amadeus

In collaboration with

UN Tourism

# Travel Insights 2025 and Trends 2026

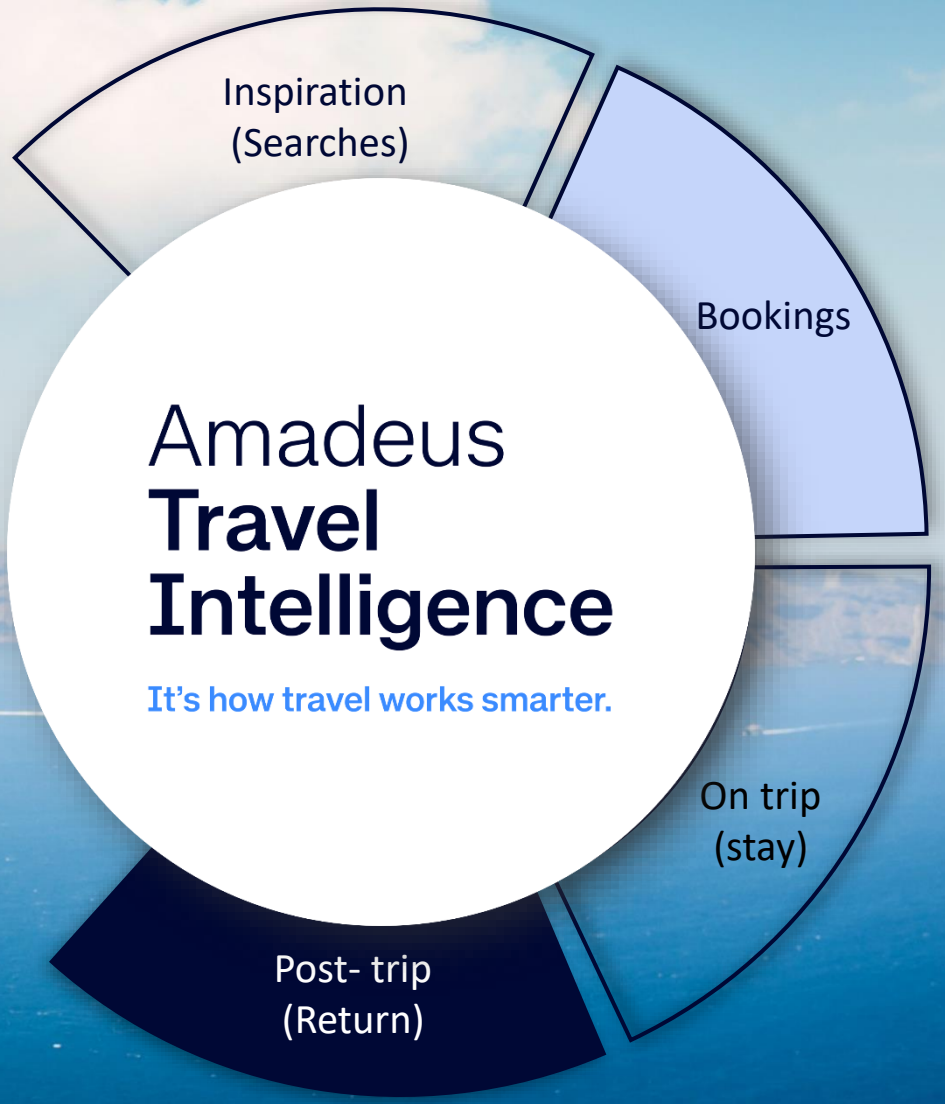
## Focus on Asia and the Pacific

**Olivier Ponti**
Director Intelligence & Marketing
10th December, 2025



# *Understand the entire Traveler Journey*

*Data-driven insights that fuel the travel ecosystem*




Amadeus. It's how travel works better.

