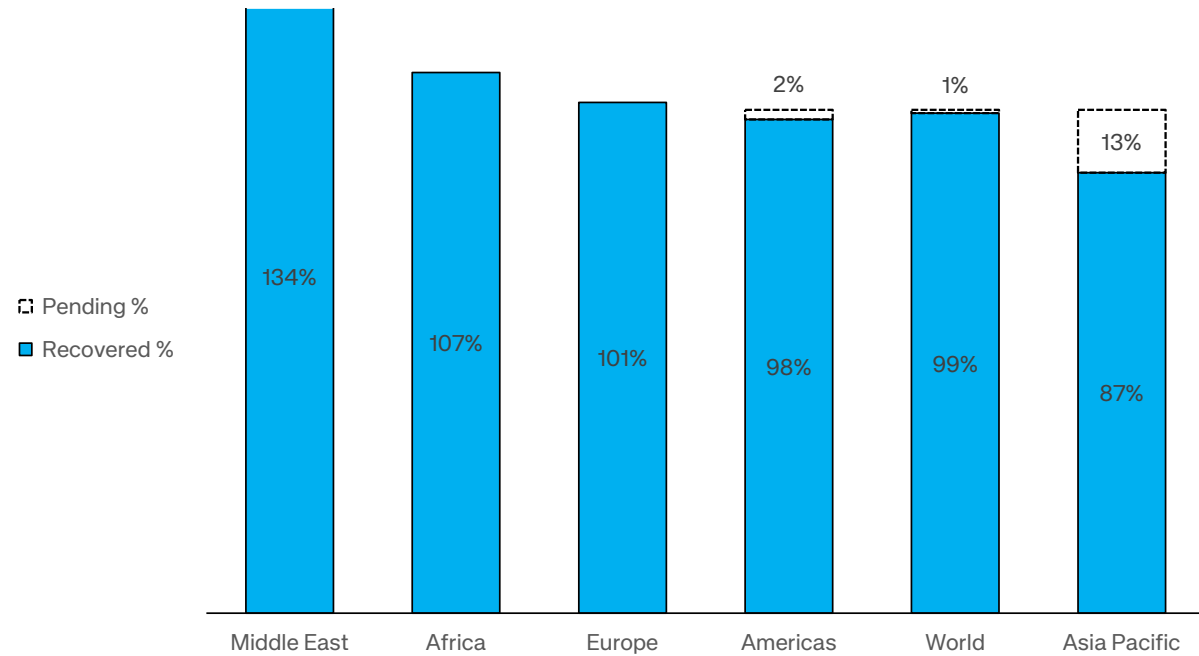
UN Tourism: key international tourism indicators

International tourist arrivals and tourism receipts



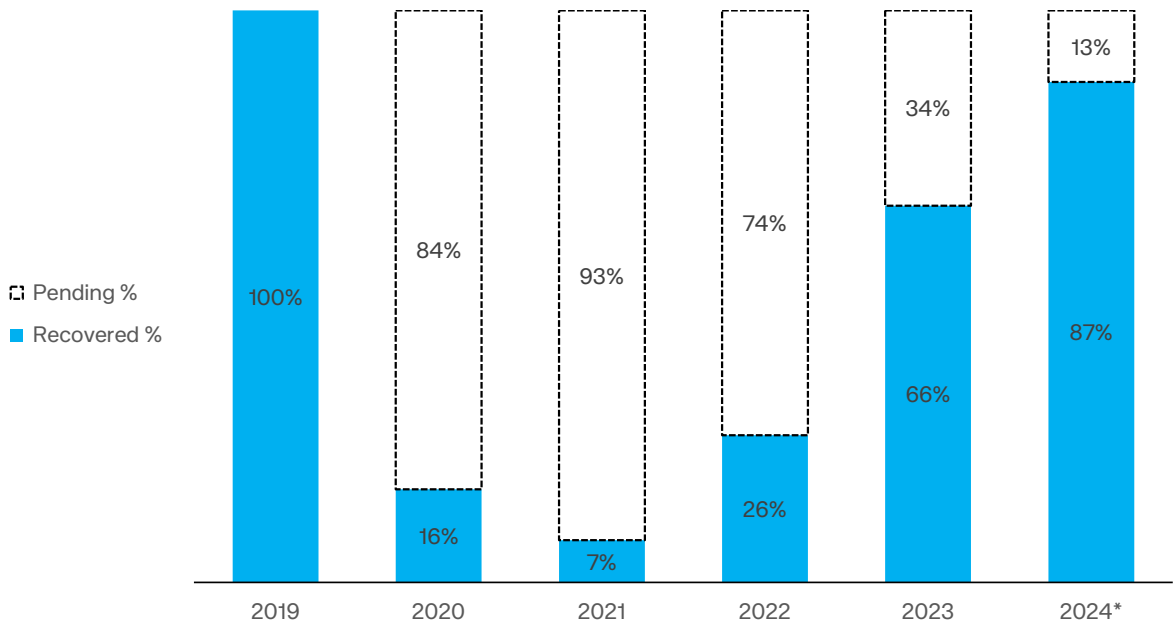
Source: World Tourism Organization (UN Tourism)
Data as of January 2025
* Data for 2024 are provisional estimates

Recovery of international tourist arrivals by world region in 2024* (% of 2019 levels)



Source: World Tourism Organization (UN Tourism)
Data as of January 2025
* Provisional data

Recovery of international tourist arrivals in Asia Pacific (% of 2019 levels)



Source: World Tourism Organization (UN Tourism)
Data as of January 2025
* Data for 2024 are provisional estimates
For full information on the World Tourism Barometer please see <https://www.unwto.org/un-tourism-world-tourism-barometer-data>

World Tourism Barometer: An analysis of 2024 data by UN Tourism

International Tourism

International tourist arrivals (overnight visitors) virtually recovered (99%) pre-pandemic levels in 2024, with most destinations exceeding 2019 numbers. The year 2024 marks the recovery of international tourism from one of the worst crises in history, four years after the outbreak of the COVID-19 pandemic.

An estimated 1.4 billion international tourists were recorded around the world in 2024, an increase of 11% over 2023, or 140 million more.

Results were driven by strong post-pandemic demand, robust performance from large source markets and the ongoing recovery of destinations in Asia and the Pacific.

The Middle East remained the strongest-performing region in relative terms, compared to 2019, with international arrivals climbing 32% above pre-pandemic levels in 2024, though 1% compared to 2023.

Europe welcomed 1% more arrivals than in 2019 and 5% over 2023, while Africa saw a 7% increase in arrivals compared to 2019 and 12% more than in 2023.

The Americas recovered 97% (-3% over 2019) of its pre-pandemic arrivals, and Asia and the Pacific 87% (-13% over 2019, though 33% more than 2023).

South Asia saw the best results by Asian subregions, with a 92% recovery (-8% from 2019), followed by South-East Asia (88%), Oceania (83%) and North-East Asia (86%).

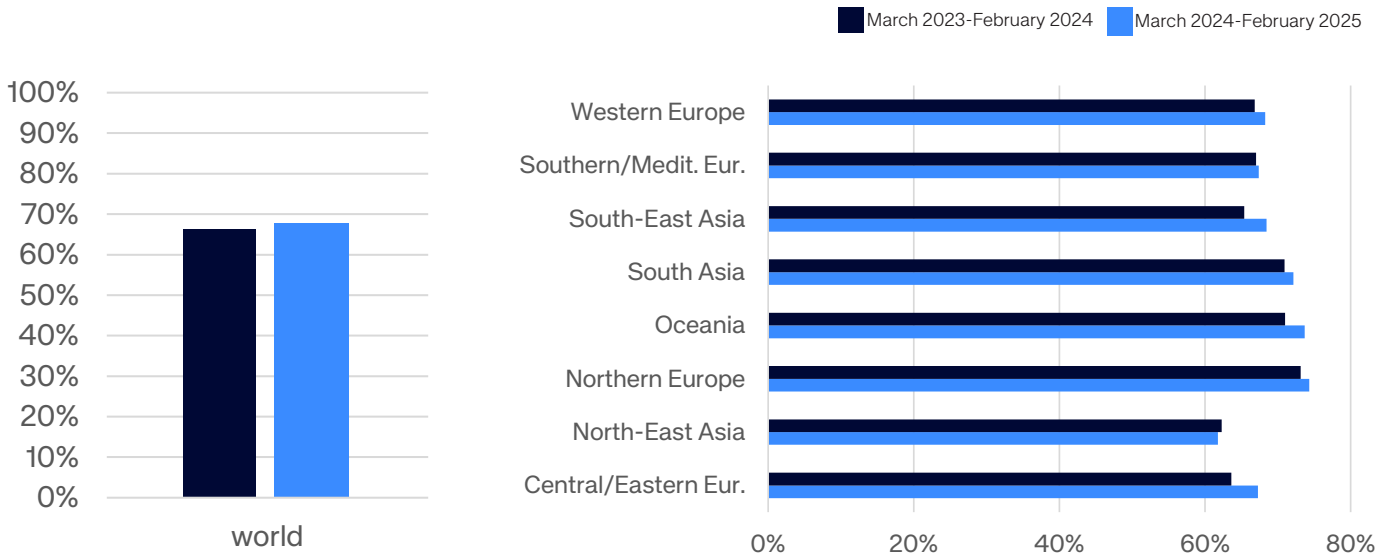
According to preliminary estimates, international tourism receipts reached USD 1.6 trillion in 2024, about 3% more than in 2023 and 4% more than in 2019 (in real terms). Receipts had already recovered pre-pandemic levels in 2023. Total export revenues from tourism (receipts and passenger transport) are estimated at a record USD 1.9 trillion in 2024, about 3% higher than 2019.



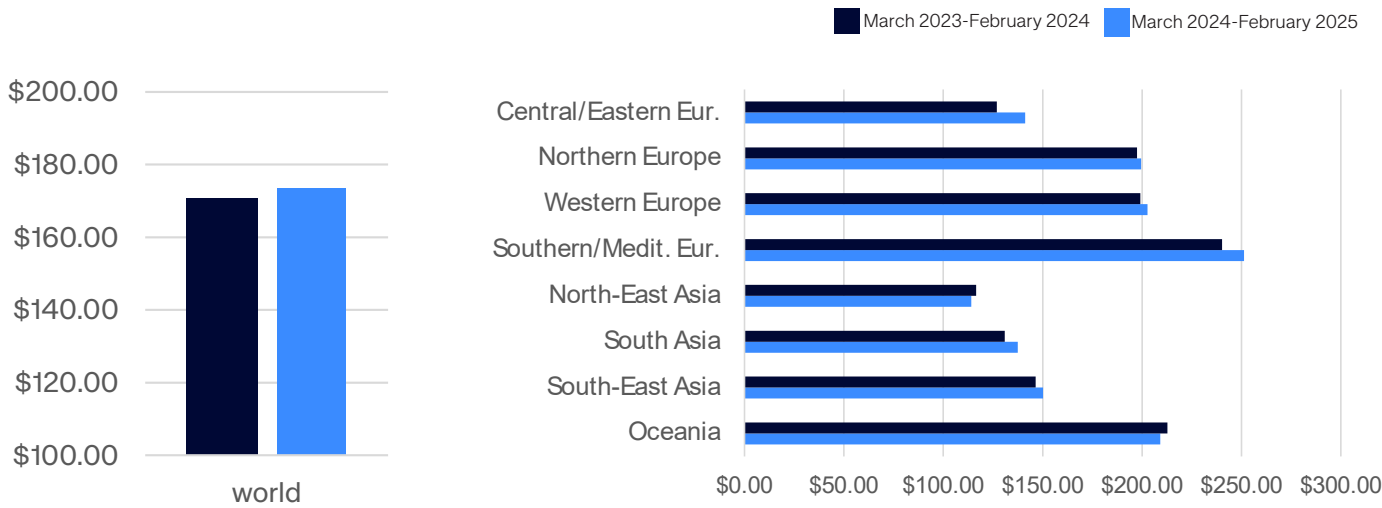


Hospitality Market Indicators

Occupancy by year



Average Daily Rate (ADR) by year



Insights:

Stable Global Occupancy: Occupancy levels remain consistent year-over-year, with some regions showing stronger resilience (e.g., Northern Europe, Oceania).

ADR Variations Across Regions: While some markets maintain pricing power, others (e.g., South & South-East Asia) see limited ADR growth, suggesting potential revenue optimization gaps.



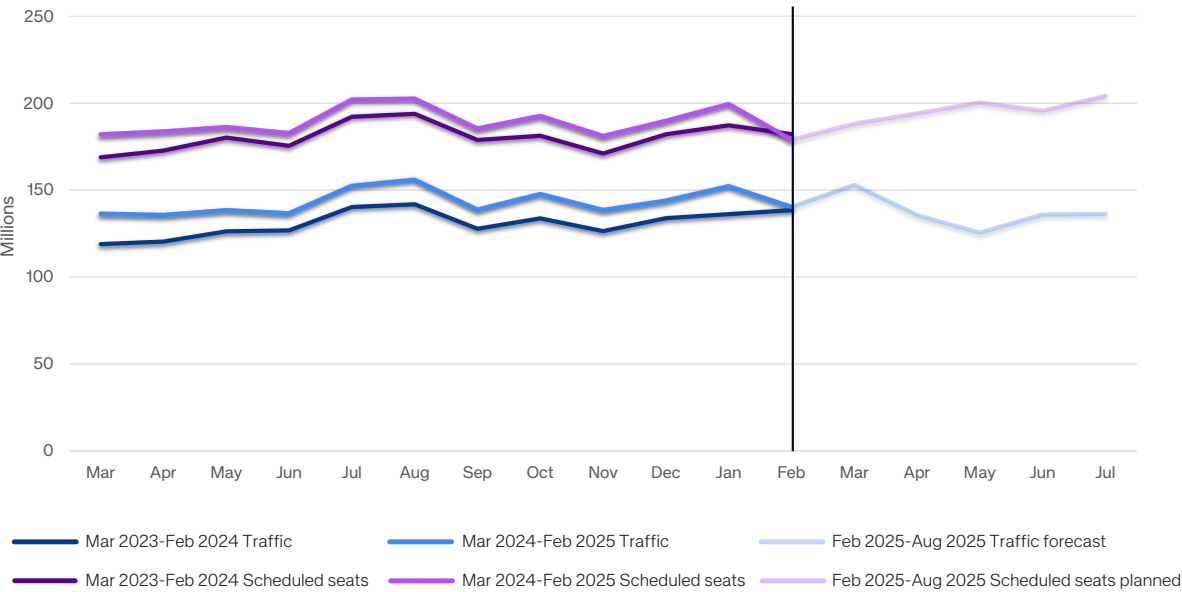
Asia & the Pacific

Air Travel Overview



Worldwide to Asia and the Pacific

Air passenger volume & scheduled seats



Passenger traffic and capacity analysis

Insights

According to data pulled on March 16th, passenger traffic to Asia and the Pacific is expected to grow by 9.3%, indicating increasing demand for travel to the region.

Steady capacity expansion: Scheduled seat capacity follows a similar upward trend, suggesting airlines are aligning supply with demand.

Seasonality trends: Traffic fluctuations reflect traditional seasonal demand patterns, with slight dips and rebounds over time.

Recommendation

Destinations and stakeholders can work with airlines to optimize route development and frequency to sustain growth and improve accessibility across key markets.

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for Asia and the Pacific

Origin markets	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
India	2	1
China*	8	2
United States	1	3
Japan	4	4
Korea (ROK)	3	5
Australia	5	6
Thailand	6	7
United Kingdom	7	8
Malaysia	10	9
Canada	9	10

Top 10 origin markets travelling to Asia and the Pacific

Origin markets	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
India	1	1	13%
Korea (ROK)	2	2	17%
Australia	3	3	-1%
United States	4	4	1%
Thailand	5	5	17%
Japan	8	6	38%
Taiwan (pr. of China)	6	7	24%
United Kingdom	7	8	3%
Saudi Arabia	9	9	18%
Philippines	10	10	10%
Total	64.3%	64.1%	

Are travellers from these origin markets to Asia and the Pacific already on your radar?

Top 10 origin markets searching forAsia and the Pacific with the highest growth

Origin markets	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	235%
Macao (China)	2	99%
Indonesia	3	81%
Vietnam	4	66%
Taiwan (pr. of China)	5	65%
Philippines	6	64%
Malaysia	7	60%
Japan	8	55%
Saudi Arabia	9	53%
Italy	10	51%

Top 10 origin markets travelling to Asia and the Pacific with the highest growth

Origin markets	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	86%
Russian Federation	2	46%
Japan	3	38%
Malaysia	4	33%
Indonesia	5	33%
Vietnam	6	31%
Taiwan (pr. of China)	7	24%
Singapore	8	22%
Hong Kong (China)	9	21%
Saudi Arabia	10	18%

Analysis of incoming tourists to Asia and the Pacific

Insights:

1. China and India drive demand
China has surged in searches for travel to Asia and the Pacific, with a 235% increase YoY. India also leads in actual travel volume, maintaining its top position with a 13% increase, reinforcing its importance as a key source market.

2. Strong regional growth in secondary markets
Macao (China), Indonesia, and Vietnam are among the fastest-growing outbound markets in searches, with YoY growth ranging from 66% to 99%. This trend suggests an expanding pool of travellers seeking diverse destinations within the region.

3. Consistent growth in actual travel
Japan, Malaysia, and Indonesia are seeing steady increases in travellers heading to Asia and the Pacific, with 30%+ YoY growth. This points to improved connectivity, economic stability, or targeted marketing strategies paying off.

Recommendation:

Focusing on emerging high-growth source markets like Macao (China), Indonesia, and Vietnam could bring added value to destination marketing efforts. Strengthening air connectivity, tailoring promotional campaigns, and leveraging digital strategies to capture this rising demand may help destinations in the region maximize inbound travel opportunities.



Where do people from Asia and the Pacific travel to? Reality vs. aspirations

Top 10 searched destinations in Asia and the Pacific

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
India	1	1
China	3	2
Japan	2	3
Thailand	4	4
Korea (ROK)	6	5
Australia	5	6
Indonesia	8	7
Vietnam	9	8
Malaysia	11	9
Philippines	7	10

Top 10 booked destinations in Asia and the Pacific

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
India	1	1	10%
China	5	2	53%
Japan	3	3	22%
Thailand	4	4	13%
Australia	2	5	-5%
Korea (ROK)	6	6	10%
Philippines	7	7	5%
Vietnam	8	8	15%
Indonesia	10	9	25%
Malaysia	9	10	14%
Total	81.0%	82.2%	

Top performing destinations in Asia and the Pacific

Top 10 searched destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Brunei	1	92%
China	2	91%
Macao (China)	3	82%
Bhutan	4	77%
Malaysia	5	72%
Mongolia	6	54%
Indonesia	7	53%
Cambodia	8	52%
Korea (ROK)	9	51%
Japan	10	50%

Top 10 booked destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Macao (China)	1	55%
China	2	53%
Cambodia	3	31%
Indonesia	4	25%
Mongolia	5	24%
Japan	6	22%
Vietnam	7	15%
Bangladesh	8	15%
Malaysia	9	14%
Myanmar	10	14%

Preferred destinations in Asia and the Pacific

Insights:

1. Macao (China) and China lead destination growth

Macao (China) has recorded a 55% YoY increase in bookings, while China follows closely with 53% growth. This reflects their rising appeal, likely driven by easing travel restrictions and increased regional connectivity.

2. New travel patterns in the region

Beyond major destinations, Cambodia, Mongolia, and Indonesia are experiencing steady booking growth (31%, 24%, and 25% YoY, respectively). This suggests travellers are diversifying their choices within Asia-Pacific.

3. Brunei and Bhutan among top emerging destinations

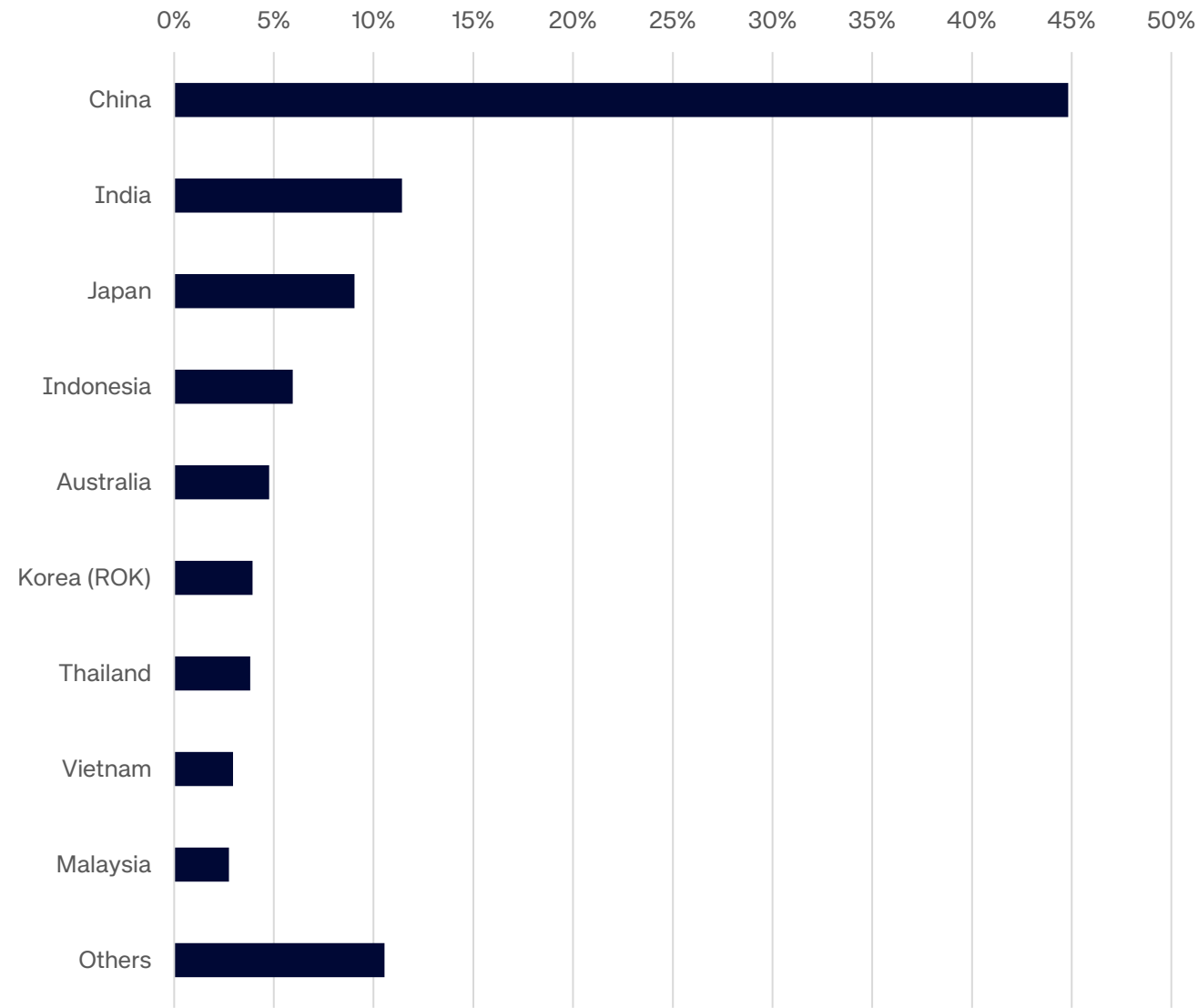
Brunei has seen a remarkable 92% surge in searches, followed by Bhutan with 77%, signaling strong interest in niche or less-explored destinations.

Recommendation:

The increasing interest in destinations beyond traditional hotspots presents an opportunity for DMOs to enhance promotional efforts in emerging markets. Highlighting unique cultural and adventure experiences, alongside infrastructure improvements, can further drive conversion from interest to actual travel.

Share of available seats in flights to Asia and the Pacific, by market

March 2024-February 2025 Schedules (%)



YoY* capacity growth by subregion

Mar 2024-Feb 2025 vs Mar 2023-Feb 2024

UN Tourism subregion	YoY Growth
South Asia	7%
South-East Asia	6%
North-East Asia	4%
Oceania	1%

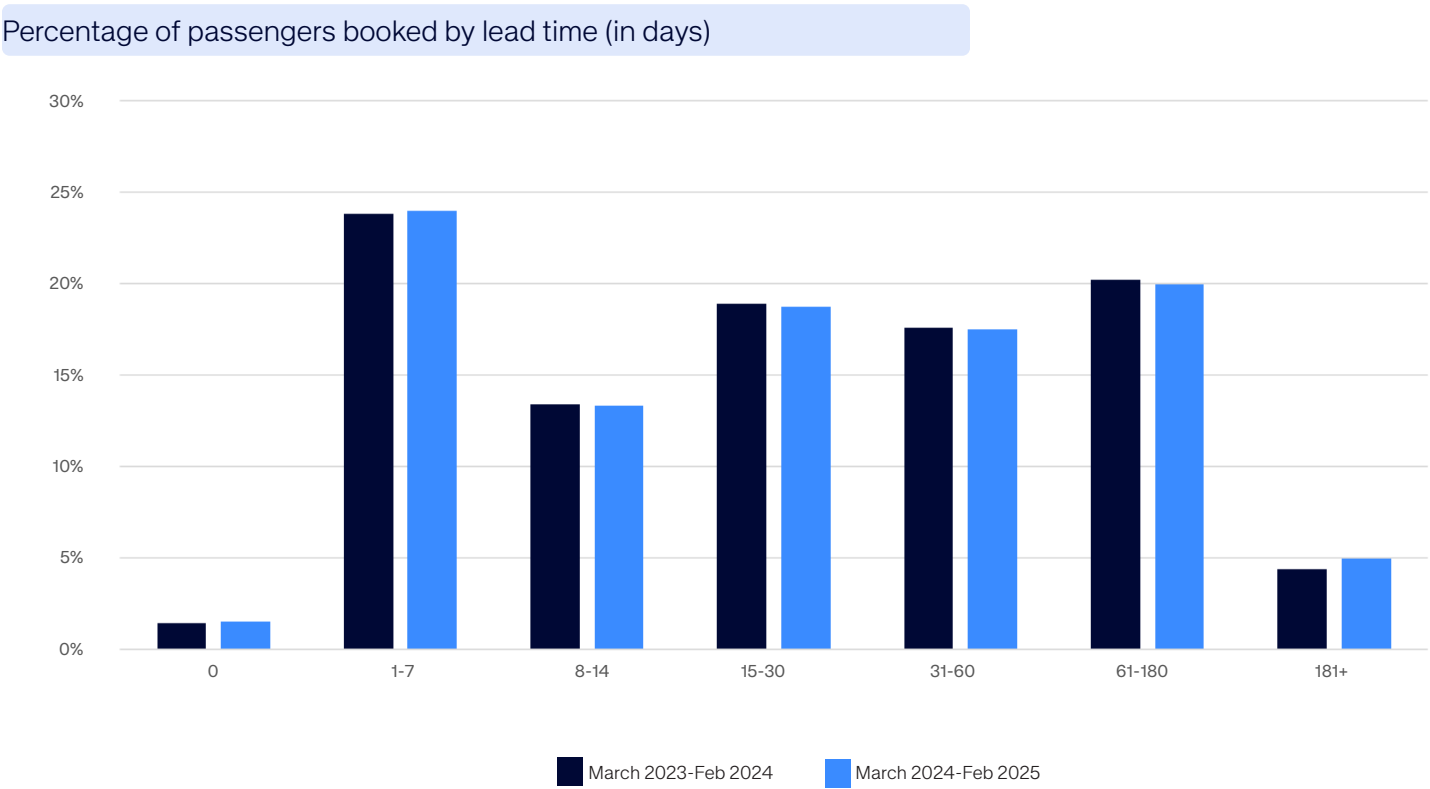
Analysis

- China dominates seat capacity:** China holds a significant share of available seats, far surpassing all other destinations in the region.
- South Asia and South-East Asia show the highest growth:** Seat capacity in South Asia and South-East Asia is growing at 7% and 6% YoY, respectively, indicating rising demand and potential investment opportunities in air connectivity.
- Seasonality trends:** Traffic fluctuations reflect traditional seasonal demand patterns, with slight dips and rebounds over time.
- Recommendation**

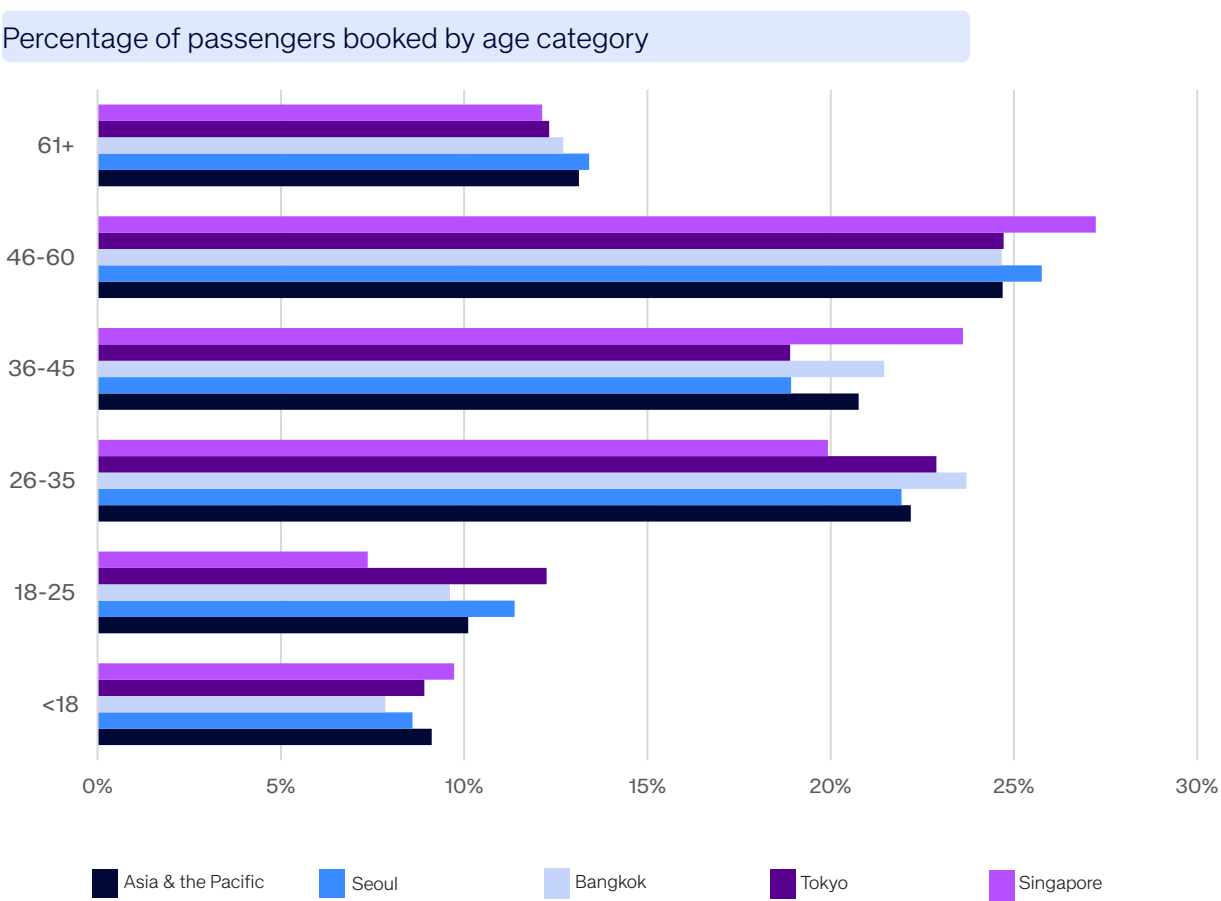
Strengthen regional connectivity: To maximize growth opportunities, stakeholders could focus on enhancing air connectivity in South Asia and South-East Asia, ensuring increased capacity translates into higher passenger demand and tourism development.

