

行政院及所屬各機關出國報告
(出國類別：其他)

出席亞太旅行協會二〇〇三年十月新加坡
理事會報告書

服務機關：交通部觀光局

出國人員：職稱-局長

姓名-蘇成田

出國地區：新加坡

出國期間：92年10月3日至5日

報告日期：93年2月24日

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系統識別號：C09204656

行政院及所屬各機關出國報告提要

頁數：43 頁 含附件：是否

出國報告名稱：參加 PATA 十月份二〇〇三年理事會報告書

出國計畫主辦機關：交通部觀光局

出國人員姓名/服務機關/單位/職稱/電話

蘇成田/交通部觀光局/局長/23491600

出國類別：1.考察2.進修3.研究4.實習5.其他：參加會議

出國期間：民國 92 年 10 月 3 日至民國 92 年 10 月 5 日

出國地區：新加坡

報告日期：民國 93 年 2 月 24 日

分類號/目：

關鍵詞：

內容摘要：本次 PATA 理事會議側重於針對 2002 年底印尼巴厘島爆炸案對於亞太地區觀光產業之影響及如何重建秩序等進行討論。PATA 秘書長 Peter de Jong 報告針對確認之 2003 年 4 月份理事會會議紀錄所應採取之行動及就「恢復進展」(Recovery in Progress) 進行演講；PATA 執行經理 Michael Yates 並就鳳凰計畫 (Phoenix Project) 進行專題報告。PATA 各相關部門並就各政府類會員之重要觀光統計數據更新暨就財務收支進行報告及採認。

參加 PATA 十月份二〇〇三年理事會 報告書目次

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壹、前言

亞太旅行協會（Pacific Asia Travel Association, PATA）係於 1951 年在夏威夷創立的觀光組織。經過五〇年的發展，目前已成為全球擁有 17,000 多個會員，及 81 個分會（會員總數 17,000 多人）的最大旅遊組織。每年在不同會員國家舉行一次年會，理事會原每四個月開會一次，開會地點亦分別在不同地點舉行。但為節省會員時間及開銷，自 2003 年起改為二次，即第一次改於 4 月份年會期間時合併舉行，另一次則於年度旅遊交易會（PATA Travel Mart）時合併辦理。

PATA 之會員分三大類，即政府/目的地類、航運類及旅行與旅館等業者類，成員包括政府觀光組織、航空公司、郵輪、旅行業、旅館業、旅遊雜誌、媒體、旅遊顧問公司等。我國除觀光局外計有華航、長榮及業者共 23 個機構加入總會會員。另外亦成立分會，會員數 48 個。

PATA 理事共有 76 位，我國會員擔任常務理事者有觀光局蘇成田局長、華航魏總經理幸雄、長榮林總經理寶水等三位；另福樂旅行社張奉文總經理為候補理事。

本次理事會在 10 月 3 日至 5 日於新加坡之 Grand

Copthorne Waterfront Hotel 舉行，與會理事及代表計有 68 位，為近年來少有高出席率之理事會，另外尚有觀察員、各理事國之陪同人員、終生會員等約 60 人參加會議，造成此次會議之少見盛況。我國與會者除本局蘇局長成田外，尚有中華航空公司客運處劉乃珩處長代表魏總經理幸雄，長榮公司新加坡分公司林經理代表總經理林寶水，福樂旅行社總經理張奉文等共四人與會。謹將與會情形報告如后。

貳、與會行程

10 月 2 日（四）下午 搭華航 2：30 往新加坡

10 月 3 日（五）上午 參加提名委員會議及參觀 PATA 交易會

下午 拜會新加坡旅遊局林局長洽談中星
觀光會議及雙方觀光合作推廣事
宜；視察本局駐新加坡辦事處。

晚上 新加坡旅遊局歡迎晚會。

10 月 4 日（六）全日 參加 PATA 理事會

中午 代表本局在大上海餐廳宴請全體與
會人員，藉此傳達本局爭取 2007PATA
年會之信息。

晚上 外交部駐新加坡代表處烏代表元彥

先生設宴款待。

10月5日(日)上午 參加 PATA 理事會

中午 結束會議，下午搭華航返國。

參、會議經過

10月3日主要議程集中於 PATA 各次級委員會(財務、行銷、教育、永續觀光、提名、榮譽、研究暨執行委員會)各自召開之會議，當晚由新加坡觀光局舉行歡迎晚宴。

10月4日之會議由菲律賓觀光部部長兼 PATA 理事會主席 Richard J. Gordon 主持，渠報告內容側重於 2002 年底印尼巴厘島爆炸案後對於亞太地區觀光產業之影響及如何就重建秩序等進行討論；大會對於本局贊助本次理事會本(4)日午宴暨華航公司為本次理事會贊助航空公司之一(另包含印度航空、國泰航空、日本航空)，特別表示感謝。

本日會議極大部分時間用於有關 2003 年 4 月份印尼巴厘島 PATA 理事會會議記錄之宣讀與確認。本日會議中，各分類會員並進行各該會員之會議；上午並召開本次會議第一場理事會會議，下午則召開第二場理事會會議。PATA 秘書長 Peter de Jong 並報告針對確認之 2003 年 4 月份印尼巴厘島

PATA 理事會會議紀錄所應採取之行動及就「恢復進展」

(Recovery in Progress) 進行演講，執行經理 Michael Yates 並就鳳凰計畫 (Phoenix Project) 進行專題報告；另外，PATA 各相關部門並就各政府類會員之重要觀光統計數據更新暨就財務收支進行報告及採認。

另外，2004 年第 53 屆 PATA 年會主辦國韓國，就 2004 年 4 月份召開之濟州島年會籌辦情形進行報告；本次會議並就 2003 年 10 月 1 日至 3 日舉行之 PATA 旅遊交易會召開會後檢討會。秘書長 Peter de Jong 並報告次年度即將召開之理事會場次日期及地點，分別為 4 月份之韓國濟州島年會暨理事會及 9 月份之泰國 PATA 旅遊交易會暨理事會。

10 月 5 日之會議係進行濟州島年會 PATA 總部之 PAC2004 計畫委員會會議，本日上午並召開第三場理事會會議並於本日下午進行會後相關參訪活動後結束此次大會所有行程。

肆、感想與建議

一、感想

(一) PATA 是目前最活躍的國際觀光組織，向為各會員國

及業界會員所重視，協會之秘書處亦一直致力推動亞太地區之觀光發展。總部於 2000 年遷至曼谷，並於 2002 年新任秘書長 Peter de Jong 上任後，協會之作為另有一番興革，包括理事會次數由一年三次改為二次，PATA 旅遊交易會收回自辦並每年在不同國家舉行（原委由英國 Reed 公司承辦，並原訂自 2001 年至 2006 年期間，固定在新加坡舉行，惟舉辦三年後，即因出席狀況欠佳，故 2004 年 9 月將改至泰國舉辦，2005 年將於馬來西亞舉辦），辦理鳳凰計畫（Phoenix Project）復甦 SARS 後亞太地區之觀光，及推動延宕數年之 See you in Pacific Asia 計畫等，新任秘書長積極推動亞太觀光業務之作為獲得理事會之肯定。

- (二) 新任秘書長 Peter de Jong 上任後，PATA 秘書處對處理我國用 Taiwan 名稱參與 PATA 之觀光宣傳計畫，已有相當正面之作法，目前在鳳凰計畫、See you in Pacific Asia 計畫中均已同意我國使用 Taiwan 之名稱。對多年來，我國一直爭取將會員名稱 Chinese Taipei 與旅遊地名稱 Taiwan 分開考量的努力總算有了一些成果。

(三) PATA 2004 年會將於 2004 年 4 月 18-22 日在韓國濟州島之國際會展中心舉行，會議之主題是”Tourism is Everybody’s Business”，韓國主辦單位企圖吸引 1,500 個外國與會者，另外加入國內 504 人參加，湊成與 2004 年相同之與會人數。本局已在此次理事會中應允籌委會，贊助帽子做為禮物(帽子將以”Taiwan – Touch your heart”之 logo 做帽徽)，以藉機宣傳台灣觀光年，並藉此爭取理事會員支持台灣主辦 2007 PATA 年會。