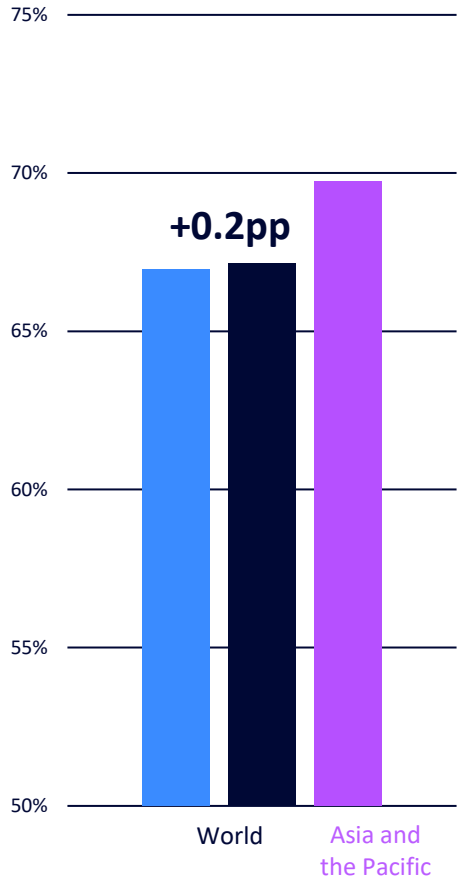
CONFIDENTIAL

# Global Trends

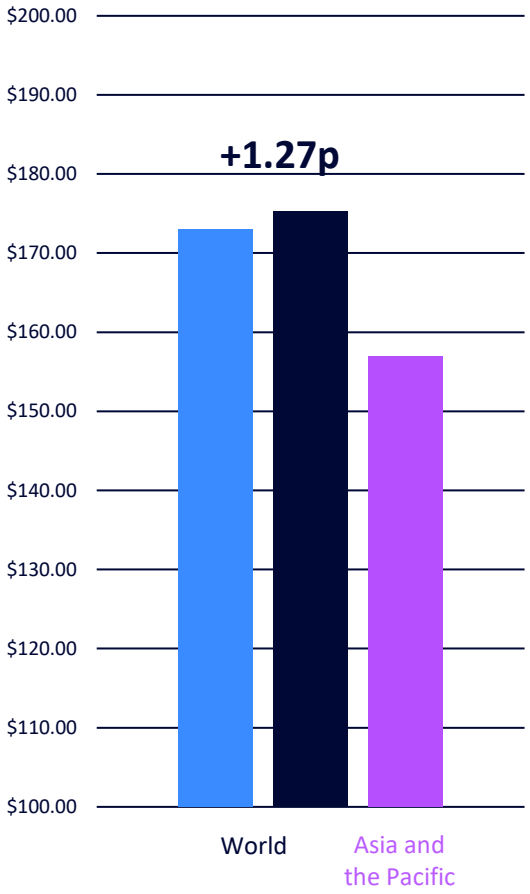


# Hospitality market indicators

**Occupancy evolution**
(Average of 12 months period in %)



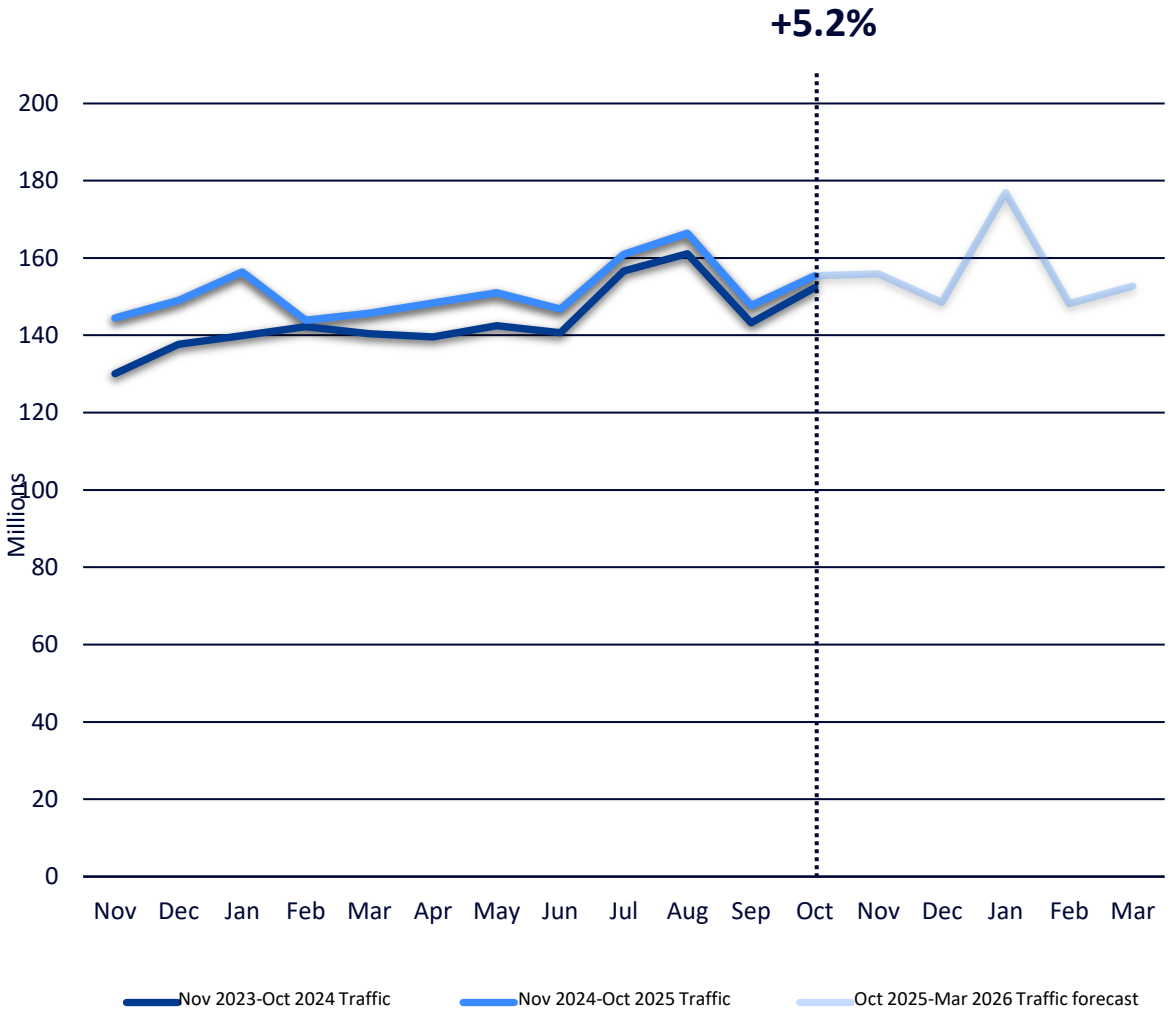

**Average Daily Rate ("ADR") evolution in USD**
(Average of 12 months period )




Nov 2023 - Oct 2024
Nov 2024 - Oct 2025
Nov 2024 - Oct 2025

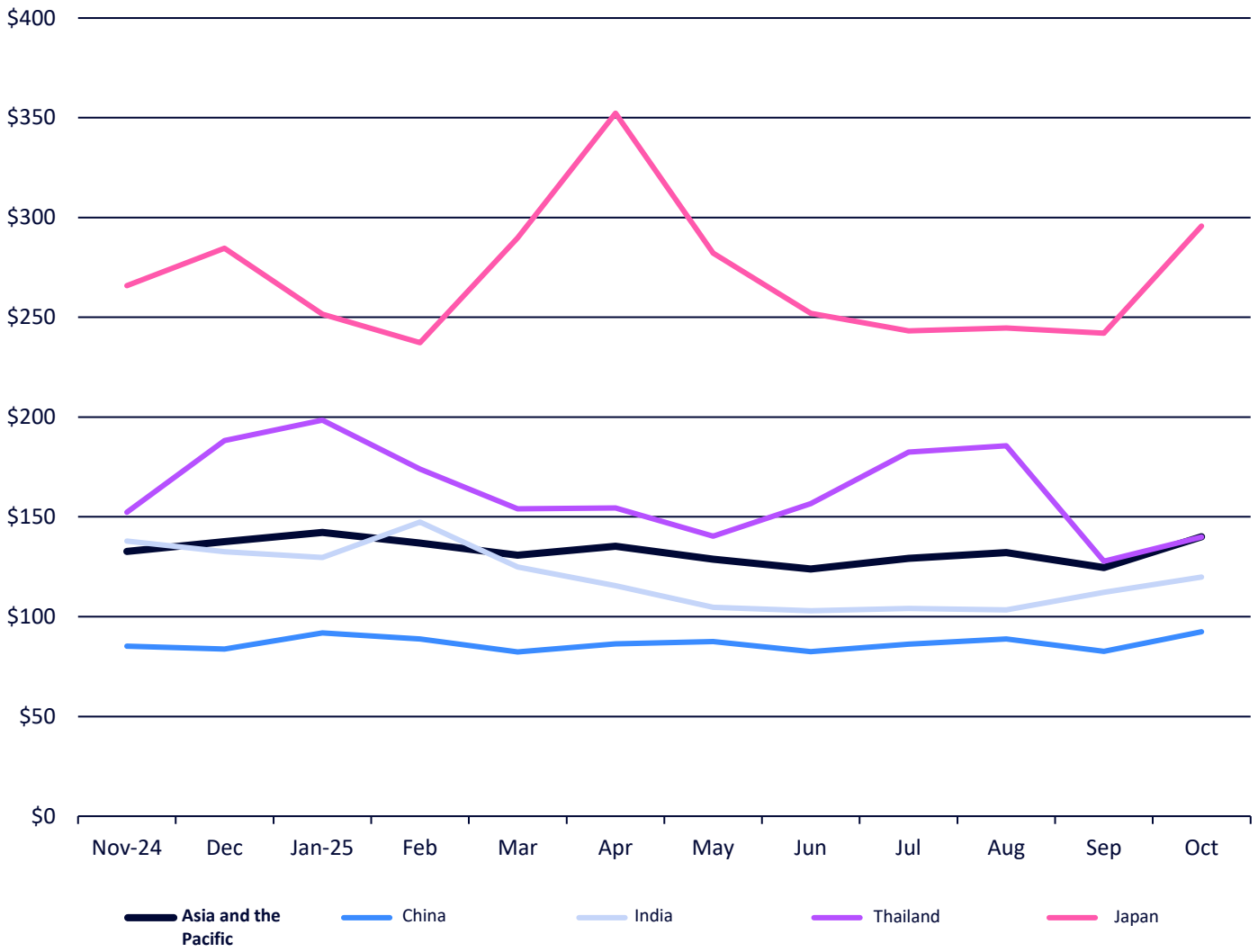
# Rising Air Traffic in Asia and the Pacific

**Worldwide to the Asia and the Pacific: International and domestic passenger traffic**




© Amadeus IT Group and its affiliates and subsidiaries

# Average Daily Rate (ADR) in USD




Source: Destination Gateway™ as of Sunday, 16 November 2025



Travel trends 2025: focus on Asia and the Pacific.