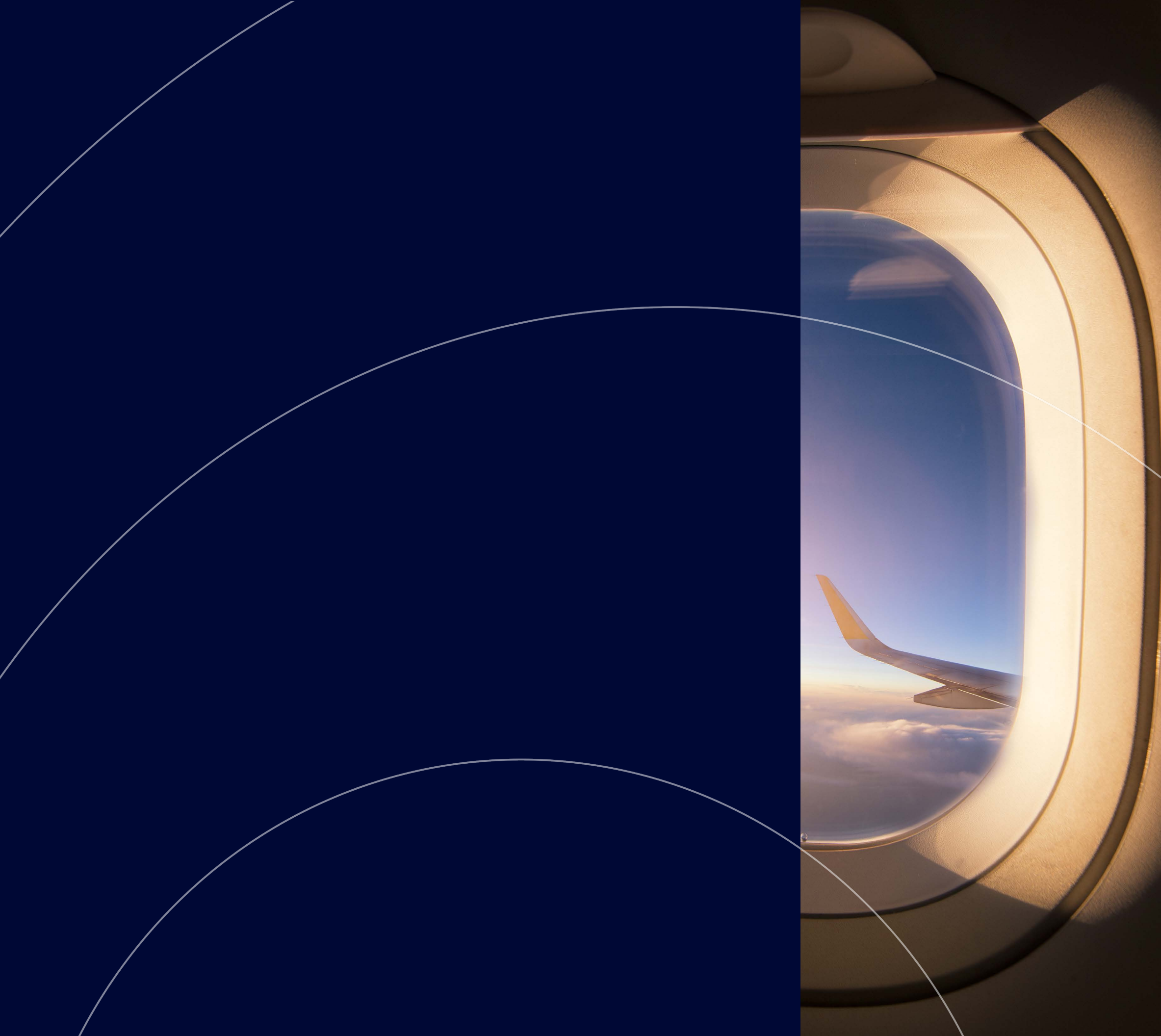


Air travel bookings to Asia and the Pacific by lead time



What type of travellers travel to Asia and the Pacific: Top 4 destination cities





Lead time and profile analysis

Insights:

1. Lead time trends

The majority of bookings to Asia and the Pacific are made within short- to mid-term windows (1-7 days and 15-30 days), suggesting strong last-minute demand as well as steady planning behavior.

2. Traveller demographics

The 46-60 age group dominates bookings across the top 4 destination cities, indicating a key segment for premium travel and extended stays.

3. Gender distribution

Bookings from male travellers slightly outpace female bookings, offering opportunities for targeted engagement.

Recommendation:

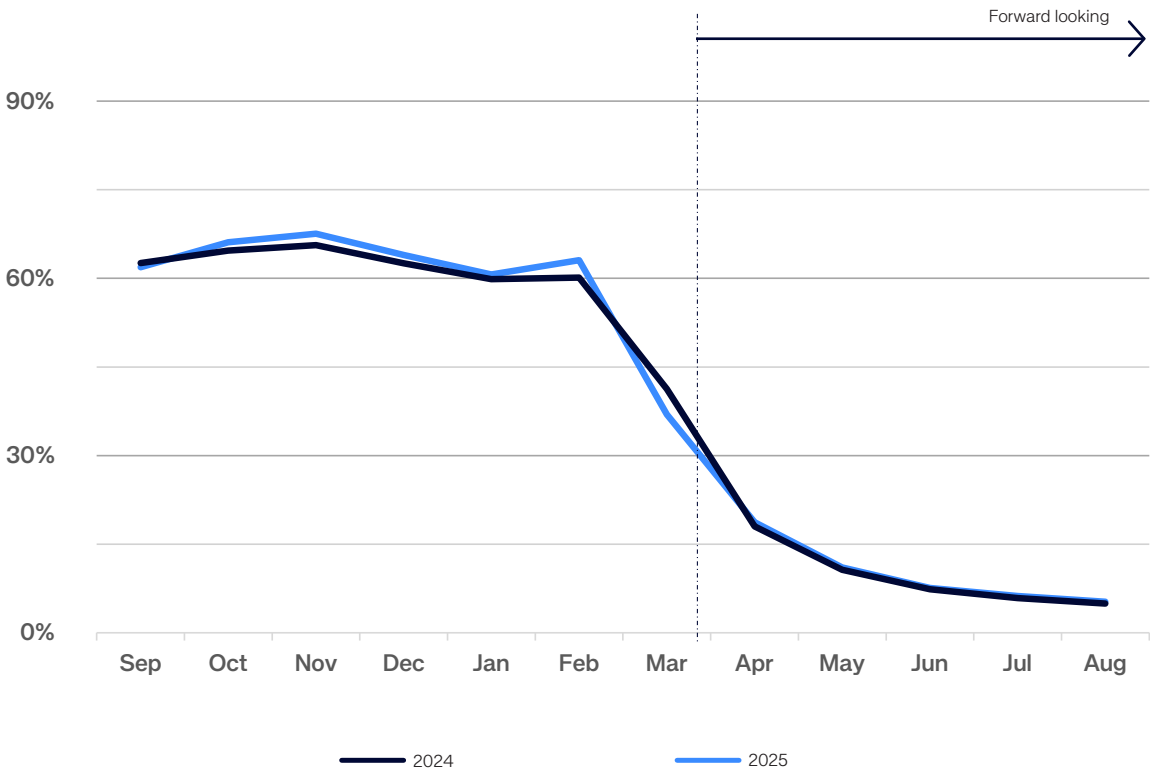
Optimize for lead time segments: Destinations and tourism stakeholders can develop promotions targeting last-minute bookers while also capitalizing on the mid-term planning segment to secure higher-value travellers.

Hospitality Occupancy Overview



Hotel occupancy in Asia and the Pacific

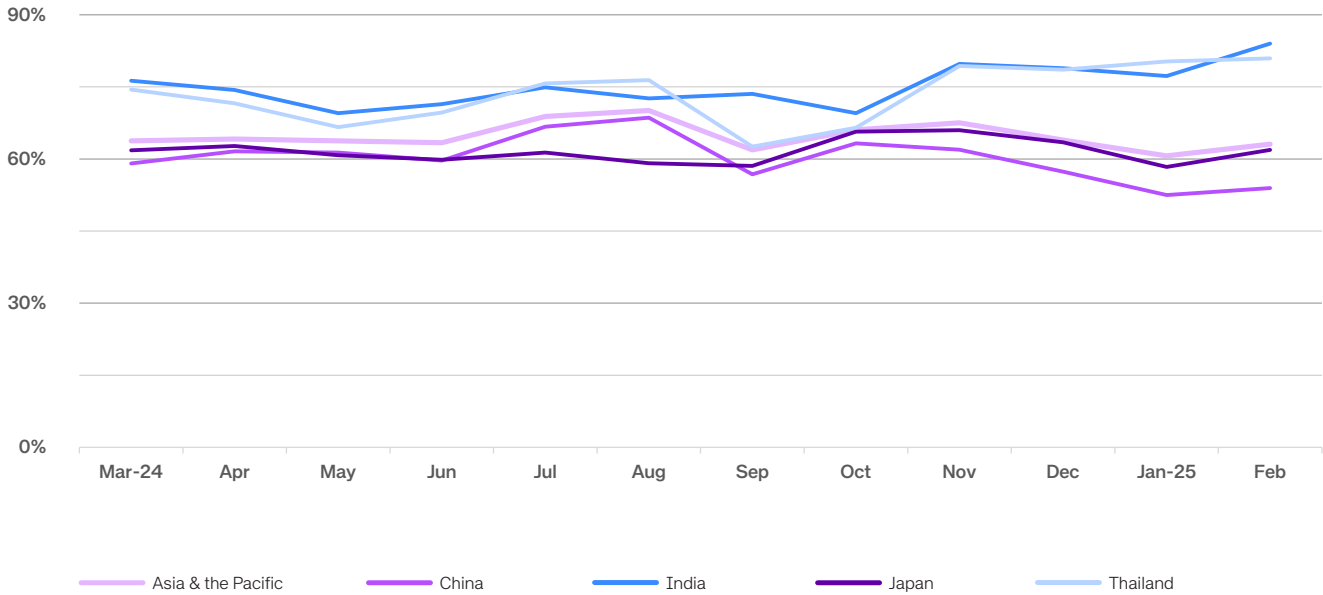
On-the-books by month compared to same month last year (%)



Hotel occupancy for the past 12 months

For Asia and the Pacific and its TOP 4 destinations

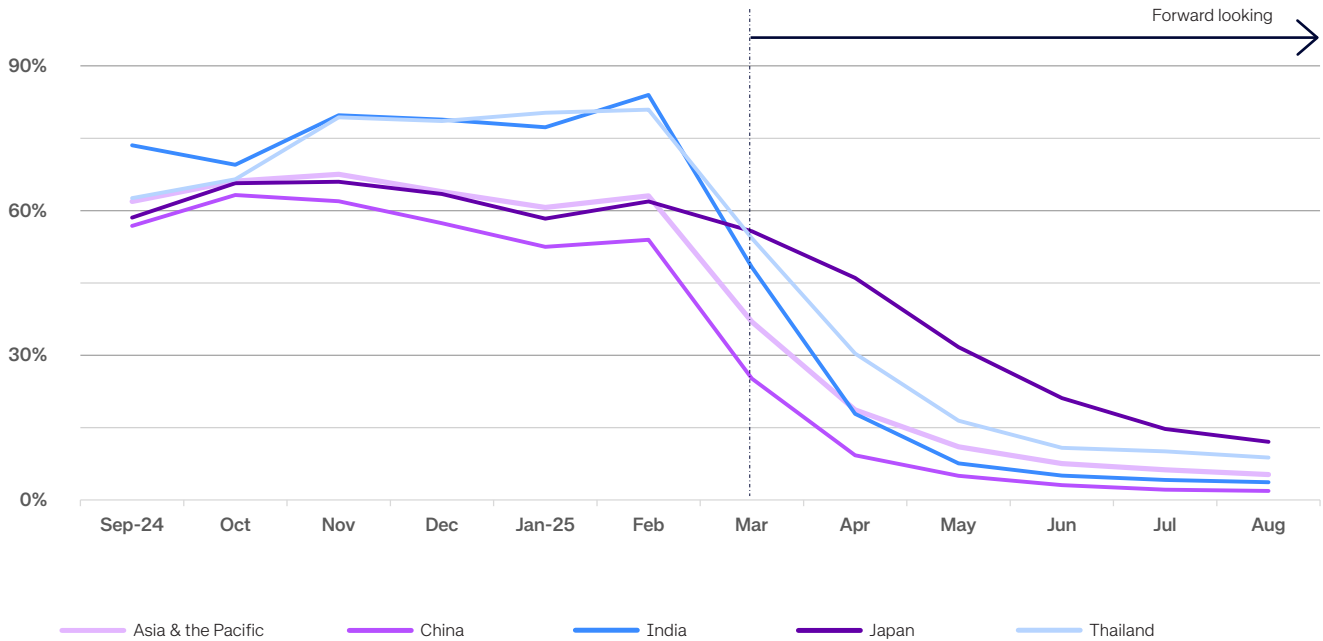
(March 2024-February 2025)



Hotel occupancy on-the-books

For Asia and the Pacific and its TOP 4 destinations

(September 2024-August 2025)



Hotel occupancy analysis

Insights:

1. Stable hotel occupancy across key markets

Occupancy in Asia Pacific's top markets (China, India, Japan, and Thailand) has remained consistently strong at 60-70%, reflecting steady demand and resilience in the region.

2. Forward-looking occupancy aligns with expected seasonality

On-the-books data for 2025 follows a predictable seasonal trend, creating opportunities for targeted strategies to boost demand during off-peak months.

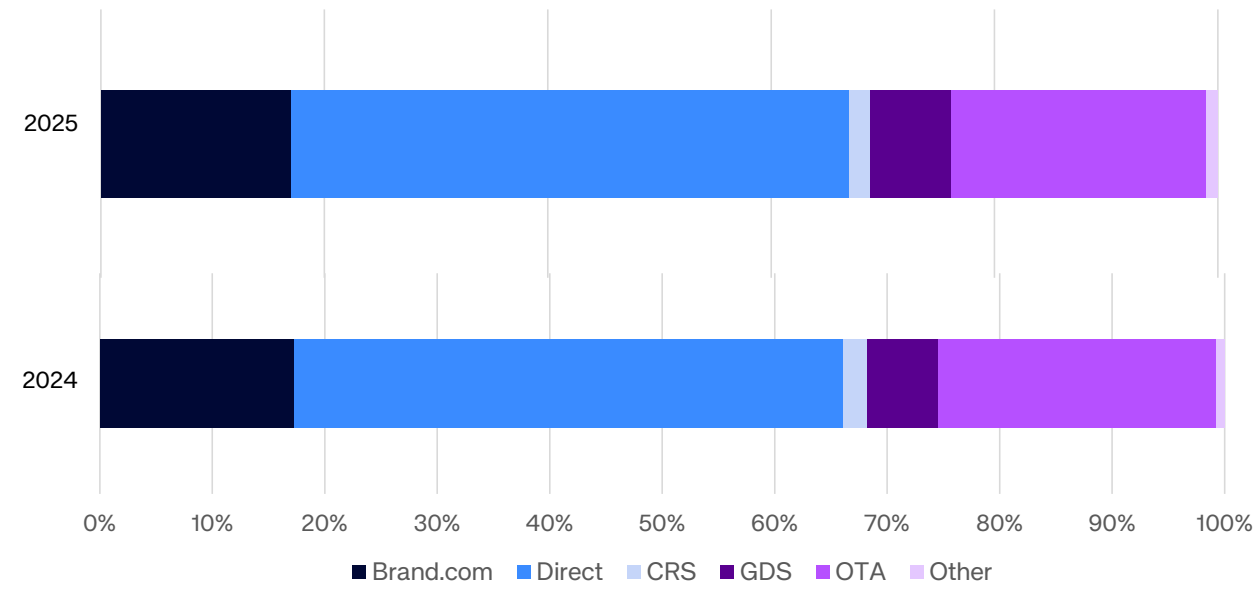
3. Growth opportunities in key markets

India's dynamic market signals evolving travel patterns, China continues to be a strong driver of demand, and Thailand shows promising growth in forward bookings, particularly in leisure travel.



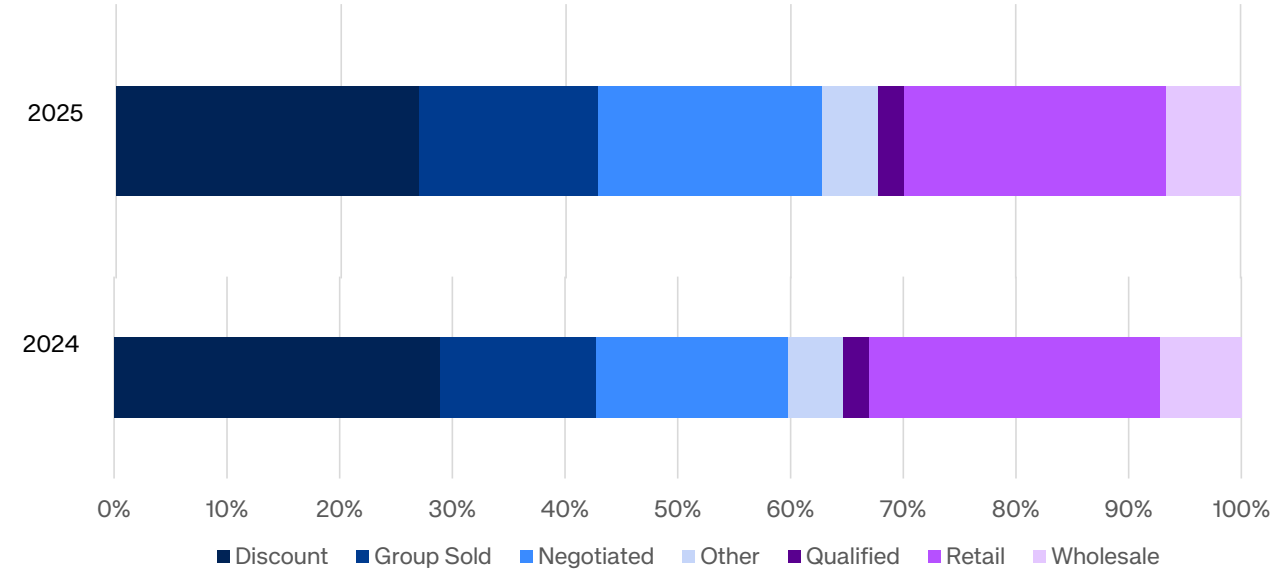
Hotel channel mix in Asia and the Pacific

On-the-books distribution for March 2025 vs same month last year



Hotel segmentation in Asia and the Pacific

On-the-books distribution for March 2025 vs same month last year



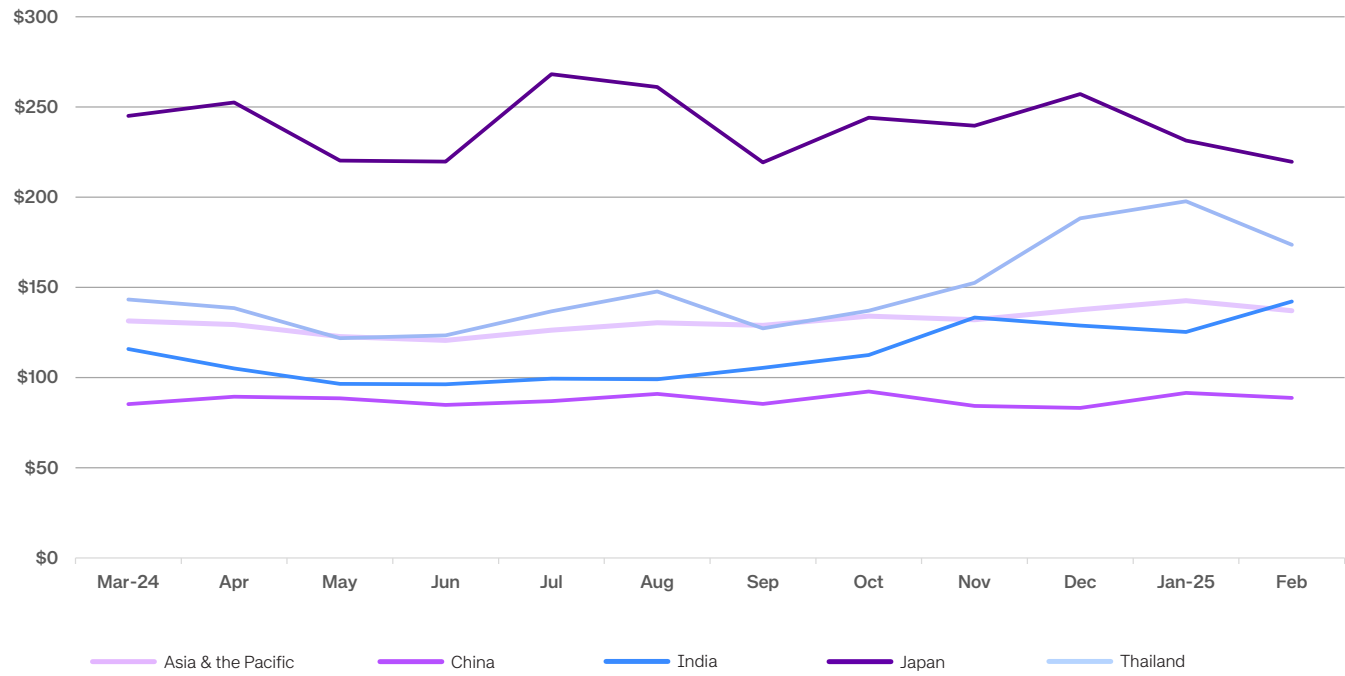
Hotel mix & segmentation analysis

Insights:

- 1. Shift toward direct and Brand.com bookings**
Direct and Brand.com channels are maintaining a strong presence, indicating travellers' preference for direct engagement with hotels.
- 2. Growing role of negotiated and group sales**
Negotiated and group sales segments have increased, highlighting the importance of business and group travel in hotel bookings.
- 3. Stable OTA contribution with diversified distribution**
OTAs continue to be a major booking channel, but diversification across channels suggests a balanced approach to distribution.



Average Daily Rate (ADR) in USD



Hotel ADR in Asia and the Pacific analysis

Insights:

1. Japan leads in ADR

Japan consistently maintains the highest Average Daily Rate (ADR), indicating strong pricing power and demand.

2. Thailand's growth trajectory

ADR in Thailand shows a steady upward trend, reflecting increasing traveller spending in the market.

3. Varied market pricing

ADR levels vary significantly across markets, highlighting the need for tailored rate strategies per destination.

Recommendation for DMOs in Asia Pacific:

Promote high-value tourism by focusing on premium travellers and experiences. Encourage collaboration between hotels and local businesses to enhance offerings to increase overall visitor spending.





Asia and the Pacific

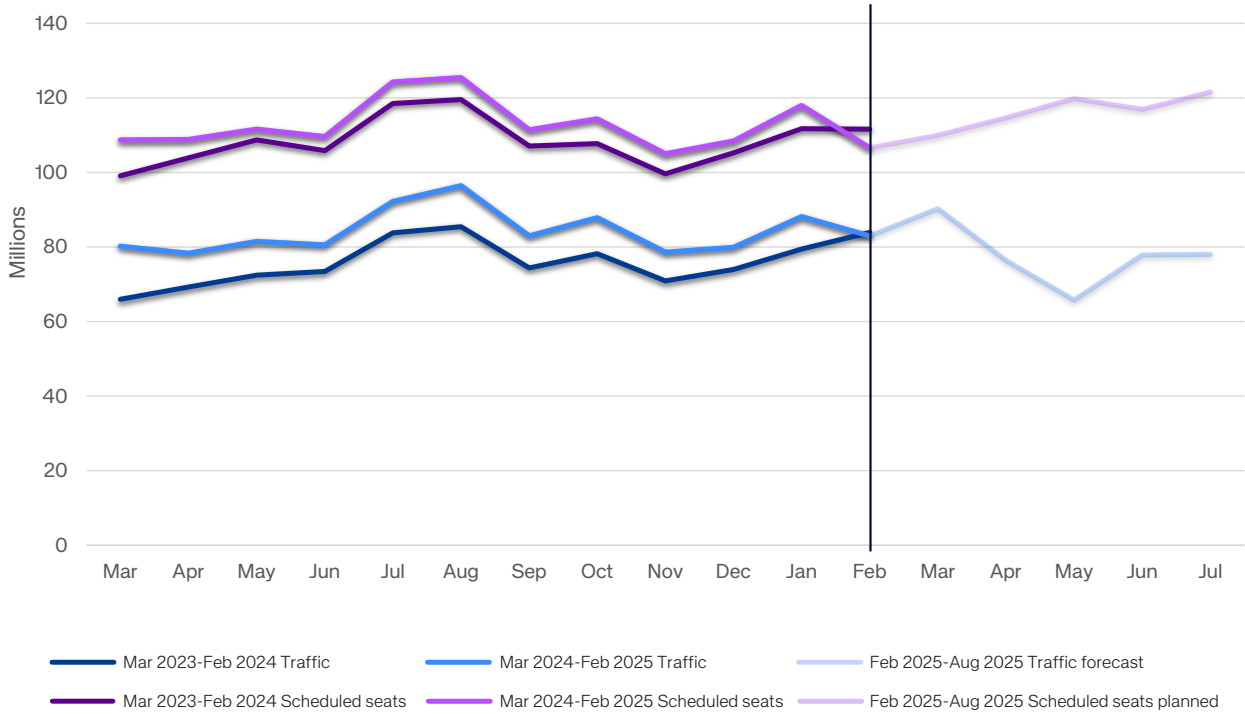
North-East Asia

Air Travel Overview



Worldwide to North-East Asia

Air passenger volume & scheduled seats



Passenger traffic and capacity analysis

Insights

1. Steady growth in air traffic

As of 16th March, passenger volumes to North-East Asia continue to rise, with a projected 10.8% growth in upcoming months.

2. Capacity expansion aligns with demand

Airlines are responding to this demand, as scheduled seat capacity is also increasing.

3. Seasonal trends impacting traffic

Peaks in traffic around key travel periods indicate strong seasonal influences on demand.

Recommendation for DMOs in Asia Pacific

DMOs could capitalize on increased connectivity by promoting destination appeal in key source markets. Collaborate with airlines and tourism stakeholders to launch campaigns that align with peak travel seasons and highlight unique cultural experiences.

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for North-East Asia

Origin markets	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
Japan	1	1
Korea (ROK)	2	2
China	5	3
United States	3	4
Taiwan (pr. of China)	4	5
Thailand	6	6
Australia	9	7
Hong Kong (China)	7	8
Canada	8	9
Malaysia	13	10

Top 10 markets travelling to North-East Asia

Origin markets	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Korea (ROK)	1	1	22%
Japan	2	2	42%
Taiwan (pr. of China)	3	3	27%
United States	4	4	12%
China	5	5	83%
Thailand	8	6	28%
Hong Kong (China)	6	7	34%
Australia	7	8	27%
Indonesia	9	9	17%
Singapore	10	10	44%
Total	70.7%	71.5%	

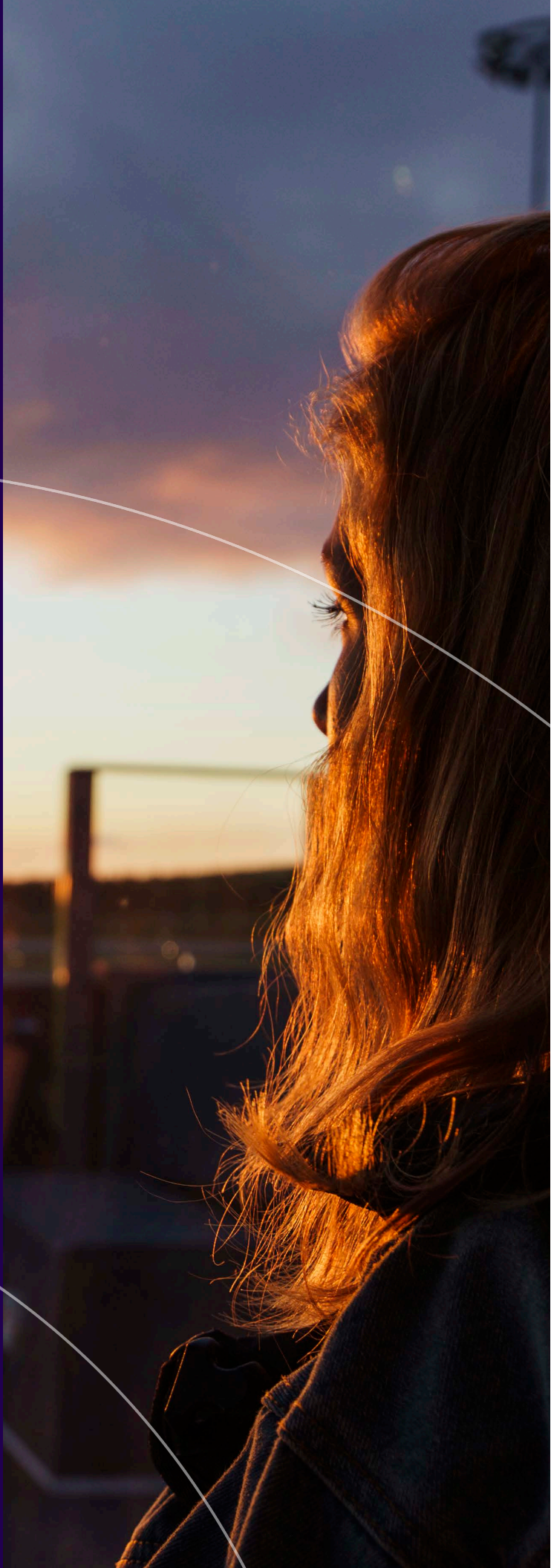
Are travellers from these origin markets to North-East Asia already on your radar?