二、建議

舉凡辦理大型國際會議展，各主辦國莫不動員大量人力、物力，務期順利圓滿，需相關各單位協調配合無間始換來之不易成果。活動期間，上至機票優惠提供，旅館的折扣，pre-tour/post-tour 安排，及交通運輸、各項展示空間、時間等之安排，環環相扣在在需要高度智慧，中間不可有誤，不僅考驗主辦單位之決心與能力，其間更能測出主辦單位能否有效運用資源高度整合，以呈現最佳狀態，贏得口碑，俾為日後類似活動之爭取奠定良好契機。事實上爭取到活動之舉辦本身就是商機，不僅帶動周邊相關產業連動，增加就業人

口，更因吸引國外參展者製造創匯條件。

以此次會議主辦單位為例，新加坡向為亞洲最具國際競爭力之國家，國家整體競爭力僅次於美國，高居世界第二位。而且向為國際人士來亞洲舉辦國際會議之首選地區，主要原因不外乎行政效率高、人民運用英文能力高居亞洲第一、市容整潔極具吸引力等。

發展會展產業（MICE, Meetings, Incentives, Conventions, Exhibitions）是「觀光客倍增計畫」的重要子計畫之一，主要目的係著眼於吸引參加國際會議及展覽之「商務型」旅客。依據統計數據顯示，該類型觀光客所創造的觀光消費是一般觀光客的四倍。由於會展產業，可帶動飯店、旅館、餐飲、交通、娛樂等周邊產業之發展，潛在商機誘人。從全球主要展覽服務業發達國家或地區（德國、香港、新加坡等）及在此領域新興後進國家（如韓國、馬來西亞、中國大陸等）均積極發展 MICE 之情形，可見世界各國莫不致力於以將發展 MICE 定為策略產業之一。

目前國內有關會議展覽業務部分分屬經濟部商業司（負責國內展覽業務推廣）與本局，惟另依據行政院「挑戰 2008—國家發展重點計畫」第五項計畫發展會展產業計畫，本局

主要業務係負責第 5.5.2「研擬獎勵機制」（目前本局除已訂定「交通部觀光局推動國際會議暨獎勵旅遊來台舉辦獎助要點」）及 5.5.3「專業人才養成制度」（已分別於北、中、南、東部各地辦理 PCO 訓練講習，目前正持續辦理中）。

至於業者最為關切事項應為如何向會展主辦單位提供競標爭取主辦權乙節，由於官方機構缺乏民營機構之機動與彈性應變能力，故國外若干城市均設有專責爭取國際會議之民營機構「會議局」；在國內，目前除台北國際會議中心（TICC）外，另亦有「中華國際會議展覽協會」等機構，未來觀光局可藉由出面召開協調會，邀請航空、旅館業者與主辦單位與會，協調相關業者提供最優惠價格，以利業者爭取國際會議。且施政重點應以扶持此等半官方或民間機構以更積極而有效率地方式，爭取國際會議來台舉辦。

事實上，為配合觀光客倍增計劃，發展會議產業已列為本局重要目標。惟面對快速變遷之時代，絕不能固步自封，實亟需有突破之觀念及作法，始能面對變局，此方面，有賴各相關部會突破本位主義攜手合作外，亦可藉由加強與國際會展組織之聯絡，如 ICCA 一請其繼續派員來台指導，與國際同軌，此實為當務之急。

再以 PATA 總部所在地—泰國為例，自 2000 年以來，即舉辦了 3,200 多場次國際活動，累積豐富的國際會展經驗及成果；根據國際會議協會（ICCA）調查顯示，泰國為亞太地區 MICE 排名第 5 位，全球第 23 位，其國際設施及規劃水準已受國際肯定，也使其成為亞太地區重要商展旅遊據點，對提昇國家形象及經貿實力具有正面效益。事實上根據 2002 年 ICCA 統計，全球國際會議次數計 2,974 次，以國別言，我國以 23 次列第 33 名，以城市言，台北則以 18 次列第 40 名。而在全球 25 個大會議城市中，台北名列第 20 名，已成為亞洲第三大會議城市。現舉凡大型國際會議展覽，若考慮在亞洲地區舉辦時，總是優先考慮在新加坡、泰國等地舉辦，此種「先入為主」觀念，對泰國而言已佔到極大便宜。此點值得我國「見賢思齊」，迎頭趕上。

附件一、會議議程

PATA BOARD OF DIRECTORS MEETING
October 3-5, 2003
Grand Copthorne Waterfront Hotel
Singapore

Meeting Programme

All meetings will take place at the meeting rooms on the 4th level of the hotel, unless otherwise stated. Secretariat room is at Toucan Room.

Friday, October 3, 2003

		<u>Meeting room</u>	<u>Staff</u>
0830-1730	Registration and Information Desk	Ballroom 1 Foyer	
0800-0900	Finance Sub-Committee	Kingfisher	RP
0900-1200	Marketing Committee Meeting	Oriole	JF/KS
0900-1030	Education Committee Meeting	Canary 1	CF/MB
0930-1030	Nominating Committee	Kingfisher	RP
1030-1200	Sustainable Tourism Committee Meeting	Canary 1	CF/MB
1030-1200	Foundation Trustees Meeting	Kingfisher	RP
1200-1330	Lunch Hosted by: MasterCard International	Ballroom 2	
1400-1700	Honours Committee Meeting	Oriole	KC
1400-1700	Research Committee Meeting	Canary 1	JK
1400-1700	Executive Committee Meeting	Kingfisher	RP
1900-	Welcome Reception & Dinner Hosted by: Singapore Tourism Board	Esplanade - Theatres on the Bay	

Saturday, October 4, 2003

0800-1730	Registration and Information Desk	Ballroom 1 Foyer	
0900-1030	Board of Directors Meeting-Session I	Ballroom 1	RP
1100-1300	Government Meeting	Oriole	JF/KS
1100-1300	Carrier Meeting	Ballroom 2	KC
1100-1300	Industry Council Meeting	Canary 1 & 2	SY

<u>Saturday, October 4, 2003</u>		<u>Meeting room</u>	<u>Staff</u>
1300-1400	PTM Advisory Committee Meeting (Luncheon Meeting)	Grand Shanghai (level 1)	SL
1300-1400	Lunch Hosted by: Tourism Bureau, Chinese Taipei	Grand Shanghai (level 1)	
1430-1800	Board of Directors Meeting-Session II	Ballroom 1	RP
1900 -	Gala Dinner Hosted by: Singapore Tourism Board and the Grand Copthorne Waterfront Hotel	Promenade	

Sunday, October 5, 2003

0830-1200	Registration and Information Desk	Ballroom 1 Foyer	
0800-0900	PAC2004 Programme Committee Meeting	Oriole	SL
0900-1030	Joint Management / Committee & Category Chairs Meeting	Oriole	RP
1030-1200	Board of Directors Meeting-Session III	Ballroom 1	RP
1200-1330	Lunch (at leisure)		
1400-	Post meeting tours (c/o : Singapore Tourism Board)		

Staff abbreviation :

CF	Chris Flynn
JF	Jim Ferguson
JK	John Koldowski
KC	Sim Kok Chwee
KS	Ken Scott
MB	Marion Buttler
RP	Ratana Poopitakchatkaew
SL	Sheila Leong
SY	Stephen Yong

Note : Dress for meeting is business or business casual (your choice)
Dress for evening functions is business attire or evening dress, unless otherwise noted.

/rp
Last update : September 5, 2003

BOARD OF DIRECTORS MEETING
October 4-5, 2003
Grand Copthorne Waterfront Hotel
Singapore

AGENDA

Saturday October 4, 2003

0900-1030 : Board of Directors Meeting – Session I		<u>Page</u>
1. Welcome and Call to Order – Mr. Richard J. Gordon, Chairman		
1.1 Introduction		1 - 2
1.2 Adoption of Agenda		3 - 4
2. Minutes		
2.1 Adoption of the Minutes – Bali Board Meeting		5 - 46
Mr. Richard J. Gordon, Chairman		
2.2 Actions on the Minutes		(on site)
Mr. Peter de Jong, President & CEO		
3. "Recovery in Progress"		
Opening Remarks		
Mr. Peter de Jong, President & CEO		
4. Presentation of Project Phoenix		
Mr. Michael Yates, Executive Director – Project Phoenix		
5. "Travel Indicators - Pacific Asia : An update"		47 - 64
Dr. Yuwa Hedrick Wong, Economic Advisor, MasterCard International		
Mr. John Koldowski, M.D.-Strategic Intelligence Centre		
1430-1800 : Board of Directors Meeting – Session II		
6. Management		
6.1 Executive Committee Report – Mr. Richard J. Gordon, Chairman		
6.2 "Progress in Recovery"		65 - 71
Mr. Peter de Jong, President & CEO		
6.3 Changes to the Board – Mr. Peter de Jong, President & CEO		72
7. Financial Statements – Mr. Brian Deeson, Secretary/Treasurer		(on site)
7.1 Financial Performance Summary		
7.2 Draft Audited Financial Statements, FY2002/2003		
7.3 FY Jul-Dec 2003 Financial Update		
7.4 FY Jan-Dec 2004 Budget		
8. Presentation / Reports :		
8.1 PATA Annual Conference 2004		
Mr. Jae-Geun Choi, Executive Vice President		
Korea National Tourism Organisation		
8.2 PATA Travel Mart – Post Mart Report		
Mr. Kevin Murphy, Chairman-PATA Travel Mart Advisory Committee		