# Asia and the Pacific



© Amadeus IT Group and its affiliates and subsidiaries

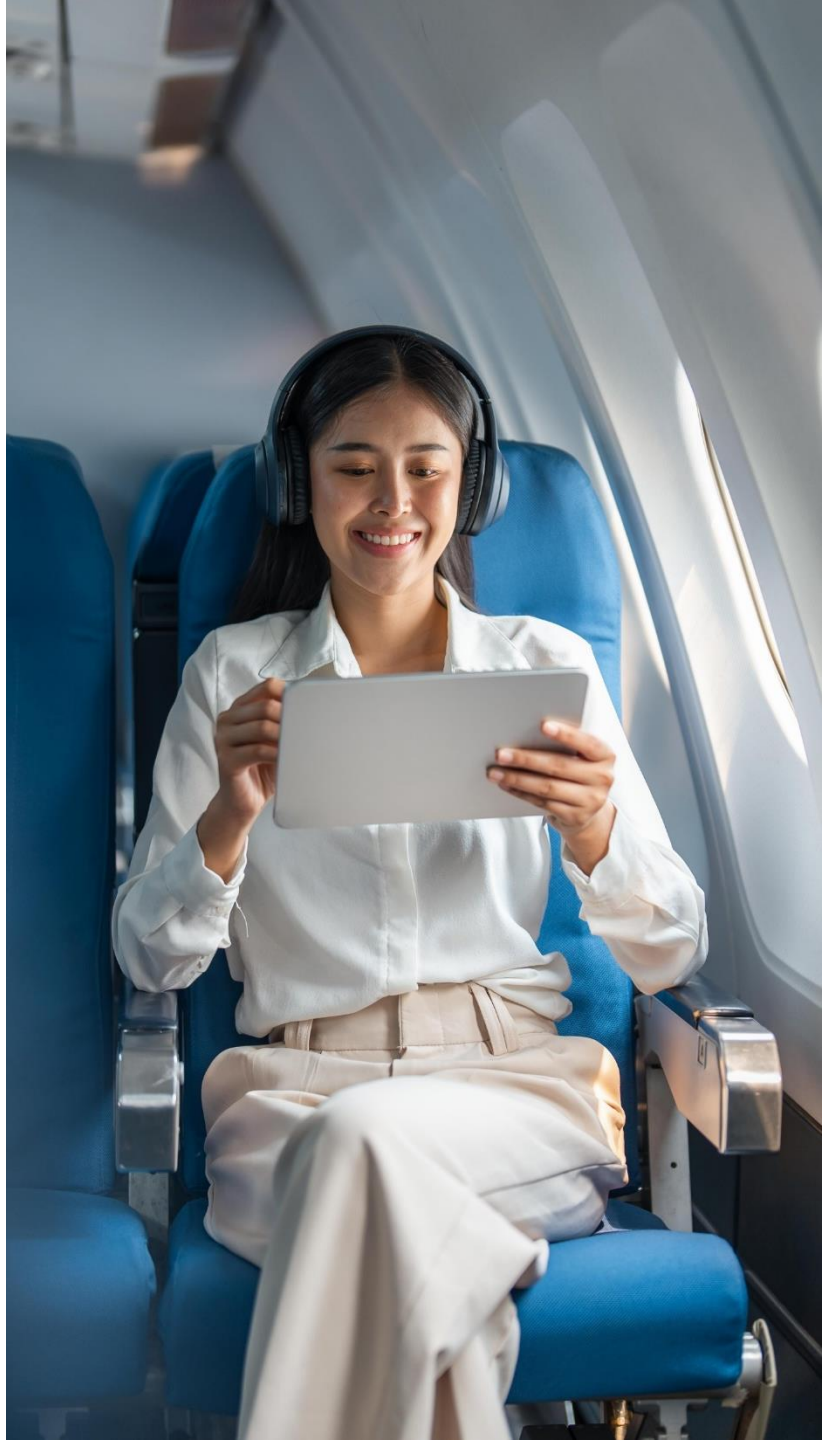
# Where do visitors come from? Reality vs. aspirations

Top origin markets **searching** for Asia and the Pacific

| Origin market | Nov.23-Oct.24 ranking | Nov.24-Oct.25 ranking |
|---|---|---|
| China | 3 | 1 |
| United States | 1 | 2 |
| India | 2 | 3 |
| Japan | 5 | 4 |
| Rep. of Korea | 4 | 5 |
| Australia | 7 | 6 |
| Thailand | 6 | 7 |
| United Kingdom | 8 | 8 |
| Malaysia | 10 | 9 |
| Taiwan (pr. Of China) | 12 | 10 |

Top origin markets **travelling** to Asia and the Pacific

| Origin market | Nov.23-Oct.24 ranking | Nov.24-Oct.25 ranking |
|---|---|---|
| India | 1 | 1 |
| Rep. of Korea | 2 | 2 |
| Australia | 3 | 3 |
| United States | 4 | 4 |
| Japan | 6 | 5 |
| Taiwan (pr. Of China) | 7 | 6 |
| Thailand | 5 | 7 |
| United Kingdom | 9 | 8 |
| Philippines | 10 | 9 |
| China | 11 | 10 |



Source: Destination Gateway™ as of Sunday, 16 November 2025

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

Top origin markets searching for Asia and the Pacific with the highest growth (among the TOP 30)

| Origin market | Nov.24-Oct.25 vs Nov.23-Oct.24 ranking | YoY Growth |
|---|---|---|
| China | 1 | 83% |
| Malaysia | 2 | 73% |
| Saudi Arabia | 3 | 68% |
| Japan | 4 | 54% |
| Indonesia | 5 | 53% |
| Vietnam | 6 | 53% |
| Qatar | 7 | 50% |
| Cambodia | 8 | 46% |
| Philippines | 9 | 45% |
| Russia | 10 | 44% |