Top 10 markets searching for North-East Asia with the highest growth

Origin markets	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	204%
Indonesia	2	106%
New Zealand	3	96%
Malaysia	4	95%
Russian Federation	5	95%
Vietnam	6	89%
Macao (China)	7	88%
Mexico	8	80%
Philippines	9	76%
Singapore	10	74%

Top 10 markets travelling to North-East Asia with the highest growth

Origin markets	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	83%
Russian Federation	2	74%
Nepal	3	72%
Malaysia	4	69%
Kazakhstan	5	59%
Singapore	6	44%
Japan	7	42%
Vietnam	8	41%
Macao (China)	9	38%
Hong Kong (China)	10	34%



Who is searching and visiting North-East Asia analysis

Insights:

1. Strong growth in travel interest

China leads outbound growth (+204% searches, +83% actual travel), with Indonesia, New Zealand, and Malaysia also showing rising demand.

2. High potential from emerging markets

Russian Federation, Nepal, and Kazakhstan are expanding rapidly (50%+ YoY growth), alongside strong intent and travel from Vietnam, Macao (China), and Singapore.

3. Alignment between demand and bookings

China, Indonesia, and Malaysia show high conversion potential, reinforcing the need for targeted marketing to maximize arrivals.

Recommendation:

Prioritize growth markets with tailored campaigns: DMOs could focus on China, Indonesia, and Russian Federation with curated travel experiences, and multi-destination promotions to drive visitor spending.

Where do people from North-East Asia travel to? Reality vs. aspirations

Top searched destinations in North-East Asia

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
China	2	1
Japan	1	2
Korea (ROK)	3	3
Hong Kong (China)	4	4
Macao (China)	5	5
Mongolia	6	6

Top booked destinations in North-East Asia

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
China	2	1	53%
Japan	1	2	22%
Korea (ROK)	3	3	10%
Hong Kong (China)	4	4	12%
Macao (China)	5	5	55%
Mongolia	6	6	24%

Top performing destinations in North-East Asia

Top searched destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	91%
Macao (China)	2	82%
Mongolia	3	54%
Korea (ROK)	4	51%
Japan	5	50%
Hong Kong (China)	6	43%

Top booked destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Macao (China)	1	55%
China	2	53%
Mongolia	3	31%
Japan	4	25%
Hong Kong (China)	5	24%
Korea (ROK)	6	22%

Where visitors are going in North-East Asia

Insights:

1. China leads in demand and bookings

China has overtaken Japan as the most searched and booked destination, with a 91% YoY increase in searches and a 53% rise in actual bookings.

2. Macao (China) and Mongolia emerge as high-growth markets

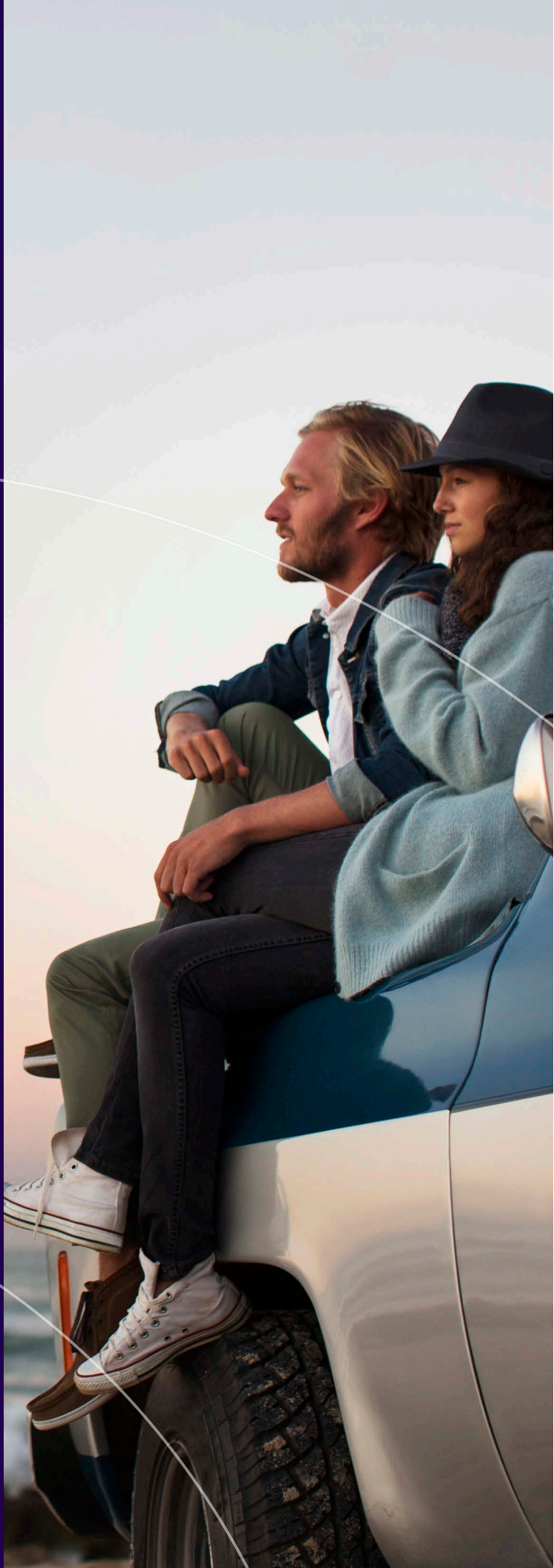
Both destinations are experiencing strong interest, with Macao (China) showing an 82% surge in searches and a 55% increase in bookings.

3. Strong alignment between aspiration and travel behavior

The most searched destinations—China, Japan, and Korea (ROK)—are also the most booked, indicating high conversion potential.

Recommendation:

DMOs could focus on targeted marketing campaigns to sustain momentum in high-growth destinations like Macao (China), Mongolia, and China, ensuring promotional efforts translate into sustained bookings.



Where do travellers in North-East Asia go? Reality vs. aspirations

Top 10 searched destination cities in North-East Asia

Destination cities	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
Tokyo	1	1
Seoul	2	2
Hong Kong (China)	3	3
Shanghai	5	4
Osaka	4	5
Beijing	6	6
Guangzhou	7	7
Fukuoka	8	8
Jeju	10	9
Sapporo	9	10

Top 10 booked destination cities in North-East Asia

Destination cities	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Tokyo	2	1	17%
Seoul	1	2	13%
Hong Kong (China)	3	3	12%
Shanghai	4	4	38%
Osaka	5	5	18%
Beijing	9	6	56%
Guangzhou	7	7	40%
Fukuoka	8	8	22%
Sapporo	6	9	-5%
Busan	10	10	13%
Total	78.1%	73.3%	

Top performing destinations in North-East Asia

Top 10 searched destination cities with the highest growth

Destination cities	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Zhengzhou	1	125%
Kunming	2	120%
Chongqing	3	117%
Hangzhou	4	114%
Chengdu	5	109%
Xi An	6	107%
Wuhan	7	107%
Changsha	8	106%
Harbin	9	103%
Shenzhen	10	100%

Top 10 booked destination cities with the highest growth

Destination cities	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Chongqing	1	125%
Kunming	2	113%
Wuhan	3	99%
Chengdu	4	93%
Xi An	5	89%
Shenzhen	6	77%
Nanjing	7	66%
Dalian	8	62%
Beijing	9	56%
Hangzhou	10	54%

Where are visitors going in North-East Asia?

Insights:

1. China leads in growth

China surpasses Japan as the most searched and booked destination, with a 91% YoY increase in travel intent and 53% growth in actual bookings.

2. Strong momentum in emerging destinations

Macao (China), Mongolia, and Korea (ROK) show notable increases in both search interest and confirmed bookings, indicating growing traveller interest.

3. High-growth Chinese cities

Second-tier Chinese cities, such as Chongqing, Kunming, and Hangzhou, are experiencing over 100% YoY growth, making them emerging hotspots for inbound tourism.

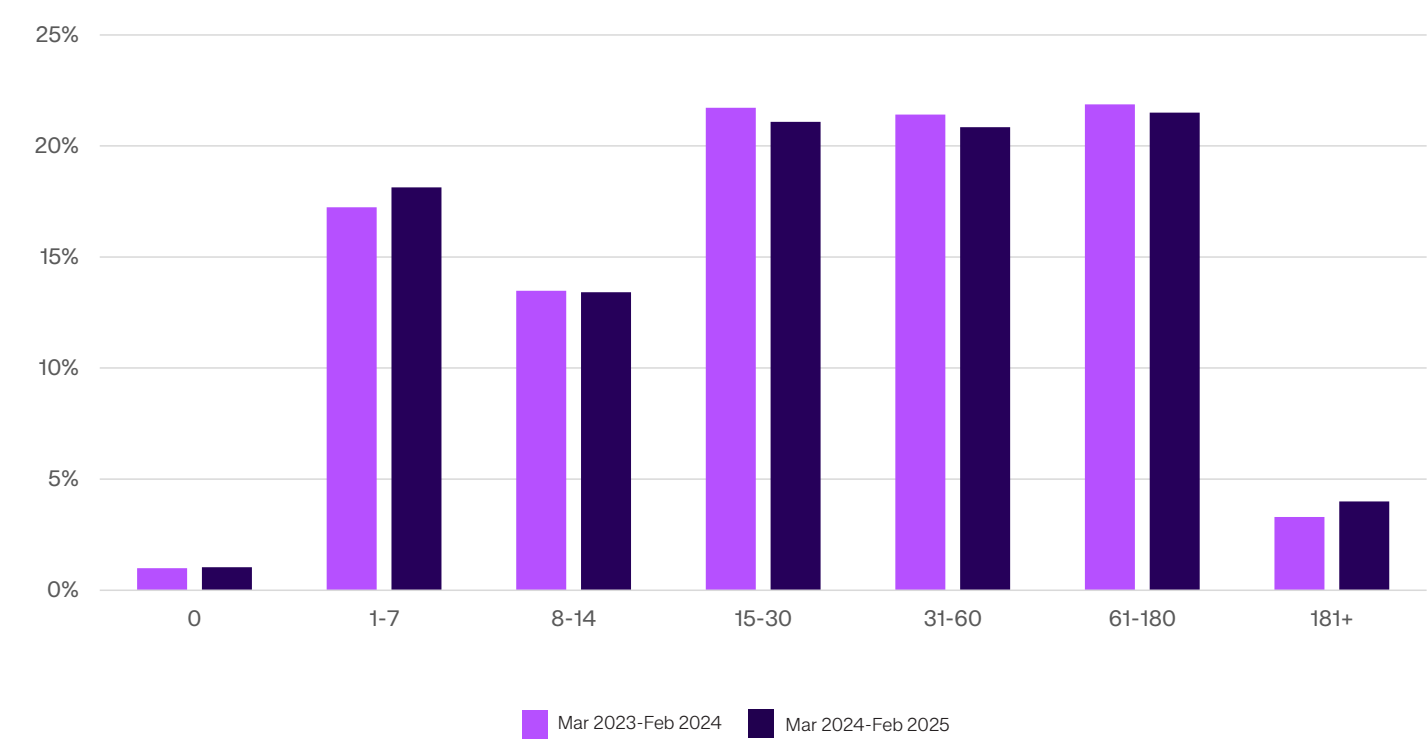
Recommendation:

Capitalize on China's Demand: DMOs could strengthen destination marketing efforts targeting Chinese travellers, highlighting lesser-known destinations and unique experiences to drive further engagement.



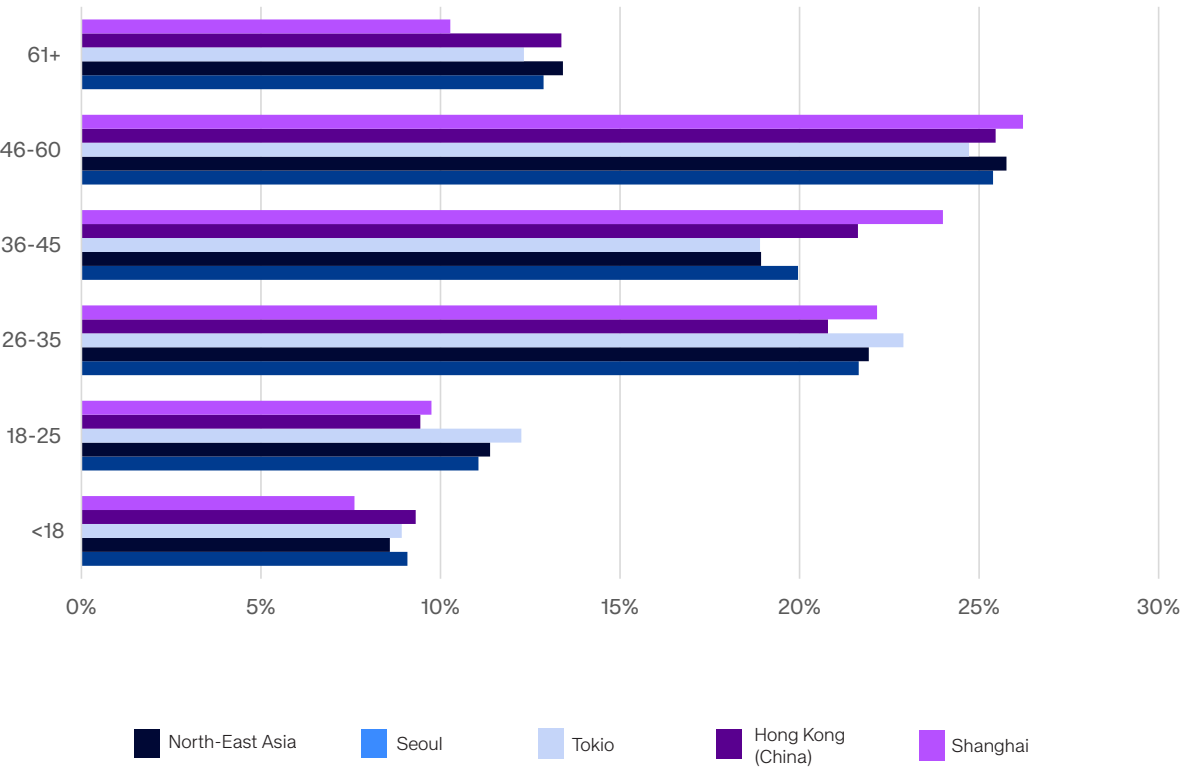
Air travel bookings to North-East Asia by lead time

Percentage of passengers booked by lead time (in days)

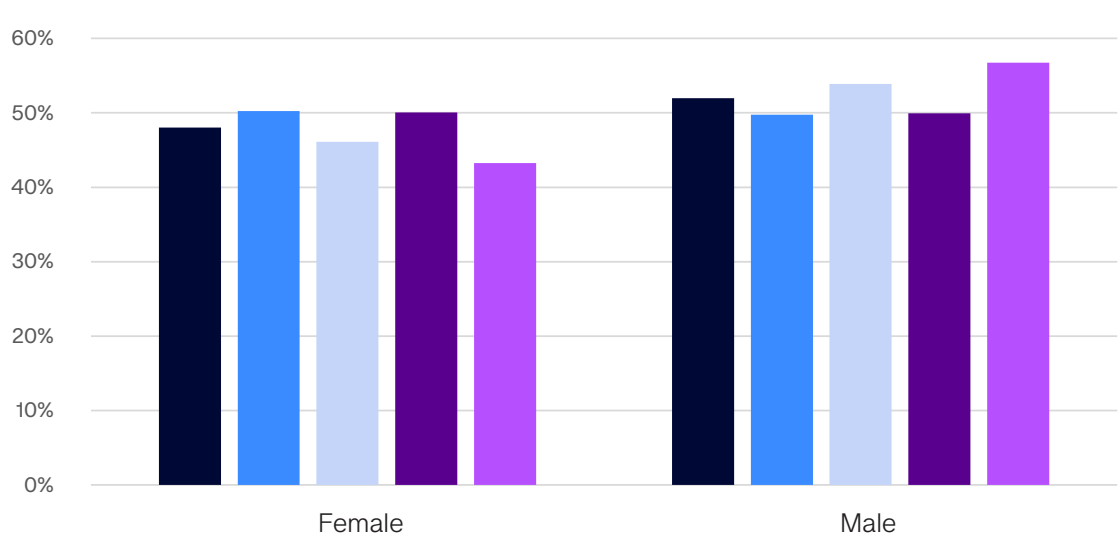


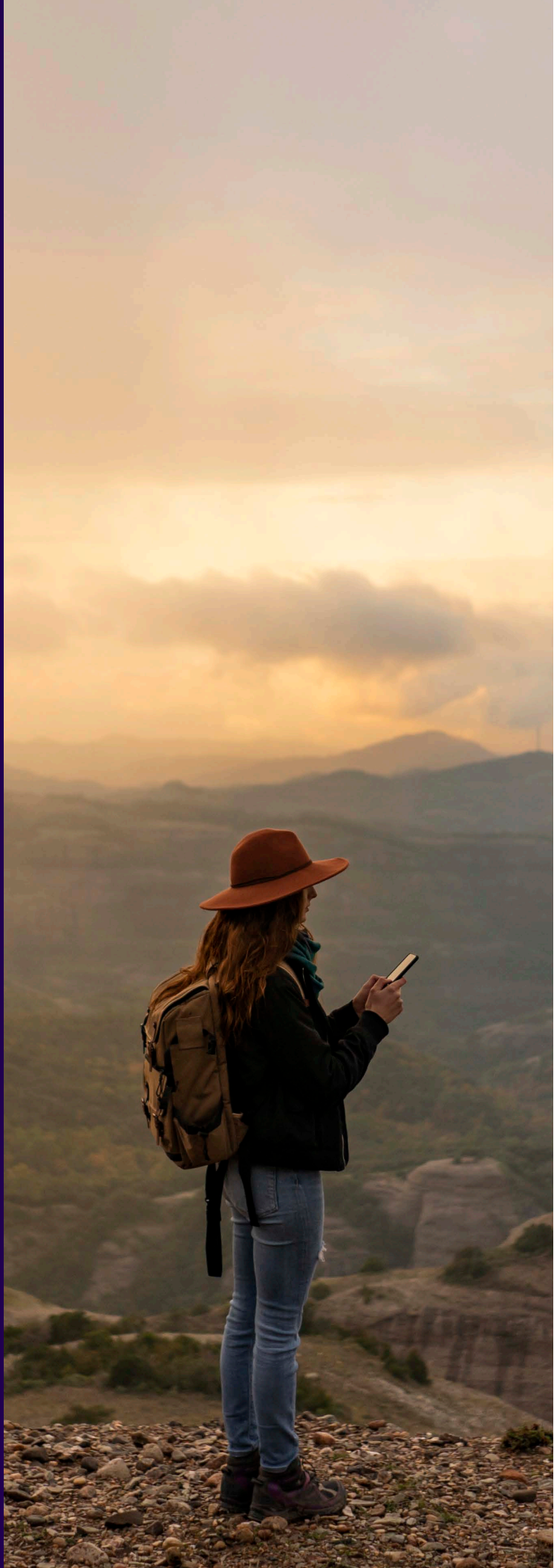
What type of travellers travel to North-East Asia: Top 4 destination cities

Percentage of passengers booked by age category



Percentage of passengers booked by gender





Lead time and profile analysis

Insights:

1. Booking lead times reflect stability
travellers to North-East Asia continue to book with similar lead times as last year, with a strong share of bookings made 15-60 days in advance, supporting consistent travel planning trends.

2. A balanced demographic profile of travellers
46-60 Age group is the dominant long-stay segment to North-East Asia, while younger age groups show steady interest, ensuring a balanced mix of visitors across generations.

3. Balanced gender representation
The gender split of travellers is nearly even, with slight variations across key destinations, reinforcing the need for tailored marketing approaches to both male and female audiences.

Recommendation:

Optimize marketing strategies based on booking behaviors by targeting travellers in the 15-60 day lead window and tailoring promotions to the 46-60 age group, while maintaining engagement with younger travellers for future growth.

1526 new routes in North-East Asia

New routes from multiple markets

Origin Market	New Routes
China	95
Japan	52
Korea (ROK)	46
Russian Federation	32
Malaysia	31
Vietnam	30
Hong Kong (China)	26
Thailand	23
Taiwan (pr. of China)	13
Philippines	12

Top 10 new international routes (based on seat capacity)

New routes	Origin Market	Destination
Toronto-Beijin	Canada	China
Kuala Lumpur- Singapore	Malaysia	China
New York-Fuzhou	United States	China
Singapore-Osaka	China	Japan
Osaka-Singapore	Japan	China
Guangzhou-Nagoya	China	Japan
Kunming-Osaka	China	Japan
Osaka-Kunming	Japan	China
Nagoya-Guangzhou	Japan	China
Brussels-Shanghai	Belgium	China

New routes analysis

Insights:

1. Significant air connectivity expansion
North-East Asia added 1,526 new routes, with China, Japan, and Korea (ROK) leading in new connections, reinforcing the region's strong aviation network.

2. Strategic international route growth
The top new international routes primarily link North-East Asia with major markets such as Canada, the U.S., and Europe, creating more opportunities for long-haul travel.

3. Enhanced regional connectivity
Markets like Vietnam, the Philippines, and Malaysia are increasing their links with Japan and China, strengthening intra-Asia travel flows.

Recommendation:

Possibility to capitalize on new routes by targeting key source markets with destination marketing campaigns, ensuring strong demand aligns with the expanded air capacity.

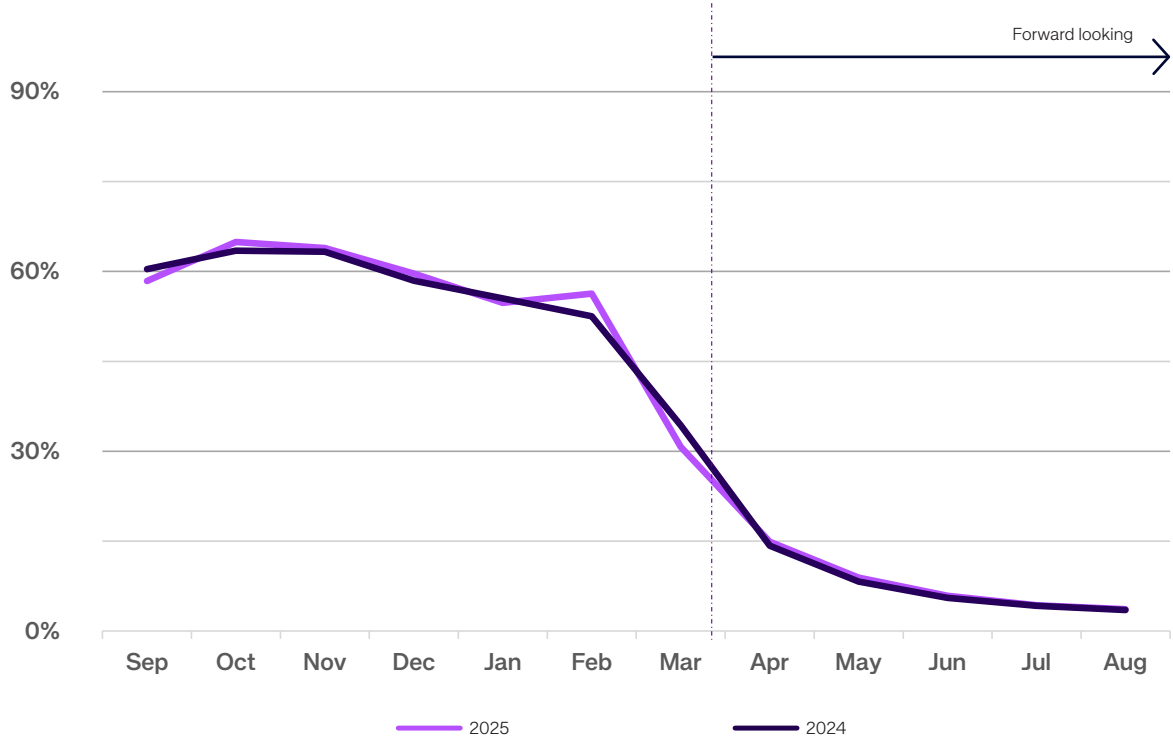


Hospitality Occupancy Overview



Hotel occupancy in North-East Asia

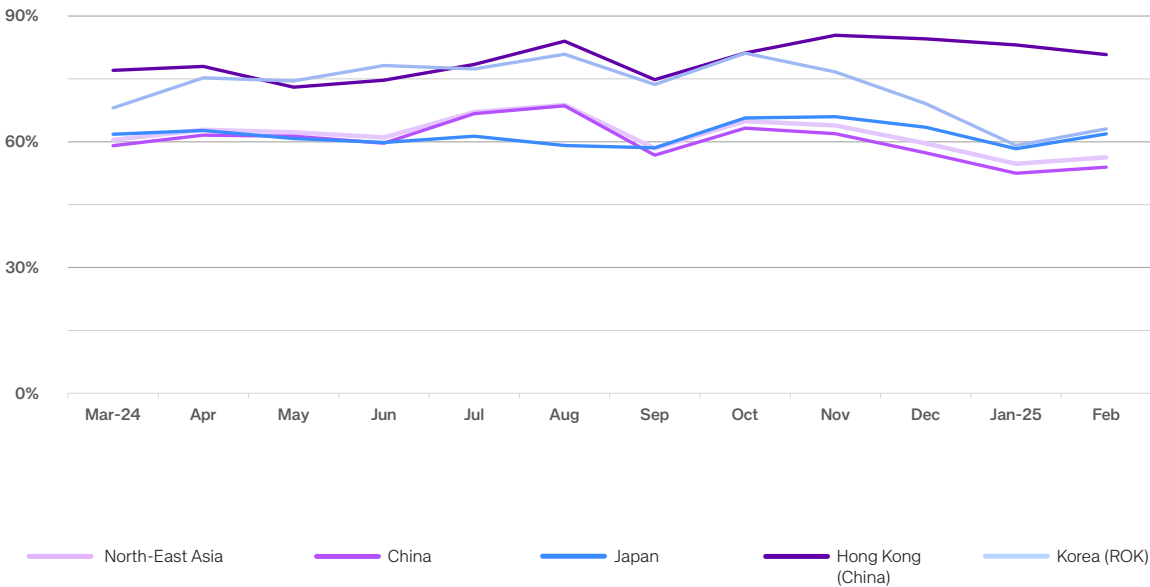
On-the-books by month compared to same month last year (%)



Hotel occupancy for the past 12 months

For North-East Asia and its TOP 4 markets

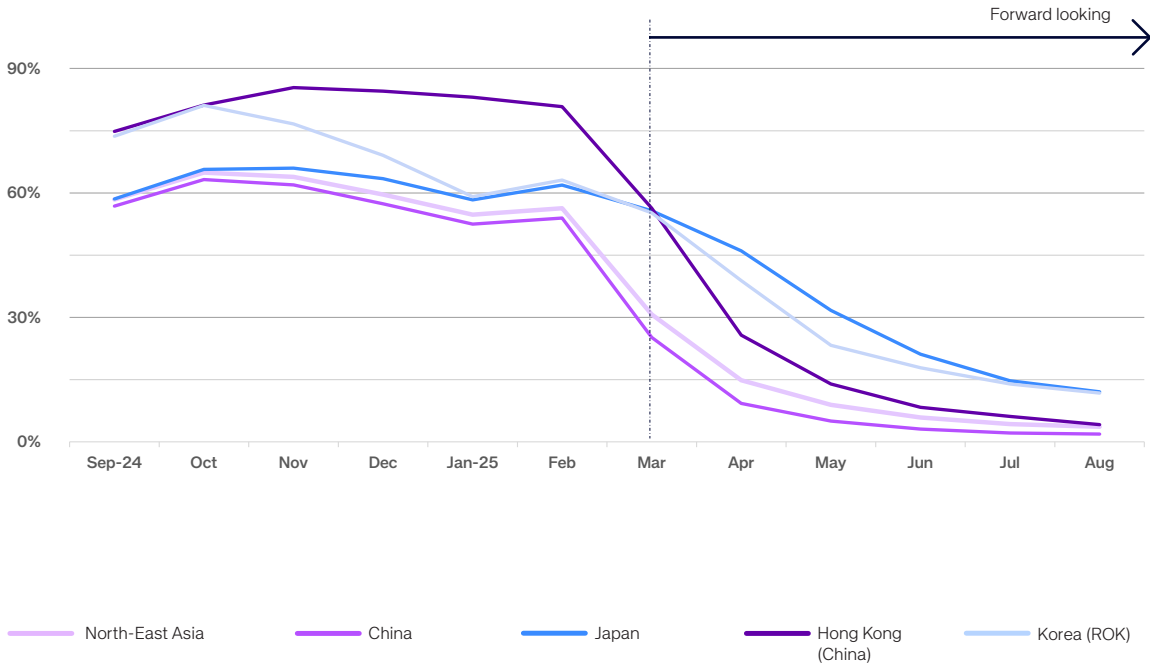
(March 2024- February 2025)



Hotel occupancy on-the-books

For North-East Asia and its TOP 4 markets

(September 2024- August 2025)



Hotel occupancy in North-East Asia analysis

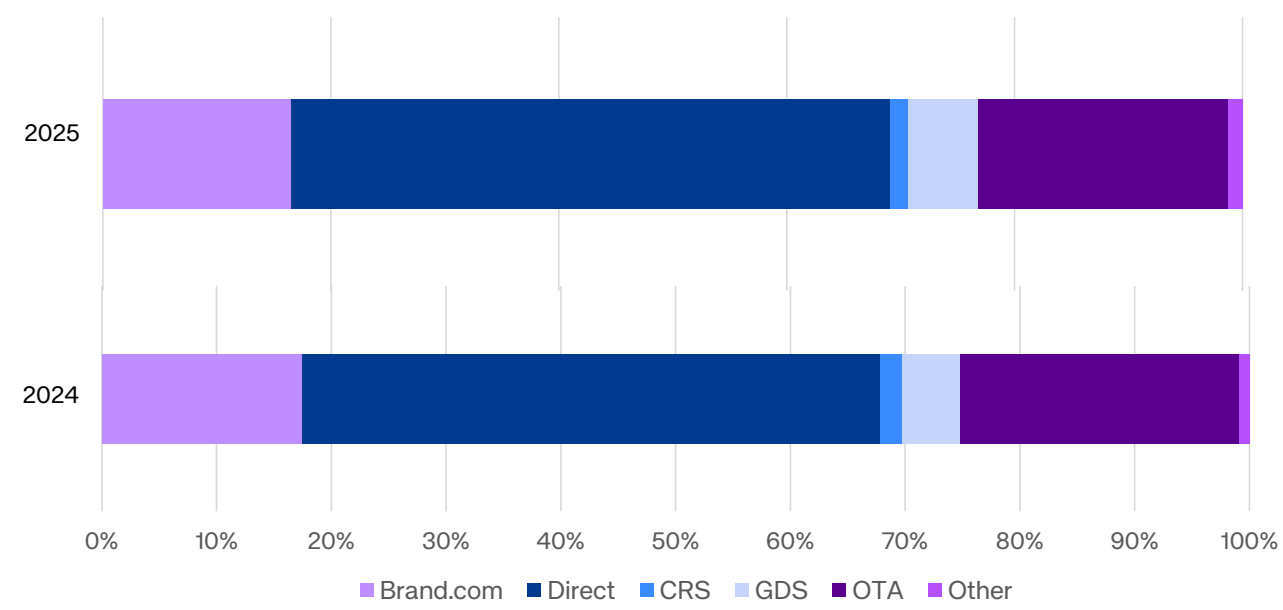
Insights:

- 1. Steady occupancy levels across the past year**
Hotel occupancy in North-East Asia has remained relatively stable, fluctuating around 60-70%, with Hong Kong (China) and Korea (ROK) maintaining stronger occupancy trends.
- 2. Forward-looking occupancy reflects seasonal patterns**
On-the-books data for 2025 shows a gradual decline from March onwards, aligning with 2024 trends. This suggests a predictable seasonal effect rather than a demand slowdown.
- 3. Diverse market performance creates growth opportunities**
Korea (ROK) has seen the highest occupancy peaks, while Japan and China maintain consistent levels. These variations present opportunities for market-specific demand generation.



