



PATA[®]

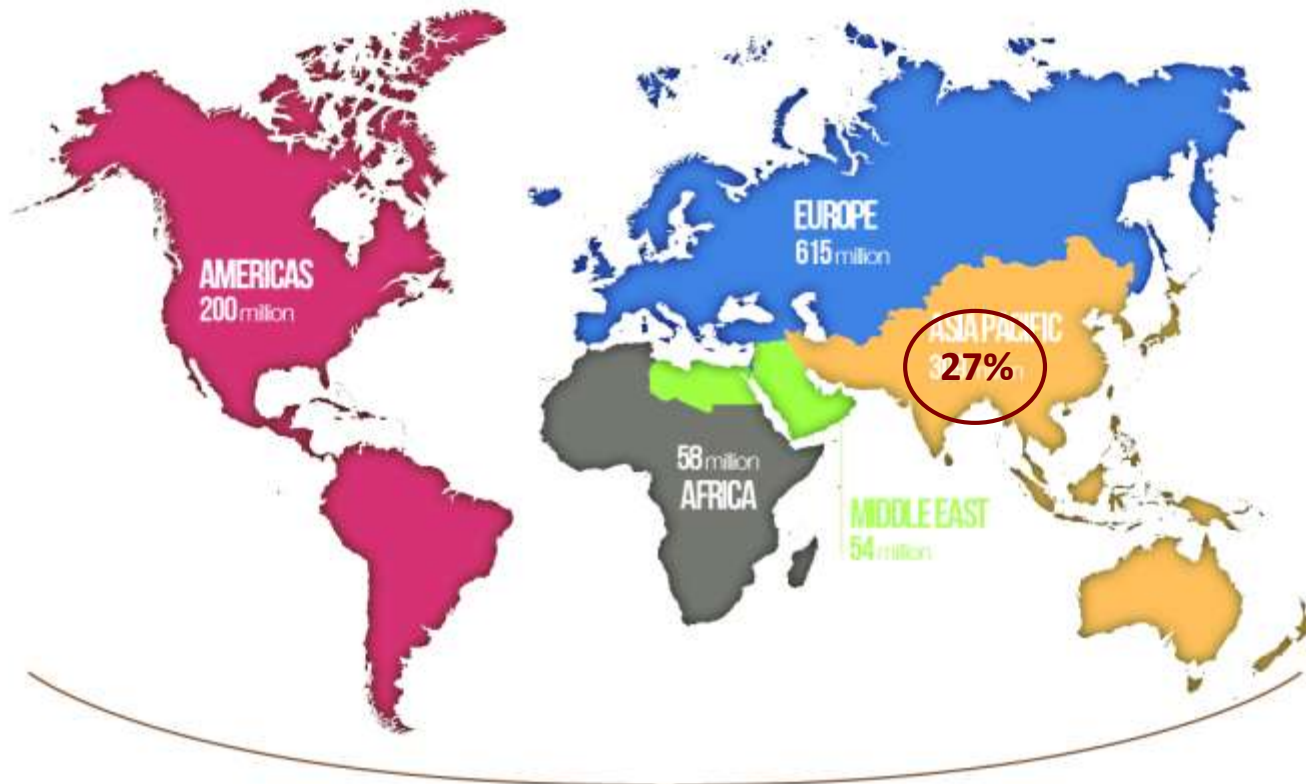
Pacific Asia Travel Association



Travel & Tourism Investment Landscape

INTERNATIONAL TOURIST ARRIVALS 2016

(million)



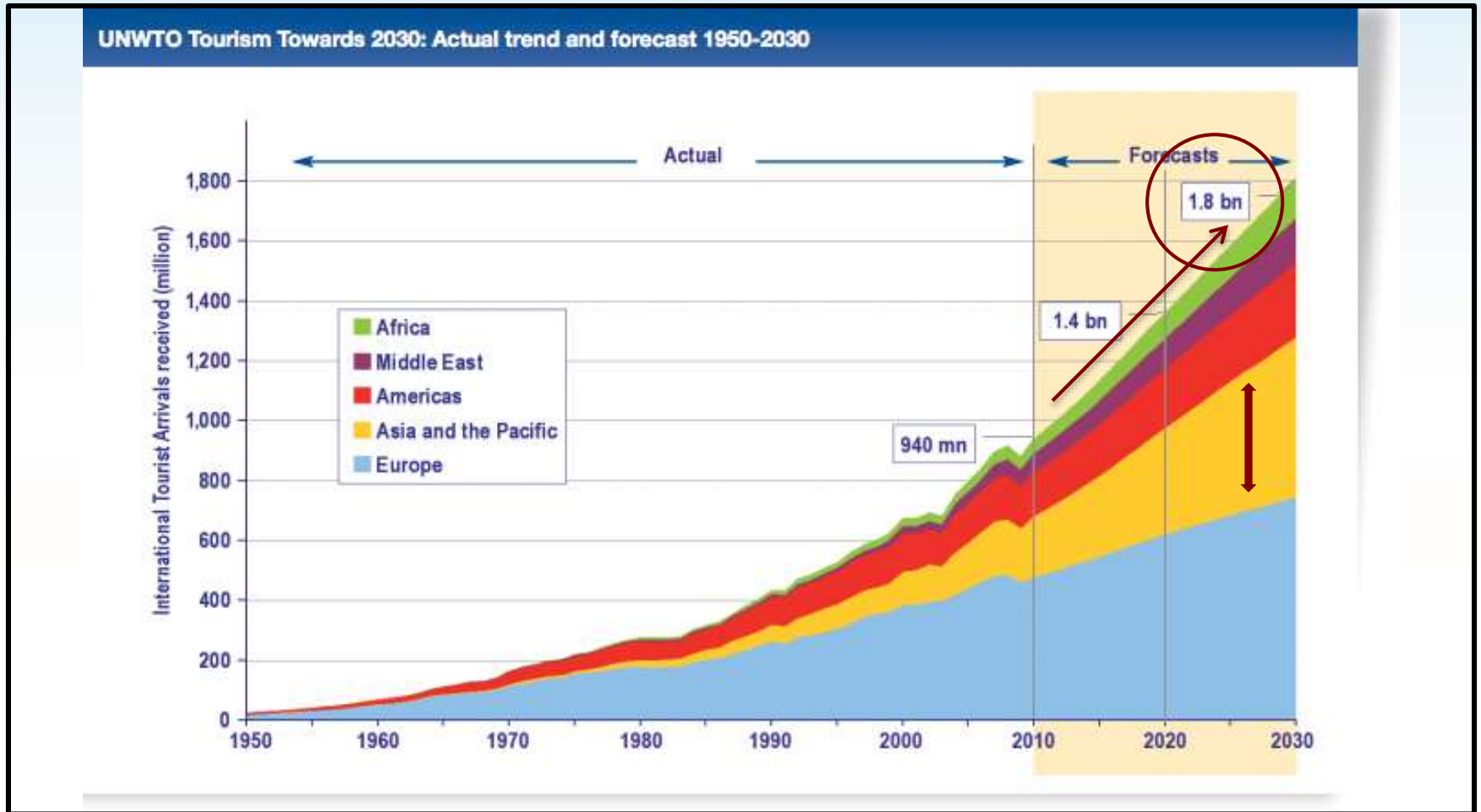
WORLD: 1,235 MILLION



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



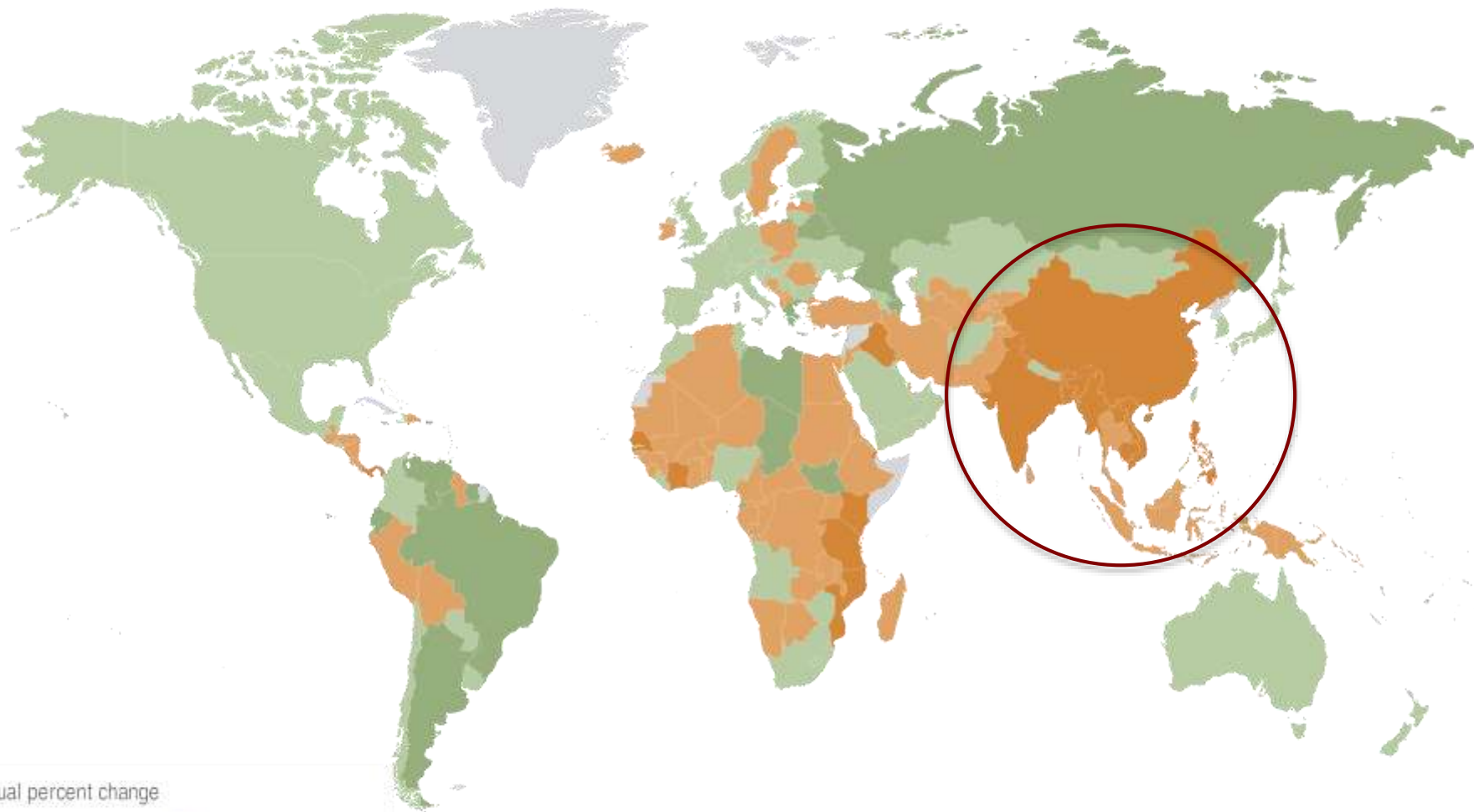
Anticipated tourism growth to 2030



IMF Data Mapper ®

Real GDP growth (2016)

Source: World Economic Outlook (April 2016)