9. PATA Foundation 2003/2004 Grant Presentations
Mr. David Paulon, Chairman, Board of Trustees
10. Future Board Meetings – Mr. Peter de Jong, President & CEO 73
11. Any Other Business

Sunday, October 5, 2003

1030-1200 : Board of Directors Meeting – Session III

12. Reports (Chairs / Staff)
- 12.1 Category Reports
- Government / Destinations (Tony Thirlwell / JF,KS)
 - Carrier (Bjorn Collin / KC)
 - Industry Council (Brian Deeson / SY)
- 12.2 Committee Reports
- Sustainable Tourism Committee (Dawn Drew / CF,MB)
 - Marketing Committee (Luzi Matzig / JF,KS)
 - Research Committee (Tim Robinson / JK)
 - Education Committee (Basant Mishra / CF,MB)
 - Honours Committee (Tunku Iskandar / KC)
 - 2004 Conference Programme Committee (Fan Chee Chye / SL)
 - Nominating Committee (Bjorn Collin / RP)

Attachment : Calendar of Events

Staff abbreviation :

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JF Jim Ferguson
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KC Sim Kok Chwee
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RP Ratana Poopitakchatkaew
SL Sheila Leong
SY Stephen Yong

/rp
September 5, 2003

附件二、出席代表

Dr. Tat-Hon Chan
Chief International Operations
Singapore Tourism Board
Singapore

Mr. Stephen Chang
Managing Director
Fuller Express Corporation
Taipei, Chinese Taipei

Mr. Philip Chao
Regional Director
Tourism Bureau, Chinese Taipei
Singapore

Ms. Yaqi Chen
Sales Manager
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附件三、旅遊指標

TRAVEL INDICATORS

**A Presentation to
the PATA Board of Directors
October 4, 2003
Singapore**

Prepared by:

Dr. Yuwa Hedrick Wong

Economic Advisor, MasterCard International

Mr. John Koldowski

Managing Director-Strategic Intelligence Centre,
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September, 2003

TRAVEL INDICATORS

A Presentation to the PATA Board of Director's Meeting
3rd – 5th October 2003
Singapore

At the time of preparation of this presentation, data for twenty-three destinations within the Pacific Asia region, covering the period January to June had been received and analysed by PATA's Strategic Intelligence Centre.

The results are quite sobering.

At the aggregate level, total international arrivals to our region (for the 23 destinations covered), numbered almost 80 million as at the end of June.

This represents a decline of around 14% which in turn translates into a loss of some 13 million visits over the same period in 2002.

Nearly all destinations covered are experiencing contractions in their arrivals base. Those few showing positive results for the period are mostly doing so as they struggle back to strong levels experienced some years earlier and the positive indicators are based on relatively weak comparative years.

At least they are still positive.

Quite clearly, the issue we face now is one of battling for a share of the travelling market that still exists. And the key to that will be in understanding those markets and the particular nuances they exhibit.

The background notes provided here (and updated at the Board meeting) will hopefully provide a useful start point for that process. The presentation proper on Saturday 4th October will provide much more detail.

International Visitor Arrivals
Run: 08 Sept 2003

Destination	Period	Year		% Change
		2002	2003	
The Americas				
Canada (Total)	Jan-Jun	8,020,000	6,866,600	-14.4
Canada (Excl USA)	Jan-Jun	1,561,000	1,347,100	-13.7
USA (Total)	Jan-May	13,542,798	12,428,249	-8.2
USA (Overseas only)	Jan-May	7,180,646	6,382,241	-11.1
South Asia				
Bangladesh	Jan-Mar	57,761	57,740	0.0
India	Jan-Jun	1,125,048	1,255,503	11.6
Maldives	Jan-Jul	264,673	312,502	18.1
Nepal (air only)	Jan-Jun	100,616	109,446	8.8
Sri Lanka	Jan-Jun	173,136	216,144	24.8
Northeast Asia				
China (PRC)	Jan-Jun	46,827,480	41,322,832	-11.8
China (PRC) (Foreign only)	Jan-Jun	6,143,716	4,621,323	-24.8
Chinese Taipei	Jan-Mar	670,720	755,863	12.7
Hong Kong SAR (Total)	Jan-Jul	8,871,796	7,239,487	-18.4
Hong Kong SAR (Excl China, Macau)	Jan-Jul	5,124,452	3,089,520	-39.7
Japan	Jan-Mar	1,226,703	1,302,340	6.2
Korea (ROK)	Jan-Jul	2,951,175	2,453,001	-16.9
Macau SAR	Jan-Jun	5,476,829	5,068,660	-7.5
Southeast Asia				
Cambodia (Air)	Jan-Jun	240,700	205,308	-14.7
Indonesia	Jan-Jun	2,511,631	2,067,125	-17.7
Bali	Jan-Jul	798,687	495,236	-38.0
Lao (PDR)	Jan-Mar	215,502	183,660	-14.8
Malaysia	Jan-Jun	6,632,359	4,594,835	-30.7
Myanmar (Air)	Jan-Jun	105,315	98,335	-6.6
Philippines	Jan-Jul	1,144,230	1,027,688	-10.2
Singapore	Jan-Jun	3,677,282	2,510,048	-31.7
Thailand	Jan-May	4,583,577	3,872,056	-15.5
Vietnam	Jan-Jun	1,298,000	1,067,500	-17.8
The Pacific				
Australia	Jan-Jul	2,710,836	2,524,000	-6.9
New Zealand	Jan-Jly	1,148,885	1,147,610	-0.1
Cook Islands	Jan-May	25,930	30,260	16.7
Fiji	Jan-Apr	117,000	116,366	-0.5
Guam	Jan-Jul	622,209	452,271	-27.3
New Caledonia	Jan-Jun	47,563	44,273	-6.9
Niue	Jan-Mar	178	334	87.6
Northern Marianas	Jan-Jun	229,671	218,160	-5.0
Palau	Jan-Jul	33,168	32,689	-1.4
Papua New Guinea	Jan-Feb	8,010	9,033	12.8
Samoa	Jan-Apr	25,596	25,968	1.5
Vanuatu	Jan-Jul	27,291	25,869	-5.2
Hawaii (Air)	Jan-Jul	3,716,188	3,668,066	-1.3

Resident Departures**Run: 08 Sept 2003**

Departure from:	Period	Year		% Change
		2002	2003	
The Americas				
Canada (Total)	Jan-Jun	8,561,000	8,493,500	-0.8
Canada (Excl USA)	Jan-Jun	2,553,000	2,721,900	6.6
USA (Total)	Jan-May	12,233,670	11,262,530	-7.9
USA (Excl to Canada & Mexico)	Jan-May	9,367,965	8,677,718	-7.4
South Asia				
Bangladesh	Jan-Mar	298,704	357,772	19.8
Maldives	Jan-Jul	24,272	23,225	-4.3
Northeast Asia				
Chinese Taipei	Jan-Mar	1,777,711	1,630,753	-8.3
Hong Kong SAR (Total)	Jan-Jul	37,262,958	33,110,785	-11.1
Hong Kong SAR (Excl China, Macau)	Jan-Jul	2,803,740	2,394,600	-14.6
Japan	Jan-Mar	3,753,396	3,837,737	2.2
Korea (ROK)	Jan-Jul	4,076,842	3,796,118	-6.9
Southeast Asia				
Singapore	Jan-Jun	2,152,236	1,781,593	-17.2
Thailand	Jan-May	971,940	799,990	-17.7
The Pacific				
Australia	Jan-Jun	1,622,662	1,454,917	-10.3
New Zealand	Jan-Jul	687,543	693,230	0.8
Cook Islands	Jan-Feb	1,417	1,563	10.3
Fiji	Jan-Mar	22,416	27,030	20.6
New Caledonia	Jan-Jul	6,641	6,955	4.7
Vanuatu	Jan-Jun	2,805	3,019	7.6