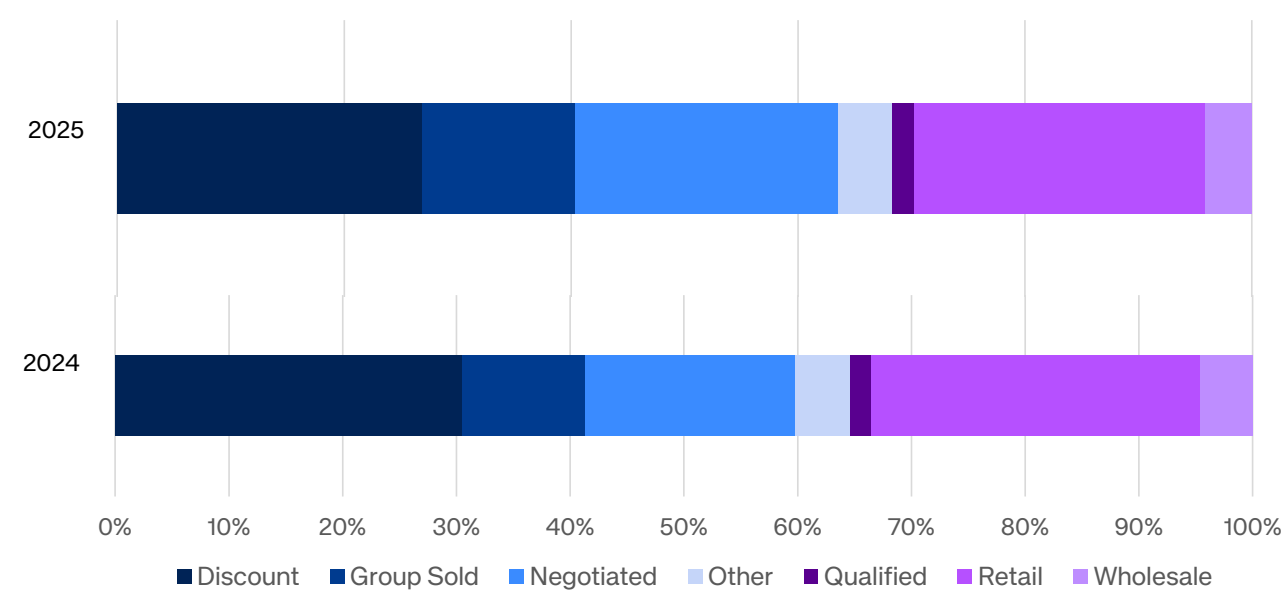
Hotel Channel mix in North-East Asia

On-the-books distribution for March 2025 vs same month last year



Hotel segmentation in North-East Asia

On-the-books distribution for March 2025 vs same month last year

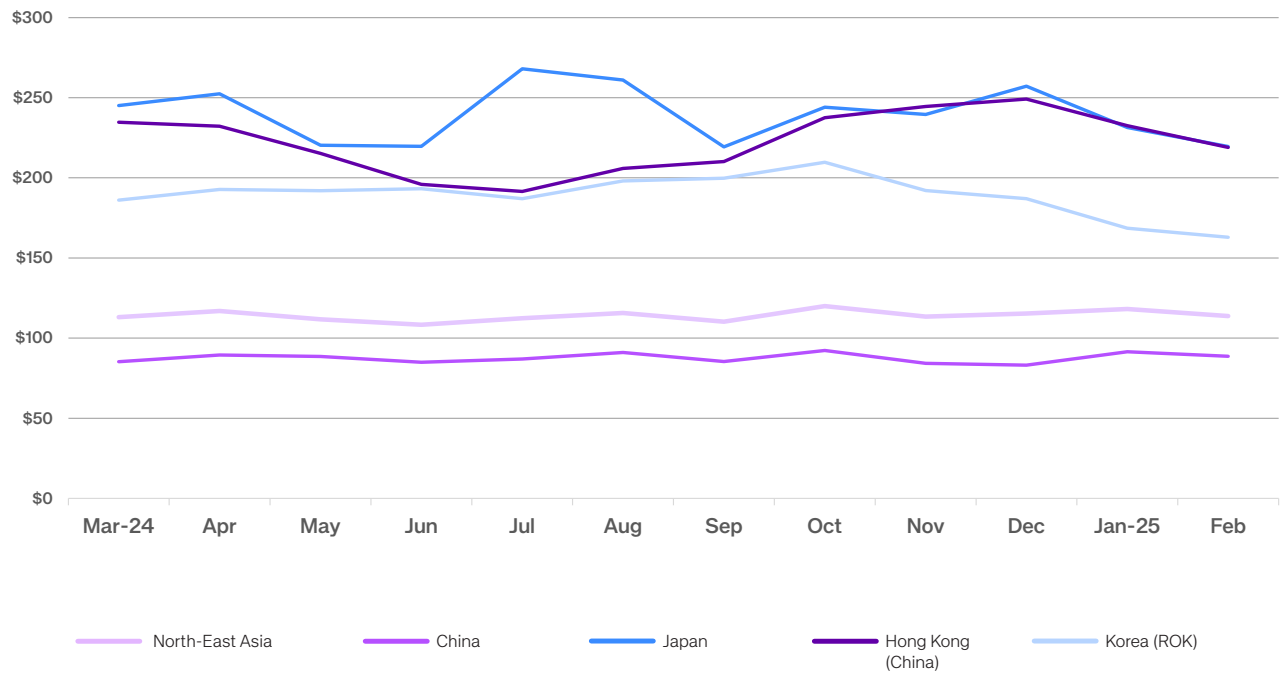


Hotel segmentation & channel analysis in North-East Asia

Insights:

- 1. Consistent occupancy trends**
Hotel occupancy in North-East Asia has remained stable over the past 12 months, with slight fluctuations across key markets such as China, Japan, Hong Kong (China), and Korea (ROK).
- 2. Forward-looking demand**
On-the-books data for 2025 aligns with seasonal patterns, showing a natural dip from March onwards, presenting opportunities for targeted demand-driving strategies.
- 3. Diverse traveller profiles**
A balanced mix of traveller segments is evident, with a strong presence of the 46-60 age group and a nearly even gender distribution across top destinations.

Average Daily Rate (ADR) in USD



Hotel ADR analysis in North-East Asia

1. Stable ADR for North-East Asia

The overall ADR for North-East Asia remains steady, with minor fluctuations, indicating consistent pricing strategies across the region.

2. Japan leading premium pricing

Japan consistently maintains the highest ADR, with noticeable seasonal peaks, highlighting strong demand for higher-value accommodations.

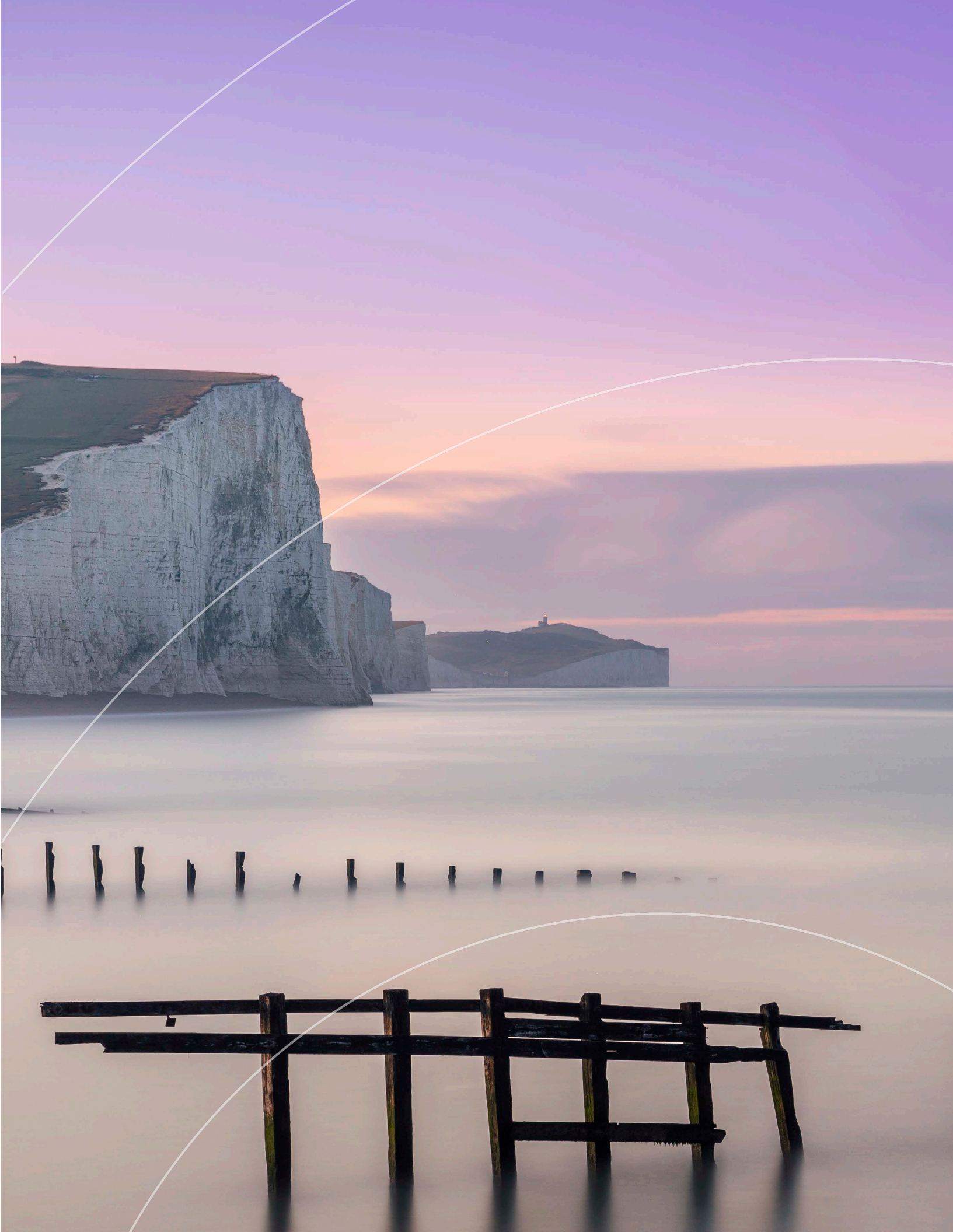
3. China and Korea (ROK) show moderate growth

While China and Korea (ROK) exhibit more stable ADRs, their gradual upward trends suggest steady demand.



Glossary for North-East Asia

Destination	Subregion
China	North-East Asia
Hong Kong (China)	North-East Asia
Japan	North-East Asia
Korea (ROK)	North-East Asia
Macao (China)	North-East Asia
Mongolia	North-East Asia
Taiwan (pr. of China)	North-East Asia





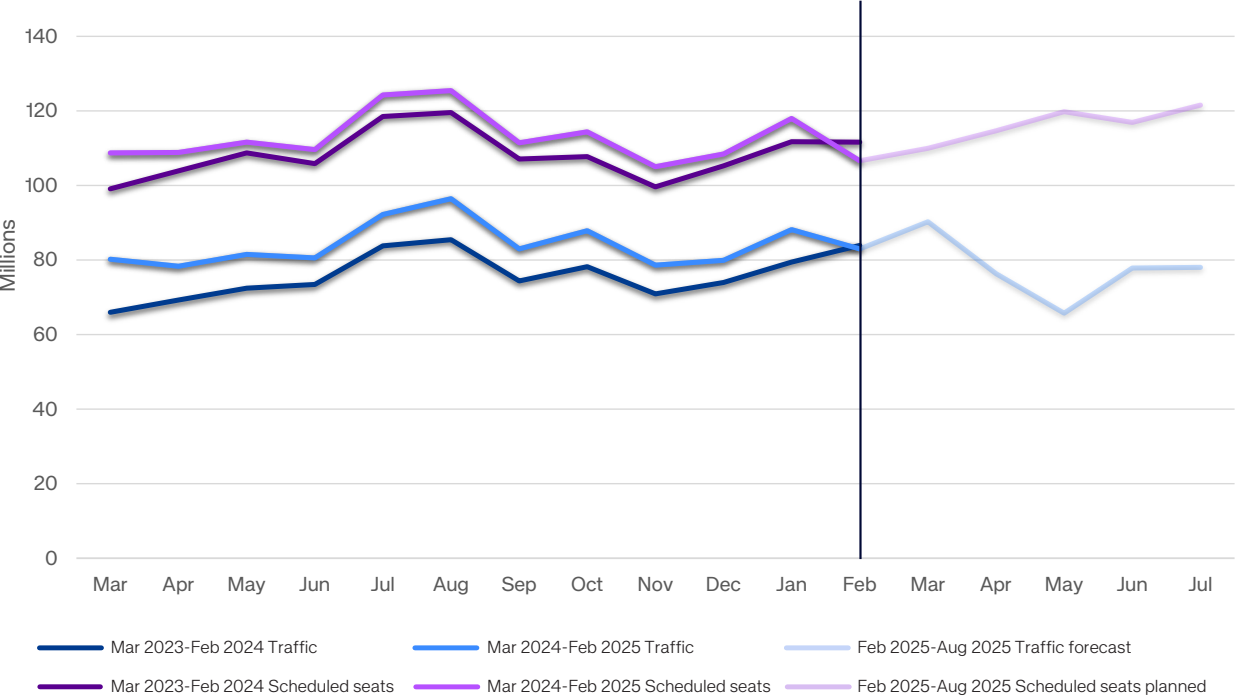
Asia and the Pacific Oceania

Air Travel Overview



Worldwide to Oceania

Air passenger volume & scheduled seats



Passenger traffic and capacity analysis

- 1. Steady growth in passenger traffic**
As of 16th March, air travel to Oceania is experiencing a 4.1% growth, showing a steady increase in demand, reinforcing the region's resilience as a travel destination.
- 2. Capacity expansion aligns with demand**
Scheduled seat capacity is increasing in line with passenger traffic, ensuring a well-balanced supply and reducing risks of overcapacity.
- 3. Seasonal peaks drive demand**
Travel spikes in July, December, and February, reflecting strong seasonal trends that present opportunities for targeted marketing and promotions.

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for travel to Oceania

Origin market	Mar 23-Feb 24 ranking	Mar 24-Feb 25 ranking
Australia	1	1
China	8	2
United States	2	3
United Kingdom	3	4
New Zealand	4	5
India	5	6
Korea (ROK)	6	7
Japan	7	8
Indonesia	11	9
Hong Kong (China)	14	10

Top 10 origin markets travelling to Oceania

Origin market	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Australia	1	1	-5%
New Zealand	2	2	-8%
India	3	3	-24%
United States	4	4	-4%
United Kingdom	5	5	-6%
Korea (ROK)	6	6	-14%
Japan	8	7	33%
Indonesia	7	8	5%
Papua New Guinea	9	9	-1%
Fiji	12	10	-6%
Total	82.5%	82.8%	

Are travellers from these origin markets to Oceania already on your radar?

Top 10 markets searching for travel to Oceania with the highest growth

Origin market	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	239%
Indonesia	2	53%
Vietnam	3	52%
Taiwan (pr. of China)	4	47%
Hong Kong (China)	5	47%
Japan	6	45%
Australia	7	24%
India	8	19%
Thailand	9	18%
Türkiye	10	18%

Top 10 markets travelling to Oceania with the highest growth

Origin market	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	51%
Japan	2	33%
Indonesia	3	5%
Taiwan (pr. of China)	4	2%
French Polynesia	5	1%
Italy	6	0%
Netherlands	7	-1%
Papua New Guinea	8	41%
Malaysia	9	-2%
Bangladesh	10	-3%

Who is searching and visiting Oceania analysis

Insights:

1. Steady travel demand from top markets

Australia remains the dominant market for both searches and actual travel to Oceania, while China has surged in search interest, moving from 8th to 2nd place.

2. Growing interest from emerging markets

China, Indonesia, and Vietnam show the highest YoY search growth, signaling strong forward-looking demand from these regions.

3. Divergence between interest and actual travel

Despite significant growth in travel interest from China and other markets, actual travel growth remains moderate, indicating potential conversion challenges.

Recommendation:

DMOs could strengthen targeted marketing and promotions for high-growth markets like China, Indonesia, and Vietnam to convert strong interest into actual bookings.



Where do travellers go in Oceania? Reality vs. aspirations

Top 10 searched destinations in Oceania

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
Australia	1	1
New Zealand	2	2
French Polynesia	4	3
Fiji	3	4
Guam	5	5
Papua New Guinea	7	6
Vanuatu	9	7
New Caledonia	6	8
Samoa	8	9
Marshall Islands	10	10

Top 10 booked destinations in Oceania

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Australia	1	1	-5%
New Zealand	2	2	-10%
Fiji	3	3	-3%
Guam	4	4	-10%
Papua New Guinea	5	5	-3%
French Polynesia	6	6	-6%
Samoa	7	7	-4%
Vanuatu	8	8	-12%
New Caledonia	9	9	-34%
Marshal Islands	10	10	-6%
Total	100%	100%	

Top performing destinations being searched and booked in Oceania

Top 10 searched destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Papua New Guinea	1	40%
Vanuatu	2	30%
New Zealand	3	25%
Australia	4	25%
Marshall Islands	5	11%
Guam	6	9%
French Polynesia	7	7%
Fiji	8	6%
Samoa	9	-7%
New Caledonia	10	-22%

Top 10 booked destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Papua New Guinea	1	-3%
Fiji	2	-3%
Samoa	3	-4%
Australia	4	-5%
French Polynesia	5	-6%
Marshall Islands	6	-6%
New Zealand	7	-10%
Guam	8	-10%
Vanuatu	9	-12%
New Caledonia	10	-34%



Where travellers go in Oceania?

Insights:

1. Emerging destinations gaining traction

Interest in destinations like Papua New Guinea and Vanuatu is surging, presenting a great opportunity for DMOs to convert curiosity into actual visits through tailored campaigns and improved accessibility.

2. Strong demand for unique experiences

French Polynesia and New Caledonia continue to capture traveller interest, signaling a growing appetite for exclusive, immersive experiences. Capitalizing on this demand with personalized marketing and flexible booking options can drive more conversions.

3. Established destinations can leverage repeat visitors While bookings to Australia, New Zealand, and Fiji have seen a slight dip, these destinations still hold strong appeal. Engaging past visitors with loyalty incentives and refreshed experiences can maintain their competitive edge.

Recommendation:

Turn Interest into Action: DMOs could enhance digital marketing strategies, showcase hidden gems, and collaborate with airlines and OTAs to create seamless travel packages. Emphasizing ease of access, value-driven experiences, and sustainable tourism initiatives will help translate high search interest into increased bookings.

Where do visitors go? Reality vs. aspirations

Top 10 searched destination cities in Oceania

Destination cities	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
Sydney	1	1
Melbourne	2	2
Auckland	3	3
Brisbane	4	4
Perth	5	5
Adelaide	6	6
Christchurch	8	7
Guam	7	8
Nadi	9	9
Cairns	11	10

Top 10 booked destination cities in Oceania

Destination cities	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Sydney	1	1	-6%
Melbourne	2	2	-8%
Brisbane	3	3	-8%
Auckland	4	4	-10%
Perth	5	5	-5%
Adelaide	6	6	-9%
Nadi	7	7	-4%
Christchurch	8	8	-5%
Guam	9	9	-10%
Cairns	10	10	-7%
Total	72.2%	72%	

Top performing destinations in Oceania

Top 10 searched destination cities with the highest growth

Destination cities	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Yulara	1	57%
Heron Island	2	49%
Port Moresby	3	41%
Proserpine	4	37%
Launceston	5	35%
Christchurch	6	35%
Queenstown	7	33%
Port Vila	8	32%
Brisbane	9	29%
Auckland	10	28%

Top 10 booked destination cities with the highest growth

Destination cities	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Newman	1	13%
Proserpine	2	7%
Karratha	3	7%
Perth	4	5%
Rockhampton	5	2%
Port Hedland	6	0%
Newcastle	7	-1%
Queenstown	8	-2%
Port Moresby	9	-2%
Canberra	10	-3%

Which cities do travellers visit in Oceania?

Insights:

- 1. Consistent demand for key cities**
Sydney, Melbourne, and Auckland remain the top-searched and most-booked cities, reflecting stable traveller interest in these key hubs.
- 2. Emerging interest in secondary destinations**
Cities like Ayers Rock (Australia), Hamilton Island (Australia), and Port Moresby (Papua New Guinea) are seeing significant search growth, indicating rising traveller interest in more diverse locations.
- 3. Alignment between searches and bookings**
While major cities maintain strong booking numbers, secondary cities with high search growth may require more targeted efforts to convert interest into actual travel.

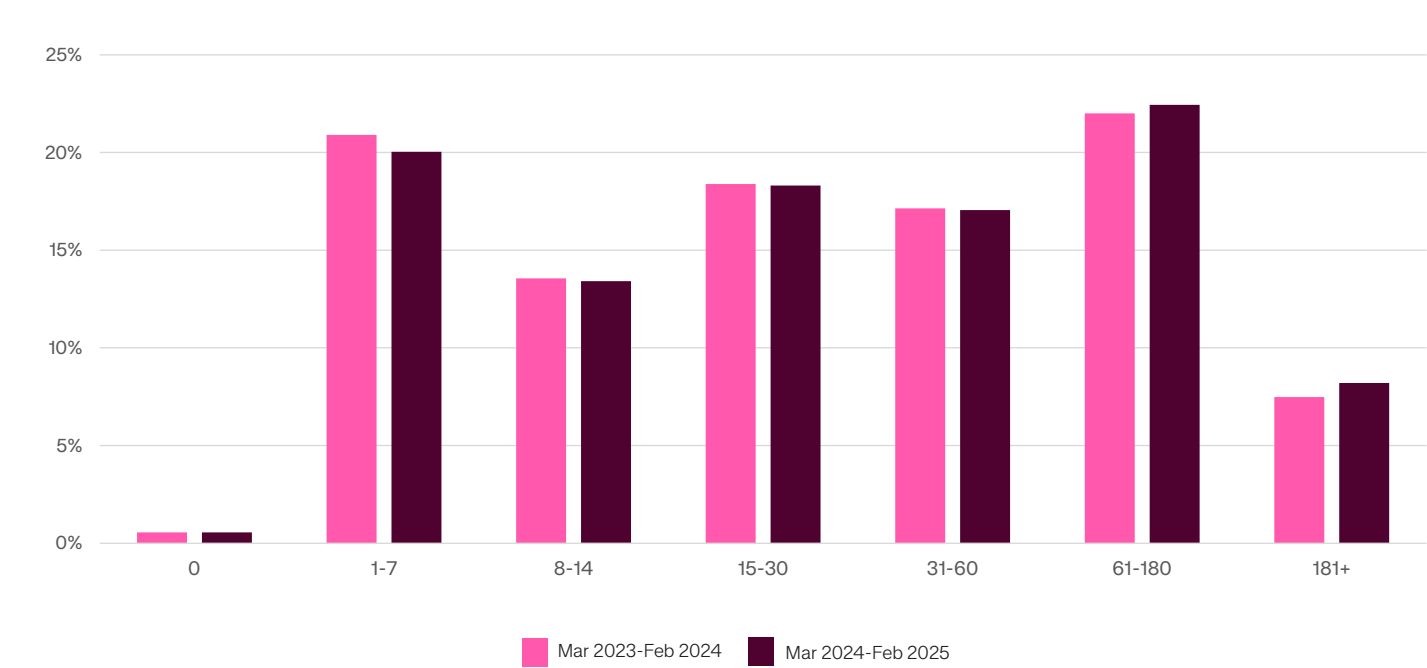
Recommendation:

DMOs can capitalize on the growing interest in secondary destinations by promoting unique experiences and travel packages, ensuring that increased search activity translates into higher bookings.



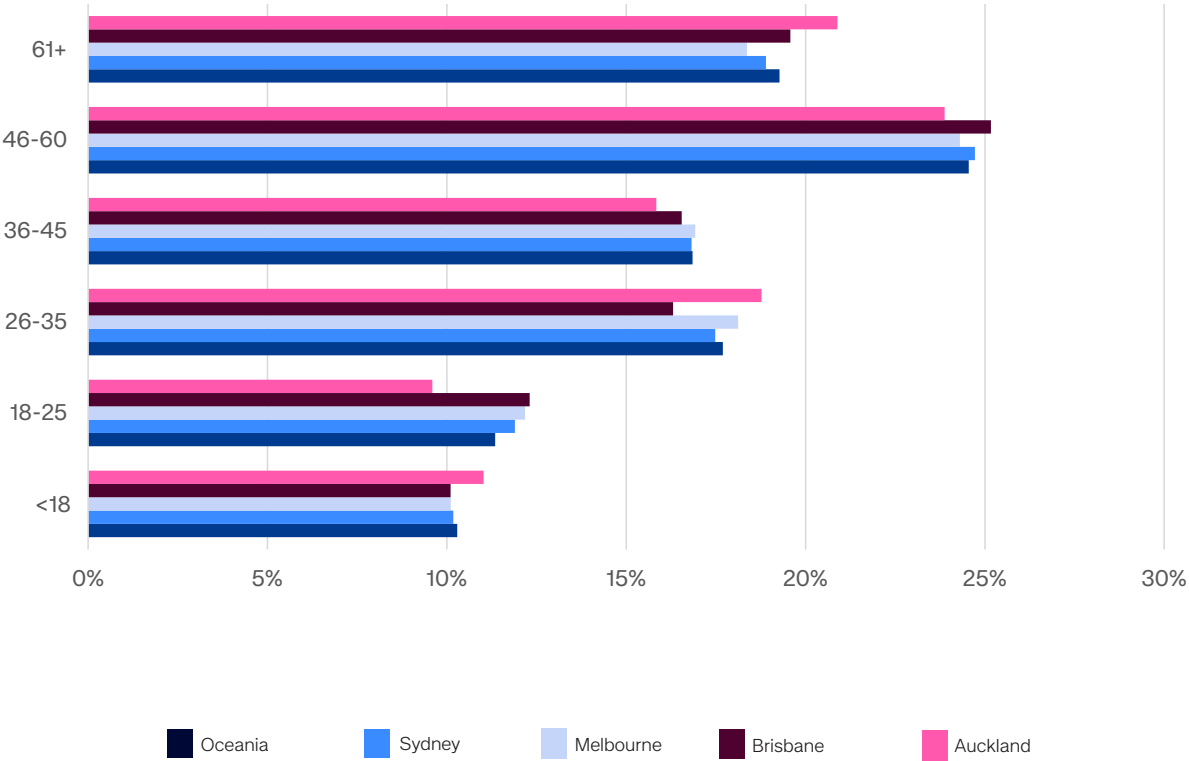
Air travel bookings to Oceania by lead time

Percentage of passengers booked by lead time (in days)

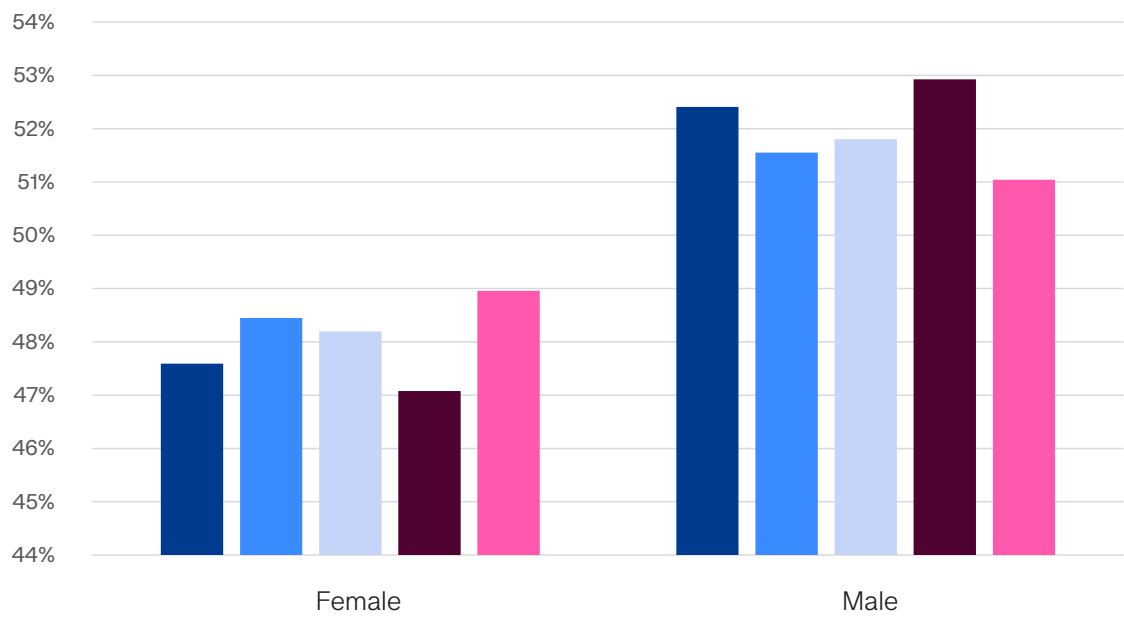


What type of travellers travel to Oceania: Top 4 destination cities

Percentage of passengers booked by age category



Percentage of passengers booked by gender





Lead time and profile analysis

Insights:

1. Travellers to Oceania show strong lead time planning

The majority of air travel bookings to Oceania are made well in advance, with over 40% of passengers booking more than 60 days ahead. This indicates strong confidence in long-term travel plans and an opportunity for early-bird promotions.