Top origin markets travelling to Asia and the Pacific with the highest growth (among the TOP 30)

| Origin market | Nov.24-Oct.25 vs Nov.23-Oct.24 ranking | YoY Growth |
|---|---|---|
| Russia | 1 | 32% |
| Indonesia | 2 | 28% |
| Vietnam | 3 | 25% |
| Japan | 4 | 25% |
| China | 5 | 20% |
| Cambodia | 6 | 16% |
| Hong Kong (China) | 7 | 14% |
| Singapore | 8 | 14% |
| Malaysia | 9 | 13% |
| Italy | 10 | 12% |



Source: Destination Gateway™ as of Sunday, 16 November 2025

# Asia and the Pacific
# North-East Asia



© Amadeus IT Group and its affiliates and subsidiaries

# Worldwide to North-East Asia

## International and domestic passenger traffic




5%
year-on-year growth
in passenger traffic

Source: Destination Gateway™ as of Sunday, 16 November 2025

# Where do visitors come from? Reality vs. aspirations

Top origin markets **searching** for North-East Asia

| Origin market | Nov.23-Oct.24 ranking | Nov.24-Oct.25 ranking |
|---|---|---|
| Japan | 1 | 1 |
| Rep. of Korea | 2 | 2 |
| China | 4 | 3 |
| United States | 3 | 4 |
| Taiwan (pr. of China | 5 | 5 |
| Thailand | 6 | 6 |
| Malaysia | 13 | 7 |
| Australia | 9 | 8 |
| Hong Kong (China) | 7 | 9 |
| Canada | 8 | 10 |

Top origin markets **travelling** to North-East Asia

| Origin market | Nov.23-Oct.24 ranking | Nov.24-Oct.25 ranking |
|---|---|---|
| Rep. of Korea | 1 | 1 |
| Japan | 2 | 2 |
| Taiwan | 3 | 3 |
| China | 5 | 4 |
| United States | 4 | 5 |
| Hong Kong (China) | 6 | 6 |
| Thailand | 7 | 7 |
| Vietnam | 8 | 8 |
| Indonesia | 9 | 9 |
| Singapore | 12 | 10 |




Source: Destination Gateway™ as of Sunday, 16 November 2025

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

Top origin markets searching for North-East Asia with the highest growth (among the TOP 30)

| Origin market | Nov.24-Oct.25 vs Nov.23-Oct.24 ranking | YoY Growth |
|---|---|---|
| Saudi Arabia | 1 | 138% |
| Malaysia | 2 | 97% |
| China | 3 | 89% |
| Russia | 4 | 82% |
| Mexico | 5 | 71% |
| Cambodia | 6 | 69% |
| Indonesia | 7 | 61% |
| New Zealand | 8 | 61% |
| Vietnam | 9 | 60% |
| Singapore | 10 | 59% |

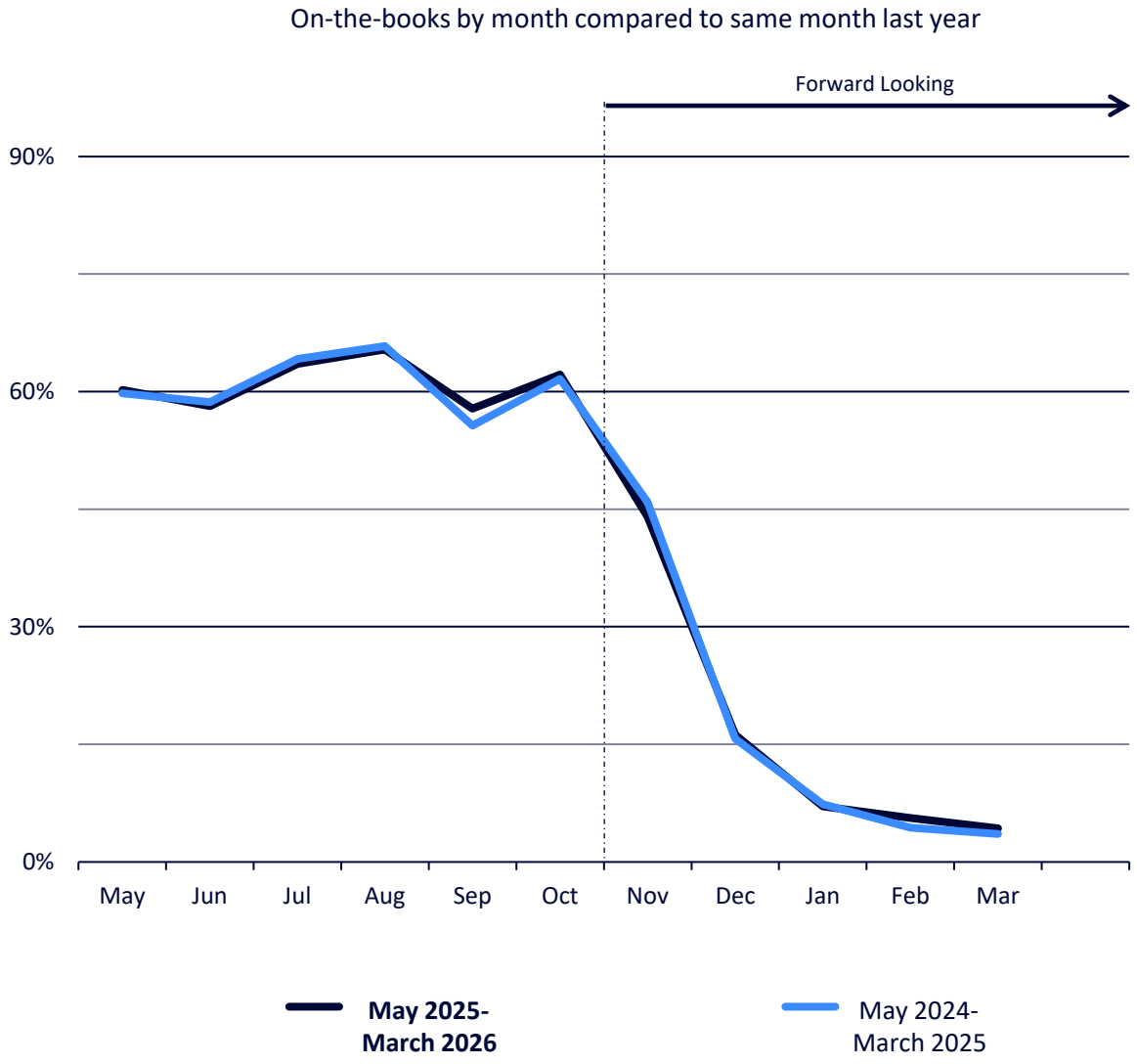
Top origin markets travelling to North-East Asia with the highest growth (among the TOP 30)

| Origin market | Nov.24-Oct.25 vs Nov.23-Oct.24 ranking | YoY Growth |
|---|---|---|
| Bangladesh | 1 | 55% |
| Russia | 2 | 48% |
| Kazakhstan | 3 | 39% |
| Malaysia | 4 | 36% |
| Singapore | 5 | 28% |
| Italy | 6 | 27% |
| Japan | 7 | 25% |
| Cambodia | 8 | 23% |
| China | 9 | 23% |
| Utd. Arab Emirates | 10 | 22% |