附件四、簡報

MasterCard
International
Financial

The Asymmetric Logic of Value Creation & The New Travel Mindset

Dr. Yuwa Hedrick-Wong
Economic Advisor, Asia/Pacific Region
October 2003

The Asymmetric Logic of Value Creation

Inside
looking out :
producer's
perspective

→ ←

Disjunction

Outside
looking in :
customer's
perspective

- better quality → higher prices <== better quality + lower prices
- faster delivery → more complicated logistics <== faster delivery + simpler procedures
- sophisticated functions → complicated design <== sophisticated functions + ease of use

2

The Asymmetric Logic of Value Creation Schumpeterian "Creative Destruction"

3

New Dynamics in Asia/Pacific for the Travel Industry

4

The Asymmetric Logic of Value Creation in the Travel Industry in Asia/Pacific

Retirement
Community

comfortable and safe environment
+
new adventures and stimuli

go away from home
+
close to home

5

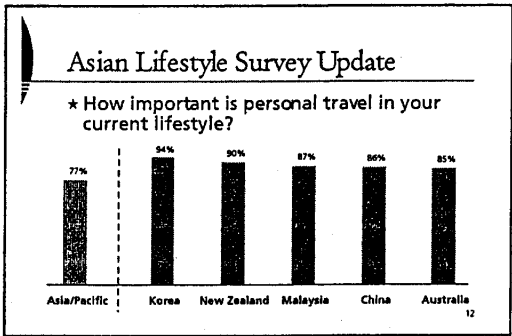
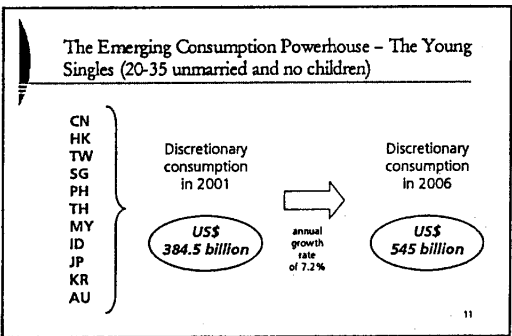
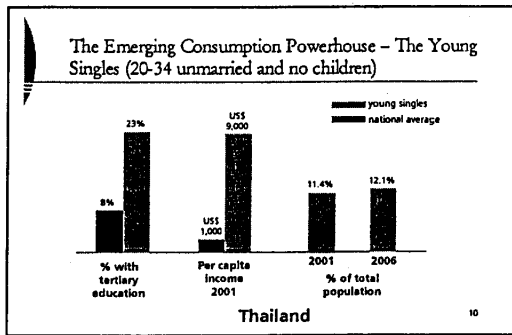
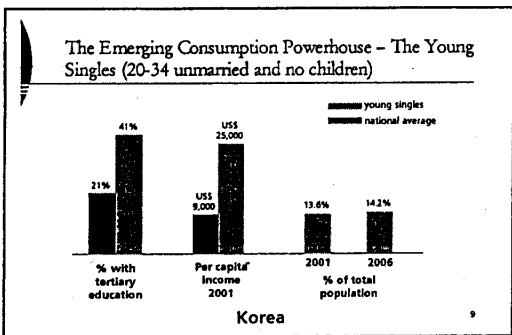
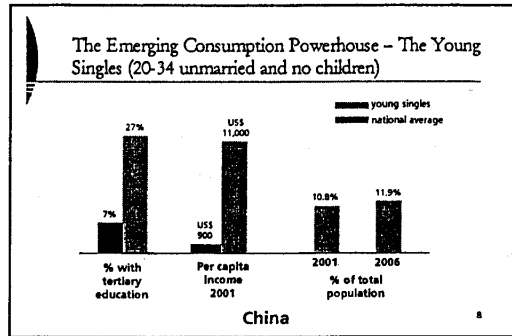
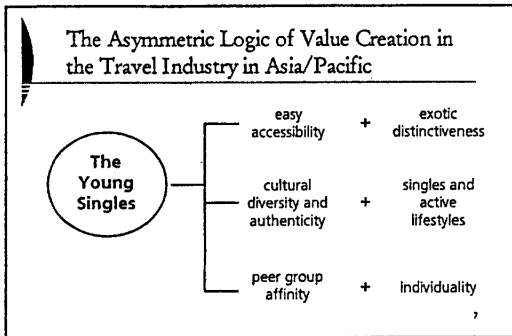
The Asymmetric Logic of Value Creation in the Travel Industry in Asia/Pacific

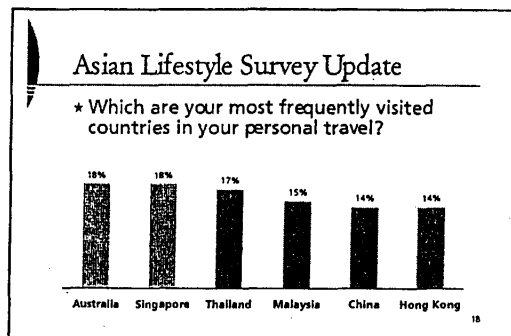
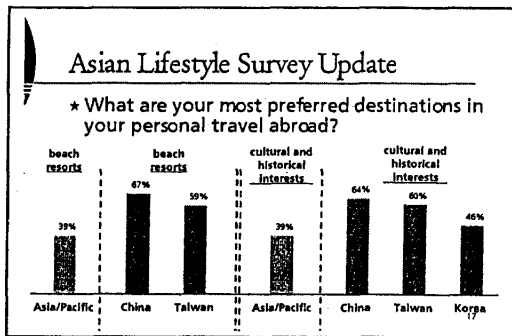
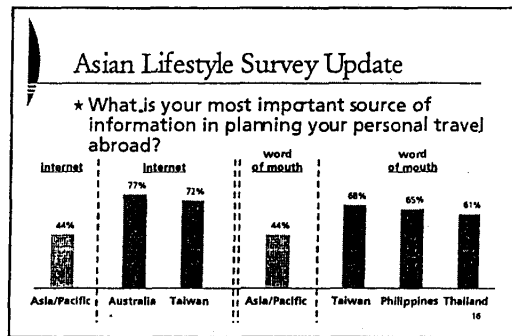
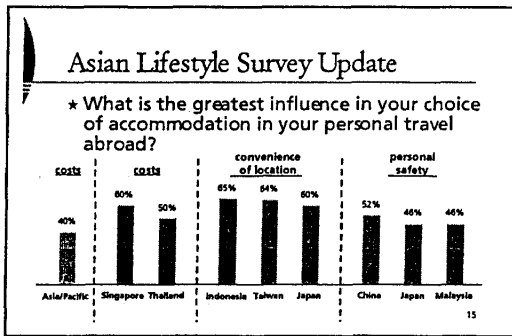
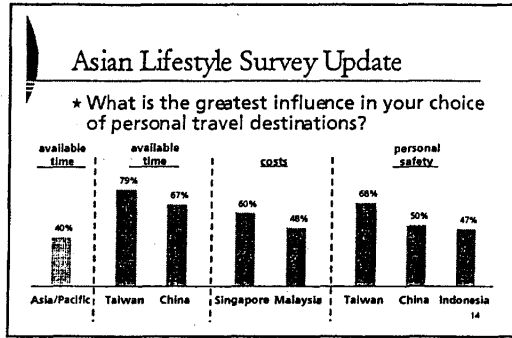
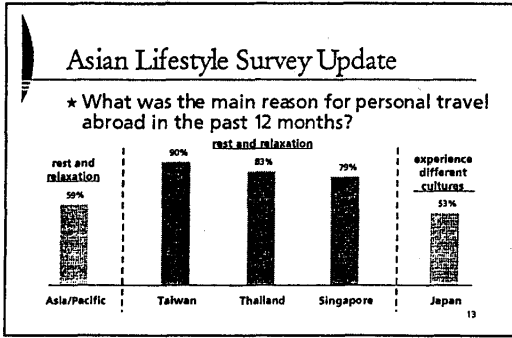
New
Mass
Markets