2. Older demographics drive travel demand

travellers aged 46+ represent the largest booking segment, particularly in top destinations like Sydney, Melbourne, and Auckland. This suggests a focus on premium travel experiences and extended stays.

3. Gender distribution highlights strong male travel segment

Across major cities, male travellers slightly outnumber female travellers, particularly in Auckland and Brisbane. This could indicate a stronger presence of business or adventure-driven travel among men.

Recommendation:

DMOs can leverage the long booking lead times by launching early promotional campaigns targeting high-value travellers (older demographics) with premium experiences, extended stays, and tailored services.

176 new routes in Oceania

New routes from multiple markets

Origin Market	New Routes
China	6
Thailand	4
United States	4
Fiji	3
France	3
Papua New Guinea	3
French Polynesia	3
Hong Kong (China)	2
Japan	2
New Zealand	2

Top 10 new international routes (based on seat capacity)

New routes	Origin Market	Destination
Bangkok-Perth	Thailand	Australia
Toronto-Sydney	Canada	Australia
Dubai-Adelaide	United Arab Emirates	Australia
Bangkok-Brisbane	Thailand	Australia
Osaka-Sidney	Japan	Australia
Istanbul-Melbourne	Türkiye	Australia
Hangzhou-Melbourne	China	Australia
Chengdu-Auckland	China	New Zealand
Guangzhou-Adelaide	China	Australia
Guangzhou-Perth	China	Australia

Key insights on new routes to Oceania

Insights:

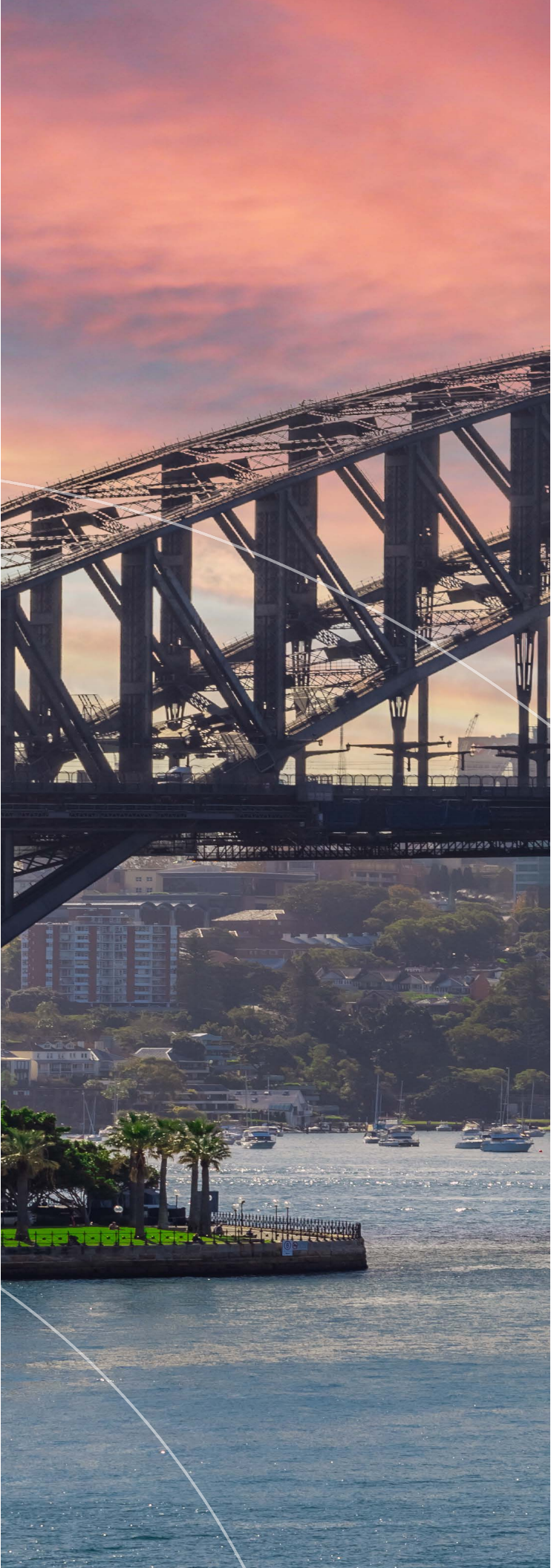
1. China leads in new route additions
China is the largest contributor to new routes to Oceania, with six new connections, reinforcing its position as a key market for both inbound and outbound travel.

2. Strengthening connectivity with major markets
New international routes from Thailand, the U.S., Japan, and the UAE highlight increasing demand and strategic expansion from diverse markets, catering to both leisure and business travellers.

3. Enhanced access to Australia and New Zealand
The majority of new routes are directed towards Australia and New Zealand, solidifying their roles as primary gateways for international arrivals in the region.

Recommendation:

Promotional efforts should target origin markets such as China, Thailand, and the U.S., leveraging these new routes to drive demand for both leisure and corporate travel.

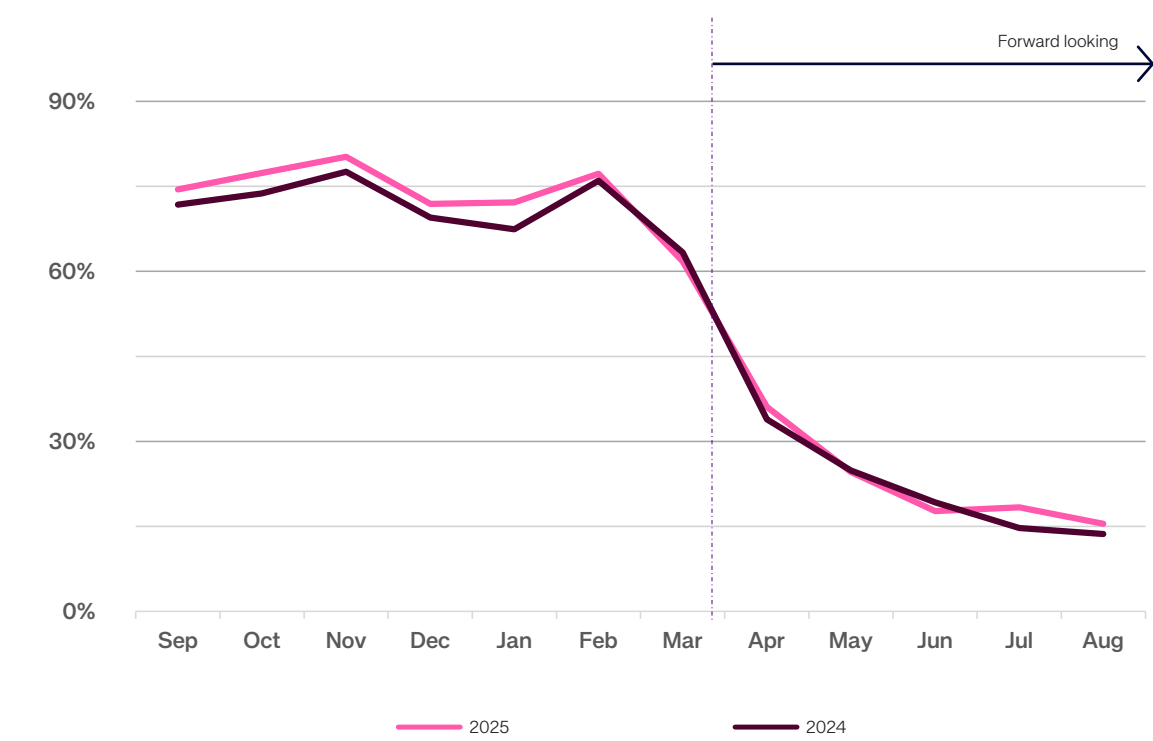


Hospitality Occupancy Overview



Hotel occupancy in Oceania

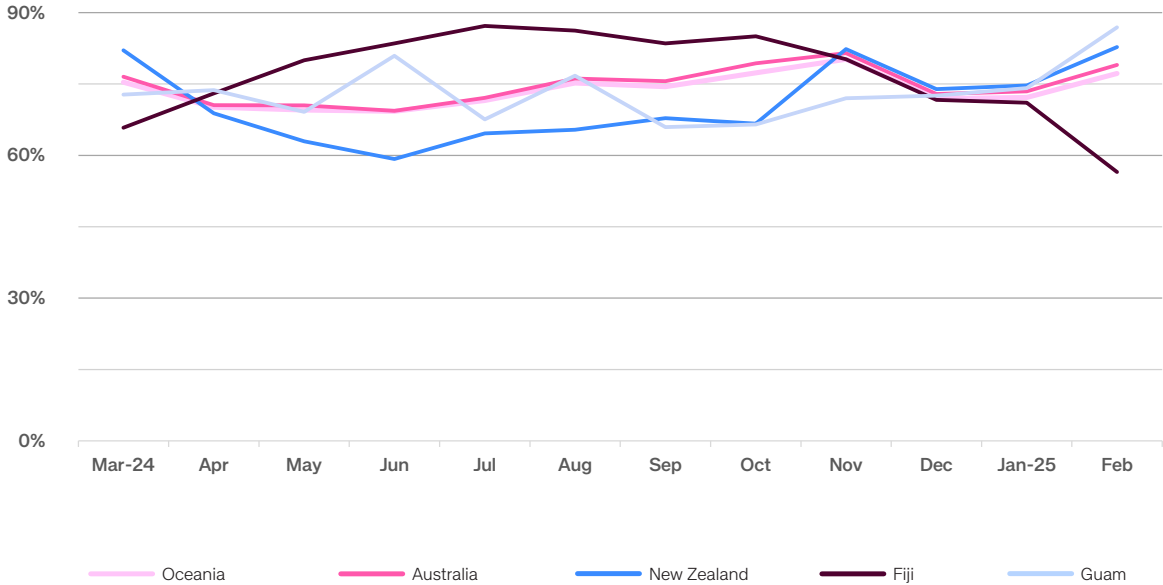
On-the-books by month compared to same month last year (%)



Hotel occupancy for the past 12 months

For Oceania and its TOP 4 markets

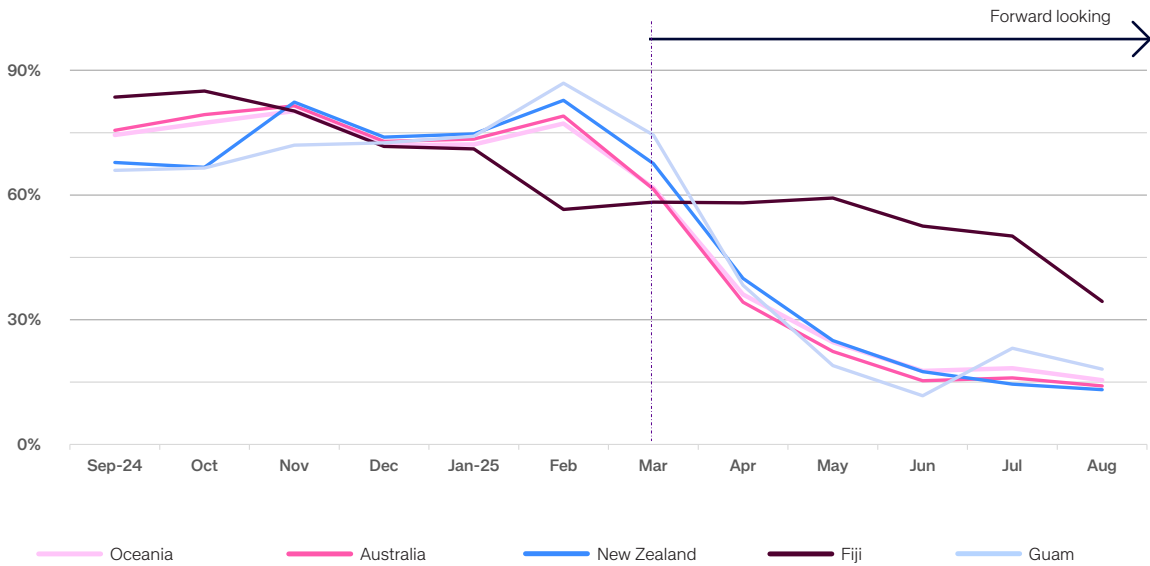
March 2024-February 2025



Hotel occupancy on-the-books

For Oceania and its TOP 4 markets

September 2024-August 2025



Hotel occupancy in Oceania

Insights:

1. Hotel occupancy aligns with seasonal trends
Forward-looking data indicates a gradual decline in occupancy from March onward, consistent with past trends, highlighting a predictable seasonal shift rather than a demand drop.

2. Australia and Fiji maintain strong occupancy rates
Among the top four Oceania markets, Australia and Fiji have shown relatively stable occupancy over the past year, while New Zealand and Guam experienced more fluctuation.

3. Future bookings show a synchronized downtrend across markets
On-the-books data suggests that all key markets in Oceania are following a similar decline in occupancy, reinforcing the importance of demand-stimulation efforts for the mid-year period.

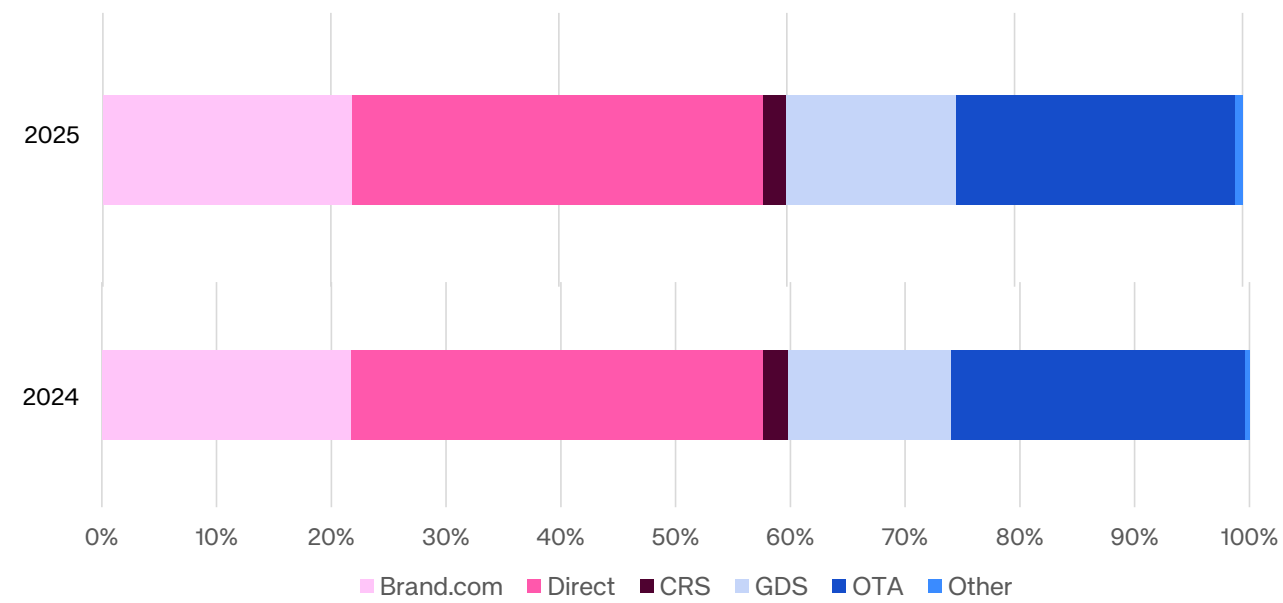
Recommendation:

DMOs could leverage targeted promotions and events to drive demand during the mid-year low season. Encouraging long-stay packages, family travel deals, and event-driven tourism (e.g., festivals, sports events) can help boost bookings, particularly in Australia and Fiji, which have demonstrated resilience in occupancy levels.



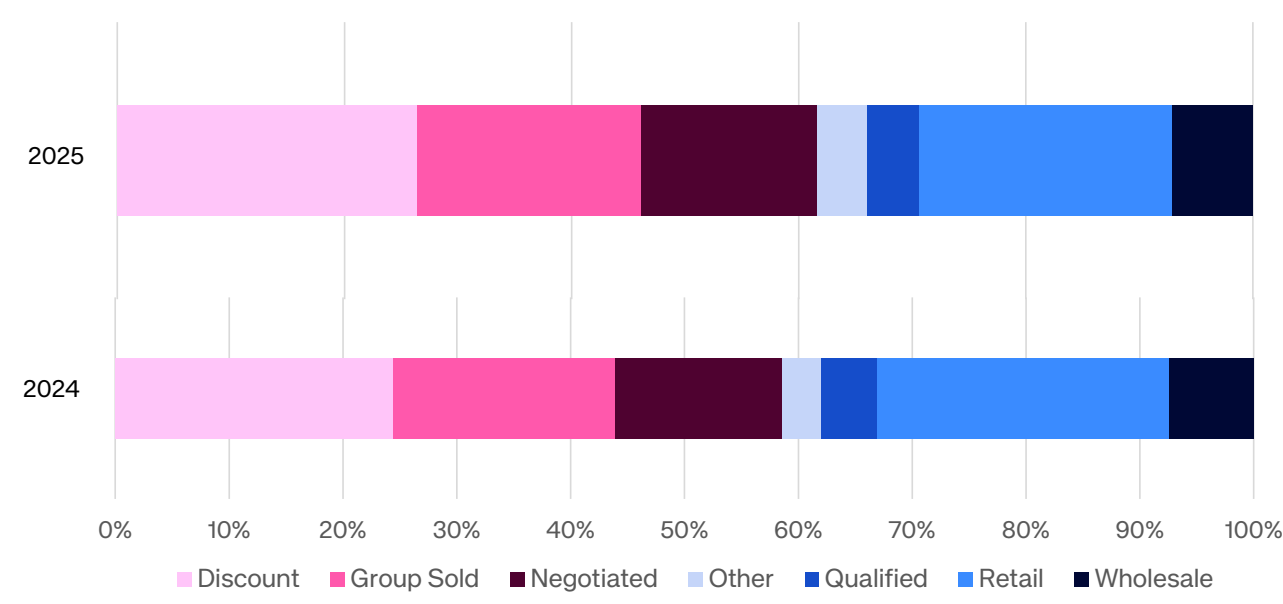
Hotel channel mix in Oceania

On-the-books distribution for March 2025 vs same month last year



Hotel segmentation in Oceania

On-the-books distribution for March 2025 vs same month last year

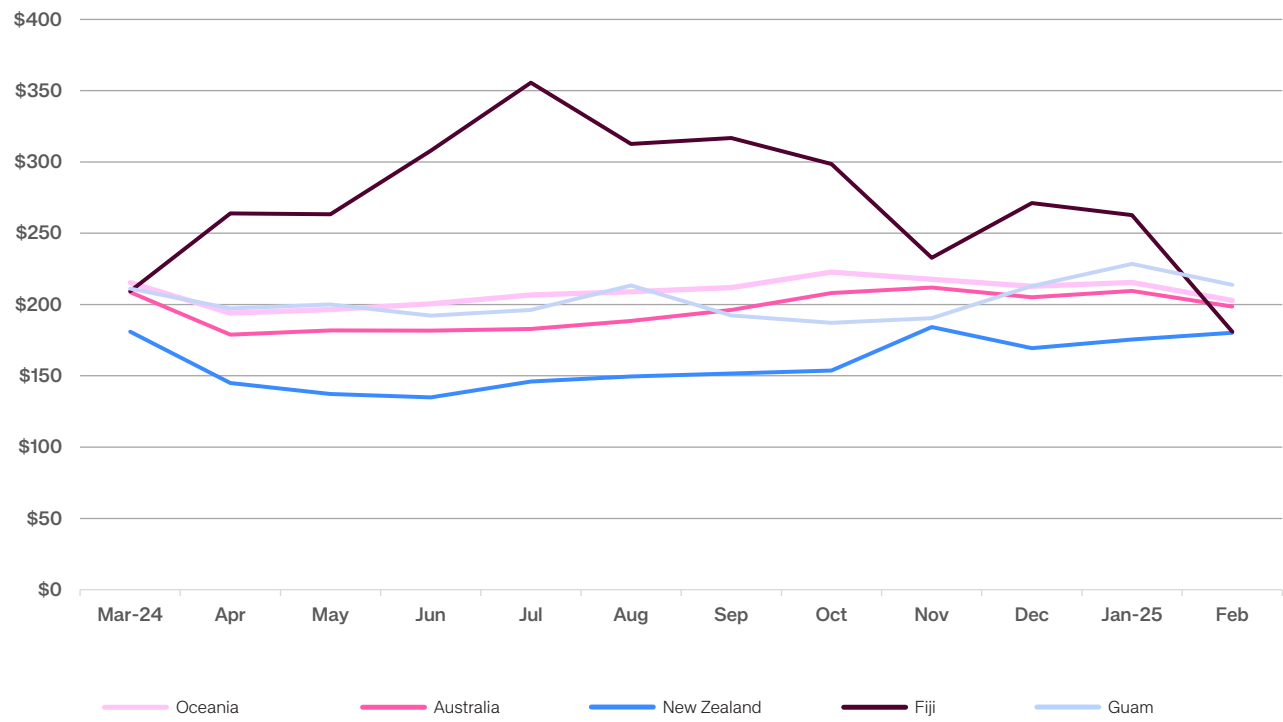


Hotel segmentation & channel analysis in Oceania

Insights:

- 1. Direct booking strength supports destination marketing** The strong performance of direct booking channels (Brand.com and direct) suggests that DMOs can collaborate with hotels to drive destination-specific marketing campaigns that encourage travellers to book directly.
- 2. Balanced market segmentation reflects varied traveller profiles** The steady mix of discount, group, and negotiated bookings indicates that Oceania attracts both leisure and corporate travellers, giving DMOs an opportunity to tailor promotional efforts accordingly.
- 3. OTAs remain key for broader market reach** While direct channels are strong, OTAs continue to capture a significant share, showing that destinations benefit from ensuring their visibility across multiple distribution platforms.

Average Daily Rate (ADR) in USD



Hotel ADR analysis in Oceania

1. Stable ADR across most markets

The average daily rate (ADR) in Oceania has remained relatively stable, with slight fluctuations depending on the destination, providing a predictable pricing environment for tourism planning.

2. Fiji's ADR shows premium demand

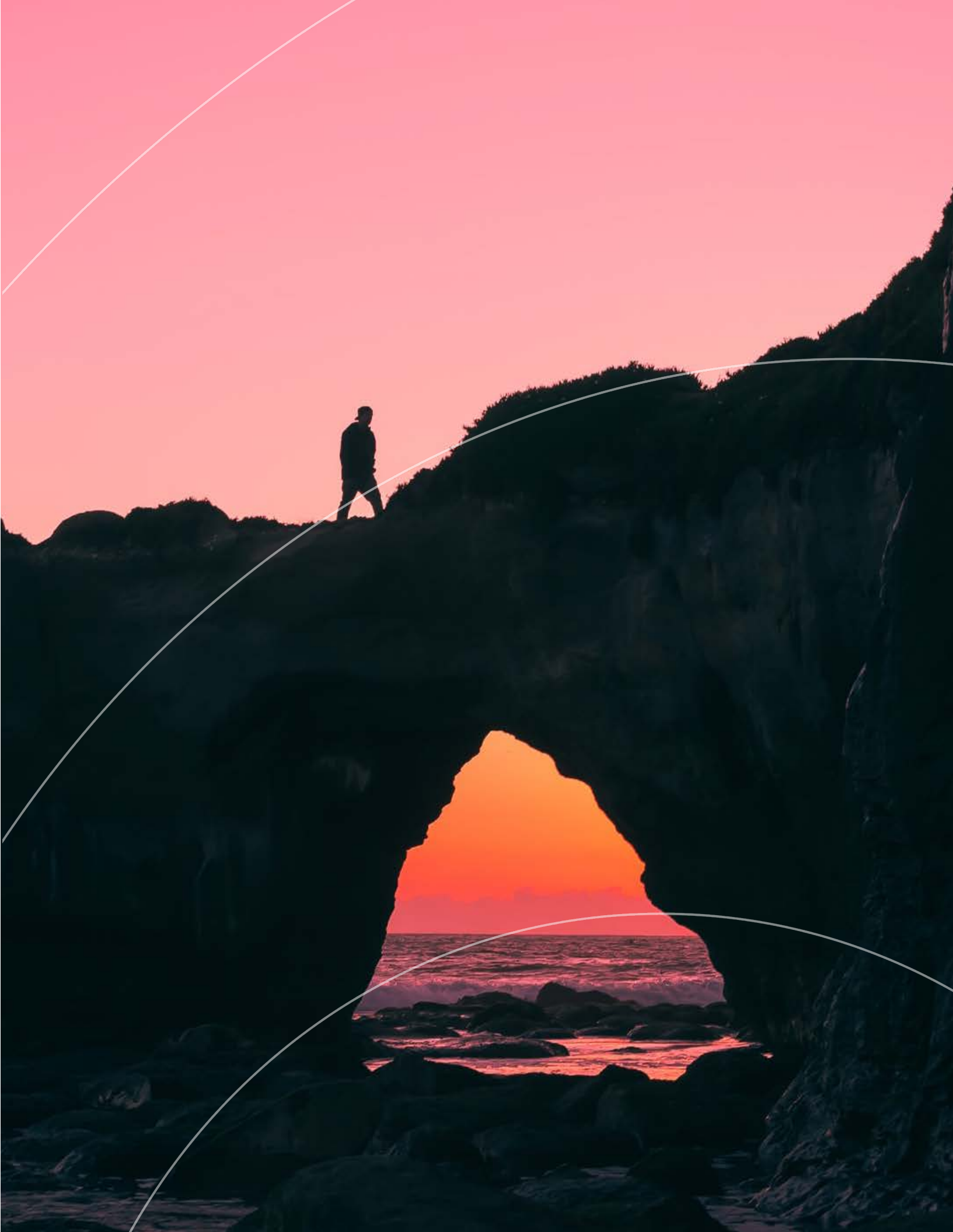
Fiji consistently maintains a higher ADR than other destinations in the region, suggesting a strong demand for premium accommodations and experiences.

3. Gradual growth in key markets

While ADR in New Zealand initially trends lower, it shows steady growth over time, indicating potential for higher-value tourism development.

Recommendation

Develop Premium Tourism Experiences to Capitalize on ADR Strength: DMOs could emphasize luxury travel experiences, particularly in markets like Fiji, where travellers demonstrate a willingness to pay higher rates. Promoting high-end accommodations, exclusive cultural experiences, and eco-luxury tourism can drive revenue growth while maintaining market appeal.



Glossary for Oceania

Destination	Subregion
American Samoa	Oceania
Australia	Oceania
Cook Islands	Oceania
Fiji	Oceania
French Polynesia	Oceania
Guam	Oceania
Kiribati	Oceania
Marshall Islands	Oceania
Micronesia FSM	Oceania
N.Mariana Islands	Oceania
New Caledonia	Oceania
New Zealand	Oceania
Niue	Oceania
Palau	Oceania
Papua New Guinea	Oceania
Samoa	Oceania
Solomon Islands	Oceania
Tonga	Oceania
Tuvalu	Oceania
Vanuatu	Oceania





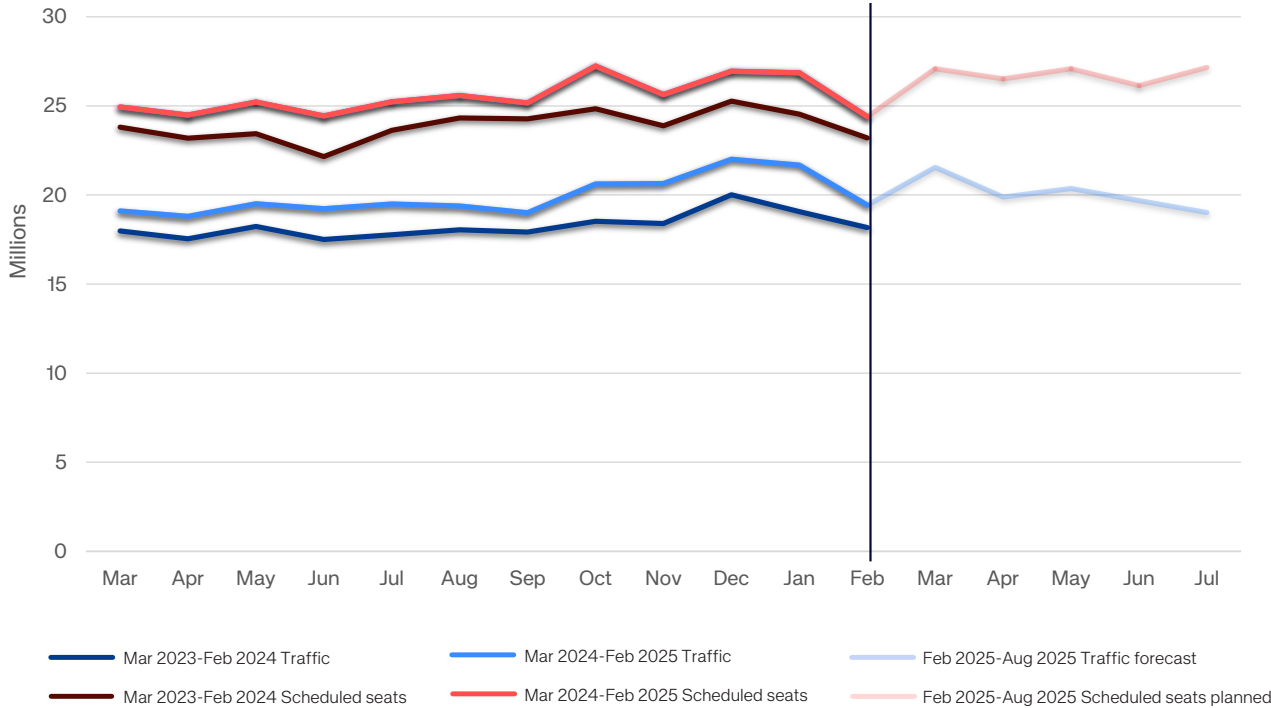
Asia and the Pacific South Asia

Air Travel Overview



Worldwide to South Asia

Air passenger volume & scheduled seats



Passenger traffic and capacity analysis

1. Steady growth in passenger traffic

Air passenger volumes to South Asia have consistently increased, and as of 16th March data shows a projected 9% growth in upcoming months. This indicates strong demand and sustained interest in the region.