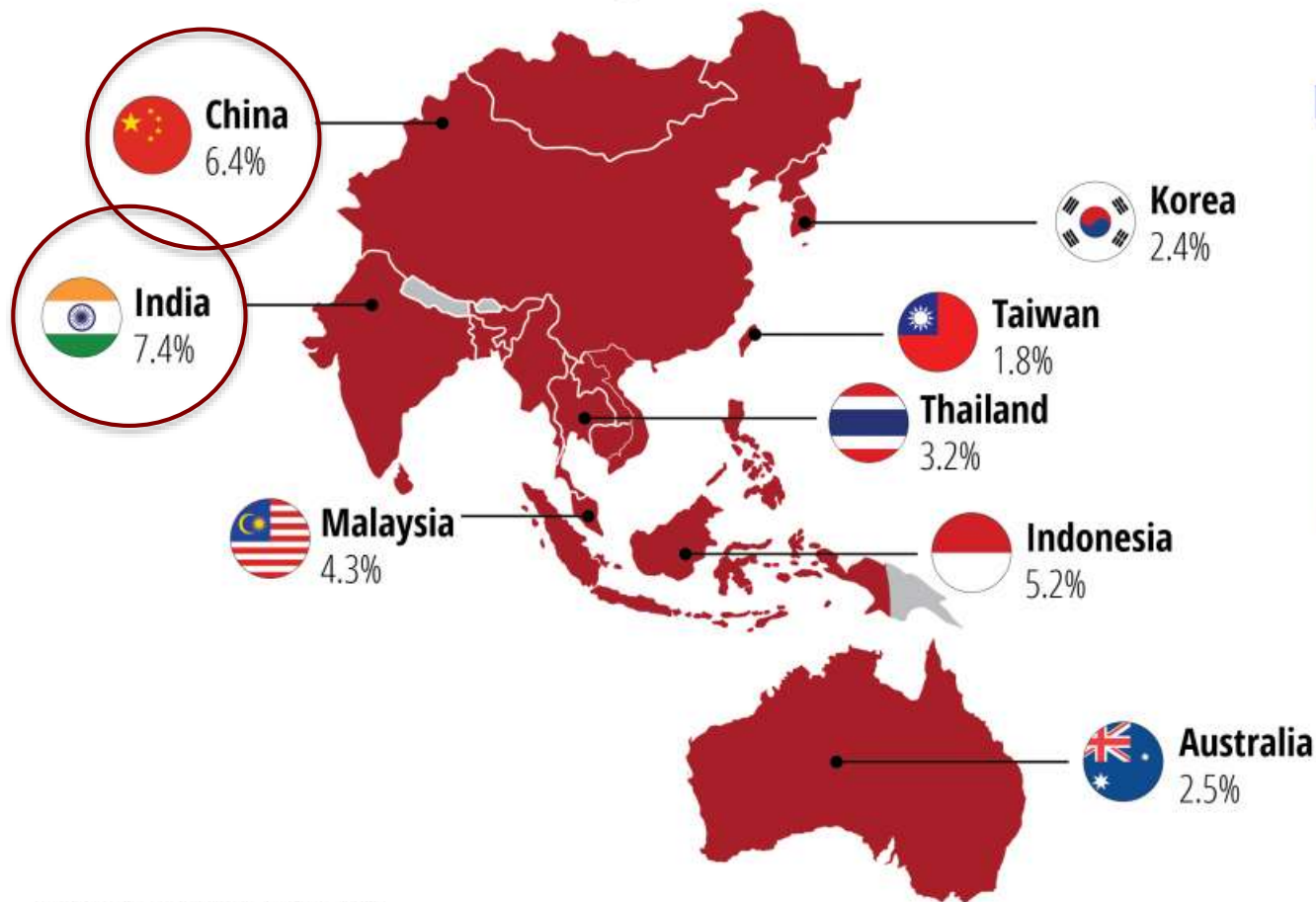


Annual percent change



WHAT TO EXPECT IN ASIA FOR 2017

GDP growth forecasts for selected Asia Pacific countries



REGIONAL GDP FORECASTS

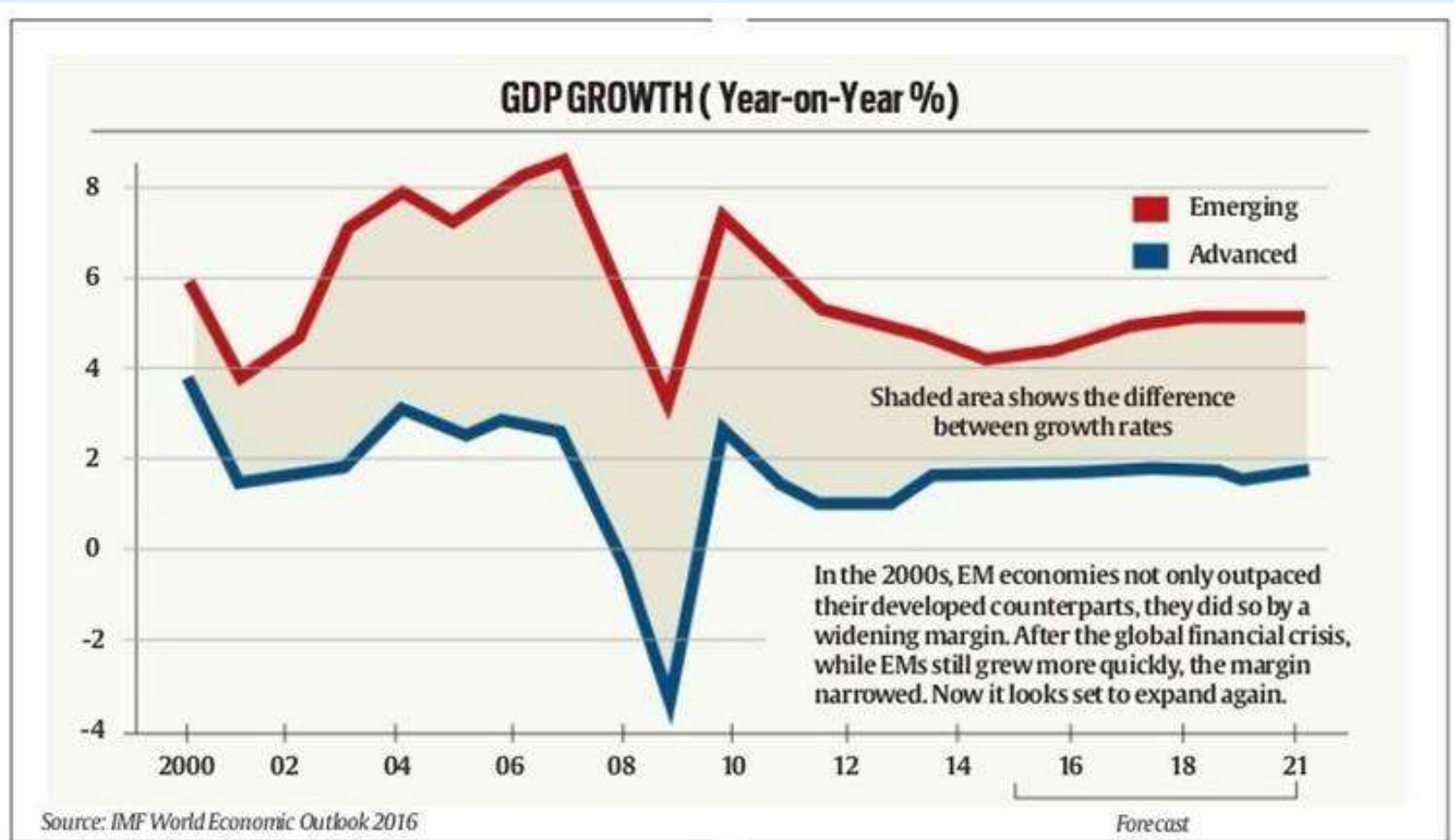
ASEAN

Analysts see the region growing **4.7%** this year on slower growth in Singapore.

East & South Asia

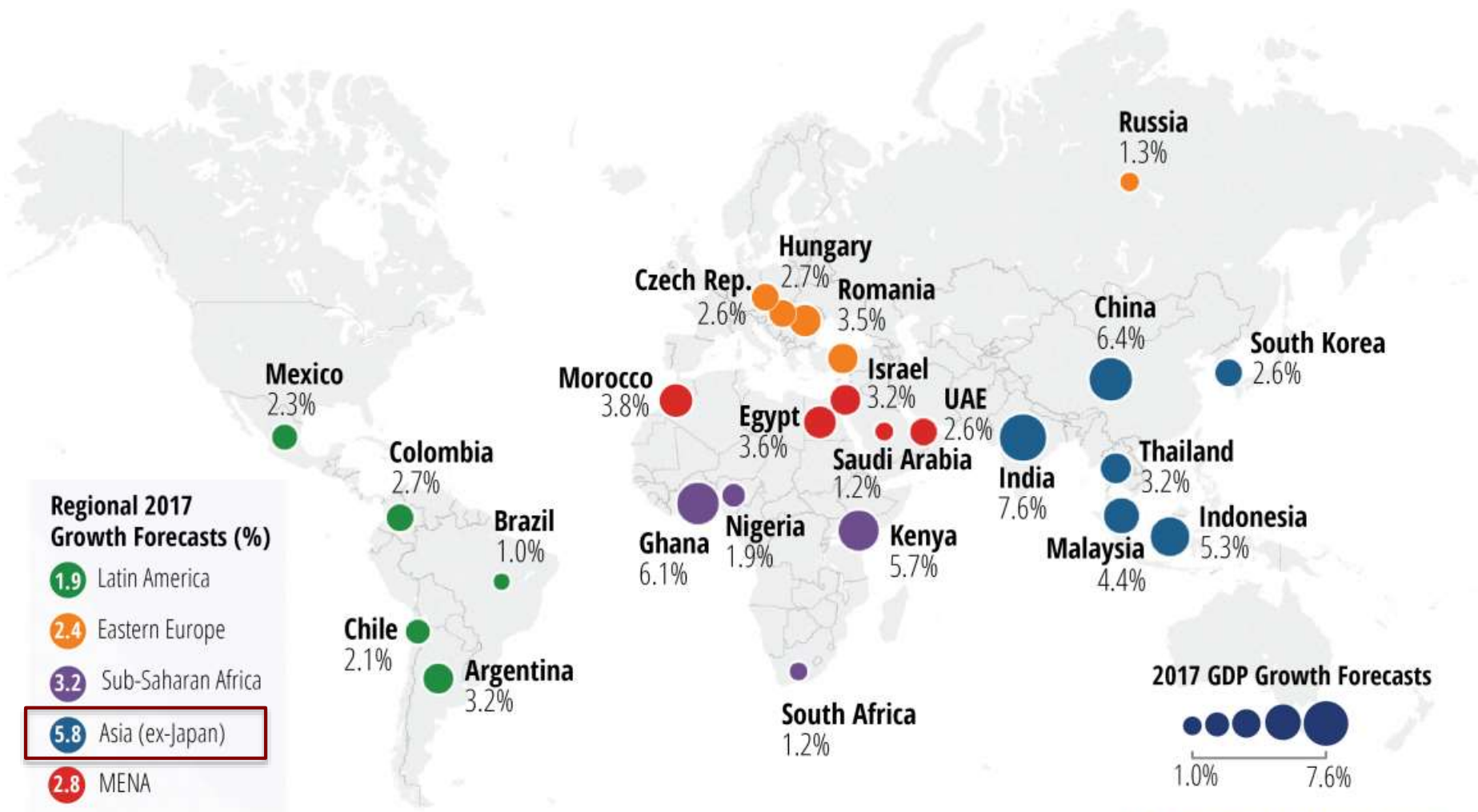
The region is expected to perform at a similar pace to that of in 2016 and grow **6.0%** this year.

Emerging Markets Driving Growth



How Will Emerging Markets Perform in 2017?

Economic conditions set to improve on the back of rising commodities prices, higher global demand and resilient domestic dynamics



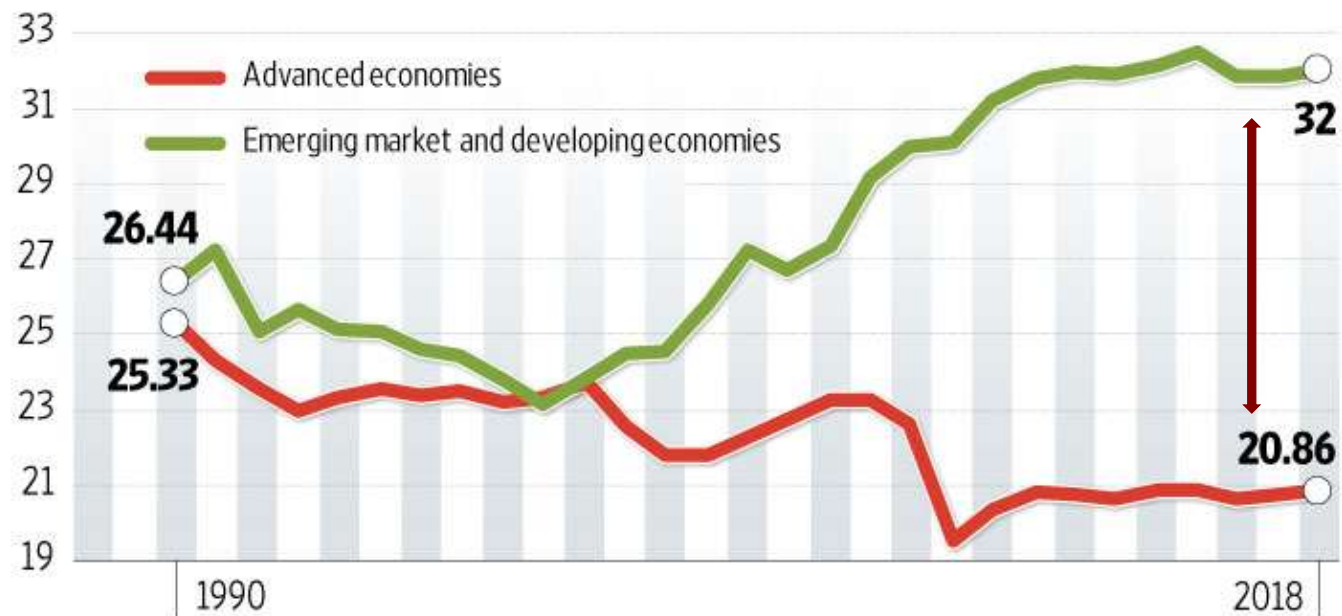
Get all the details at: www.focus-economics.com