Source: Destination Gateway™ as of Sunday, 16 November 2025

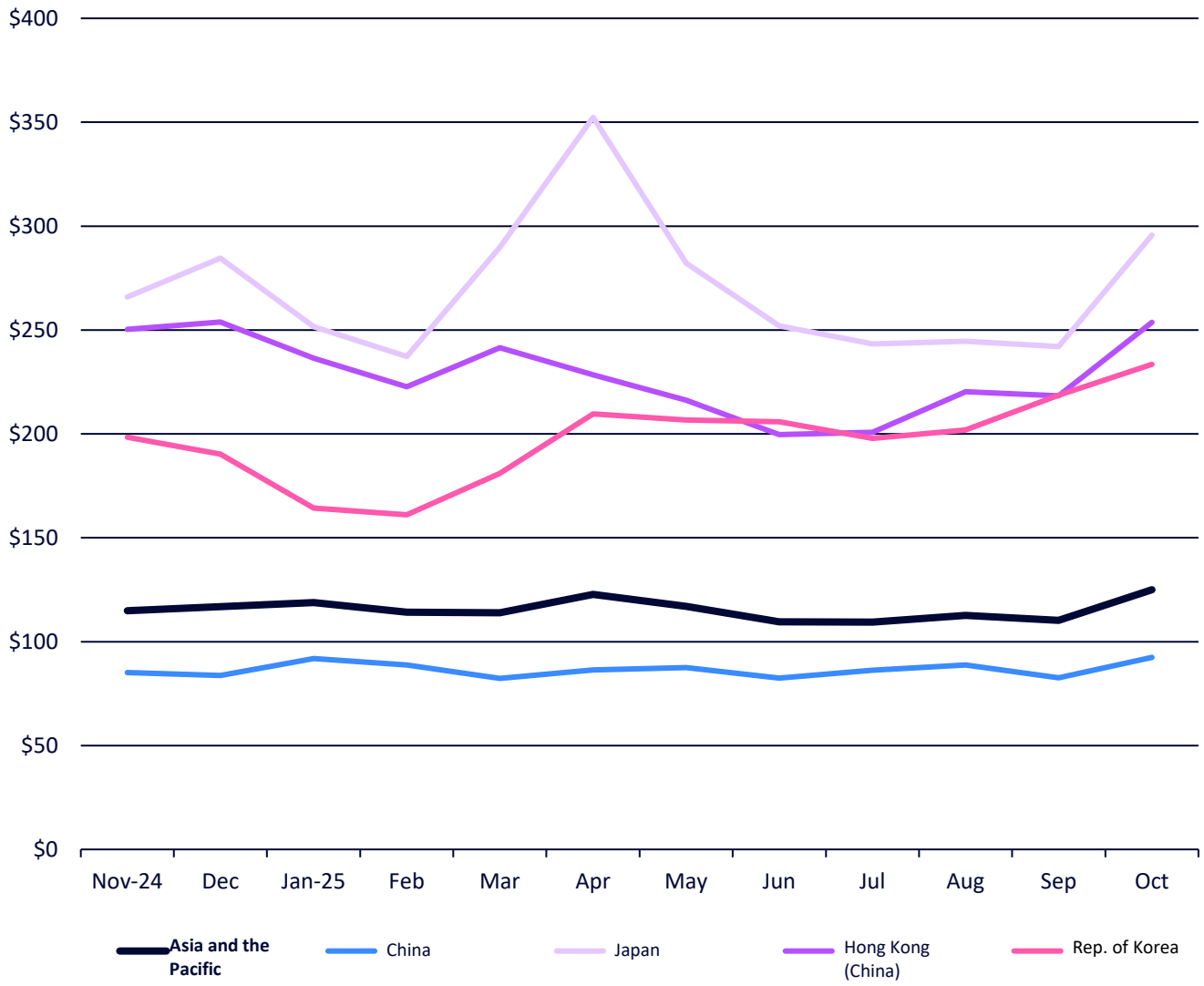
# Hotel Occupancy in North-East Asia




Source: Destination Gateway™ as of Sunday, 16 November 2025



# Average Daily Rate (ADR) in USD




Source: Destination Gateway™ as of Sunday, 16 November 2025



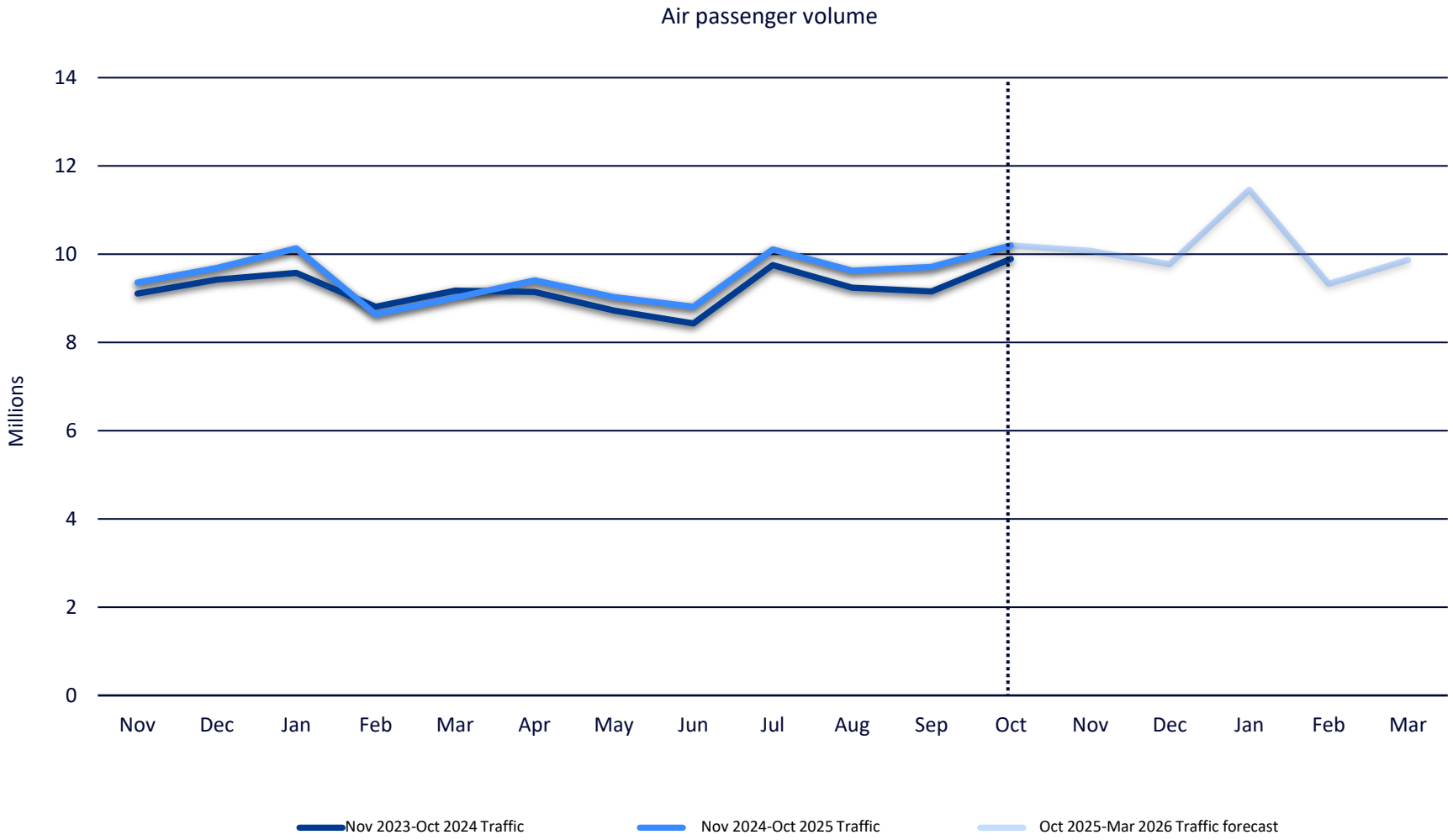
# Asia and the Pacific - Oceania



© Amadeus IT Group and its affiliates and subsidiaries

# Worldwide to Oceania

## International and domestic passenger traffic




3%
year-on-year growth
in passenger traffic

Source: Destination Gateway™ as of Sunday, 16 November 2025

# Where do visitors come from? Reality vs. aspirations

Top origin markets **searching** for Oceania

| Origin market | Nov.23-Oct.24 ranking | Nov.24-Oct.25 ranking |
|---|---|---|
| Australia | 1 | 1 |
| China | 3 | 2 |
| United States | 2 | 3 |
| United Kingdom | 4 | 4 |
| Rep. of Korea | 6 | 5 |
| India | 7 | 6 |
| Japan | 8 | 7 |
| New Zealand | 5 | 8 |
| Indonesia | 9 | 9 |
| Hong Kong (China) | 10 | 10 |

Top origin markets **travelling** to Oceania

| Origin market | Nov.23-Oct.24 ranking | Nov.24-Oct.25 ranking |
|---|---|---|
| Australia | 1 | 1 |