2. Capacity expansions supporting growth

Airlines are proactively increasing seat capacity in response to rising demand, ensuring that South Asia remains well-connected and accessible for travellers worldwide.

3. Peak travel periods offer opportunities

Passenger numbers tend to peak around October-December, presenting a strategic window for DMOs to launch targeted marketing campaigns and travel incentives to capture this demand.

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for travel to South Asia

Departure market	Mar 23 - Feb 24 ranking	Mar 24-Feb 25 ranking
India	1	1
United States	2	2
UAE	3	3
United Kingdom	4	4
Canada	5	5
Saudi Arabia	6	6
Australia	7	7
Germany	8	8
Thailand	9	9
China	20	10

Top 10 markets travelling to South Asia

Departure market	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
India	1	1	15%
Saudi Arabia	2	2	21%
United Kingdom	3	3	0%
United States	5	4	-2%
UAE	4	5	-11%
Canada	6	6	4%
Australia	7	7	-2%
Bangladesh	8	8	-2%
Qatar	9	9	0%
Italy	10	10	6%
Total	81.0%	81.7%	

Are travellers from these origin markets to South Asia already on your radar?

Top 10 markets searching for travel to South Asia with the highest growth

Departure market	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	254%
Malaysia	2	79%
Vietnam	3	76%
Indonesia	4	57%
Japan	5	53%
Saudi Arabia	6	52%
Thailand	7	50%
Hong Kong (China)	8	47%
Kuwait	9	41%
Bahrain	10	40%

Top 10 markets travelling to South Asia with the highest growth

Departure market	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	70%
Vietnam	2	55%
Malaysia	3	46%
Japan	4	32%
Saudi Arabia	5	21%
Korea (ROK)	6	19%
New Zealand	7	19%
Singapore	8	18%
Netherlands	9	17%
Hong Kong (China)	10	16%

Who is searching and visiting South Asia?

Insights:

1. Strong growth in passenger traffic

Air passenger traffic to South Asia has shown a 9% year-over-year growth, with forward-looking schedules indicating continued expansion. This reflects increasing connectivity and sustained demand for the region.

2. China driving interest and bookings

China has experienced a 254% surge in searches for travel to South Asia, making it the fastest-growing source market. Bookings from China are also up by 70%, highlighting a major inbound travel trend.

3. Diverse emerging source markets

Markets such as Vietnam, Malaysia, and Indonesia are seeing rapid increases in searches and bookings for travel to South Asia, signaling new opportunities for DMOs to expand their marketing efforts beyond traditional source markets.

Recommendation:

Capitalize on High-Growth Markets: DMOs can tailor their marketing campaigns to high-growth markets such as China, Vietnam, and Malaysia by leveraging localized promotions, language-specific content, and partnerships with regional travel agencies. Emphasizing South Asia's cultural, adventure, and wellness tourism offerings can help sustain this momentum.



Where do visitors go? Reality vs. aspirations

Top 7 searched destinations in South Asia

Destination	Mar 23 - Feb 24 ranking	Mar 24-Feb 25 ranking
India	1	1
Pakistan	2	2
Sri Lanka	4	3
Maldives	3	4
Bangladesh	5	5
Nepal	6	6
Buthan	7	7

Top 7 booked destinations cities in South Asia

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
India	1	1	10%
Bangladesh	2	2	15%
Pakistan	3	3	-2%
Sri Lanka	4	4	6%
Nepal	5	5	5%
Maldives	6	6	-1%
Buthan	7	7	329%

Top performing destinations in South Asia

Top 7 searched destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Buthan	1	77%
Bangladesh	2	39%
Sri Lanka	3	33%
Nepal	4	32%
India	5	31%
Pakistan	6	23%
Maldives	7	16%

Top 7 booked destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Buthan	1	329%
Bangladesh	2	15%
India	3	10%
Sri Lanka	4	6%
Nepal	5	5%
Maldives	6	-1%
Pakistan	7	-2%

Where are travellers going in South Asia

Insights:

1. South Asia is experiencing strong growth in air travel and capacity

A 9% increase in air passenger volume is forecasted, showing a promising demand for the region. Scheduled seat capacity is also expanding, ensuring more accessibility for travellers.

2. Emerging interest from new source markets

China, Malaysia, and Vietnam are leading in travel search growth, indicating potential new high-value markets for South Asia. In actual travel, China and Vietnam continue to show significant growth, reinforcing the need for targeted marketing efforts in these markets.

3. Bhutan stands out as a rising destination

Bhutan has seen a 329% increase in bookings, the highest growth among South Asian destinations. Searches for Bhutan have also surged by 77%, suggesting increasing global appeal.

Recommendation:

DMOs could focus on engaging Chinese, Malaysian, and Vietnamese travellers by enhancing digital marketing campaigns, forming airline partnerships, and optimizing visa policies. Additionally, Bhutan’s rise in popularity presents a strong opportunity for eco-tourism branding and sustainable travel experiences.



Where do visitors go? Reality vs. aspirations

Top 10 searched destinations cities in South Asia

Destination cities	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
Delhi	1	1
Mumbai	2	2
Bengaluru	3	3
Hyderabad	4	4
Chennai	5	5
Kochi	7	6
Colombo	8	7
Male	6	8
Ahmedabad	9	9
Kathmandu	11	10

Top 10 booked destinations cities in South Asia

Destination cities	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Delhi	1	1	7%
Mumbai	2	2	6%
Dhaka	3	3	20%
Bengaluru	4	4	28%
Hyderabad	6	5	12%
Chennai	5	6	0%
Colombo	7	7	6%
Kochi	8	8	4%
Kathmandu	9	9	5%
Calcutta	12	10	13%
Total	68.1%	68.7%	

Top performing destinations in South Asia

Top 10 searched destination cities with the highest growth

Destination cities	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Goa	1	125%
Guwahati	2	52%
Amritsar	3	46%
Varanasi	4	43%
Dhaka	5	42%
Lucknow	6	41%
Jaipur	7	39%
Tiruchirappalli	8	37%
Colombo	9	33%
Kathmandu	10	31%

Top 10 booked destination cities with the highest growth

Destination cities	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Amritsar	1	30%
Bengaluru	2	28%
Coimbatore	3	26%
Goa	4	24%
Chandigarh	5	24%
Dhaka	6	20%
Ahmedabad	7	19%
Thiruvananthapuram	8	17%
Udaipur	9	16%
Kolkata	10	13%

Which cities are travellers visiting in South Asia

Insights:

1. Goa is the fastest growing searched destination
Goa saw a remarkable 125% increase in searches year-over-year, making it the top emerging destination in South Asia. This suggests a rising appeal for beach and leisure travel within the region.

2. Bangalore is experiencing high booking growth
Bookings to Bangalore increased by 28%, positioning it as one of the fastest-growing booked cities. This indicates its strength as both a business and tourism hub, attracting a diverse mix of travellers.

3. Secondary and tertiary cities are gaining momentum Cities like Amritsar, Coimbatore, and Trivandrum are seeing double-digit growth in bookings, reflecting a shift beyond traditional metropolitan destinations.

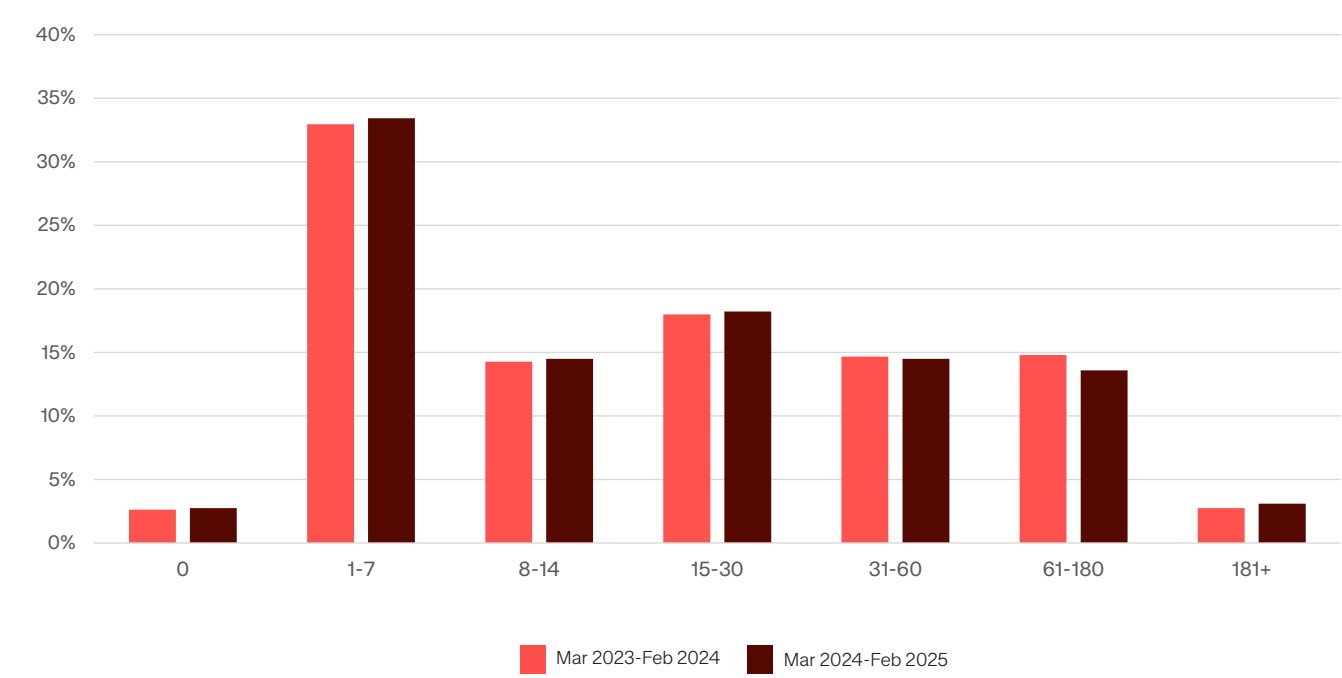
Recommendation:

With Goa leading in searches and secondary cities growing in bookings, DMOs could expand their destination marketing efforts beyond major metro areas.



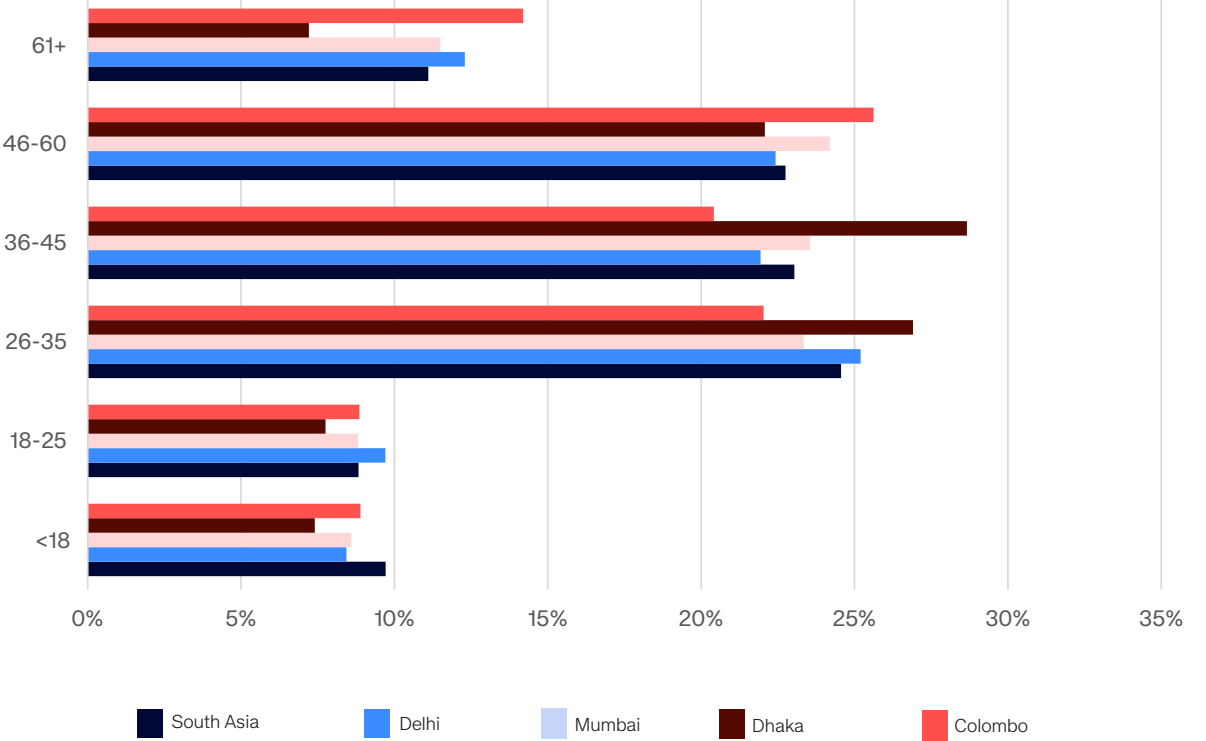
Air travel bookings to South Asia by lead time

Percentage of passengers booked by lead time (in days)

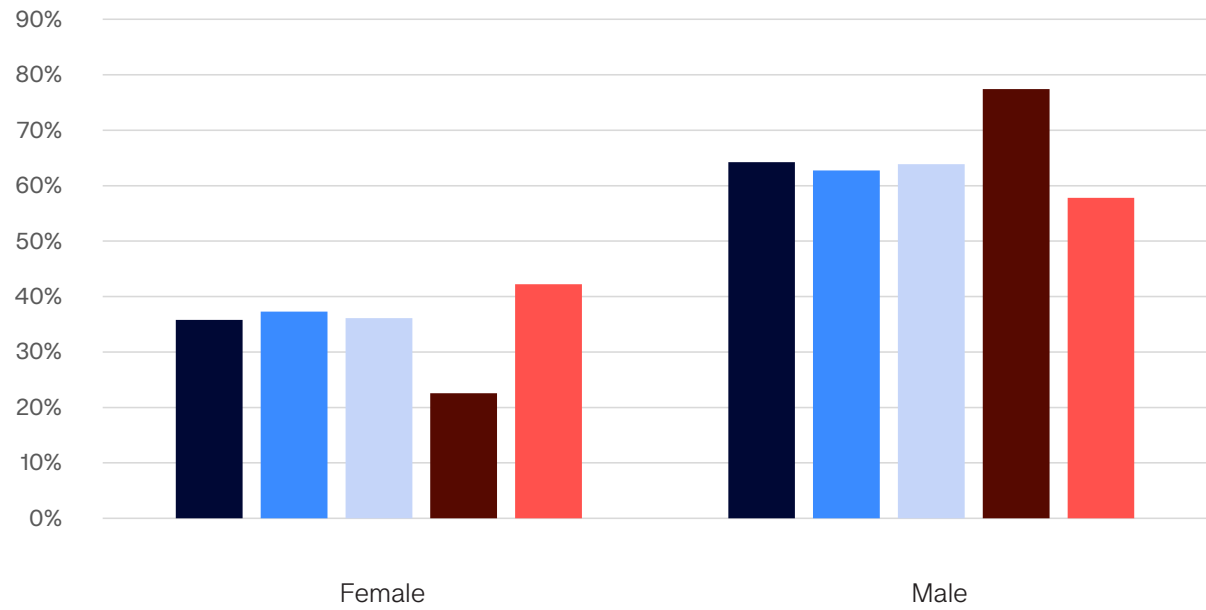


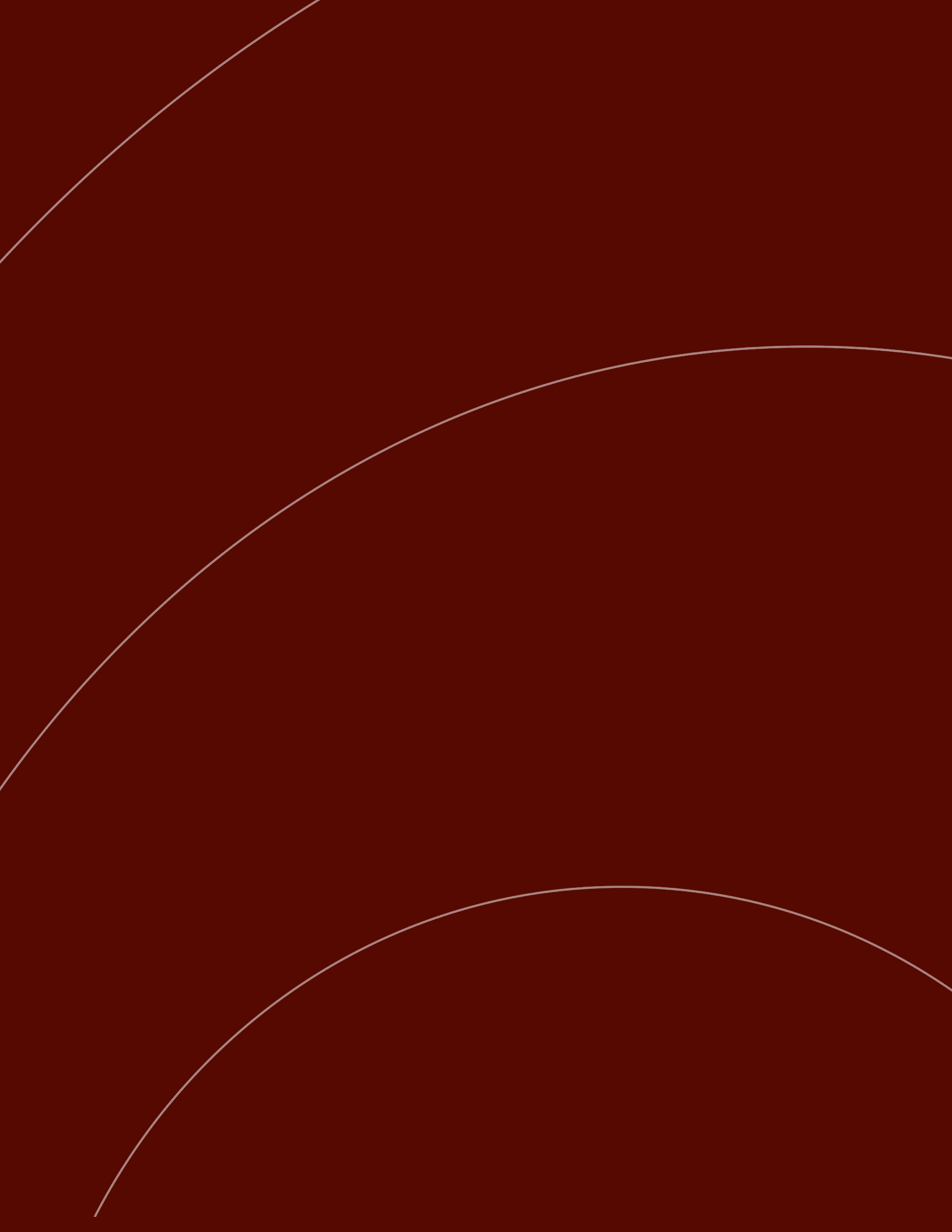
What type of travellers travel to South Asia: top 4 destination cities

Percentage of passengers booked by age category



Percentage of passengers booked by gender





Lead time and profile analysis

Insights:

1. Short booking lead times dominate

A significant portion of air travel bookings to South Asia occurs within the 1-7 day lead time, indicating a strong last-minute booking trend. This suggests a need for flexible pricing and availability strategies to accommodate spontaneous travellers.

2. Bookings are led by the 36–60 age segments, often linked to business and family travel

The 36-45 and 46-60 age groups are the most dominant in bookings for South Asia's top four cities. This demographic segment is likely made up of business travellers and expatriates visiting family, making targeted promotions for these groups particularly effective.

3. Male travellers outnumber female travellers

Across the top four South Asian cities, male travellers represent the majority of bookings, especially in Dhaka, where the difference is most pronounced. This indicates potential opportunities for campaigns tailored to solo male travellers.

Recommendation:

Leverage targeted marketing campaigns to capture last-minute travellers and middle-aged business segments: DMOs can work with airlines and hotels to offer promotional packages that cater to the prevalent short booking windows, while also creating tailored experiences that appeal to business and expatriate travellers.

425 new routes in South Asia

New routes from multiple markets

Origin Market	New routes
United Arab Emirates	10
Malaysia	9
Saudi Arabia	9
China	8
Russian Federation	8
Thailand	8
India	6
Vietnam	5
Uzbekistan	4
Bhutan	3

Top 10 new international routes (based on seat capacity)

New routes	Origin Market	Destination
Kuala Lumpur-Jaipur	Malaysia	India
Beijing-Dhaka	China	Bangladesh
Denpasar-Bengaluru	Indonesia	India
Paris-Islamabad	France	Pakistan
Abu Dhabi-Jaipur	United Arab Emirates	India
Kuala Lumpur-Visakhapatnam	Malaysia	India
Bangkok-Visakhapatnam	Thailand	India
Bangkok-Amritsar	Thailand	India
Calgary-Delhi	Canada	India
Kuala Lumpur-Bhubaneswar	Malaysia	India

Key insights on new routes to South Asia

Insights:

1. Significant expansion in air connectivity

South Asia has witnessed the introduction of 425 new routes, with the UAE, Malaysia, and Saudi Arabia leading in new connections. This signals a strong push to enhance regional and international accessibility.

2. India emerges as a key destination

Multiple new routes are connecting India with Malaysia, Indonesia, Thailand, and the UAE, reinforcing India’s position as a major travel hub in South Asia.

3. Diverse origins strengthening market potential

New routes from markets such as France, Canada, China, and Mauritius indicate a growing demand from both traditional and emerging source markets, creating new opportunities for inbound tourism.

Recommendation:

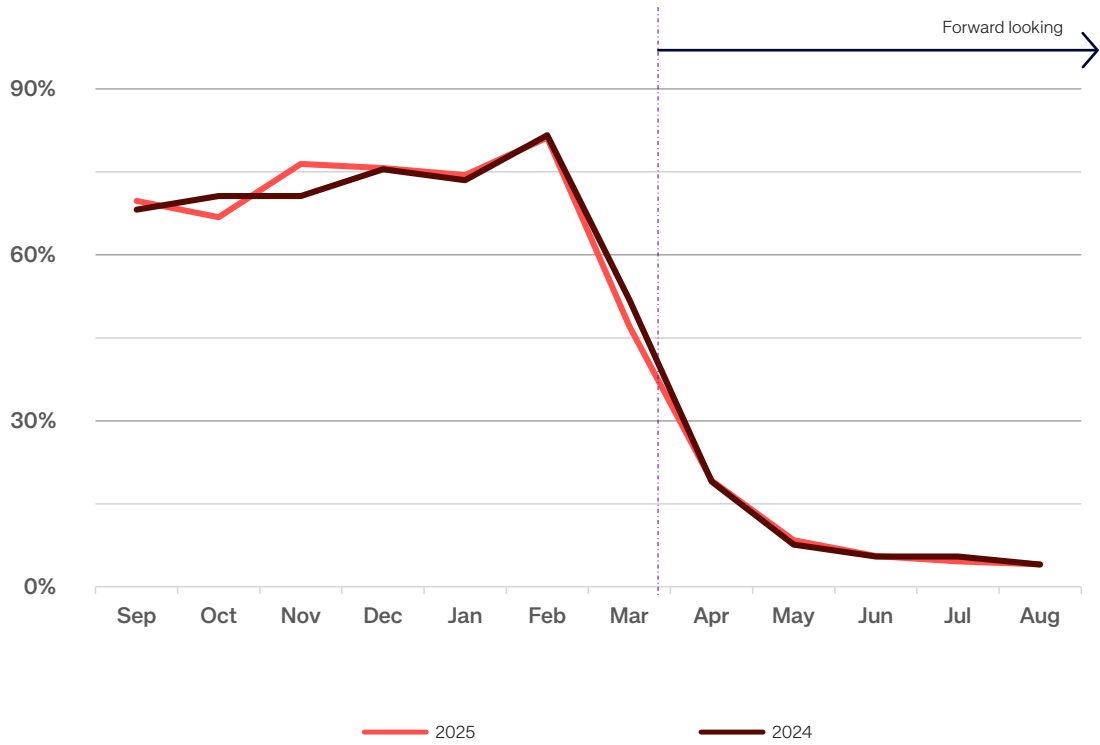
DMOs can capitalize on these new routes by launching strategic destination marketing campaigns in key origin markets. By promoting South Asia's tourism and business travel appeal in newly connected markets, DMOs can maximize the potential of increased air connectivity and drive visitor growth.

Hospitality Occupancy Overview



Hotel occupancy in South Asia

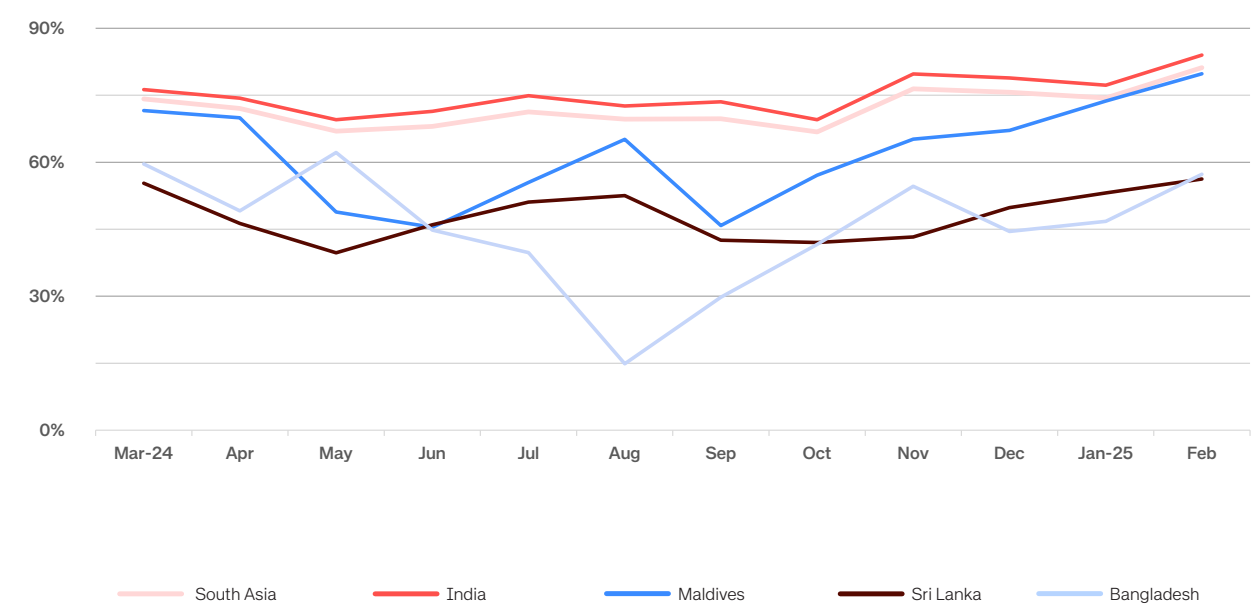
On-the-books by month compared to same month last year (%)



Hotel occupancy for the past 12 months

For South Asia and its TOP 4 markets

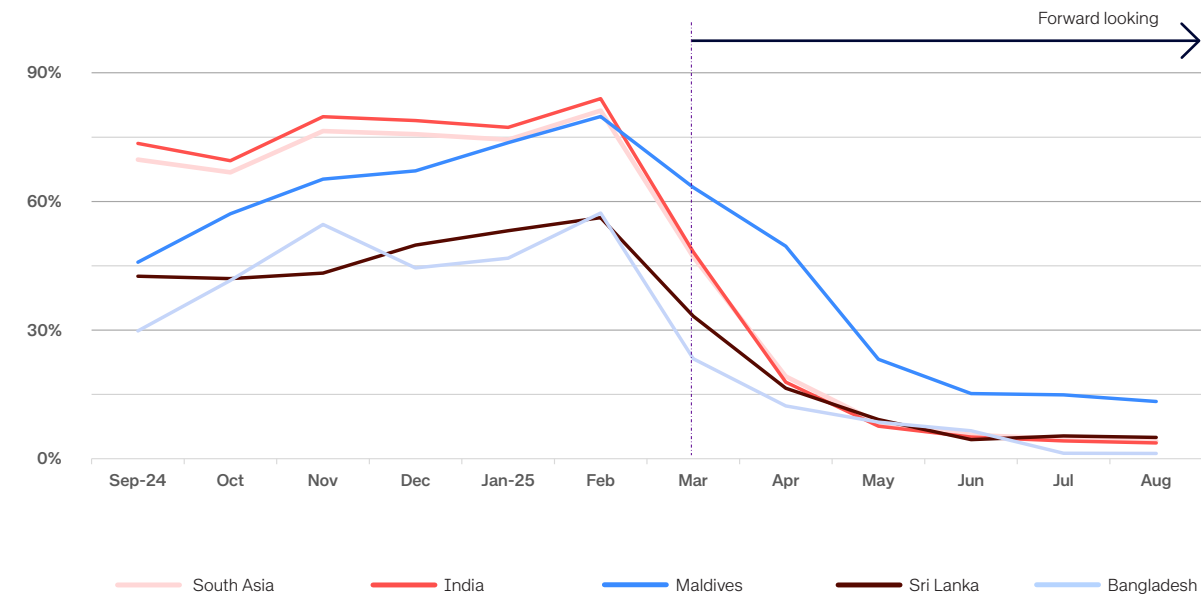
(March 2024-February 2025)



Hotel occupancy on-the-books

For South Asia and its TOP 4 markets

(September 2024-August 2025)



Hotel occupancy in South Asia

Insights:

- 1. Strong demand leading up to peak season**
South Asia's hotel occupancy remained robust until February 2025, with rates consistently above 60%. This reaffirms the region's appeal, particularly in key destinations like India, the Maldives, Sri Lanka, and Bangladesh.
- 2. Opportunities to capture extended stays**
While forward bookings indicate an expected seasonal decline from March onward, this mirrors the natural travel cycle. However, the Maldives continues to hold stronger bookings, suggesting that premium leisure markets remain resilient.
- 3. Encouraging Year-Over-Year trends**
South Asia's top-performing destinations show steady occupancy, with a notable uplift in February 2025 compared to previous months. This signals growing interest in the region, providing an opportunity to extend the peak season through targeted campaigns.