FOCUSECONOMICS

Investments in Developing Economies

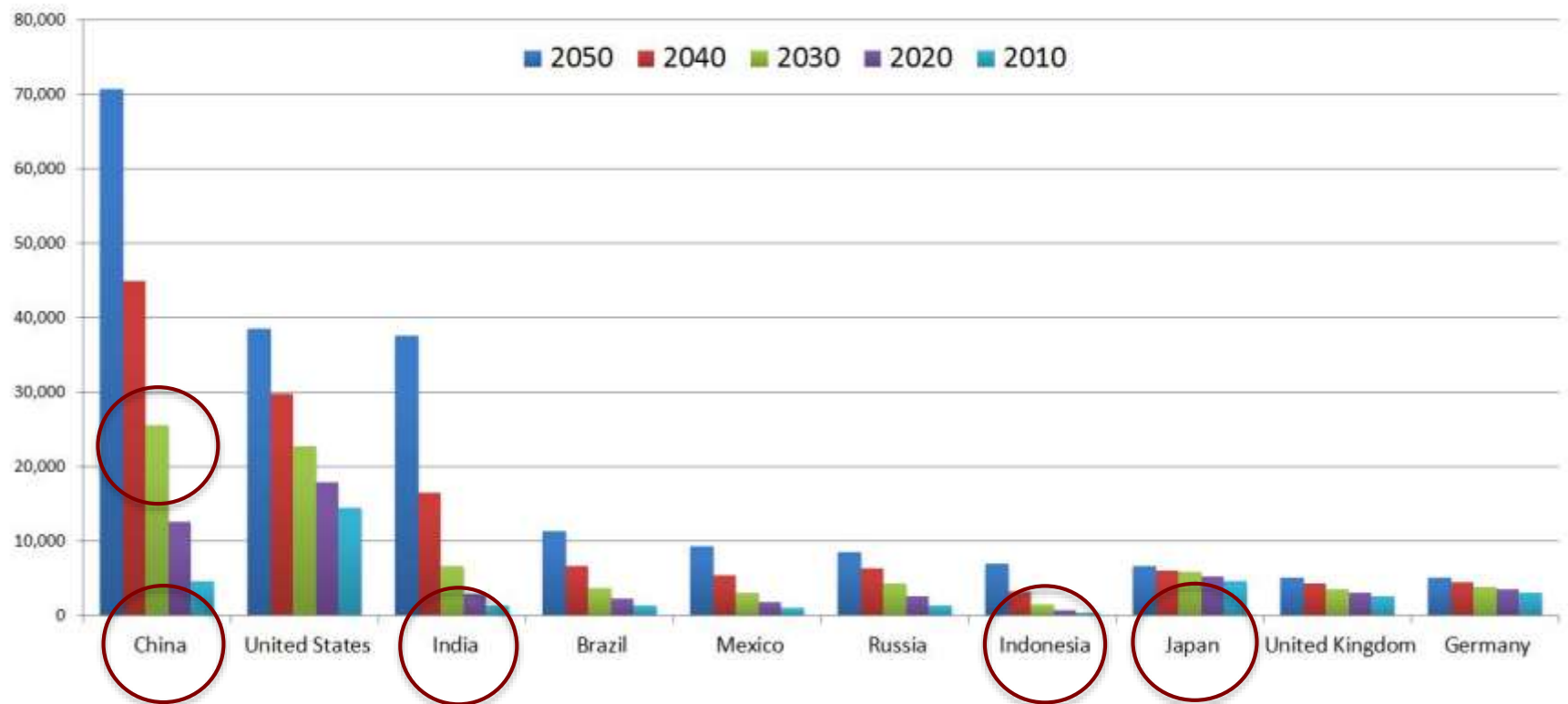
Investment in developing world continues to be robust

Investment % of GDP



International Monetary Fund, World Economic Outlook Database, October 2016

Three of the Worlds Leading Economies



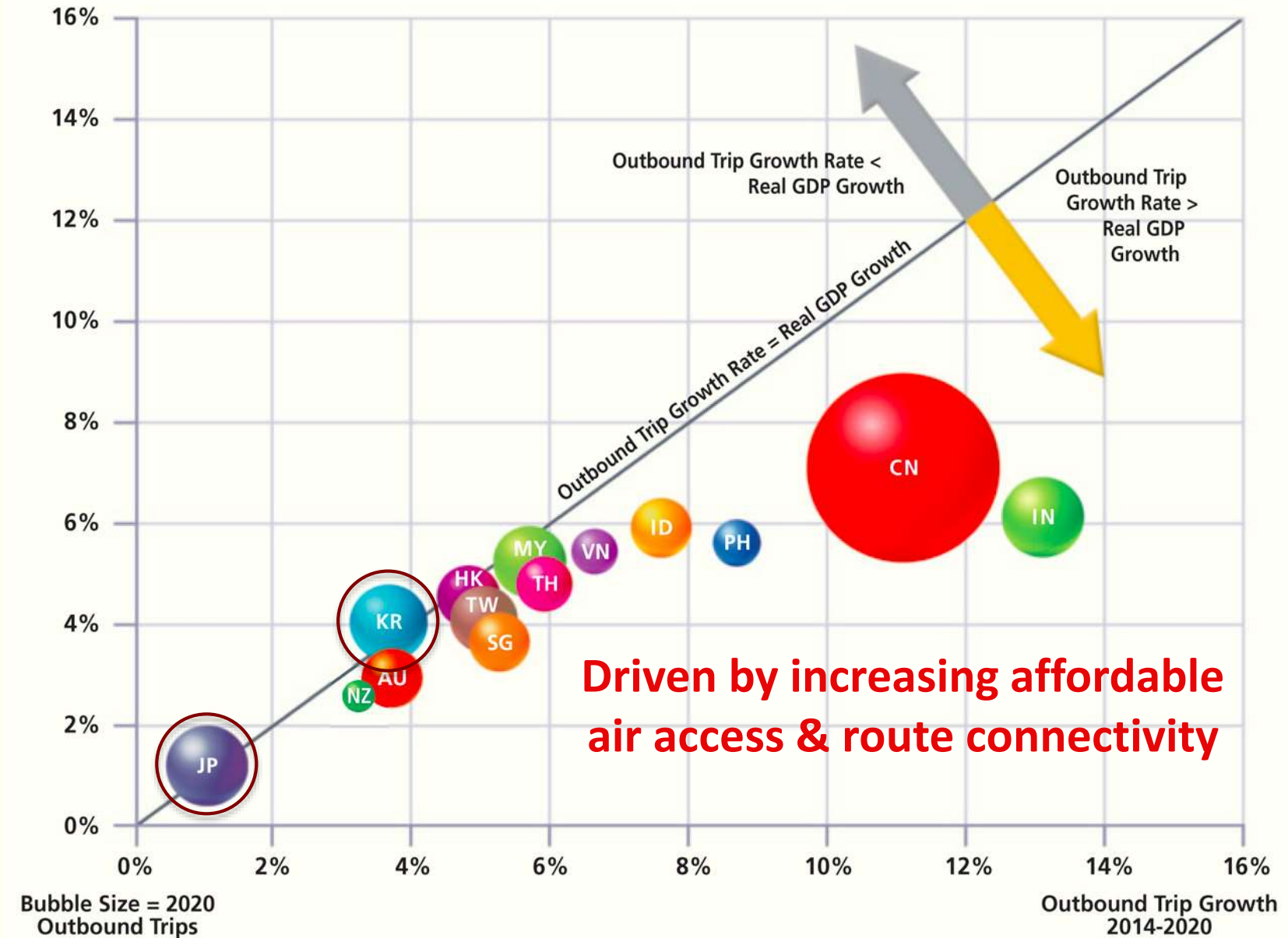
Asia - Rising Middle Class



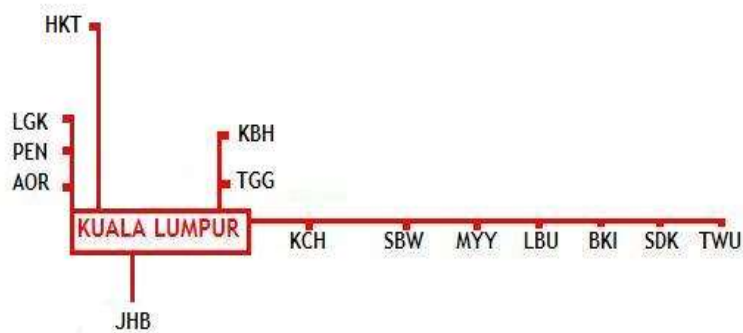
* Households with daily expenditures between \$10 and \$100 per person (at PPP)

Outbound Travel Growth versus Real GDP Growth

Real GDP Growth
2014-2020

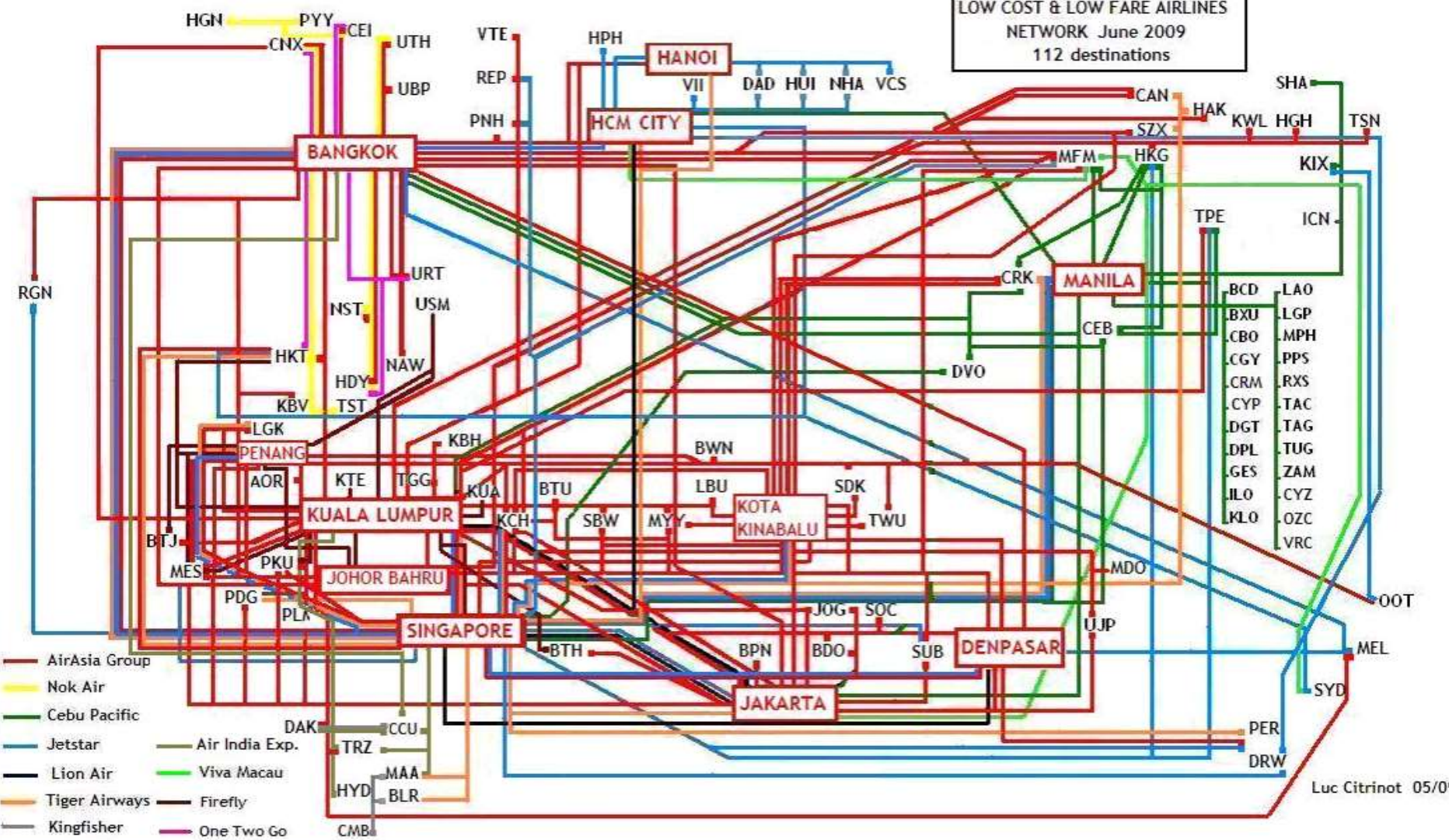


LOW COST AIRLINES NETWORK
DECEMBER 2003
17 destinations



- AirAsia Group
- Nok Air
- One-Two-Go
- Valuair

LOW COST & LOW FARE AIRLINES
NETWORK June 2009
112 destinations



China

- 9 Air
- China United Airlines
- Jiangxi Air
- Ruili Airlines
- Spring Airlines
- Urumqi Air
- West Air

Hong Kong

- HK Express

India

- Air India Express
- AirAsia India
- GoAir
- IndiGo
- SpiceJet

Indonesia

- Citilink
- Lion Air
- Indonesia AirAsia
- Indonesia AirAsia X
- Batik Air
- Wings Air

Pakistan

- Airblue

Philippines

- Cebgo
- Cebu Pacific
- Jetstar Philippines (Propos
- Philippines AirAsia

Singapore

- Jetstar Asia Airways
- Scoot
- Tigerair

South Korea

- Air Busan
- Air Seoul
- Eastar Jet
- Jeju Air
- Jin Air
- T'way Air

Taiwan

- Tigerair Taiwan

Japan

- AirAsia Japan
- Jetstar Japan
- Peach
- Skymark Airlines
- Solaseed Air
- Spring Airlines Japan
- StarFlyer
- Vanilla Air

Kyrgyzstan

- Air Manas

Thailand

- Nok Air
- NokScoot
- Thai AirAsia
- Thai AirAsia X
- Thai Lion Air
- Thai Vietjet Air