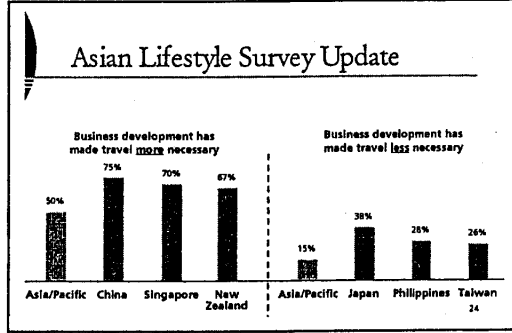
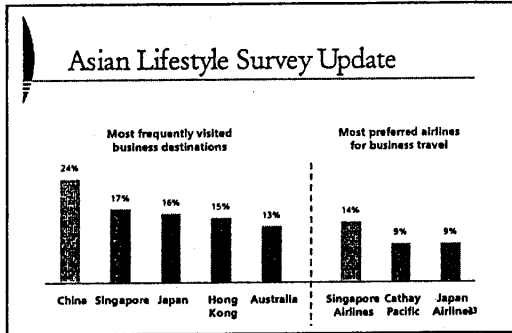
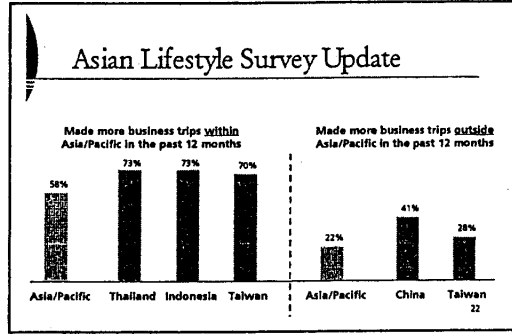
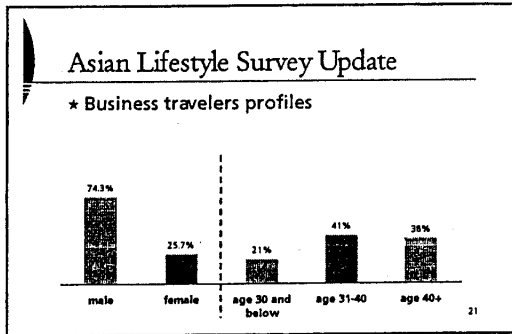
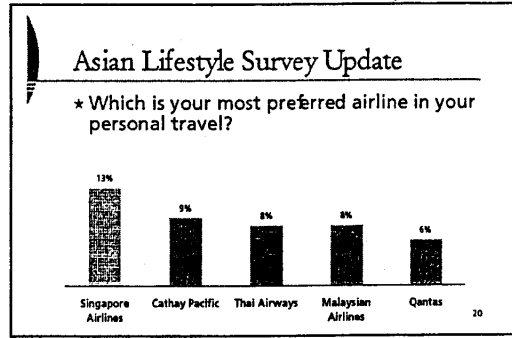
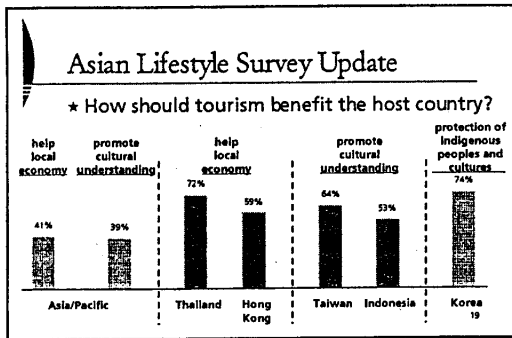
perceived luxuries
+
low prices

new experiences
+
minimum culture shock

6







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The MasterIndex of Travel By MasterCard and PATA

Partnership in Knowledge Leadership

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Background on MasterIndex

- MasterIndex survey is now in its commemorative 10th year
- Longest running and most comprehensive regional survey tracking consumer confidence
- Has evolved into regional benchmark used by the business community
- Conducted in 13 A/P markets
- Introduced in June 1993
- Implemented twice a year

Survey Structure

- Random survey covering some 6,000 respondents in each survey
- Responses represent respondents' outlook over the next six months
- A score of 50 is neutral, 100 is most optimistic and 0 is most pessimistic
- Data collection via personal and phone interviews
- Respondents need to either have a payments card or is qualified for one

MasterIndex Dimensions

Five dimensions measured:

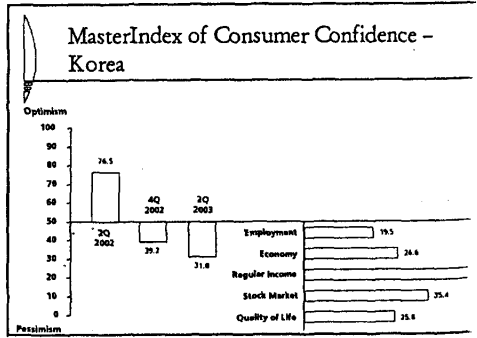
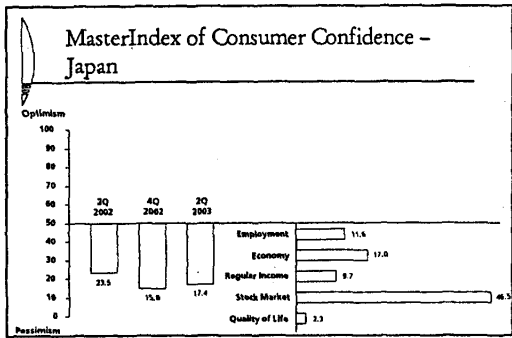
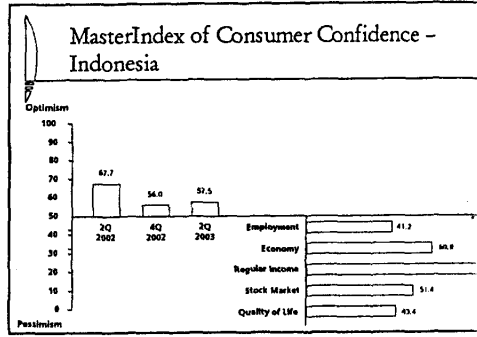
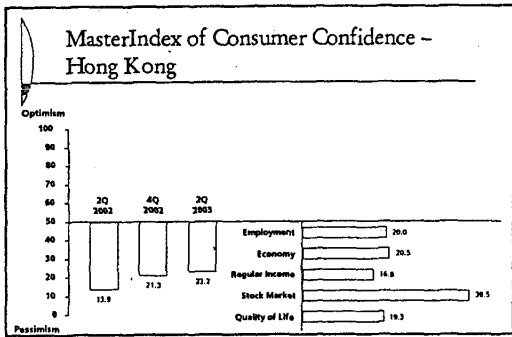
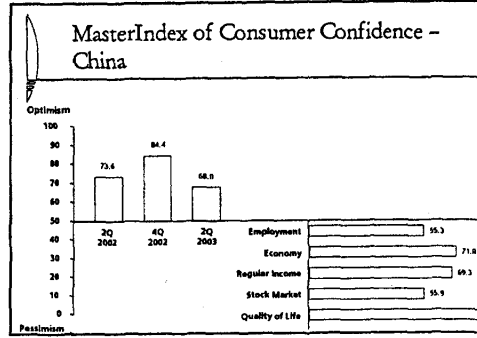
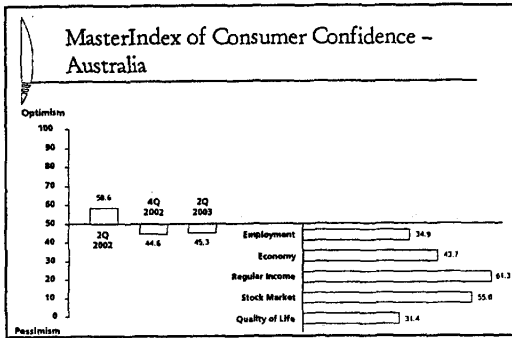
- Employment
- Economy
- Regular Income
- Stock Market
- Quality of Life