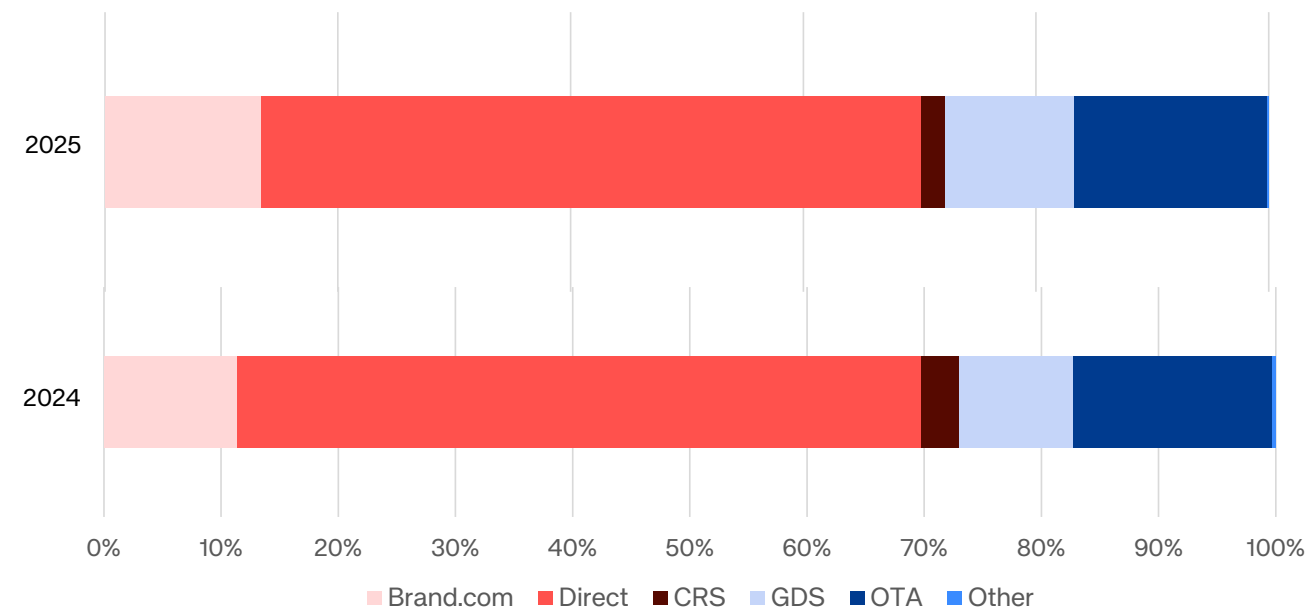
Recommendation:

Leverage Demand to Extend the Season: DMOs can position South Asia as a year-round destination by promoting wellness retreats, cultural tourism, and regional travel packages. Engaging key source markets with off-season incentives and long-stay promotions can sustain momentum beyond the peak months.



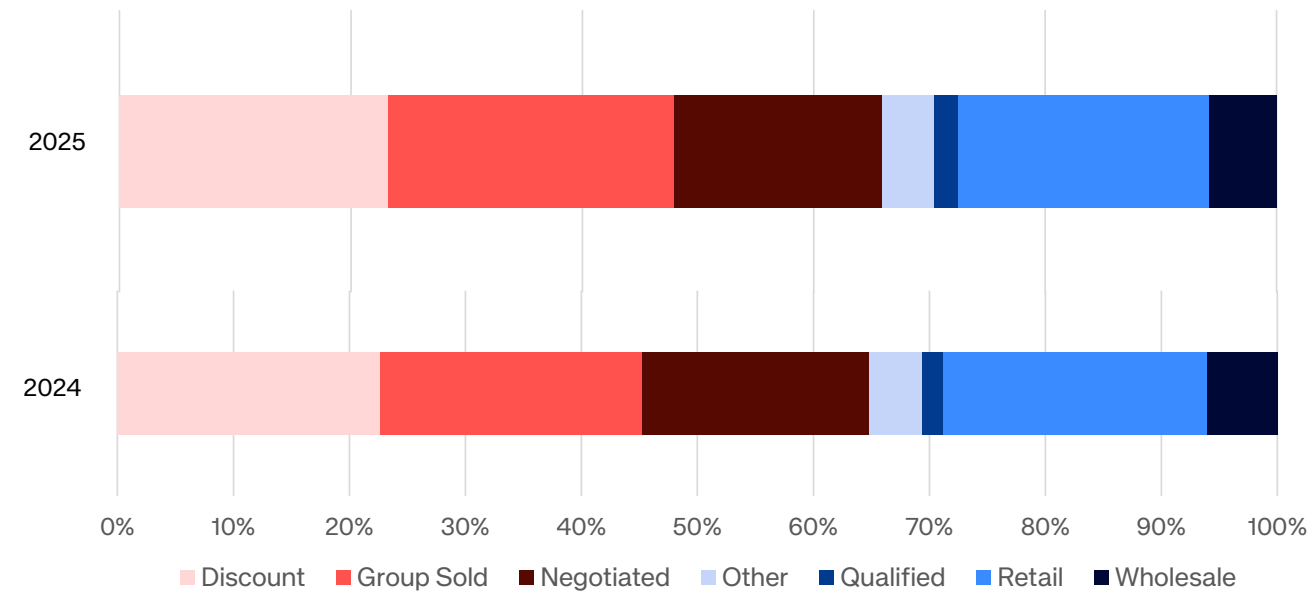
Hotel channel mix in South Asia

On-the-books distribution for March 2025 vs same month last year



Hotel segmentation in South Asia

On-the-books distribution for March 2025 vs same month last year



Hotel segmentation and channel analysis in South Asia

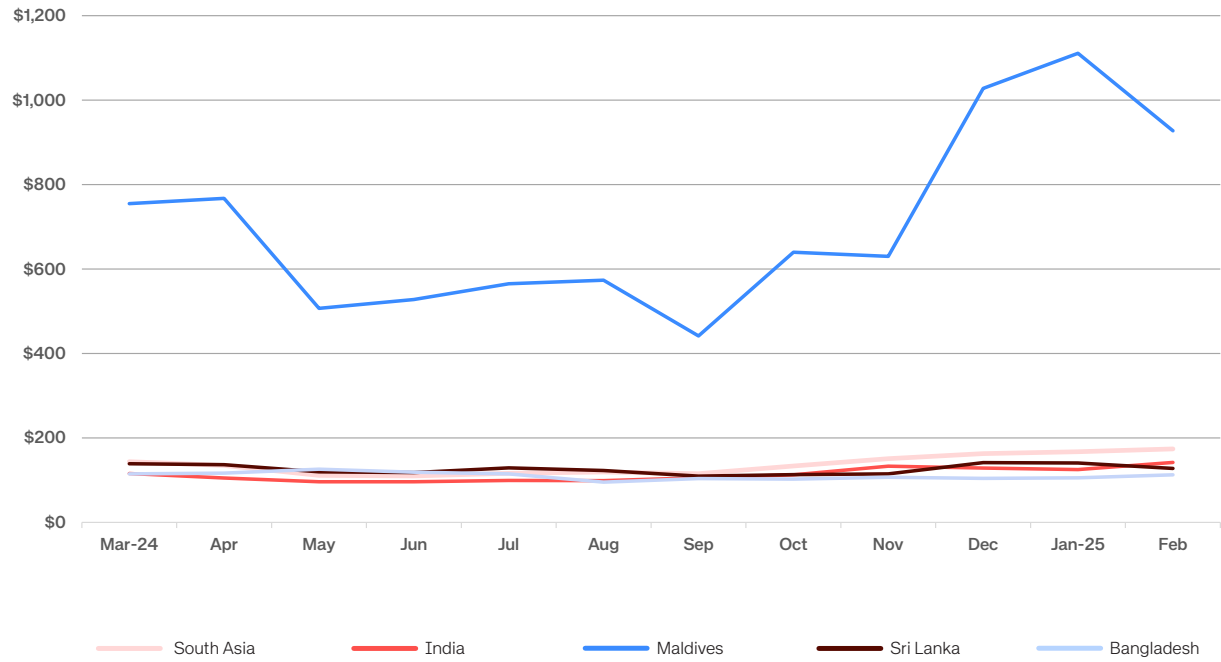
Insights:

- 1. Direct and Brand.com channels remain strong in South Asia**
The channel mix has remained stable year-over-year, with Direct bookings maintaining a dominant share, ensuring profitability for hoteliers. Brand.com continues to perform well, indicating sustained engagement with brand-loyal travellers.
- 2. Increased reliance on negotiated and group sales**
There is a noticeable rise in negotiated and group sales bookings in the segmentation mix for 2025. This indicates that corporate and event-driven travel is playing a more significant role in the region, which presents opportunities for targeted marketing.
- 3. Retail and wholesale bookings remain consistent**
The retail and wholesale segments have maintained their proportional share compared to the previous year, showcasing a stable leisure travel demand that can be further optimized through strategic promotions.

Recommendation:

DMOs can collaborate with hotels to drive more direct and Brand.com bookings through destination marketing campaigns. Highlighting unique experiences and offering exclusive packages for travellers booking via direct channels can enhance conversion rates and reduce dependency on intermediaries.

Average Daily Rate (ADR) in USD



Hotel ADR analysis in South Asia

1. Steady growth in South Asia

The ADR for South Asia as a whole shows a slight but steady upward trend toward the end of the period, suggesting resilience and potential revenue growth for hoteliers.

2. Maldives driving premium pricing

The Maldives stands out with a significantly higher ADR compared to other destinations in the region, peaking at over \$1,000. This highlights its positioning as a luxury destination with strong demand.

3. India and Sri Lanka show stability

The ADR for India and Sri Lanka remains relatively stable with minor fluctuations, indicating a consistent pricing strategy and demand that supports predictable revenue.

Recommendation

DMOs could leverage the premium positioning of destinations like the Maldives to attract high-value travellers while supporting broader regional demand through targeted promotions in India and Sri Lanka. Encouraging package deals and experiences can help sustain ADR growth across the region.



Glossary for South Asia

Destination	Subregion
Afghanistan	South Asia
Bangladesh	South Asia
Bhutan	South Asia
India	South Asia
Iran	South Asia
Maldives	South Asia
Nepal	South Asia
Pakistan	South Asia
Sri Lanka	South Asia





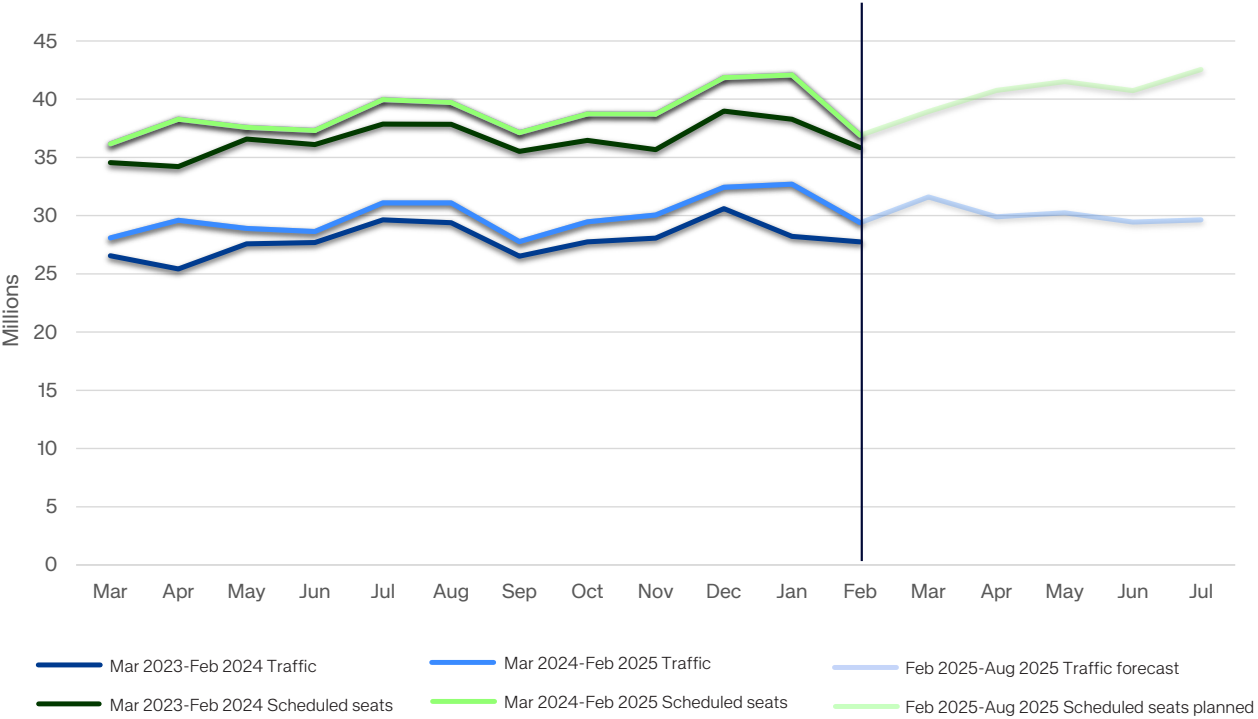
Asia and the Pacific South-East Asia

Air Travel Overview



Worldwide to South Asia

Air passenger volume & scheduled seats



Passenger traffic and capacity analysis

- 1. Consistent passenger traffic growth**
Traffic volumes to South-East Asia have been steadily increasing, with a 7.2% growth year-over-year shown as of 16th March. This signals a strong recovery and rising demand for travel to the region.
- 2. Planned capacity expansion**
Scheduled seat capacity for the upcoming months (Feb-Aug 2025) is set to surpass previous levels, ensuring that airlines are anticipating and preparing for growing travel demand.
- 3. Seasonal traffic fluctuations**
While overall traffic is growing, there are periodic dips, particularly noticeable toward the start of the year. This suggests opportunities to boost demand during slower travel months with targeted promotions.

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for travel to South-East Asia

Origin market	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
China	7	1
Thailand	1	2
Korea (ROK)	2	3
Malaysia	4	4
United States	3	5
Indonesia	9	6
Japan	8	7
India	6	8
Australia	5	9
Philippines	10	10

Top 10 markets travelling to South Asia

Origin market	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Korea (ROK)	1	1	12%
Thailand	2	2	13%
Philippines	3	3	14%
Malaysia	5	4	23%
United States	4	5	-3%
India	6	6	8%
Taiwan (pr. of China)	7	7	18%
China	16	8	95%
Indonesia	14	9	60%
Australia	8	10	8%
Total	57.7%	59.6%	

Are travellers from these origin markets to South-East Asia already on your radar?

Top 10 markets searching to South-East Asia with the highest growth

Origin market	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	269%
Macao (China)	2	125%
Indonesia	3	76%
Philippines	4	64%
Taiwan (pr. of China)	5	62%
Japan	6	56%
Italy	7	51%
India	8	50%
Türkiye	9	48%
Malaysia	10	48%

Top 10 markets travelling to South-East Asia with the highest growth

Origin market	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
China	1	95%
Indonesia	2	60%
Russian Federation	3	43%
Japan	4	28%
Vietnam	5	26%
Malaysia	6	23%
Taiwan (pr. of China)	7	18%
Italy	8	16%
Philippines	9	14%
Thailand	10	13%



Who is searching and visiting South-East Asia?

Insights:

1. China's emergence as a dominant source market

China has seen a remarkable increase in searches for travel to South-East Asia, jumping from 7th to 1st place. This aligns with its 95% YoY growth in actual travel, reinforcing China's growing importance as a key visitor market for the region.

2. Indonesia and Malaysia showing strong momentum

Both markets are not only among the top 10 searched destinations but also exhibit significant YoY growth in travellers to South-East Asia (60% for Indonesia and 23% for Malaysia). This suggests increased outbound demand, potentially influenced by economic recovery and travel incentives.

3. New growth markets emerging

Markets like Macao (China), Türkiye, and Italy are showing notable increases in travel intent to South-East Asia, with YoY growth rates of 125%, 48%, and 51% respectively. These markets may present new opportunities for targeted promotional efforts.

Recommendation:

Leverage China's strong demand with tailored marketing strategies: Given China's surge in both searches and bookings, South-East Asian DMOs can enhance their visibility in Chinese digital channels (WeChat, Ctrip, Mafengwo) and offer campaigns highlighting visa-friendly policies, cultural connections, and premium travel experiences tailored to Chinese travellers.

Where do visitors go? Reality vs. aspirations

Top 10 searched destinations in South-East Asia

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
Thailand	1	1
Indonesia	3	2
Vietnam	4	3
Malaysia	5	4
Philippines	2	5
Singapore	6	6
Cambodia	7	7
Mynmar	8	8
Brunei	9	9
Pattaya	10	10

Top 10 booked destinations in South-East Asia

Destination	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Thailand	1	1	13%
Philippines	2	2	5%
Vietnam	3	3	15%
Indonesia	5	4	25%
Malaysia	4	5	14%
Singapore	6	6	4%
Cambodia	7	7	31%
Myanmar	8	8	14%
Brunei	9	9	-2%
Pattaya	10	10	-

Top performing destinations in South-East Asia

Top 9 searched destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Breunei	1	92%
Malaysia	2	72%
Indonesia	3	53%
Cambodia	4	52%
Myanmar	5	48%
Vietnam	6	47%
Thailand	7	40%
Singapore	8	39%
Philippines	9	32%

Top 10 booked destinations with the highest growth

Destination	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Cambodia	1	31%
Indonesia	2	25%
Vietnam	3	15%
Malaysia	4	14%
Myanmar	5	14%
Thailand	6	13%
Philippines	7	5%
Singapore	8	4%
Brunei	9	-2%



Where are travellers going to in South-East Asia

Insights:

1. Thailand continues to be the dominant destination in South-East Asia

It still holds the top spot in both searches and bookings. It has experienced a 13% growth in bookings, indicating sustained interest and strong conversion from intent to actual travel.

2. Cambodia emerges as the fastest-growing booked destination with a 31% year-over-year increase

This suggests a rising appeal, possibly driven by enhanced tourism infrastructure, increased flight connectivity, or marketing efforts.

3. Brunei is witnessing a surge in search interest (92% growth)

Yet its booking performance has slightly declined (-2%). This signals an opportunity to convert high interest into actual visits, potentially through better travel incentives or streamlined booking options.

Recommendation:

DMOs can capitalize on the rising demand for Cambodia and Brunei by promoting tailored travel packages and increasing flight connectivity. Cambodia's strong booking growth suggests high traveller confidence, while Brunei's interest surge presents an opportunity to enhance conversion strategies—such as targeted marketing campaigns and simplified booking processes.

Where do visitors go? Reality vs. aspirations

Top 10 searched destinations cities in South-East Asia

Destination cities	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking
Bangkok	1	1
Singapore	2	2
Kuala Lumpur	5	3
Manila	3	4
Denpasar	4	5
Phuket	7	6
Ho Chi Minh	6	7
Jakarta	8	8
Hanoi	9	9
Chiang Mai	11	10

Top 10 booked destinations cities in South-East Asia

Destination cities	Mar 23 - Feb 24 ranking	Mar 24 - Feb 25 ranking	Mar 24 / Feb 25 vs Mar 23 / Feb 24
Bangkok	1	1	12%
Manila	2	2	2%
Singapore	3	3	4%
Kuala Lumpur	4	4	12%
Ho Chi Minh	5	5	7%
Hanoi	6	6	18%
Denpasar	7	7	16%
Jakarta	9	8	26%
Phuket	8	9	15%
Da Nang	10	10	16%
Total	78.5%	76.8%	

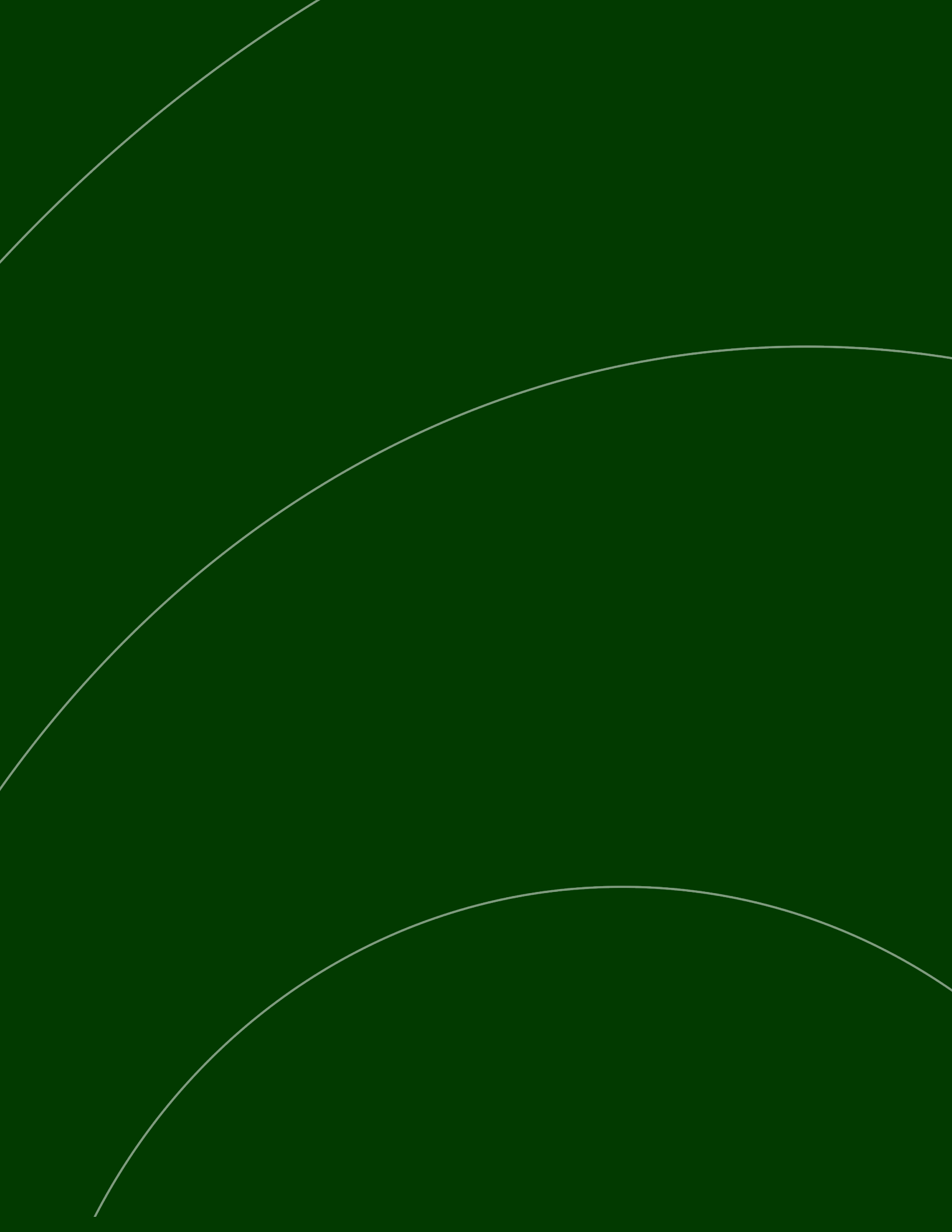
Top performing destinations in South Asia

Top 10 searched destination cities with the highest growth

Destination cities	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Phu Quoc	1	119%
Surabaya	2	110%
Tagbilaran	3	98%
Penang	4	85%
Johor Bahru	5	80%
Kota Kinabalu	6	74%
Medan	7	71%
Kuala Lumpur	8	68%
Qui Nhon	9	67%
Langkawi	10	67%

Top 10 booked destination cities with the highest growth

Destination cities	Mar 24 / Feb 25 vs Mar 23 / Feb 24	YoY Growth
Phu Quoc	1	101%
Pagadian	2	68%
Surabaya	3	50%
Hanoi	4	42%
Khon Kaen	5	35%
Chiang Mai	6	29%
Jakarta	7	26%
Phnom Penh	8	25%
Penang	9	23%
Cagayan de Oro	10	20%



Which cities travellers are going to in South-East Asia

Insights:

1. Phu Quoc Island sees remarkable growth in popularity
Vietnam's Phu Quoc (PQC) is experiencing an impressive surge in popularity, with a 119% increase in searches and a 101% growth in actual bookings. This indicates strong traveller demand for the island destination.

2. Rising Interest in Malaysia
Malaysia is emerging as a key growth destination, with multiple cities (Penang, Johor Bahru, Kota Kinabalu, and Langkawi) all showing significant search increases (67%–85%). This suggests rising interest in both urban and coastal experiences.

3. Indonesia's Surabaya (SUB) and the Philippines' Tagbilaran (TAG) are among the top emerging destinations
With over 98% growth in searches and high booking momentum, these locations may be benefiting from improved connectivity or increased promotional efforts.

Recommendation:

Capitalize on the momentum of secondary cities. While major hubs like Bangkok and Singapore remain dominant, the surge in interest for emerging destinations like Phu Quoc, Surabaya, and Tagbilaran presents an opportunity for airlines, hotels, and tourism boards to develop targeted marketing strategies and optimize capacity to meet rising demand.

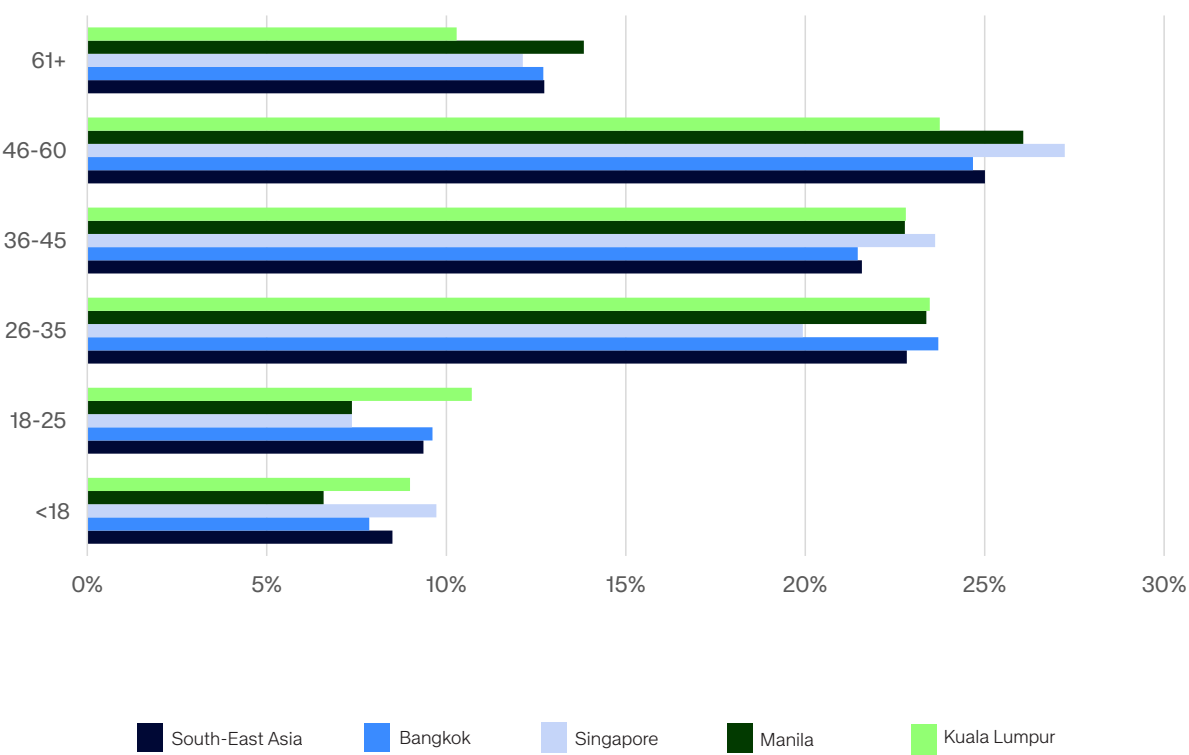
Air travel bookings to South-East Asia by lead time

Percentage of passengers booked by lead time (in days)

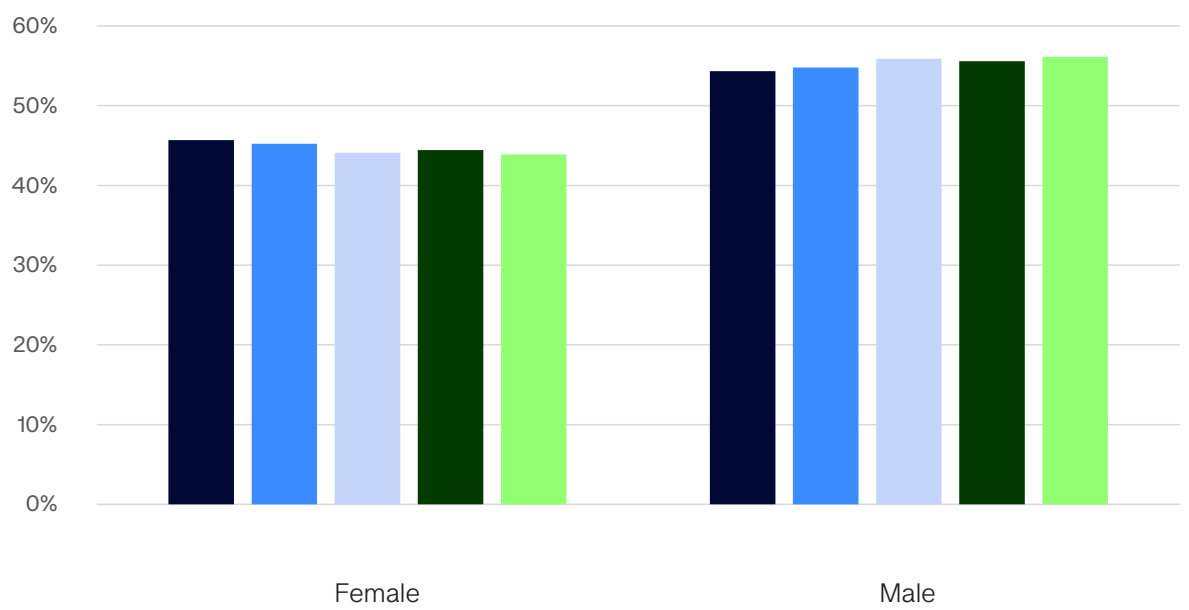


What type of traveller visits South-East Asia: top 4 destination cities

Percentage of passengers booked by age category



Percentage of passengers booked by gender





Lead time and profile analysis

Insights:

1. Consistent booking lead times

The booking patterns for travel to South-East Asia remain stable year-over-year, with a strong share of travellers booking within the 1-7 day and 61-180 day windows. This suggests a mix of last-minute travellers and long-term planners shaping demand.