Vietnam

- Jetstar Pacific Airlines
- VietJet Air

Asian LCC's
2016

HOW WITH
NO FUEL
SURCHARGE

FREE SEATS

Book from 23 - 29 Mar 2015 Travel from 1 Sep 2015 - 31 May 2016

Fly from Kuala Lumpur via klia2

Kota Bharu • Langkawi • Lombok • Singapore • Krabi
Ho Chi Minh City • Macau • Kunming • Guilin • Gold Coast
Perth • Tokyo • Colombo • Tiruchirappalli • Taipei

and many more destinations



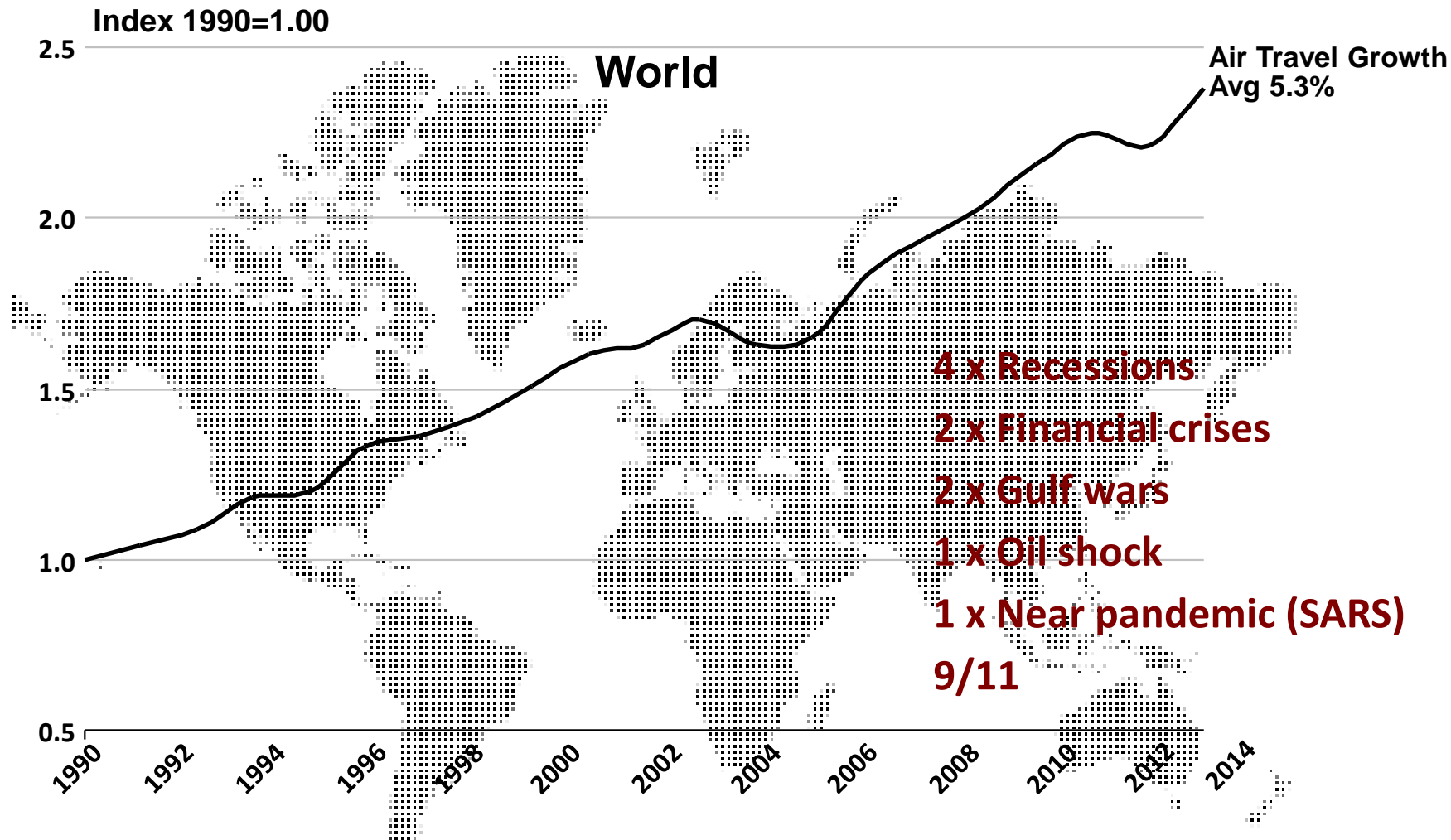
20 Fastest Growing Global Cities in 2016

Top 20 Fastest-Growing Destination Cities with at Least One Million Overnight Visitors in 2016 (2009–2016 CAGR)

Rank in Growth Rate	Destination City	CAGR	Country	Region
1	Osaka	24.15%	Japan	Asia-Pacific
2	Chengdu	20.14%	China	Asia-Pacific
3	Abu Dhabi	19.81%	UAE	Middle East & Africa
4	Colombo	19.57%	Sri Lanka	Asia-Pacific
5	Tokyo	18.48%	Japan	Asia-Pacific
6	Riyadh	16.45%	Saudi Arabia	Middle East & Africa
7	Taipei	14.53%	Taiwan-China	Asia-Pacific
8	Xi'an	14.20%	China	Asia-Pacific
9	Tehran	12.98%	Iran	Middle East & Africa
10	Xiamen	12.93%	China	Asia-Pacific
11	Jakarta	12.89%	Indonesia	Asia-Pacific
12	Bangkok	12.57%	Thailand	Asia-Pacific
13	Hanoi	11.64%	Vietnam	Asia-Pacific
14	Mumbai	10.42%	India	Asia-Pacific
15	Lima	9.86%	Peru	Latin America
16	Bogota	9.61%	Colombia	Latin America
17	Seoul	9.49%	South Korea	Asia-Pacific
18	Ho Chi Minh City	9.22%	Vietnam	Asia-Pacific
19	Chennai	9.15%	India	Asia-Pacific
20	Dubai	9.07%	UAE	Middle East & Africa

(Source MasterCard)

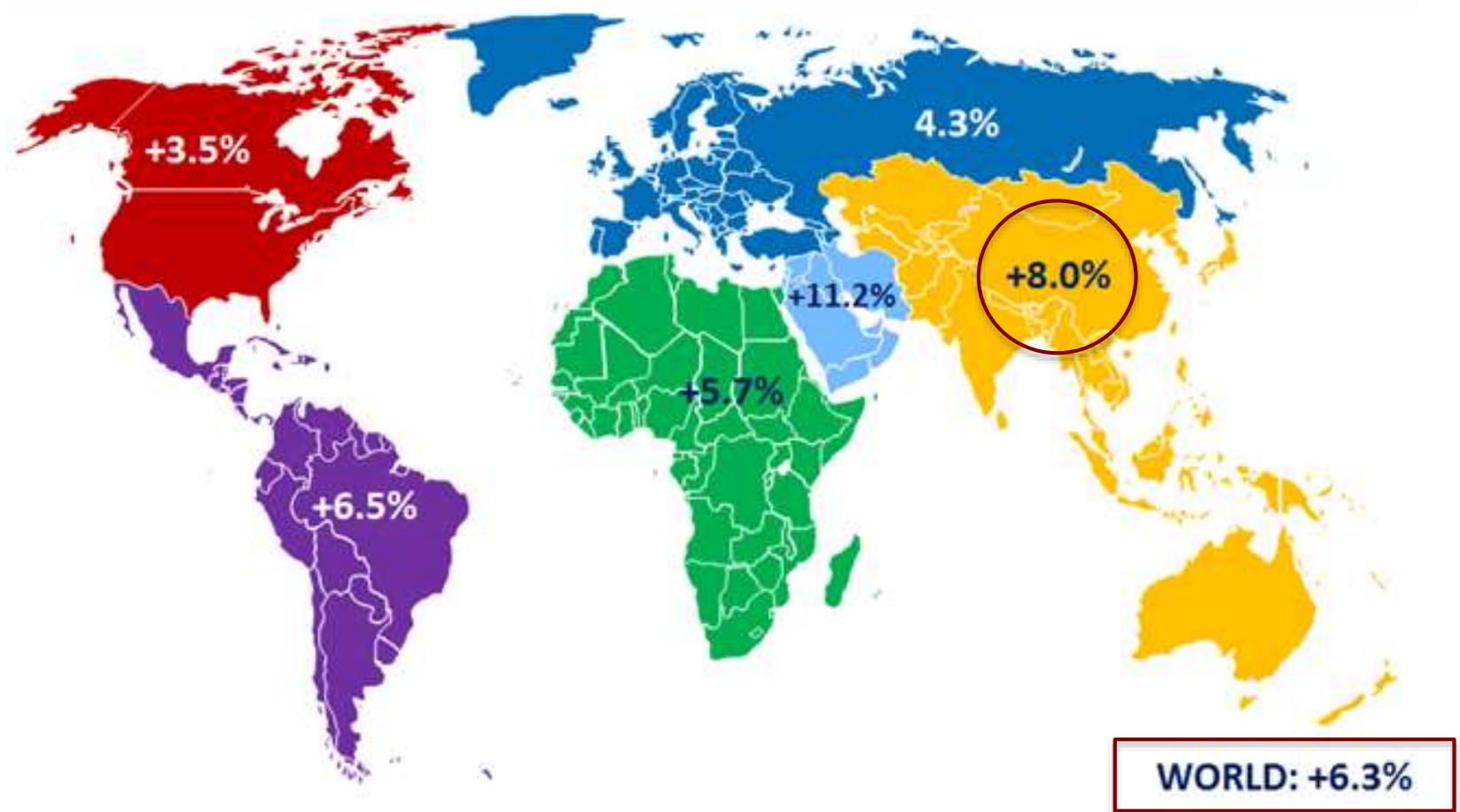
Aviation Growth



RPKs = Revenue Passenger Kilometers
Sources: ICAO Scheduled Traffic & Boeing Co

All routes

Aviation Growth 2016 (source ICAO)



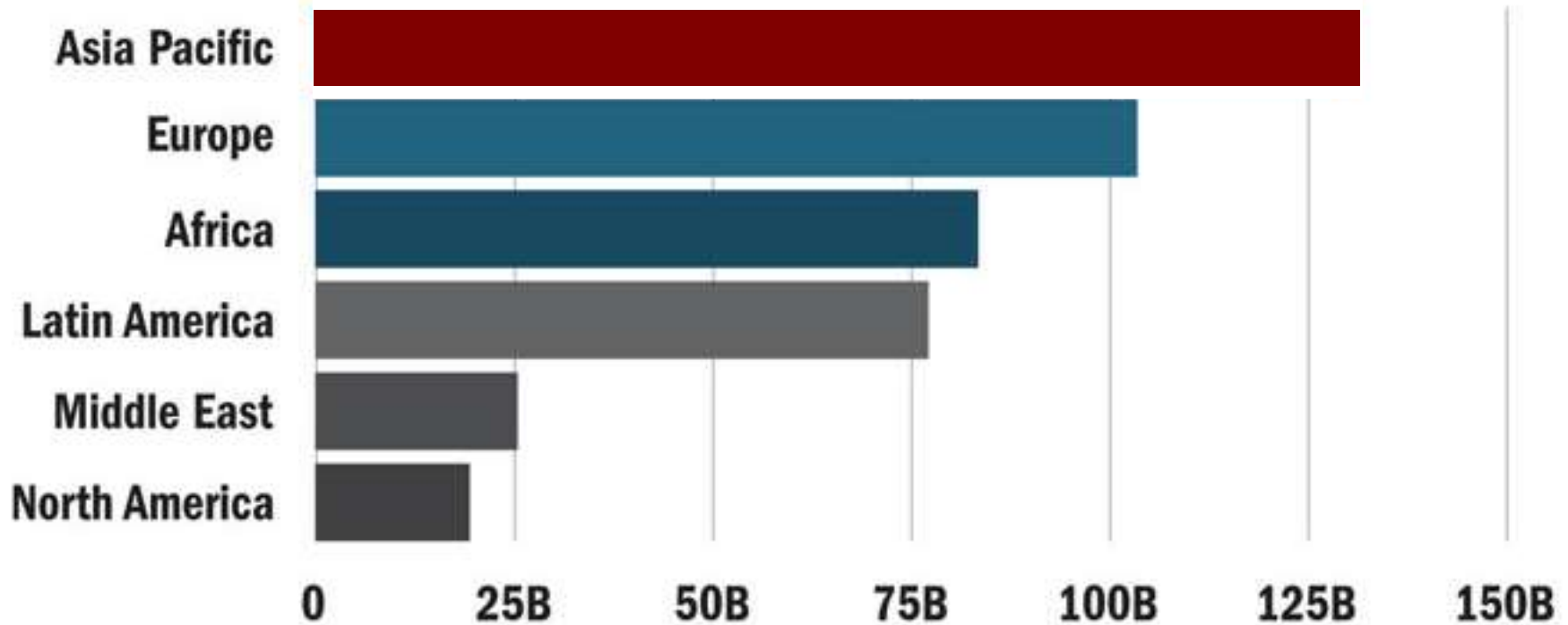
Asia 20year Passenger Growth Forecast



Global Airport Investment - Jun 2015

Chart 1: All airport project investment by all types, activity by region in US\$, as of Jun-2015