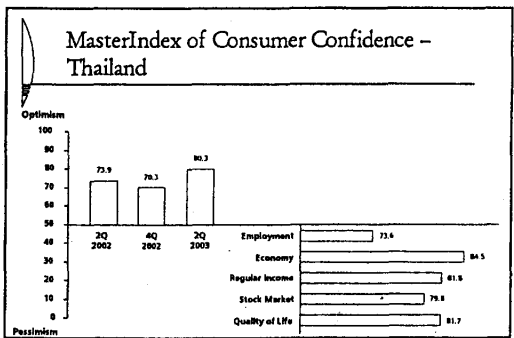
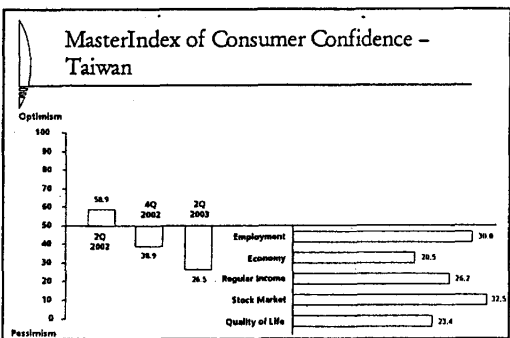
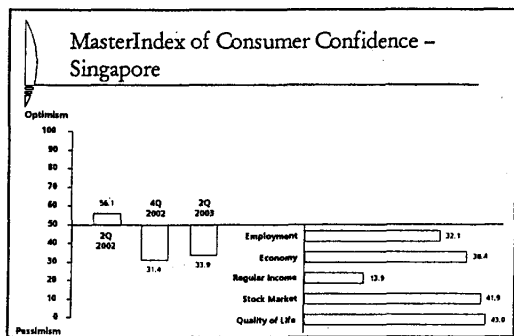
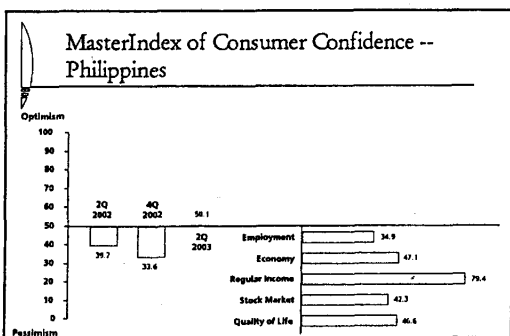
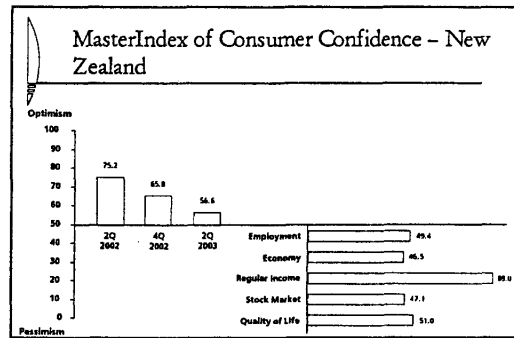
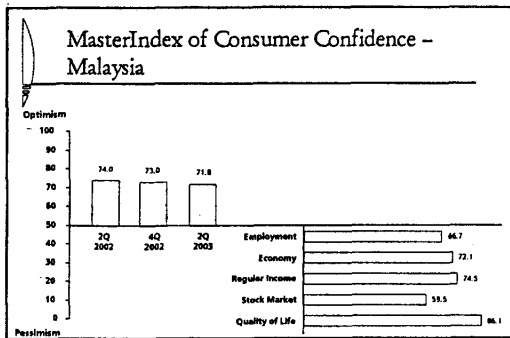
MasterIndex Milestones

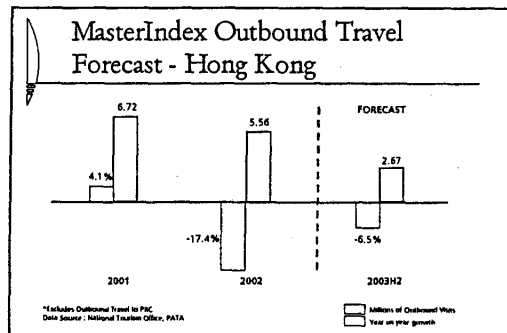
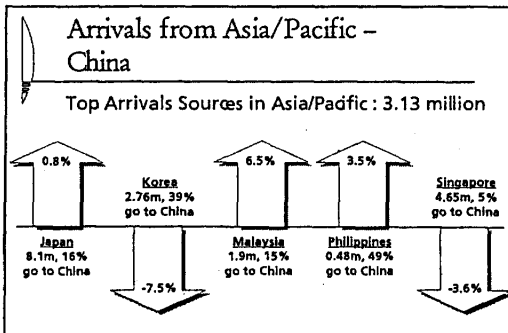
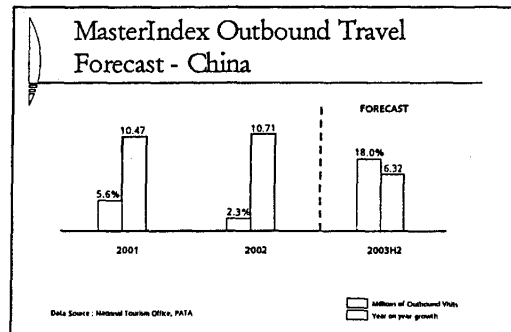
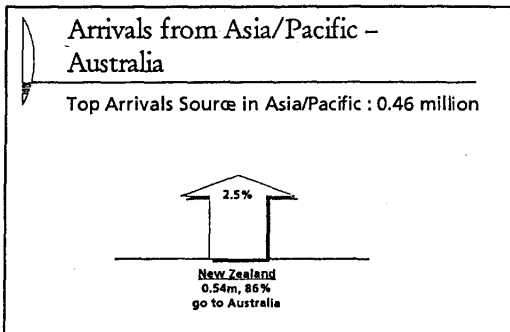
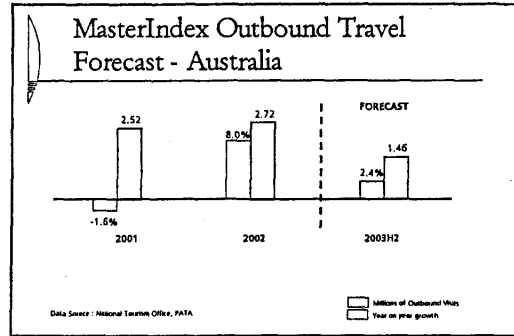
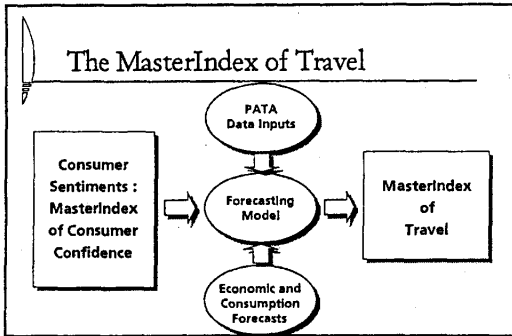
- June 1995 MasterIndex showed drop in Hong Kong scores, resulting from pre-hand over jitters
- June 1997 MasterIndex revealed a decline in consumer confidence - one month before devaluation of Thai baht in July 1997, which triggered regional crisis
- Dec 1999 MasterIndex reached highest ever levels in many markets since survey began, preceding the Asian economies' robust recovery in year 2000
- Dec 2001 MasterIndex showed a record low index of 5.4 for Hong Kong's employment. This was reflected in Hong Kong's unemployment rate in 2002 - a record high of 8%

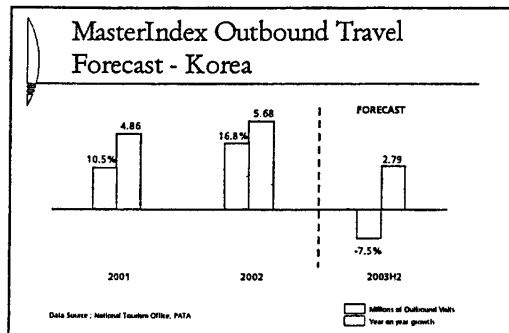
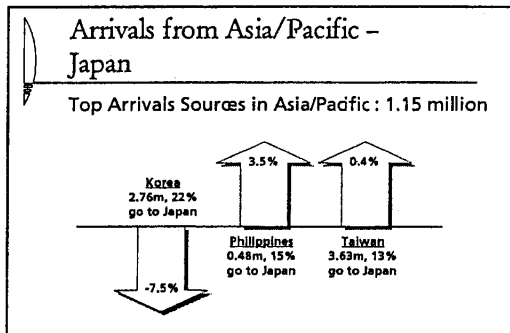
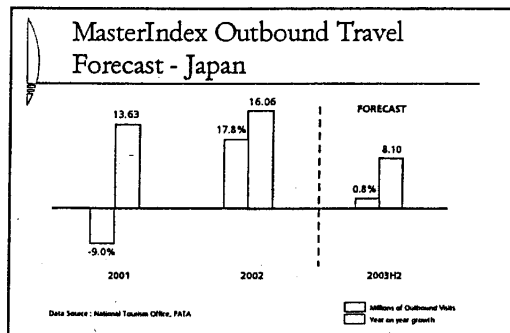
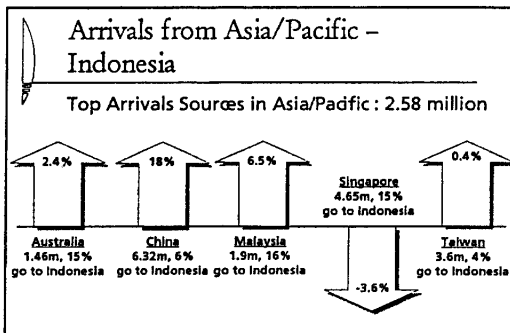
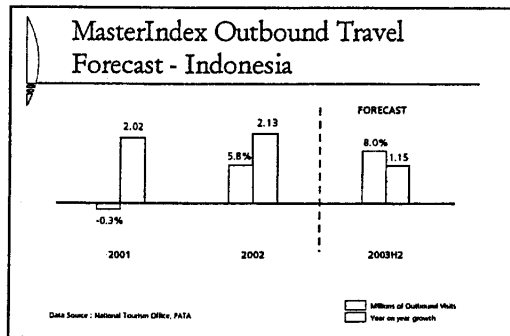
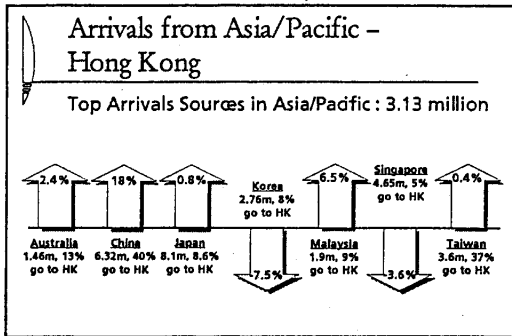
Highlights of Current MasterIndex