2. Older travellers are driving demand

The 46-60 age group is the most active in bookings across major cities like Bangkok, Singapore, Manila, and Kuala Lumpur. The 26-35 segment also shows strong engagement, indicating a blend of experienced travellers and younger explorers.

3. Balanced gender distribution

Unlike some regions where male travellers dominate, bookings for South-East Asia show a nearly equal split between male and female passengers, suggesting diverse travel motivations and broad market appeal.

Recommendation:

Tailor Marketing Efforts by Age & Booking Behavior: Tourism boards and travel providers can create personalized strategies targeting last-minute bookers with flexible offers and rewarding long-term planners with exclusive deals. Additionally, campaigns could address both leisure and business travellers within the key 46-60 and 26-35 age segments.

494 new routes in South-East Asia

New routes from multiple markets

Origin Market	New Routes
China	110
India	28
Russian Federation	14
Malaysia	12
Cambodia	11
Taiwan (pr. of China)	11
Indonesia	10
Saudi Arabia	10
Thailand	10
Vietnam	9

Top 10 new international routes (based on seat capacity)

New routes	Origin Market	Destination
Perth-Bangkok	Australia	Thailand
Dubai-Phnom Penh	United Arab Emirates	Cambodia
Singapore-Kuala Lumpur	China	Malaysia
Moscow-Hanoi	Russian Federation	Vietnam
Milan-Bangkok	Italy	Thailand
Brussels-Bangkok	Belgium	Thailand
Osaka-Cebu	Japan	Philippines
Brisbane-Bangkok	Australia	Thailand
Tianjin-Phuket	China	Thailand
Rome-Bangkok	Italy	Thailand

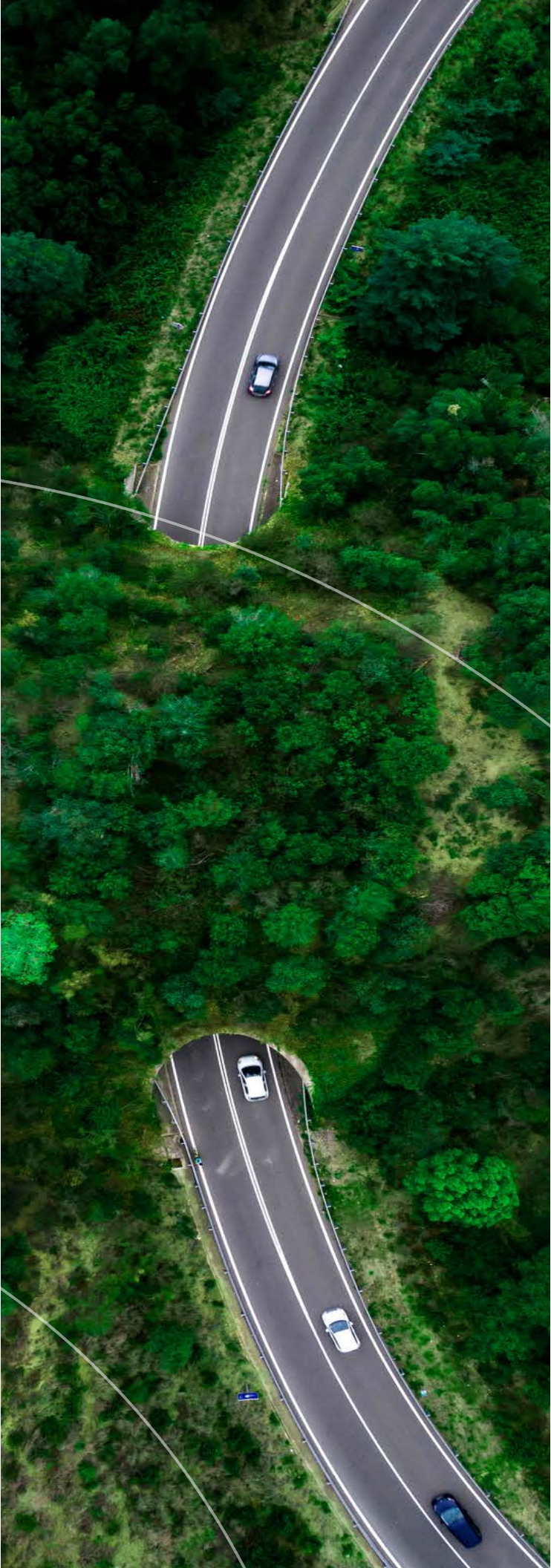
Key insights on new routes in South-East Asia

Insights:

- 1. China leads in new routes**
With 110 new routes, China is the dominant contributor to expanded connectivity in South-East Asia, reinforcing its position as a key source market for regional travel.
- 2. Thailand is a major beneficiary**
Bangkok (BKK) and Phuket (HKT) are among the top destinations receiving new international routes, particularly from key markets like Australia, Italy, and China, signaling strong demand for both leisure and business travel.
- 3. Diverse source markets expanding access**
Markets such as Russian Federation, India, Malaysia, and Indonesia have all introduced multiple new routes, suggesting a broader effort to improve regional connectivity and capture growing tourism flows.

Recommendation:

Leverage new route growth for strategic partnerships: Airlines, tourism boards, and hospitality providers can align marketing efforts with the surge in new routes, particularly targeting high-growth origin markets like China and India to maximize inbound travel demand.

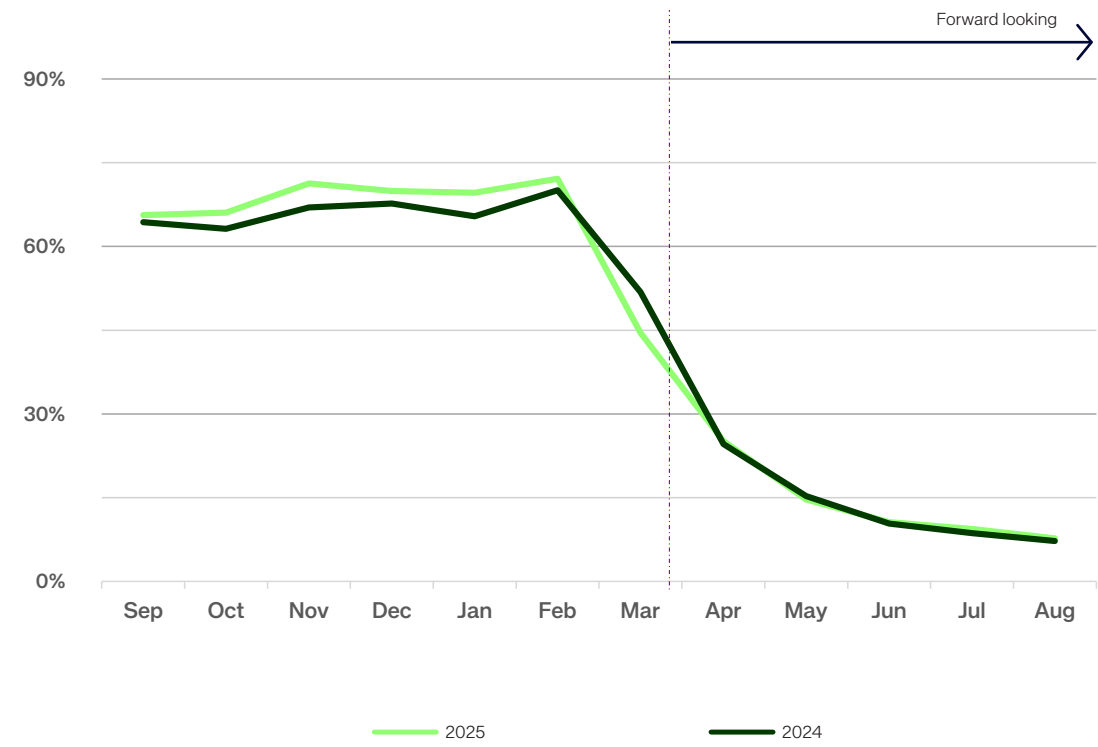


Hospitality Occupancy Overview



Hotel occupancy in South-East Asia

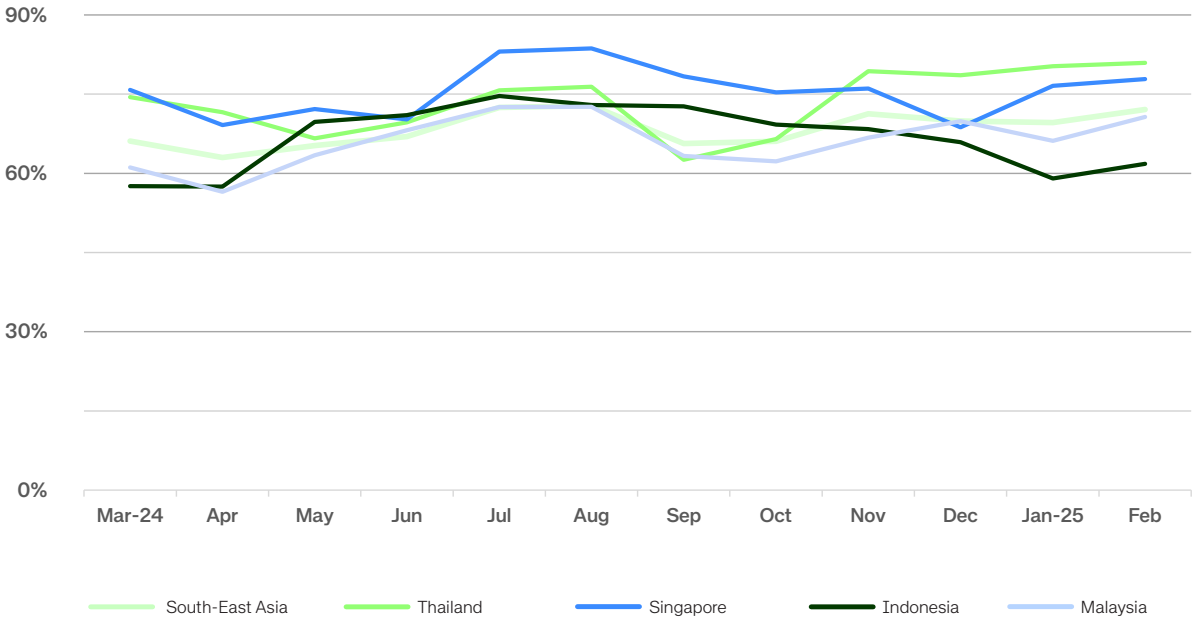
On-the-books by month compared to same month last year (%)



Hotel occupancy for the past 12 months

For South-East Asia and its TOP 4 markets

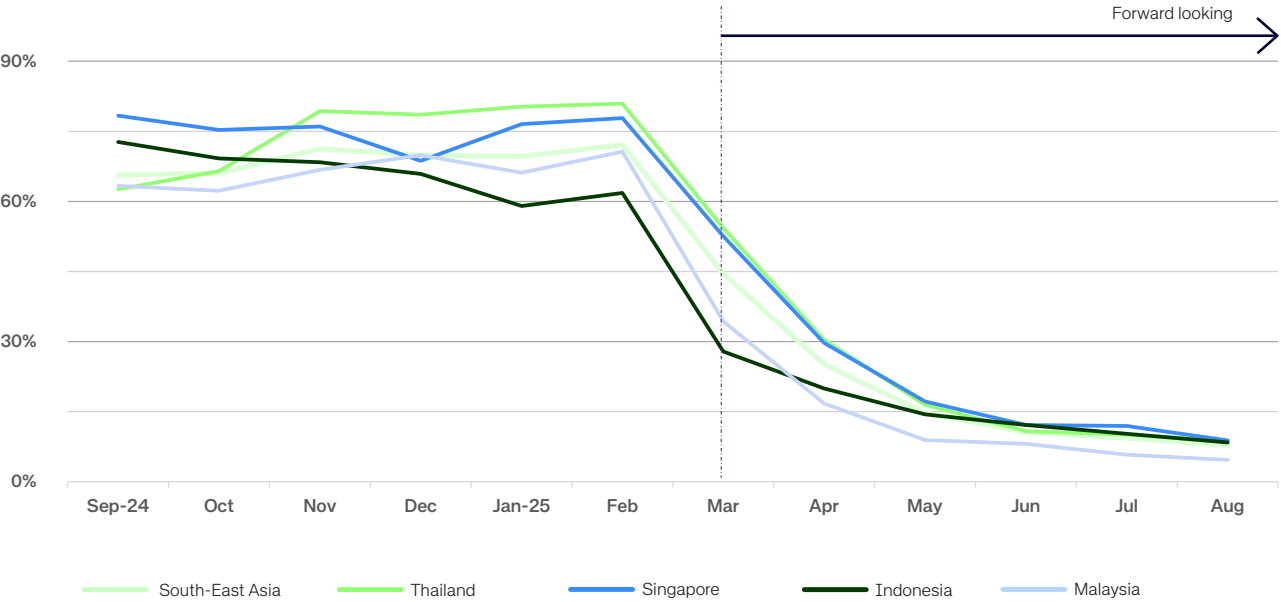
(March 2024-February 2025)



Hotel occupancy on-the-books

For South-East Asia and its TOP 4 markets

(September 2024-August 2025)



Hotel occupancy in South-East Asia

Insights:

1. South-East Asia's travel demand remains resilient, providing a solid foundation for sustained tourism growth

Despite seasonal declines post-March, early 2025 occupancy levels closely mirror last year's, signaling continued traveller confidence. This presents an opportunity for DMOs to sustain engagement and encourage bookings further into the year.

2. Beyond key hubs, emerging destinations in Malaysia and Indonesia present strong potential for tourism expansion

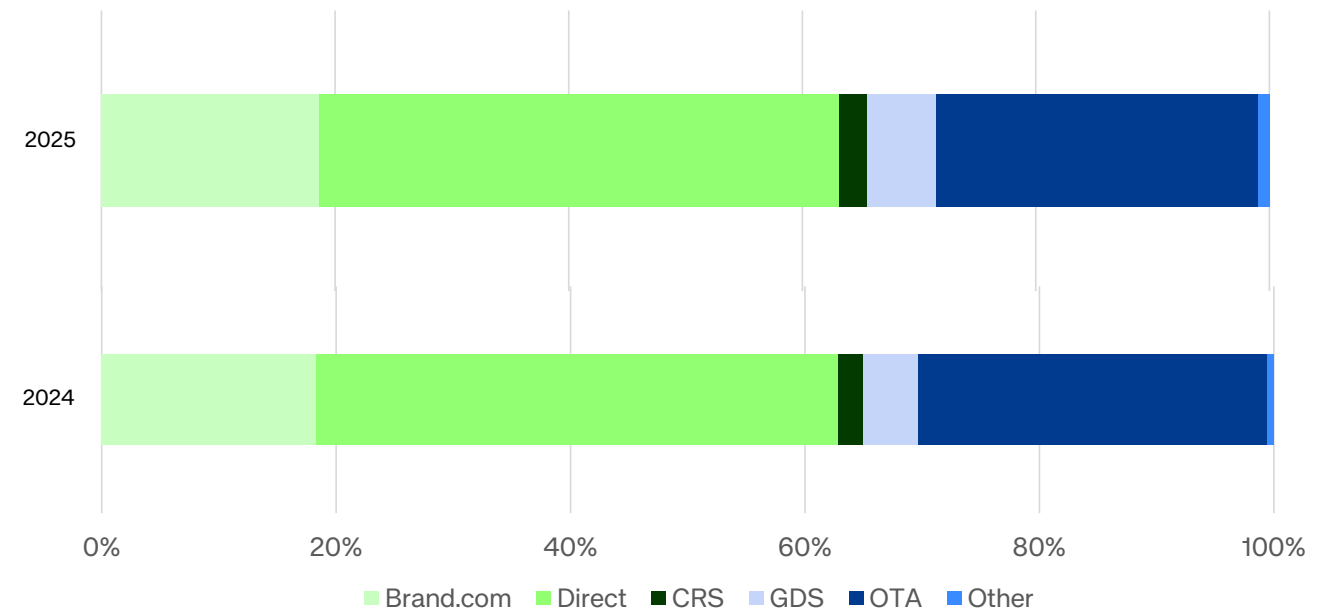
While Thailand and Singapore remain dominant, Malaysia and Indonesia's urban and coastal areas are showing growth opportunities. DMOs can tap into this by highlighting lesser-known attractions and unique travel experiences to differentiate their offerings.

3. Proactive planning can help extend visitor flows into off-peak months

The post-March decline in occupancy underscores the need for targeted seasonal campaigns. DMOs can incentivize off-peak travel through seasonal promotions, cultural events, and niche tourism experiences (wellness, eco-tourism, and adventure travel).

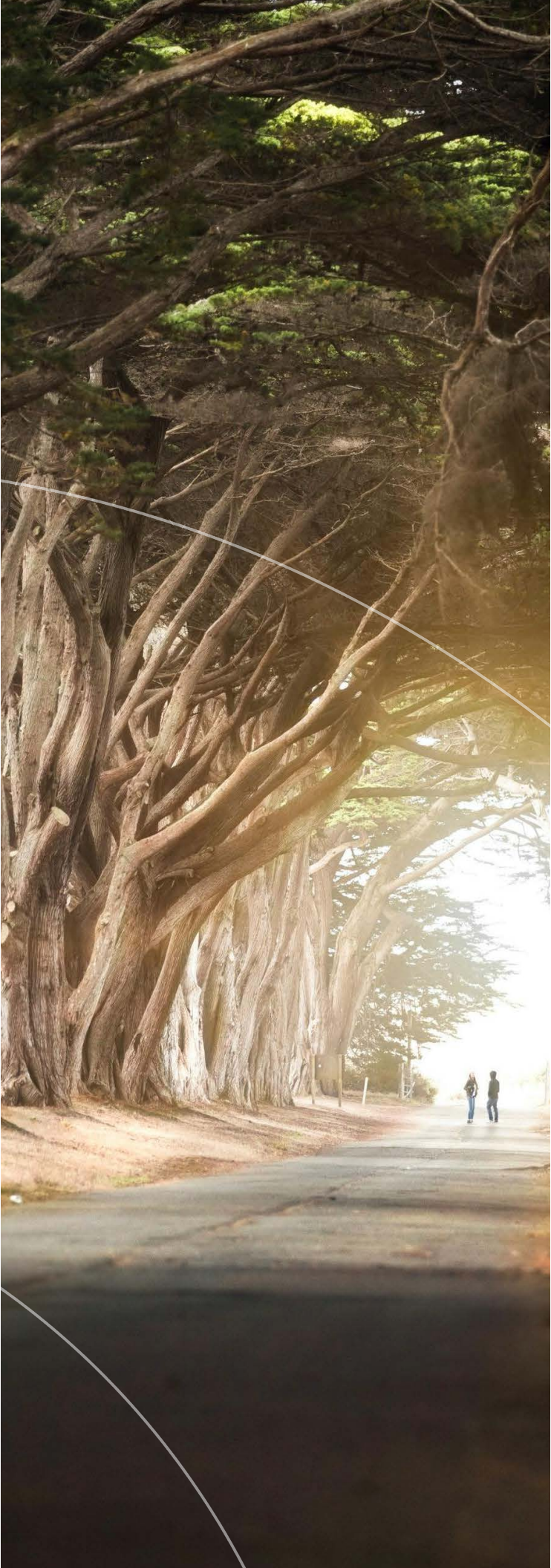
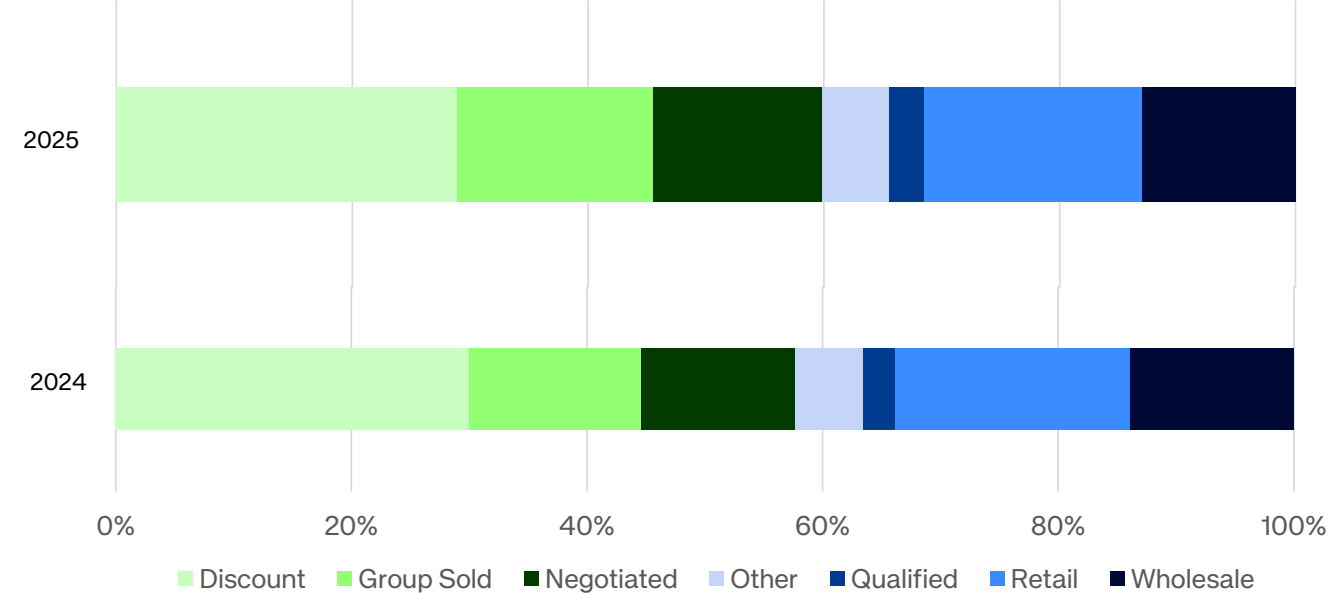
Hotel channel mix in South-East Asia

On-the-books distribution for March 2025 vs same month last year



Hotel segmentation in South-East Asia

On-the-books distribution for March 2025 vs same month last year



Hotel segmentation and channel analysis in South-East Asia

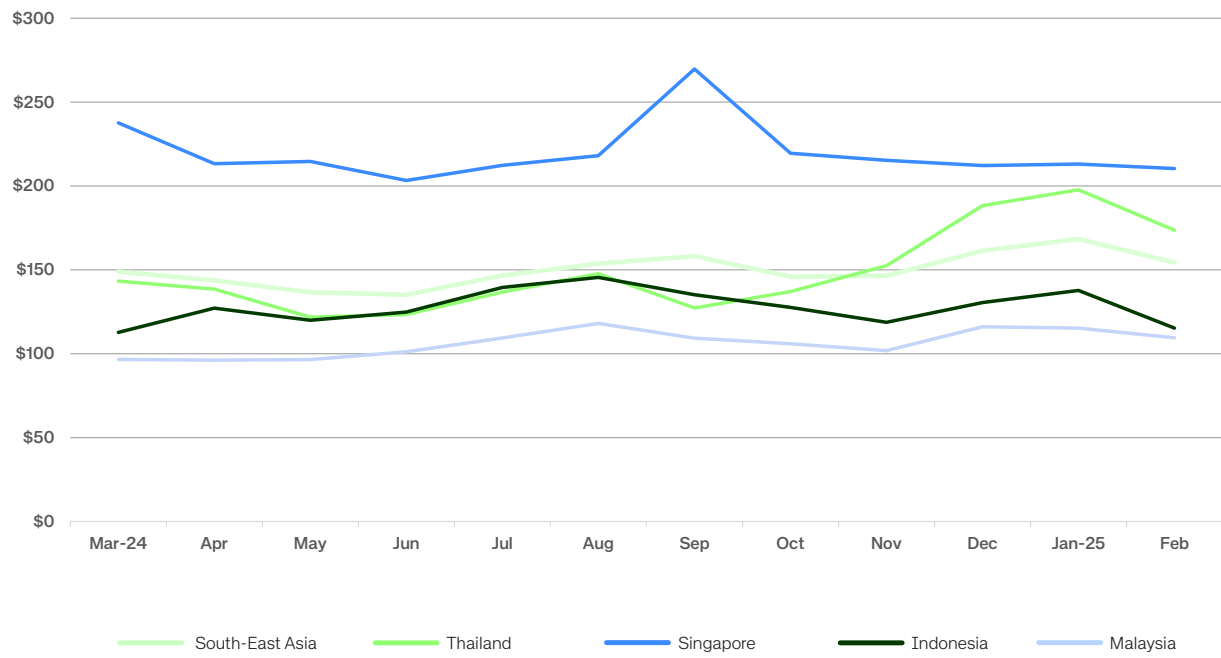
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Average Daily Rate (ADR) in USD



Hotel ADR analysis in South-East Asia

1.Direct bookings remain strong

Direct and brand.com bookings continue to hold a substantial share of hotel reservations in South-East Asia, showing that travellers still prefer booking through official hotel channels. This highlights the importance of strong brand presence and direct booking incentives for destinations.

2. Shift in hotel segmentation

There is a noticeable increase in wholesale and retail bookings for 2025 compared to last year, suggesting that more travellers are using intermediaries to secure accommodations. This could indicate rising demand for packaged travel and partnerships with distributors.

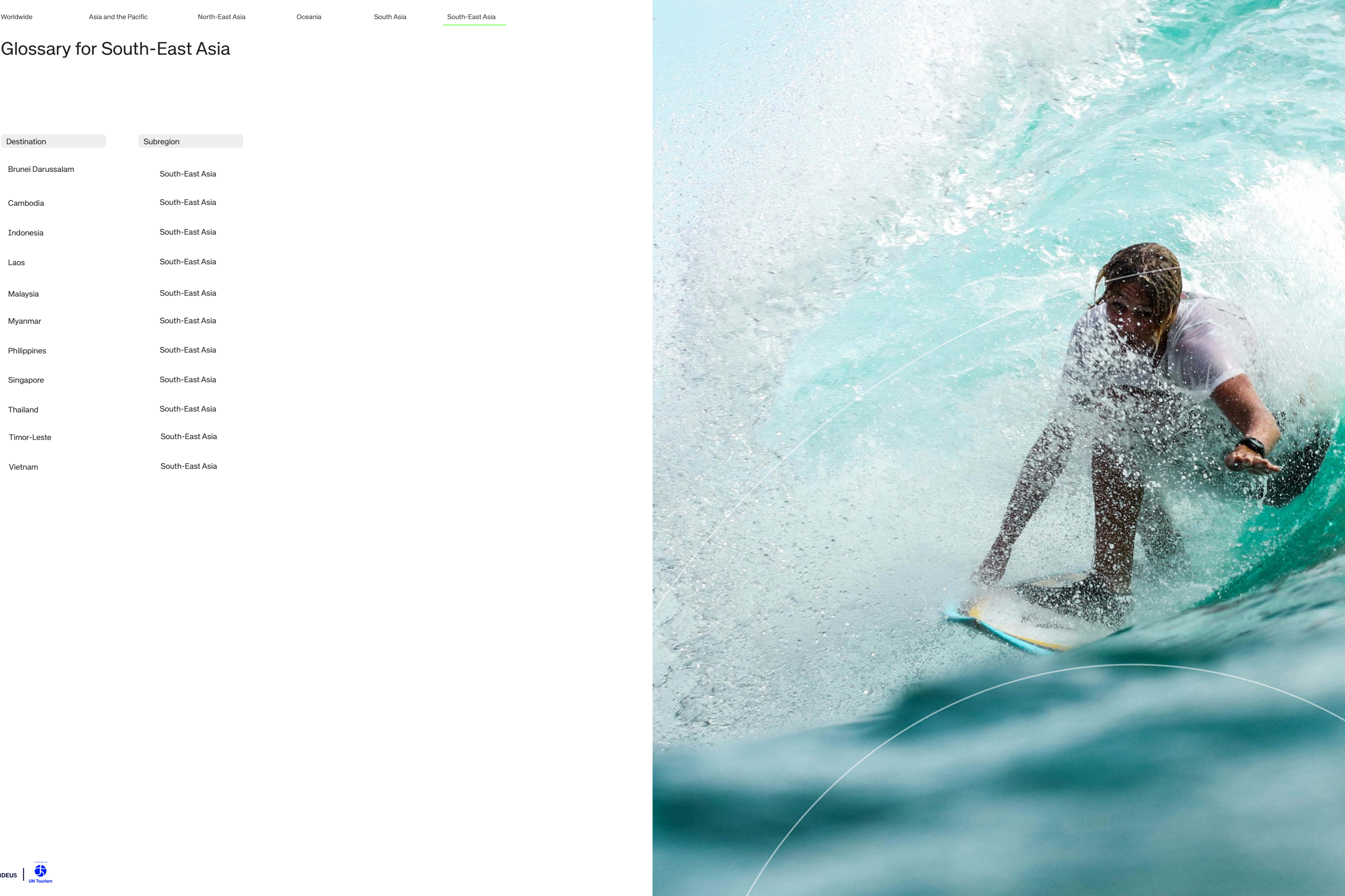
3. Group and negotiated bookings show resilience

Despite market fluctuations, the share of group and negotiated bookings remains steady, emphasizing the continued importance of corporate and group travel to the region.



Glossary for South-East Asia

Destination	Subregion
Brunei Darussalam	South-East Asia
Cambodia	South-East Asia
Indonesia	South-East Asia
Laos	South-East Asia
Malaysia	South-East Asia
Myanmar	South-East Asia
Philippines	South-East Asia
Singapore	South-East Asia
Thailand	South-East Asia
Timor-Leste	South-East Asia
Vietnam	South-East Asia



Methodological note

Passenger traffic and capacity analysis:

The report presents a detailed analysis of passenger traffic and capacity trends from March 2023 to February 2025, with a forecast extending to August 2025.

Hospitality market indicators:

The report examines hotel occupancy rates, average daily rates (ADR), and revenue per available room (RevPAR) across various regions.

Top performing destinations:

The report identifies top-performing destinations in terms of booked and searched destinations.

New routes and market opportunities

The report details the introduction of new routes in the region, emphasizing the potential for unlocking new market opportunities. For instance, North-East Asia witnessed the introduction of 1526 new routes, with China and Japan being key players.

The Amadeus in collaboration with UN Tourism Report on travel insights in Asia and the Pacific serves as a valuable resource for stakeholders in the travel and hospitality industry, offering actionable insights and data-driven strategies to navigate the dynamic market landscape. By leveraging detailed market insights, businesses can maximize growth, improve customer experiences, and optimize their operations in the Asian market.



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