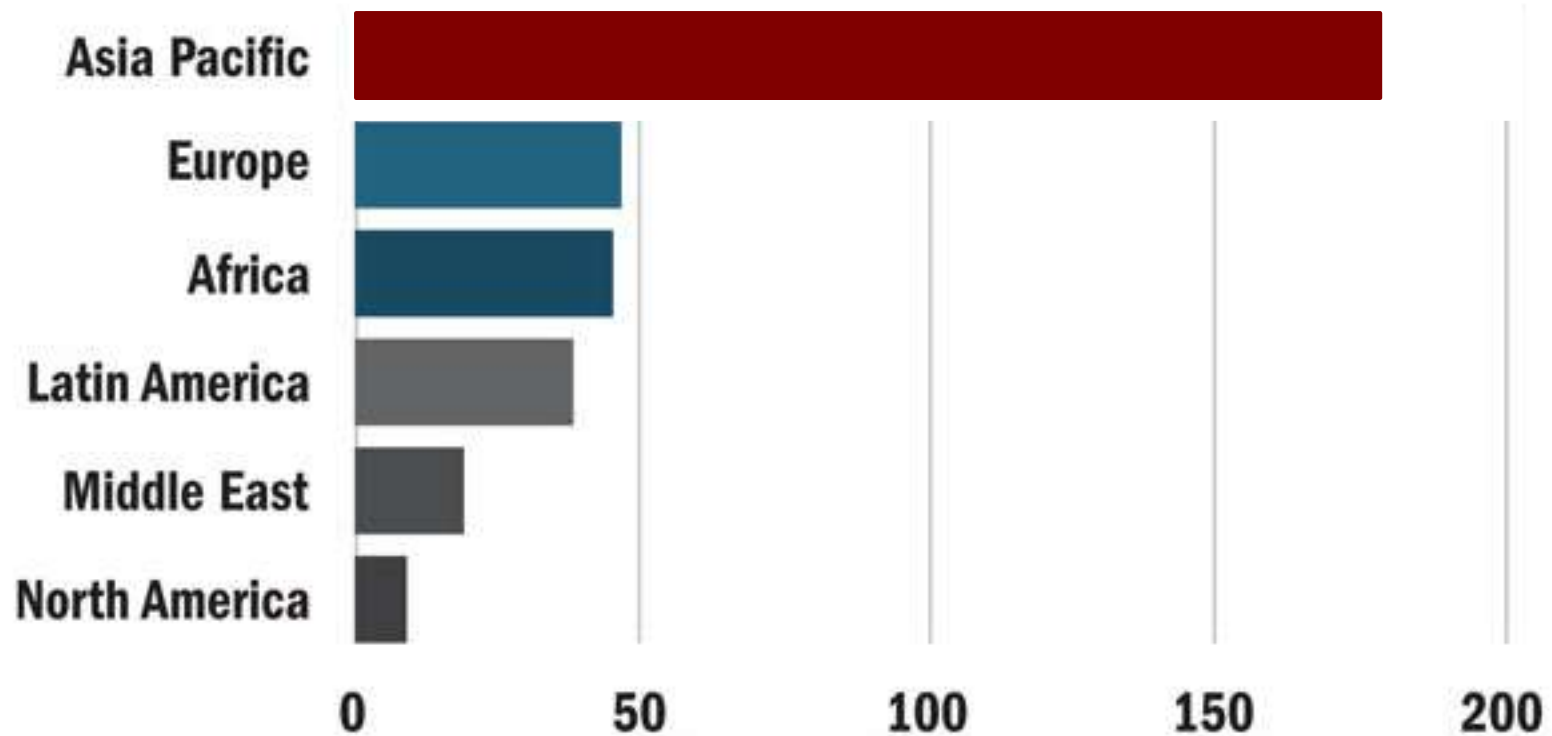
Source: CAPA - Centre for Aviation



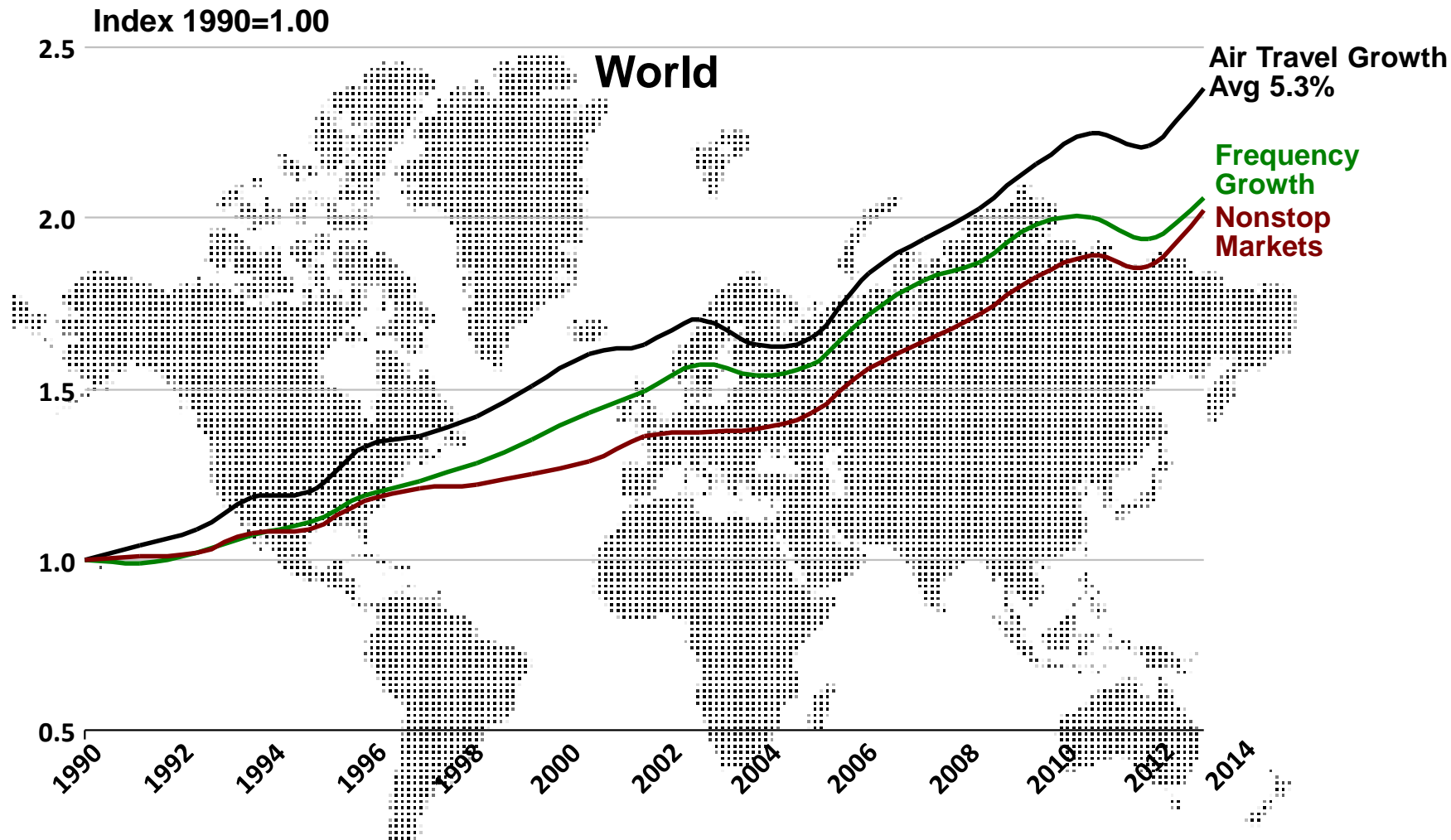
Global 'New' Airport Development – Jul 2015

Chart 2: Number of new airport projects by region, Jul-2015

Source: CAPA - Centre for Aviation



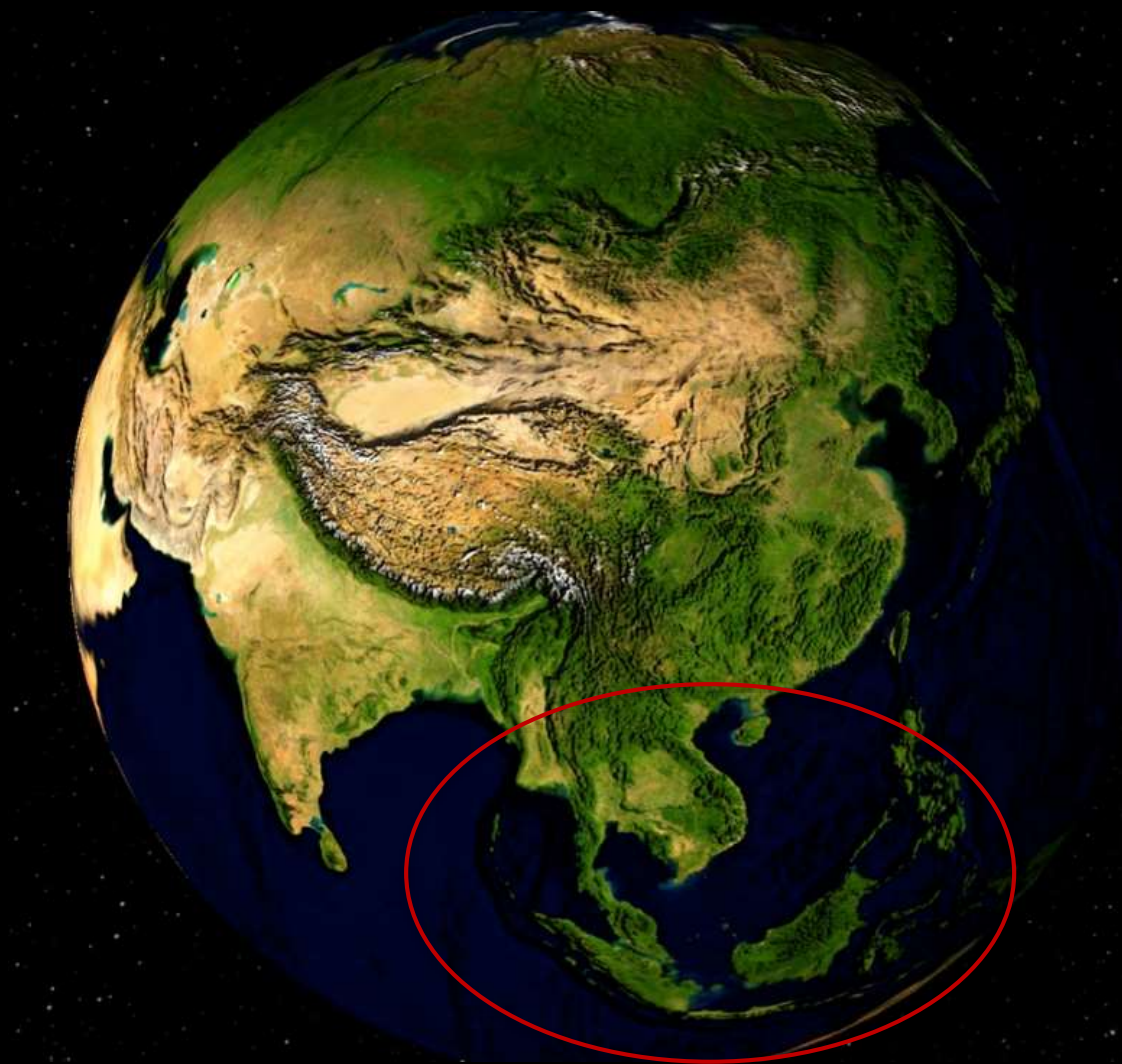
Aviation Growth



RPKs = Revenue Passenger Kilometers
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All routes