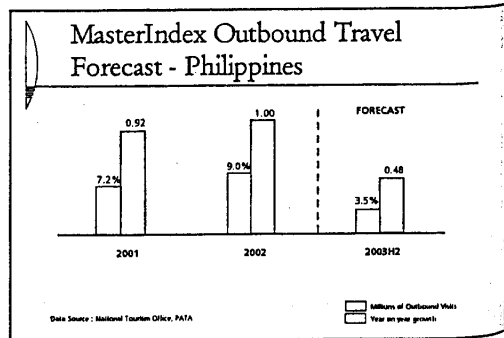
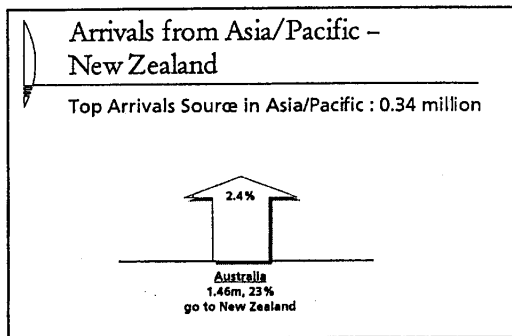
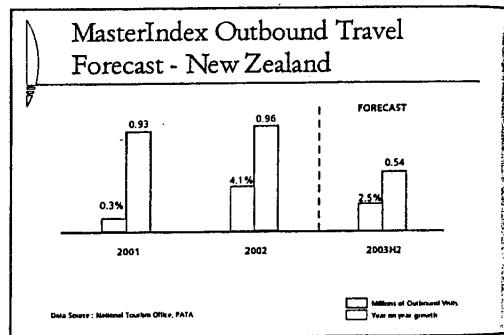
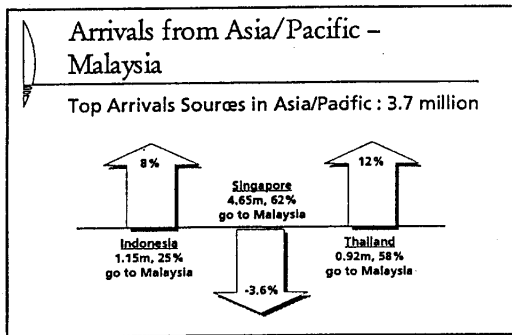
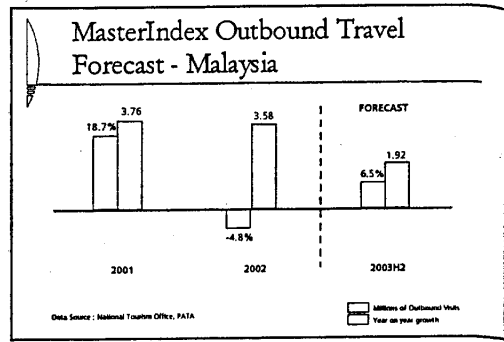
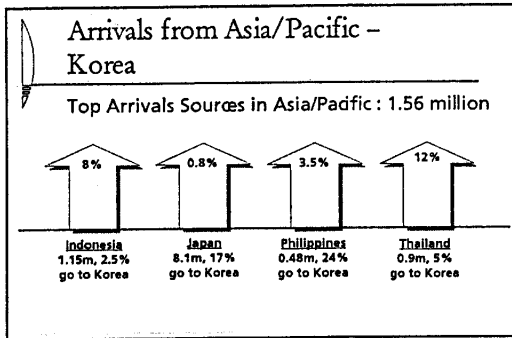
- Thailand takes the first place in A/P as the most optimistic market for the first time
- Malaysia is the second most optimistic market in A/P
- China continues to be consistently optimistic
- Indonesia and New Zealand remain optimistic
- Hong Kong and Singapore have become less pessimistic
- Philippines moved from pessimism to neutral
- Japan remains the most pessimistic market in A/P
- Korea and Taiwan have become slightly more pessimistic





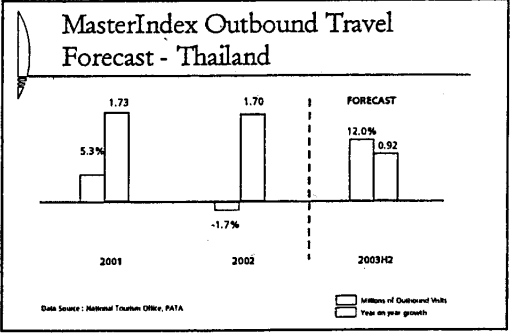
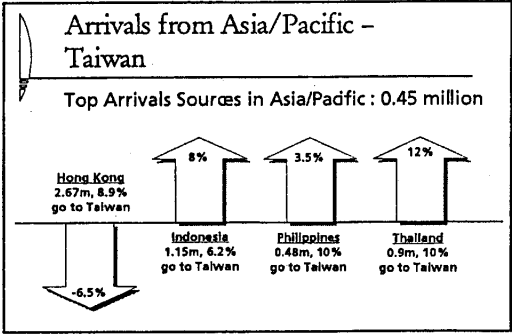
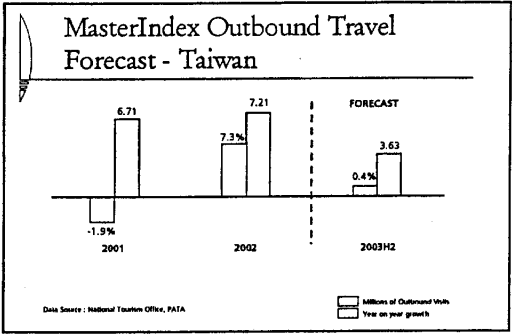
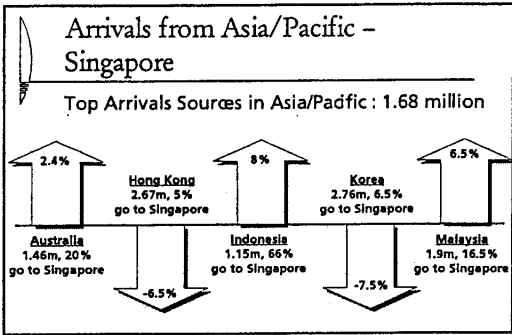
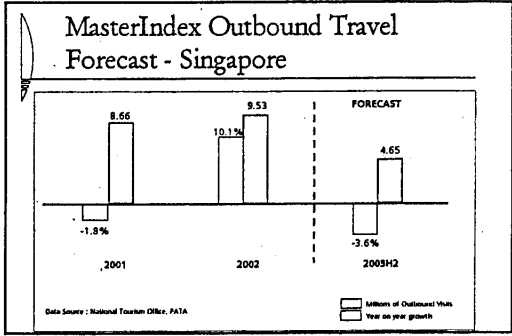