| New Zealand | 2 | 2 |
| United States | 5 | 3 |
| India | 3 | 4 |
| United Kingdom | 6 | 5 |
| Rep. of Korea | 4 | 6 |
| Japan | 7 | 7 |
| Indonesia | 8 | 8 |
| Papua New Guinea | 9 | 9 |
| Fiji | 10 | 10 |



Source: Destination Gateway™ as of Sunday, 16 November 2025

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

Top origin markets searching for Oceania with the highest growth (among the TOP 30)

| Origin market | Nov.24-Oct.25 vs Nov.23-Oct.24 ranking | YoY Growth |
|---|---|---|
| China | 1 | 83% |
| Taiwan (pr. of China) | 2 | 50% |
| Malaysia | 3 | 40% |
| Ireland | 4 | 39% |
| Japan | 5 | 38% |
| Indonesia | 6 | 37% |
| India | 7 | 33% |
| Hong Kong (China) | 8 | 33% |
| Türkiye | 9 | 31% |
| Philippines | 10 | 29% |

Top origin markets travelling to Oceania with the highest growth (among the TOP 30)

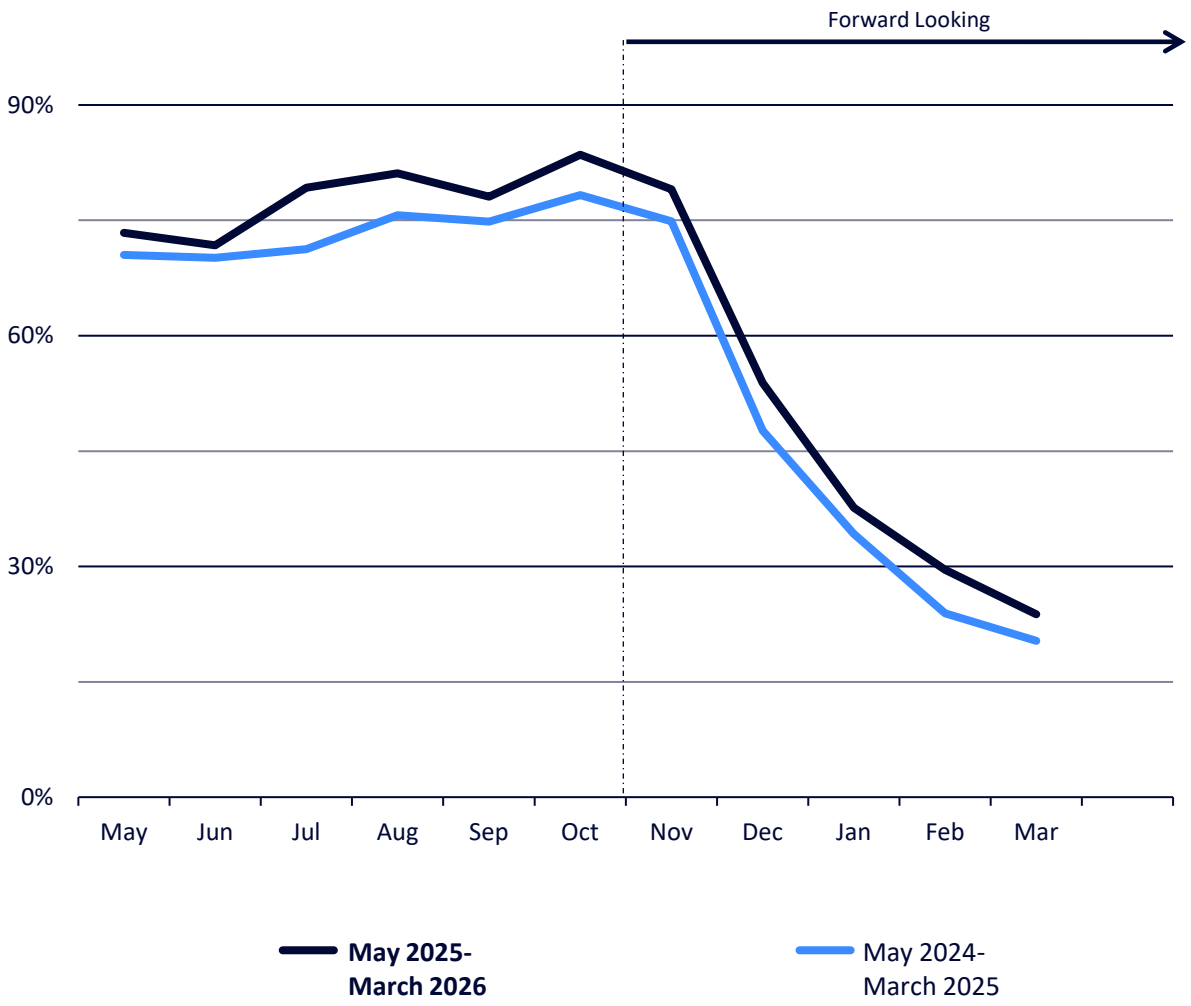
| Origin market | Nov.24-Oct.25 vs Nov.23-Oct.24 ranking | YoY Growth |
|---|---|---|
| Japan | 1 | 16% |
| Nepal | 2 | 13% |
| French Polynesia | 3 | 13% |
| China | 4 | 12% |
| Taiwan (pr. of China) | 5 | 10% |
| Bangladesh | 6 | 4% |
| Singapore | 7 | 3% |
| Fiji | 8 | 2% |
| Vietnam | 9 | 2% |
| Hong Kong (China) | 10 | 2% |