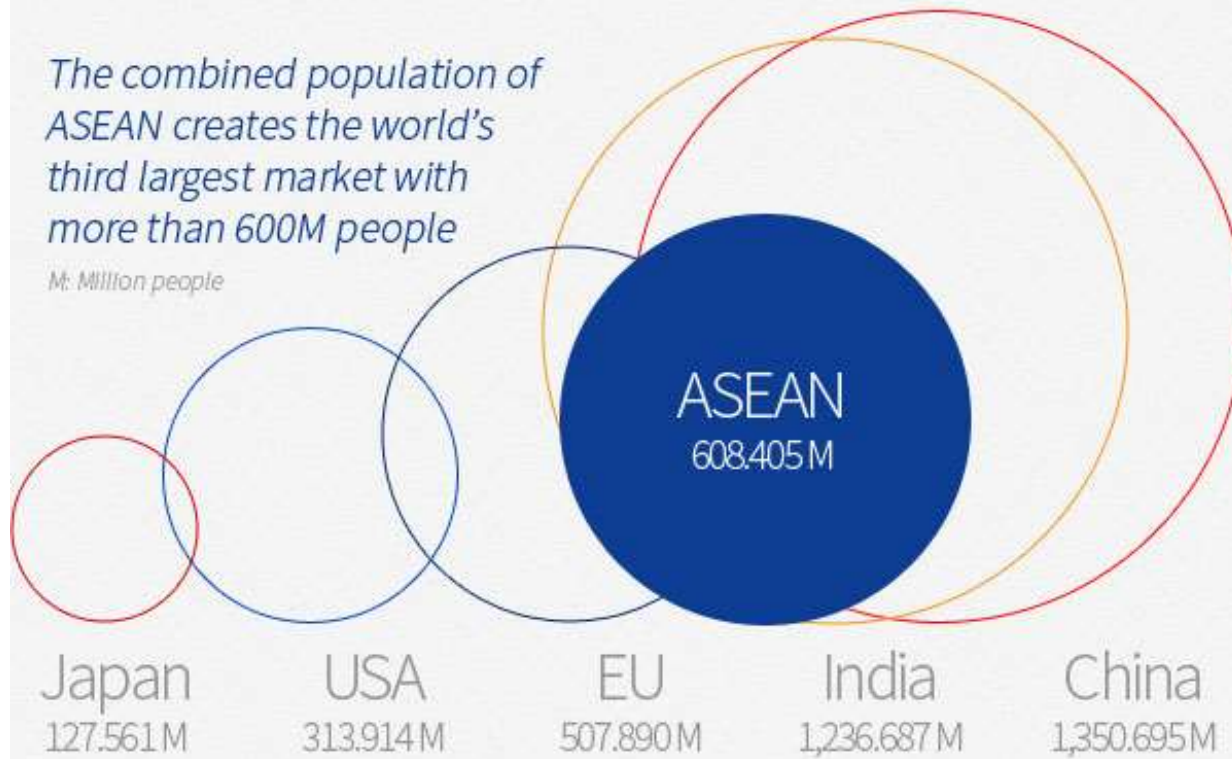
The

ASEAN MARKET



*The combined population of
ASEAN creates the world's
third largest market with
more than 600M people*

M: Million people



16:00

Singapore

Kuala Lumpur

Jakarta

NATS



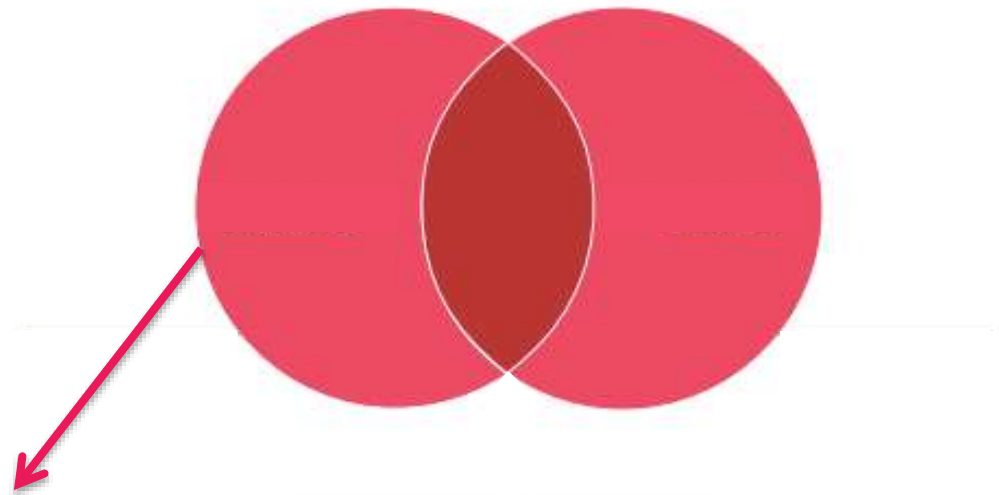
Key Tourism Investment Areas



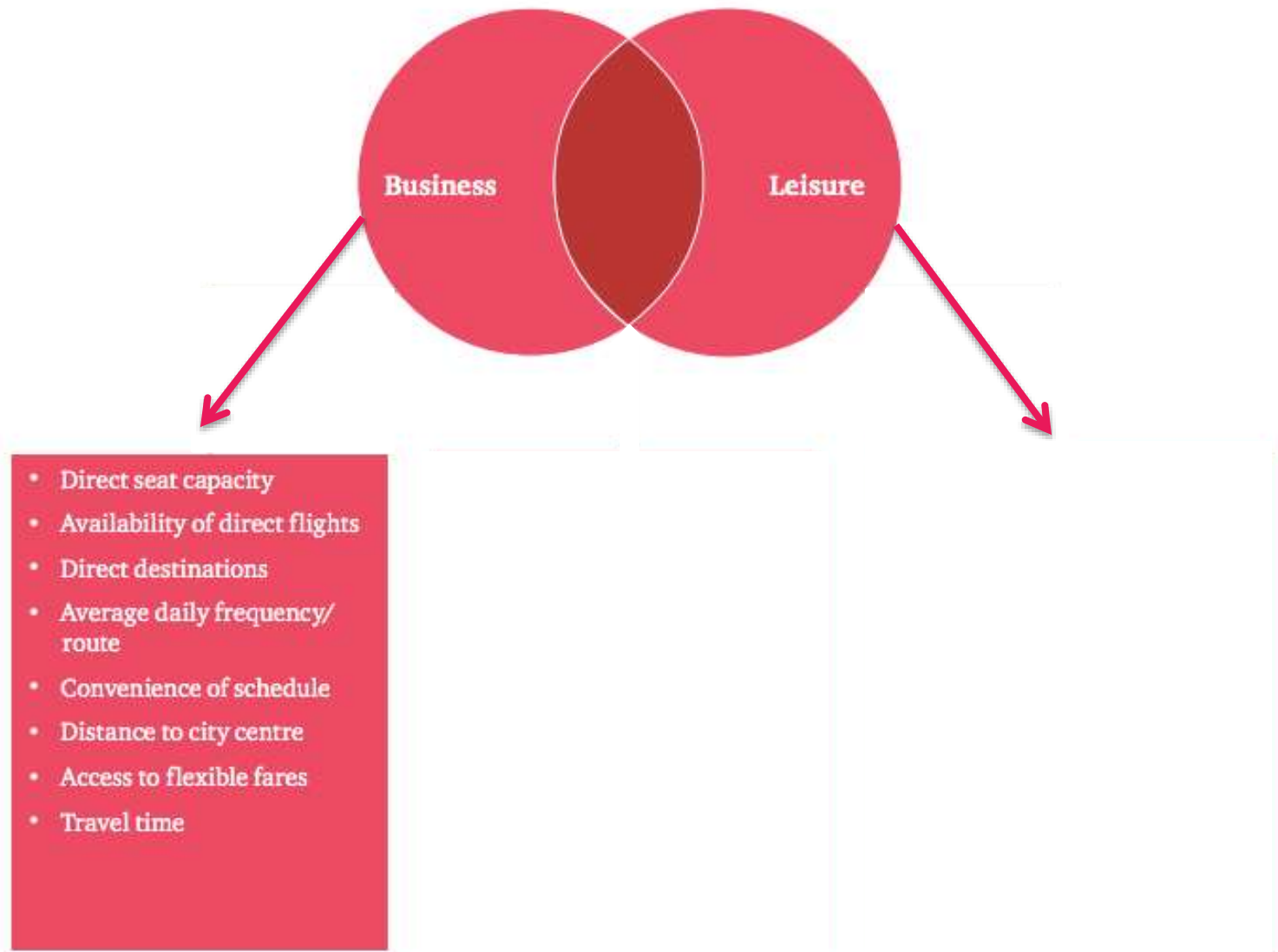
What do 'Foreign' Investors Expect: (Source - Eurocham)

- Dynamic and attractive business environment
- Connectivity: e.g. Air Services, I.T., Local Infrastructure etc.
- Proven market growth forecast

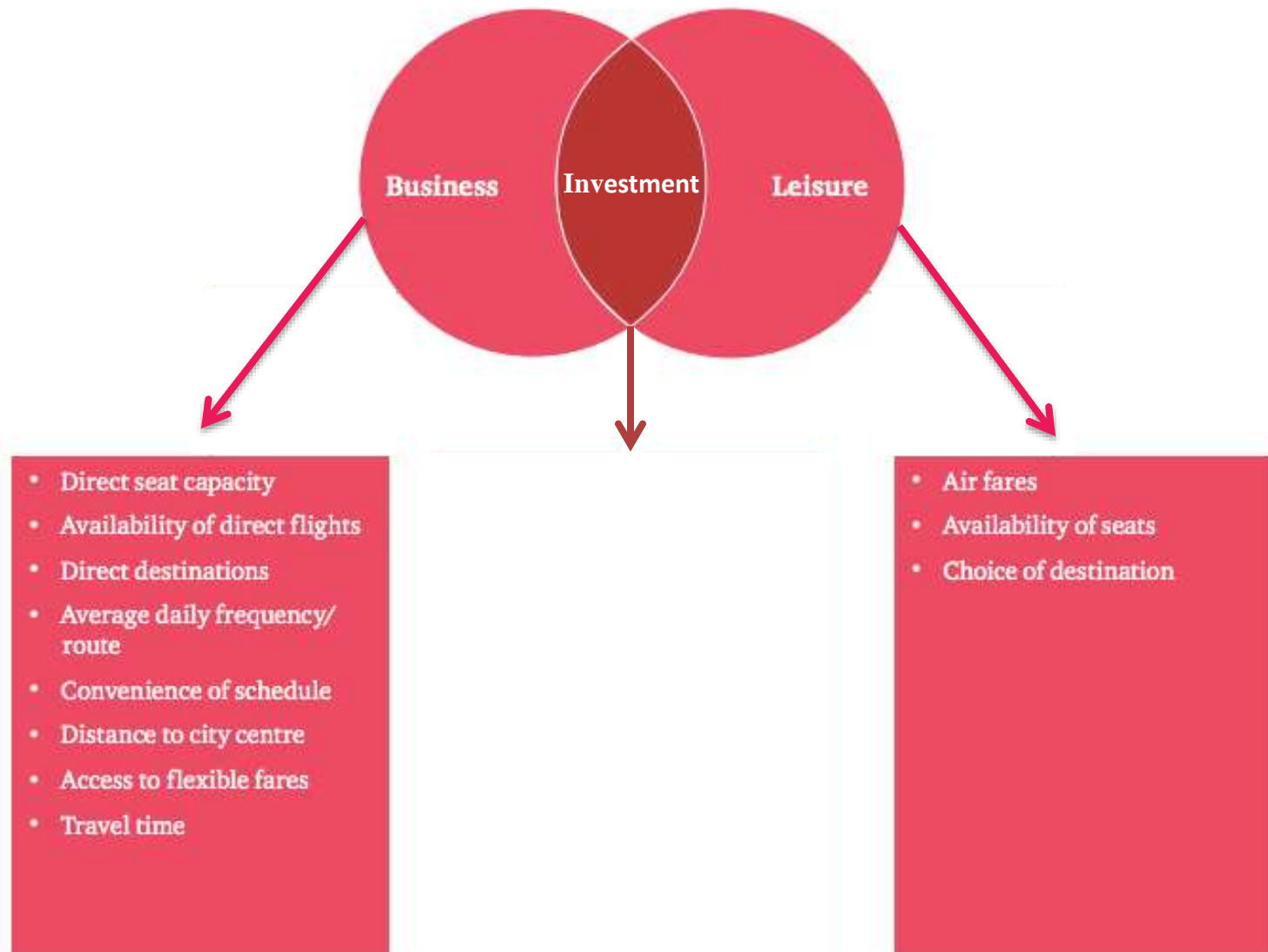
Key Tourism Investment Considerations



Key Tourism Investment Considerations



Key Tourism Investment Considerations



What do 'Foreign' Investors Expect: (Source - Eurocham)

- Dynamic and attractive business environment
- Connectivity: e.g. Air Services, I.T., Local Infrastructure etc.
- Proven market growth forecast
- Favorable investment conditions and incentives
- A level playing field
- Simple transparent and consistent administration procedures
- Reliable legal system, rule of law and enforceability
- Firm commitments and stringent implementations
- Stable Political Landscape

Source: Eurocham



Hotel Investment Matrix

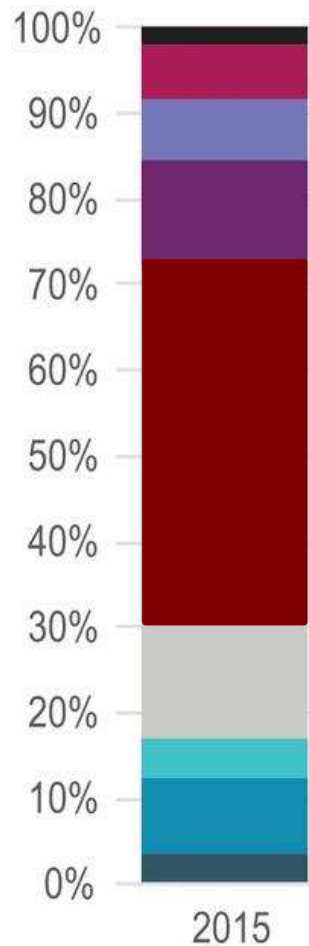
‘Risk Minimisation’

Global Rooms Pipeline @ Jan 2017

Source: STR

Chinese Investment

Hotel Buyer Composition



- Other / Unknown
- Institutional investor
- Sovereign wealth fund
- Real estate investment trust
- Investment fund / private equity
- Hotel owner / operator
- High-net-worth
- Developer / property company
- Corporates

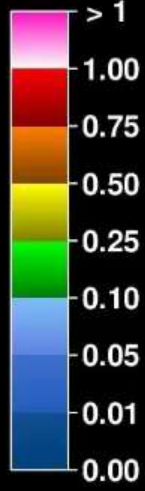
Elapsed
Time:

00 hr
00 min

UTC:

2004
26 Dec
00:58 Z

Tsunami
Wave
Amplitude
(meters)



speed = 180x
or 1 sec = 3 min

2004 Boxing Day Tsunami



Phuket, Thailand



Phuket, Thailand



Sri Lanka



EPA

Sri Lanka



The Recovery Process

- There was urgency to rebuild once the grieving process had ended
- It required new Finance/Investment to make this happen
- A different approach to drive interest was required
- So what did they do...?
 - Land ownership
 - Build

2009 Samoa Tsunami



2009 Samoa Tsunami



The Recovery Process

- There was urgency to rebuild once the grieving process had ended
- It required new investment to make this happen
- A different approach to drive interest was required
- So what did they do...?
 - Land ownership – They leased their land to developers
 - Build – Local Fabric & Cultural Design
 - Brand
 - Employment
 - Self sufficiency
 - Environment

The Recovery Process

Thailand



Sri Lanka



What should the Solomon Islands consider?