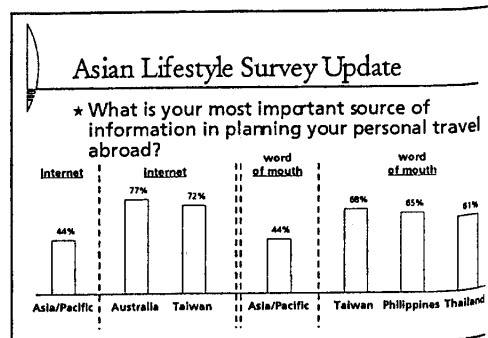
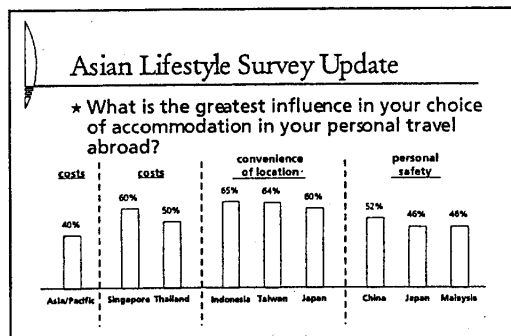
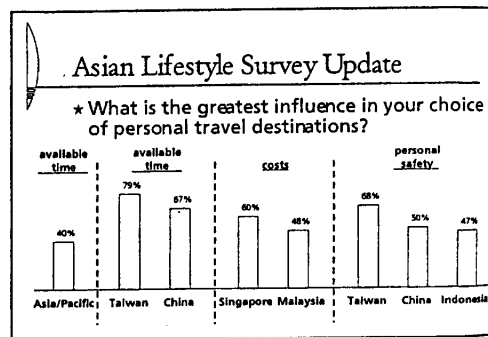
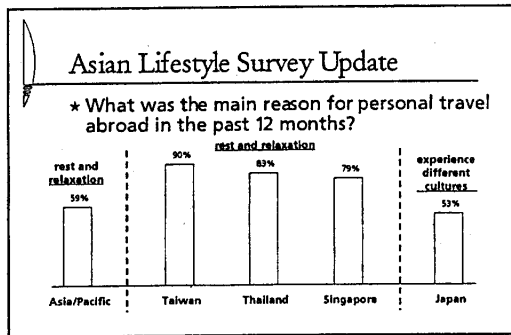
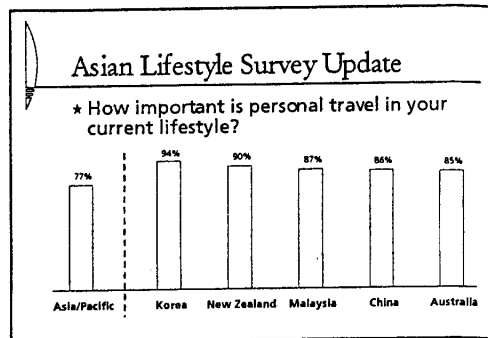
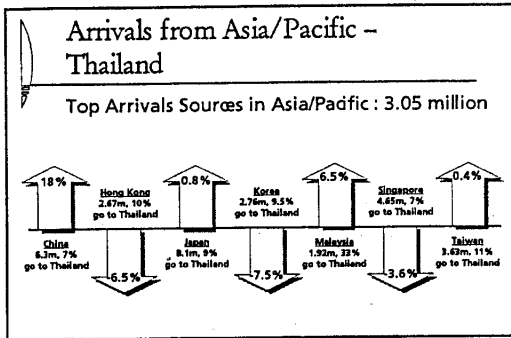


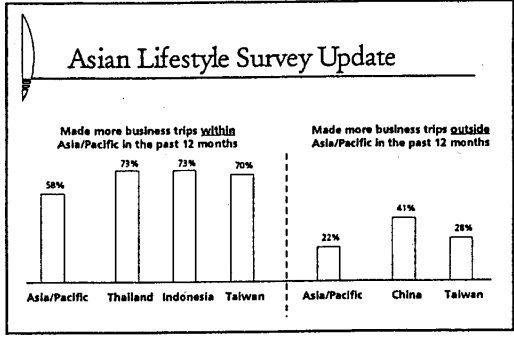
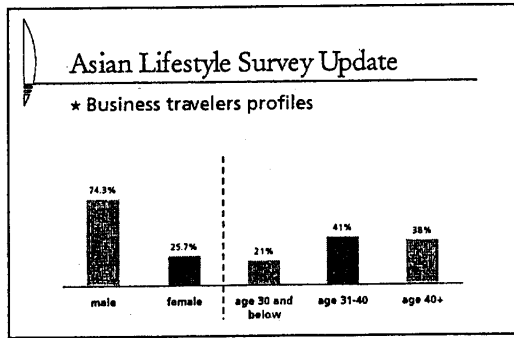
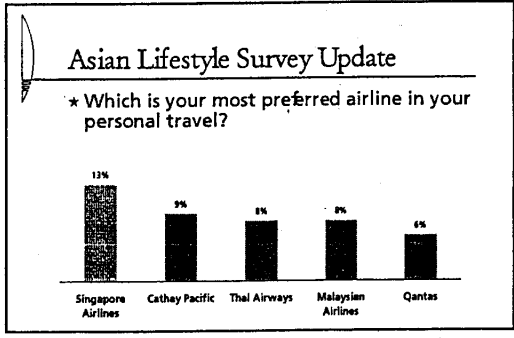
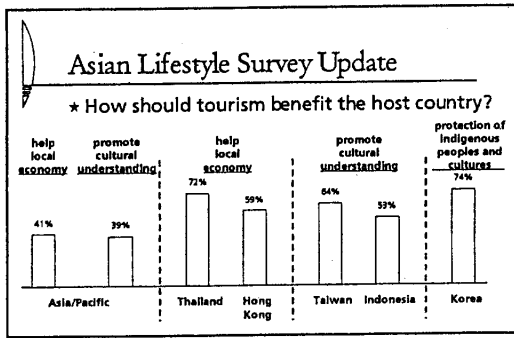
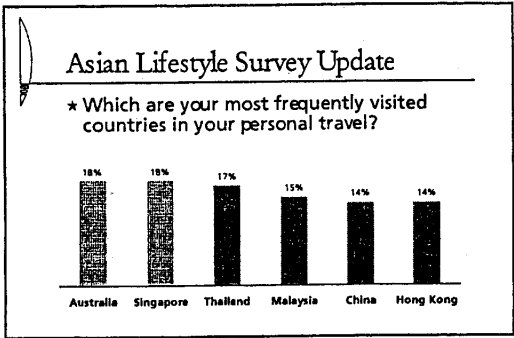
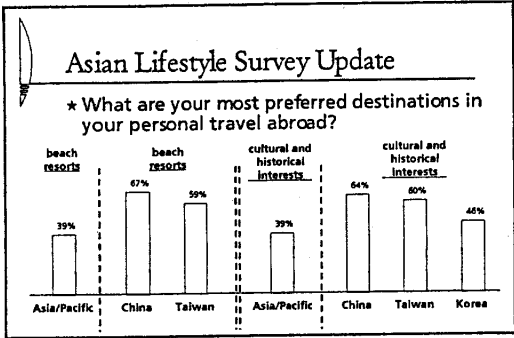


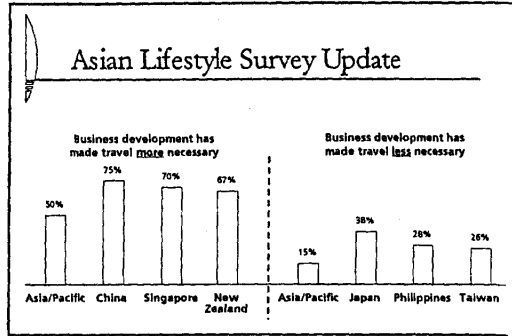
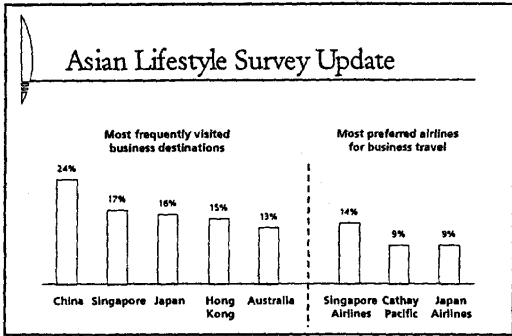
Arrivals from Asia/Pacific – Philippines

★ The Philippines is not ranked as one of the top 5 destinations in any of the key Asia/Pacific markets. Tourism arrivals are heavily dependent on non-Asia/Pacific markets.









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