Source: Destination Gateway™ as of Sunday, 16 November 2025

# Hotel Occupancy in Oceania

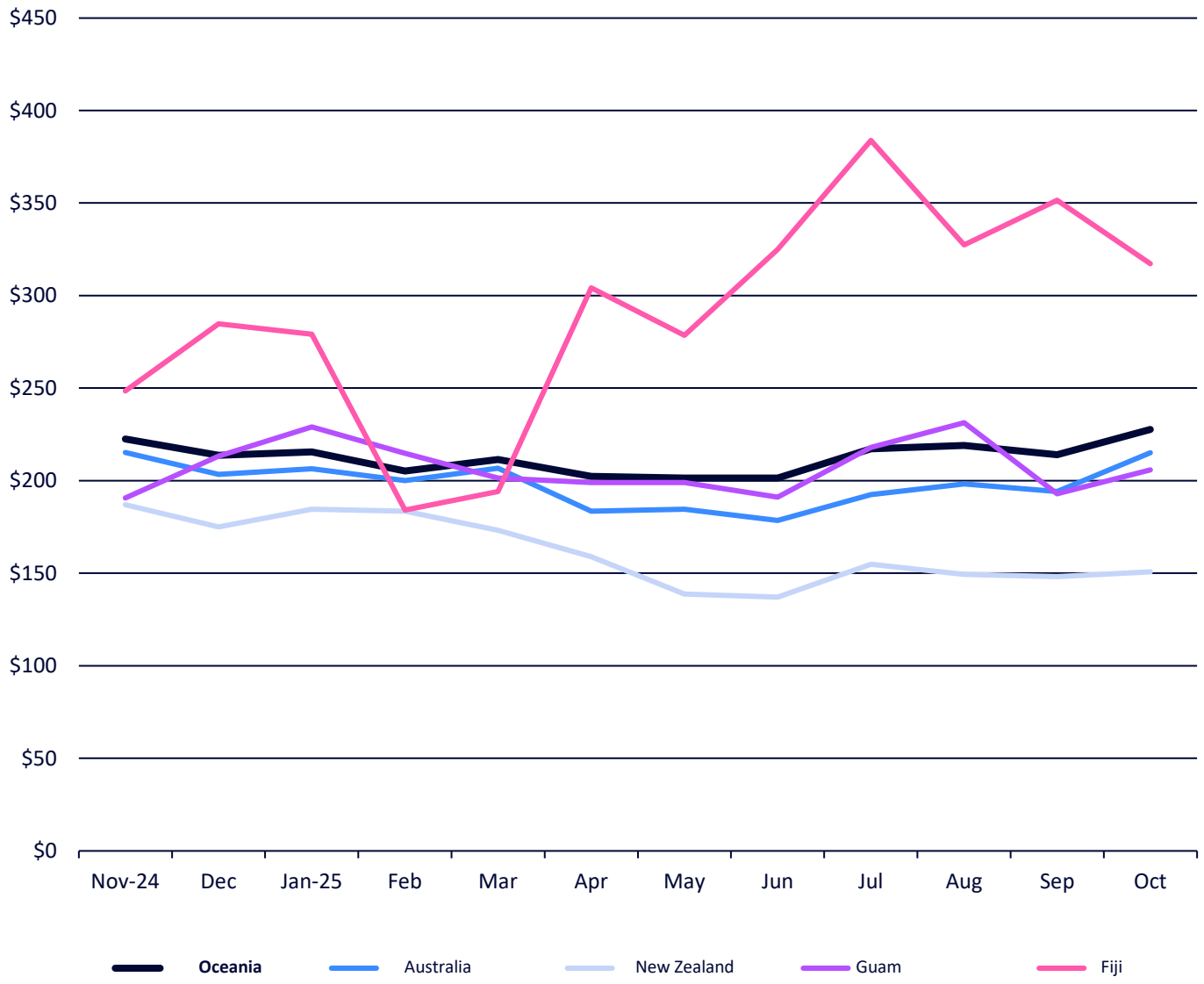
On-the-books by month compared to same month last year




Source: Destination Gateway™ as of Sunday, 16 November 2025



# Average Daily Rate (ADR) in USD




Source: Destination Gateway™ as of Sunday, 16 November 2025



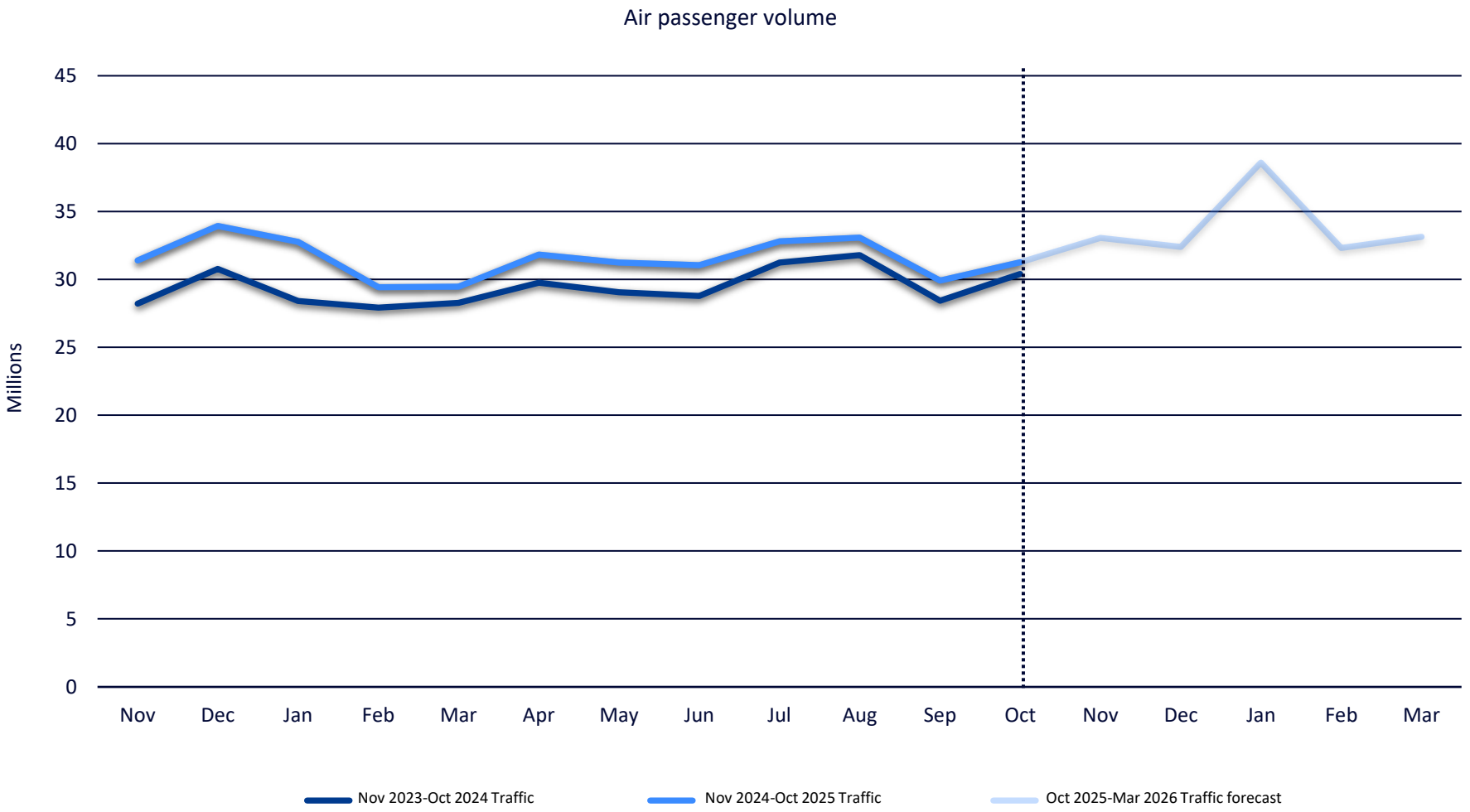
# Asia and the Pacific – South-East Asia