- Seek sustainable investments that supports your future aspirations and objectives
- Create an investment brand in concert with your destination marketing



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wonderful
indonesia

Discover

Indonesia Tourism INVESTMENT OPPORTUNITIES



pesona
indonesia



What should the Solomon Islands consider?

- Seek sustainable investments that supports your future aspirations and objectives
- Create an investment brand in concert with your destination marketing
- Be clear about your USP or investment opportunities



JAMPRO
TRADE & INVESTMENT JAMAICA

Health and Wellness Tourism

Opportunities for development of the
health and wellness tourism
sector in Jamaica

What should the Solomon Islands consider?

- Seek sustainable investments that supports your future aspirations and objectives
- Create an investment brand in concert with your destination marketing
- Be clear about your USP or investment opportunities
- Develop a workable strategy with clear goals



IRELAND'S TRADE, TOURISM AND INVESTMENT STRATEGY

EXPORT TRADE COUNCIL UPDATE JANUARY 2018

SPD, DJEI

TRADE AND INVESTMENT TARGETS TO 2020-2025



SOURCE: SPD, DJEI

RECORD LEVELS OF EXPORTS OF GOODS AND
SERVICES BY EI SUPPORTED FIRMS



SOURCE: TD/DAI/ABB

ENTERPRISE 2025

+74,000 EXPORT-RELATED
JOBS 2015-2020
(+42,000 IDA & +32,000 EI)

IDA WINNING STRATEGY

+900 INVESTMENT WINS 2015-2019

IRISH-OWNED EXPORTS

+6-8% PER ANNUM
GROWTH TO
€26bn BY 2020

EXPORT INTENSITY
TO REACH 55-60%
OF SALES FROM 51%

+€6bn IRISH-OWNED
EXPORTS BEYOND UK

GROWING TOURISM TO 2025 STRATEGY

10m OVERSEAS TOURISTS

€5bn OVERSEAS
REVENUE BY 2025

FOODWISE 2025

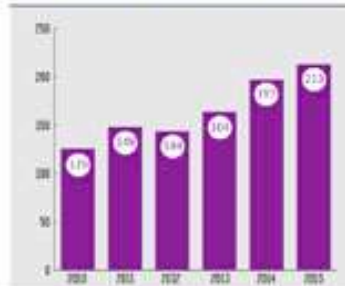
+85% FOOD & BEVERAGE
EXPORTS TO €19bn

IFS 2020

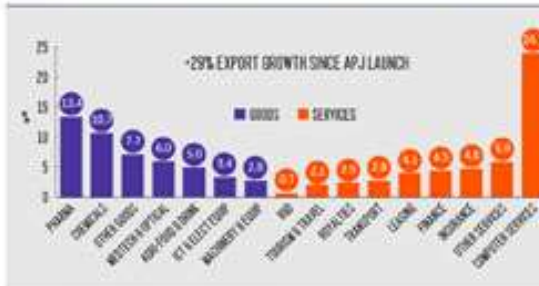
+10,000
NEW JOBS

+8% IDA INVESTMENT WINS 2015

SECTORAL SHARE OF IRISH GOODS & SERVICES EXPORTS, 2015



SOURCE: IDA IRELAND



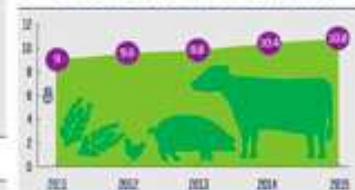
SOURCE: CSO, WFP AND EXTERNAL TRADE Q1-Q3 2015

**+11% OVERSEAS TOURISM VISITORS &
€4.2bn REVENUE IN 2015**



SOURCE: EARTY IRELAND/ TOURISM IRELAND

+3% FOOD & BEVERAGE EXPORTS 2015



SOURCE: CSO/WFP & DA ESTIMATES

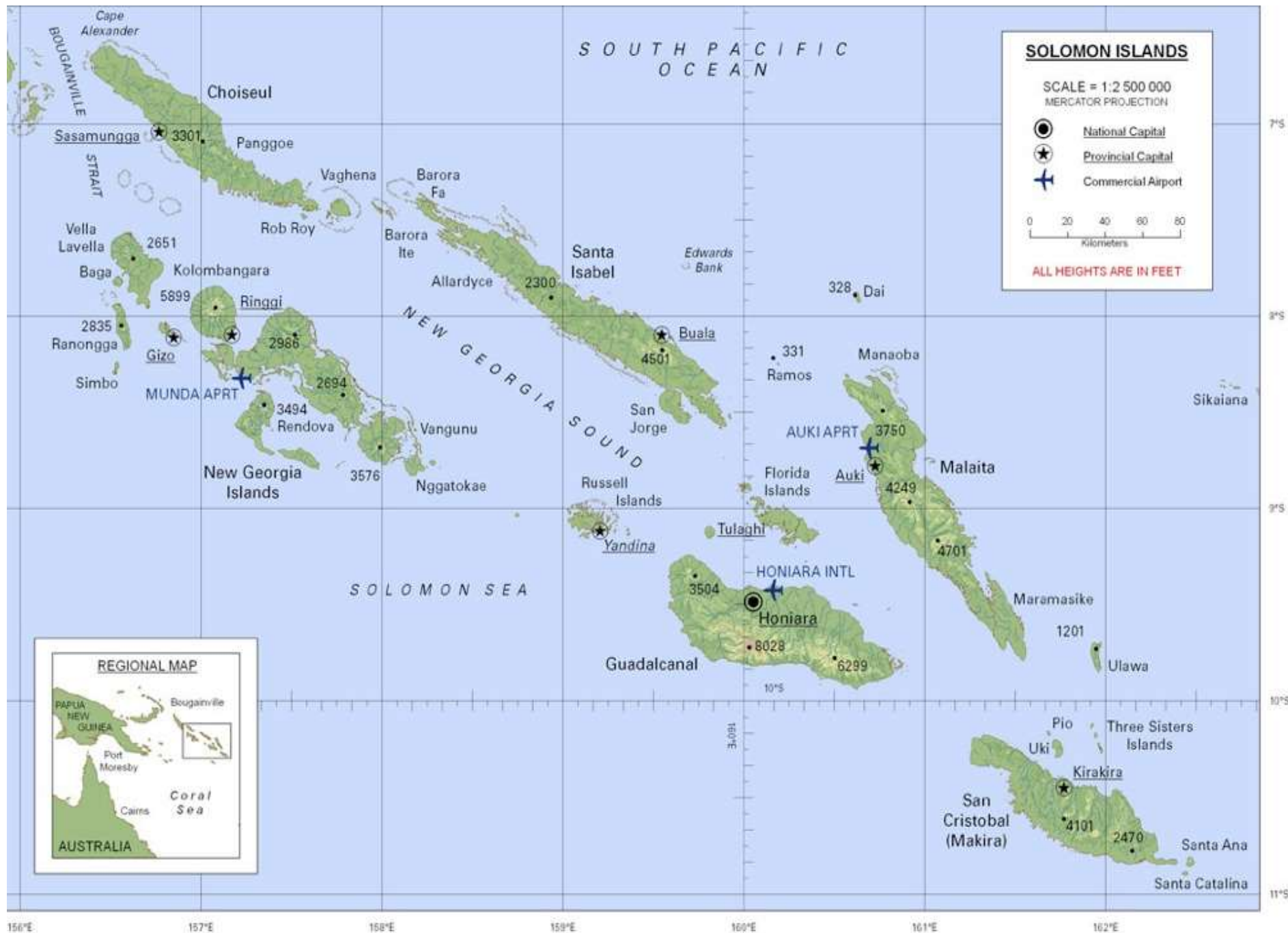
EI EXPORTS BY MARKET, 2014



SOURCE: TD/EI/DAI

What should the Solomon Islands consider?

- Seek sustainable investments that supports your future aspirations and goals
- Create an investment brand in concert with your destination marketing
- Be clear about your USP
- Develop a workable strategy with clear goals
- Play to your strengths







What should the Solomon Islands consider?

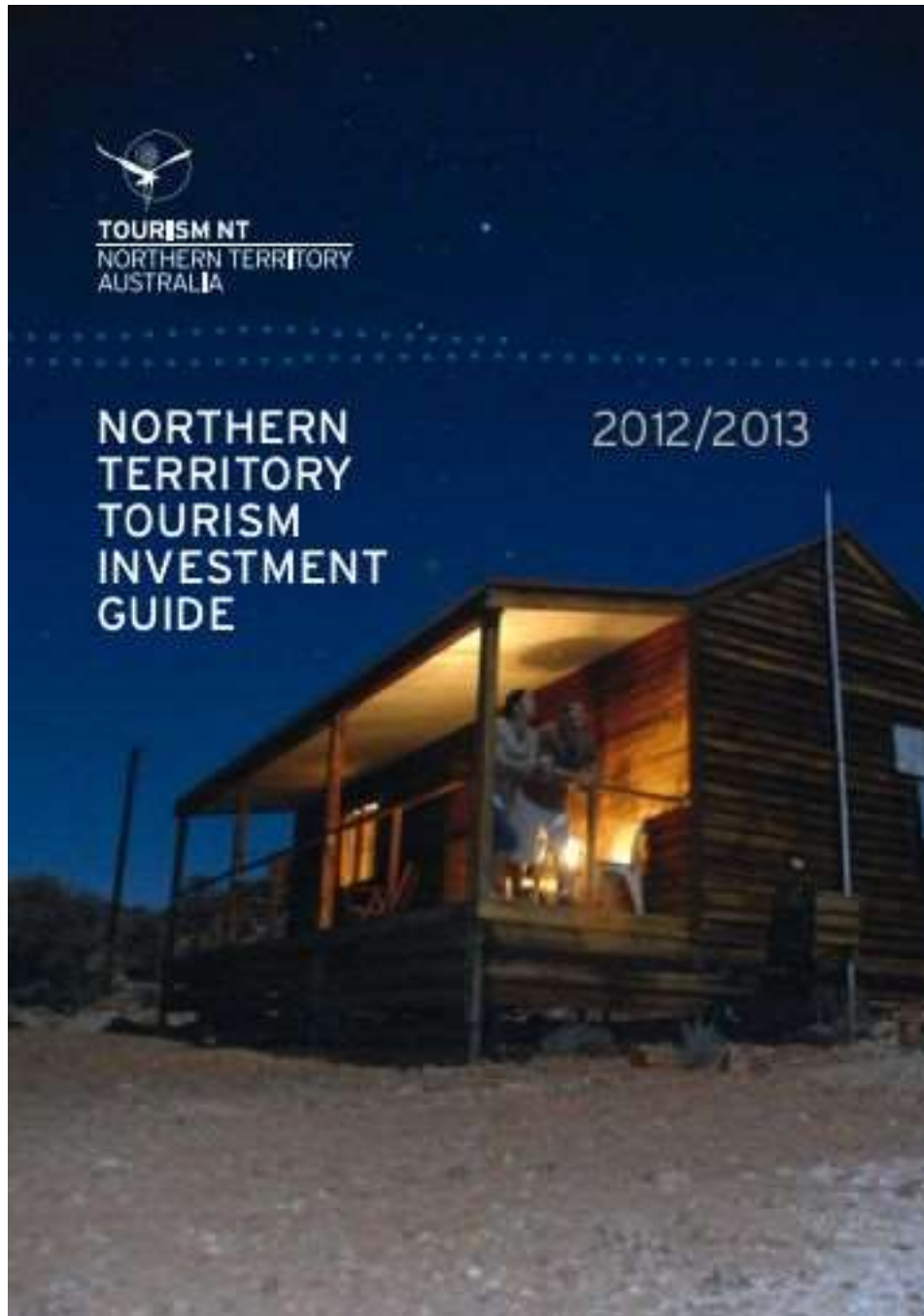
- Seek sustainable investments that supports your future aspirations and objectives
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- Play to your strengths
- Be clear about:
 - who you are
 - what you want
 - What you're offering in return

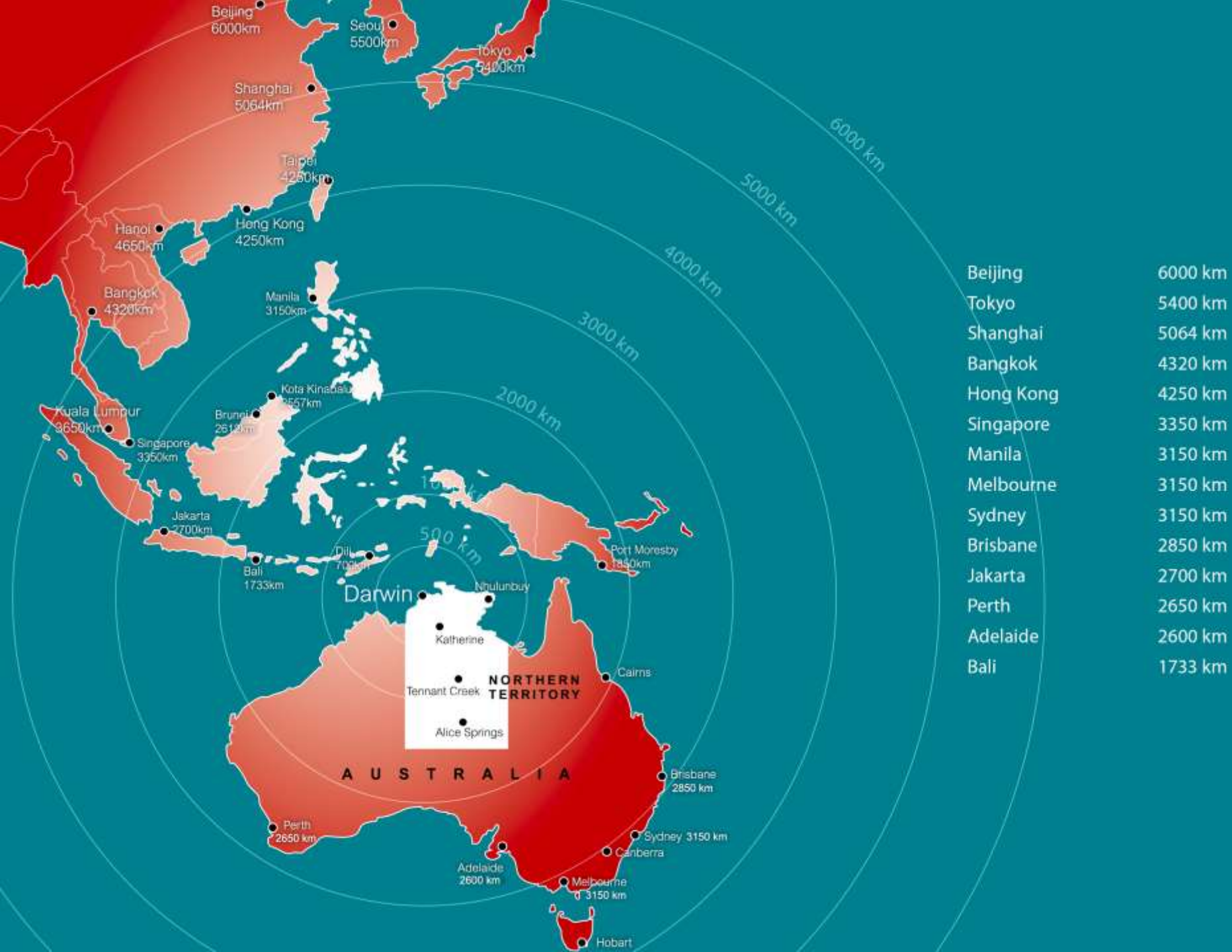


TOURISM NT
NORTHERN TERRITORY
AUSTRALIA

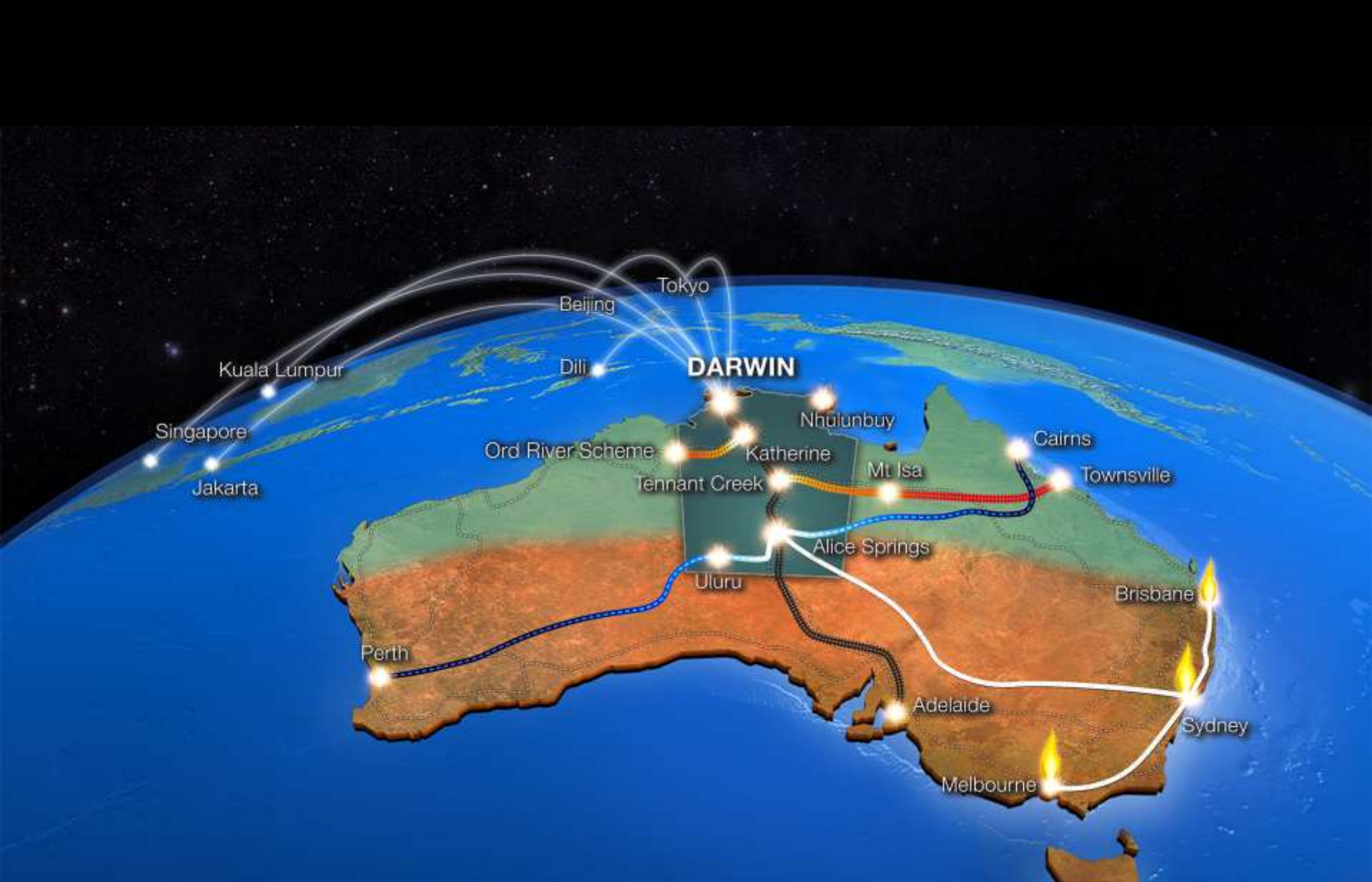
NORTHERN
TERRITORY
TOURISM
INVESTMENT
GUIDE

2012/2013





Beijing	6000 km
Tokyo	5400 km
Shanghai	5064 km
Bangkok	4320 km
Hong Kong	4250 km
Singapore	3350 km
Manila	3150 km
Melbourne	3150 km
Sydney	3150 km
Brisbane	2850 km
Jakarta	2700 km
Perth	2650 km
Adelaide	2600 km
Bali	1733 km



What should the Solomon Islands consider?

- Seek sustainable investments that supports your future aspirations and objectives
- Create an investment brand in concert with your destination marketing
- Be clear about your USP
- Develop a workable strategy with clear goals
- Play to your strengths
- Be clear about:
 - who you are
 - what you want
 - What you're offering in return
- Maybe focus on the needs of the new conscious traveller?

The Conscious Traveller

- Travellers seeking destinations that offer more rewarding experiences e.g.
 - Small / Exclusive
 - Authentic / Immersive
 - Relaxing / Peaceful / Spiritual
- Complete escape from their usual lives

Stop ... Breathe ... Rejuvenate ...
in our overwater, jungle and beach sanctuaries.

Luxury that treads lightly...

The Conscious Traveller

- Travellers seeking destinations that offer more rewarding experiences e.g.
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- Complete escape from their usual lives
- Seek a compelling story they *feel part of* and can share

Other Links

- » [Cambodia's Islands](#)
- » [Founders](#)
- » [Press](#)



Founders

Where there's a will, there's a way.

For Rory and Melita Hunter, their desire to create a sustainable sanctuary of uncompromising luxury has underpinned their entire married life.

In fact, the entity behind Song Saa Private Island was born the day the couple returned to Cambodia from their honeymoon.

Since then Rory and Melita have faced mountainous personal and professional challenges, making it all the more satisfying to watch their vision take shape.

Melita has fought and beaten cancer. The couple has survived the wild ride of the global economic crisis. And they have become first-time parents to a Cambodian boy named Naryth.

And while all that was going on, they've been breaking new ground in Cambodia, becoming the first to develop a private island, and setting new tourism standards that match any in the world.

Melita is the creative mind behind the project, responsible for the architecture, master planning, and interior design.

But she admits she can't lay claim to the name.

The island where guests will stay – and its partner on the other side of a narrow ribbon of turquoise sea – are known to Cambodians as Song Saa, or 'The Sweethearts'. "We didn't come up with the name. There's something pretty special about it, especially when we think about what the islands have meant to us," Melita says. "Perhaps they found us, not the other way round. Who knows, but one thing's for sure, our futures are intrinsically linked."

Having broken new ground in the tourism industry, with Rory at the helm of negotiations that have involved every level of government, the couple is now firmly focused on the future of their paradise found – guarding its natural assets and providing new opportunities for local communities.

With their vision almost complete – the island will open to visitors in late 2011 – Rory and Melita are already looking ahead.

"Song Saa is a very important part of our future. We plan to open another two Song Saa sanctuaries in Cambodia over the next three years, modelled on the same mix of environmental protection and social responsibility alongside world-class luxury," Rory says.

As for Naryth, his focus is firmly on fish. "Look fish! Fish, fish, fish Papa!" he says on his trips to the islands.

Ah the simple things ...





The New Conscious Traveller

- More travellers are seeking destinations that offer rewarding experiences e.g.
 - Small / Exclusive
 - Authentic / Immersive
 - Relaxing / Peaceful / Spiritual
- Complete escape from their usual lives
- Seek a compelling story they *feel part of* and can share
- They expect to pay more for this type of experience

Rates

All prices are per person per night and exclusive of taxes

Room Types	High Season	Low Season
Jungle Villa – one bedroom	US\$798	US\$668
Jungle Villa – two bedroom	US\$898	US\$698
Overwater Villa – one bedroom	US\$918	US\$708
Overwater Villa – two bedroom	US\$898	US\$698
Beach Villa – one bedroom	US\$918	US\$708
Royal Villa – two bedrooms	US\$1288	US\$1088

High season is 1st November to 31st May

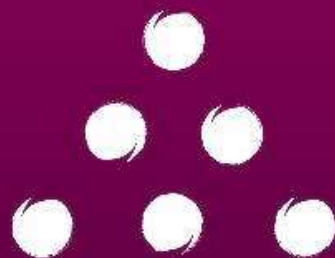
Low Season is 1st June to 31st October

All rates are subject to 10% Government VAT, 2% Accommodation tax (room only) and 10% service charge (room and board only)

The New Conscious Traveller

- More travellers are seeking destinations that offer rewarding experiences e.g.
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- Seek a compelling story they *feel part of* and can share
- They expect to pay more for this type of experience
- Increasing investment that caters for this growing breed of conscious traveller

Discreet Luxury...



SIX SENSES

HOTELS RESORTS SPAS



BANYAN TREE

HOTELS & RESORTS

The New Conscious Traveller

- More travellers are seeking destinations that offer rewarding experiences e.g.
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 - Relaxing / Peaceful / Spiritual
- Complete escape from their usual lives
- Seek a compelling story they *feel part of* and can share
- They expect to pay more for this type of experience
- Increasing investment in new experiences and brands that cater for this growing breed of conscious traveller
- Destinations are increasingly targeting this opportunity

Things to consider

- Booming economies of Asia and other emerging markets
- Rapid expansion in affordable air services and connectivity
- Changing the consumer mind-set & tourism investment landscape
- Create an investment strategy with defined goals and achievable outcomes in line with investment trends
- Be clear about who you are, what you want and what you're offering in return
- Develop an investment brand linked to tourism
- Publish and 'Investment Guide' that outlines all of this
-Make it simple
-Don't rush it!!

Thank You

Chris Flynn
PATA
Regional Director - Pacific