© Amadeus IT Group and its affiliates and subsidiaries

# Worldwide to South-East Asia

## International and domestic passenger traffic




7.1%
year-on-year growth
in passenger traffic

Source: Destination Gateway™ as of Sunday, 16 November 2025

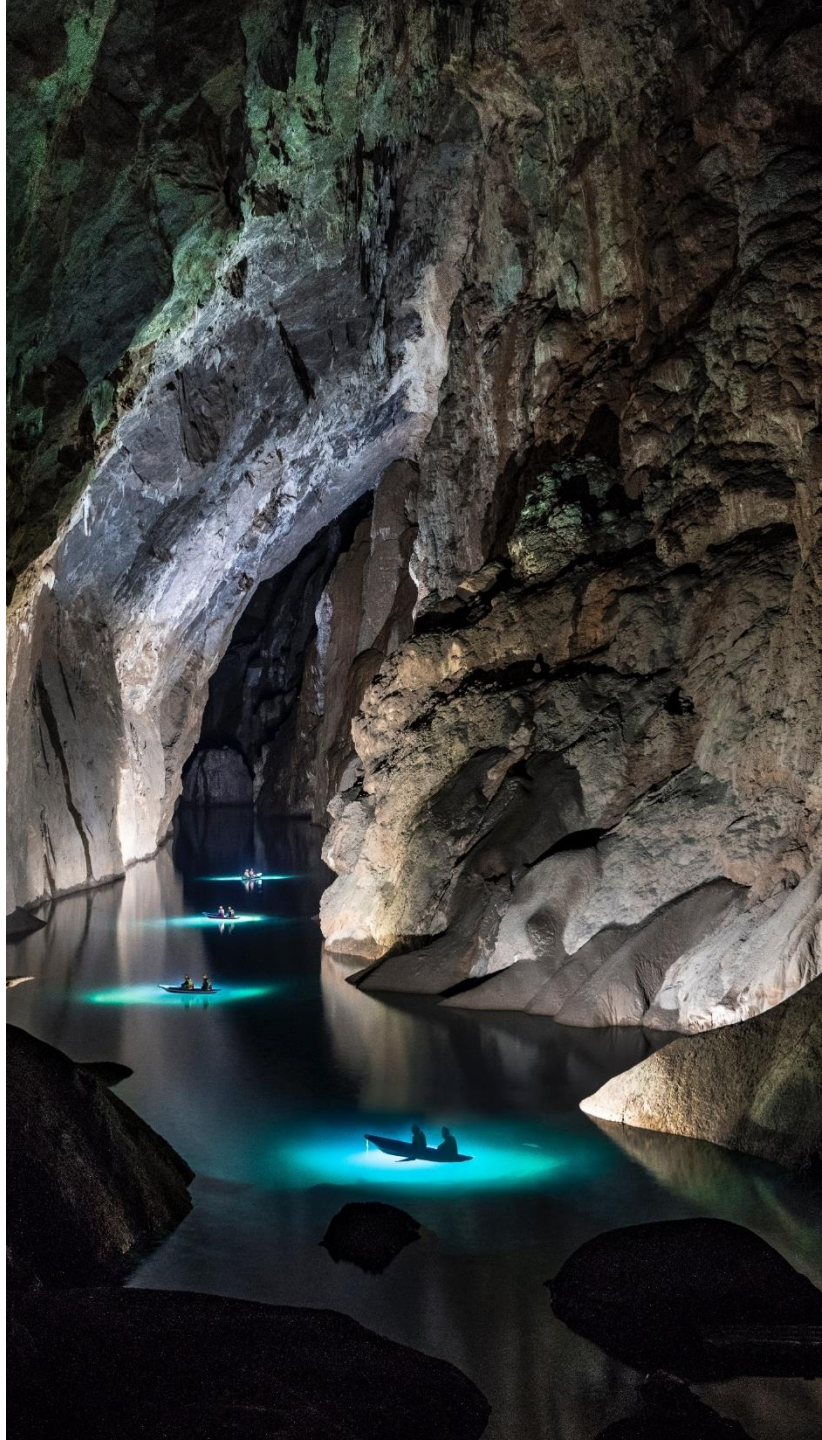
# Where do visitors come from? Reality vs. aspirations

Top origin markets **searching** for South-East Asia

| Origin market | Nov.23-Oct.24 ranking | Nov.24-Oct.25 ranking |
|---|---|---|
| China | 1 | 1 |
| Thailand | 2 | 2 |
| Rep. of Korea | 3 | 3 |
| Malaysia | 5 | 4 |
| United States | 4 | 5 |
| Indonesia | 8 | 6 |
| Japan | 7 | 7 |
| India | 6 | 8 |
| Philippines | 10 | 9 |
| Australia | 9 | 10 |

Top origin markets **travelling** to South-East Asia

| Origin market | Nov.23-Oct.24 ranking | Nov.24-Oct.25 ranking |
|---|---|---|
| Rep. of Korea | 1 | 1 |
| Philippines | 3 | 2 |
| Thailand | 2 | 3 |
| Malaysia | 4 | 4 |
| United States | 5 | 5 |
| India | 6 | 6 |
| Indonesia | 11 | 7 |
| Taiwan (pr. of China) | 7 | 8 |
| China | 8 | 9 |
| Japan | 10 | 10 |



Source: Destination Gateway™ as of Sunday, 16 November 2025

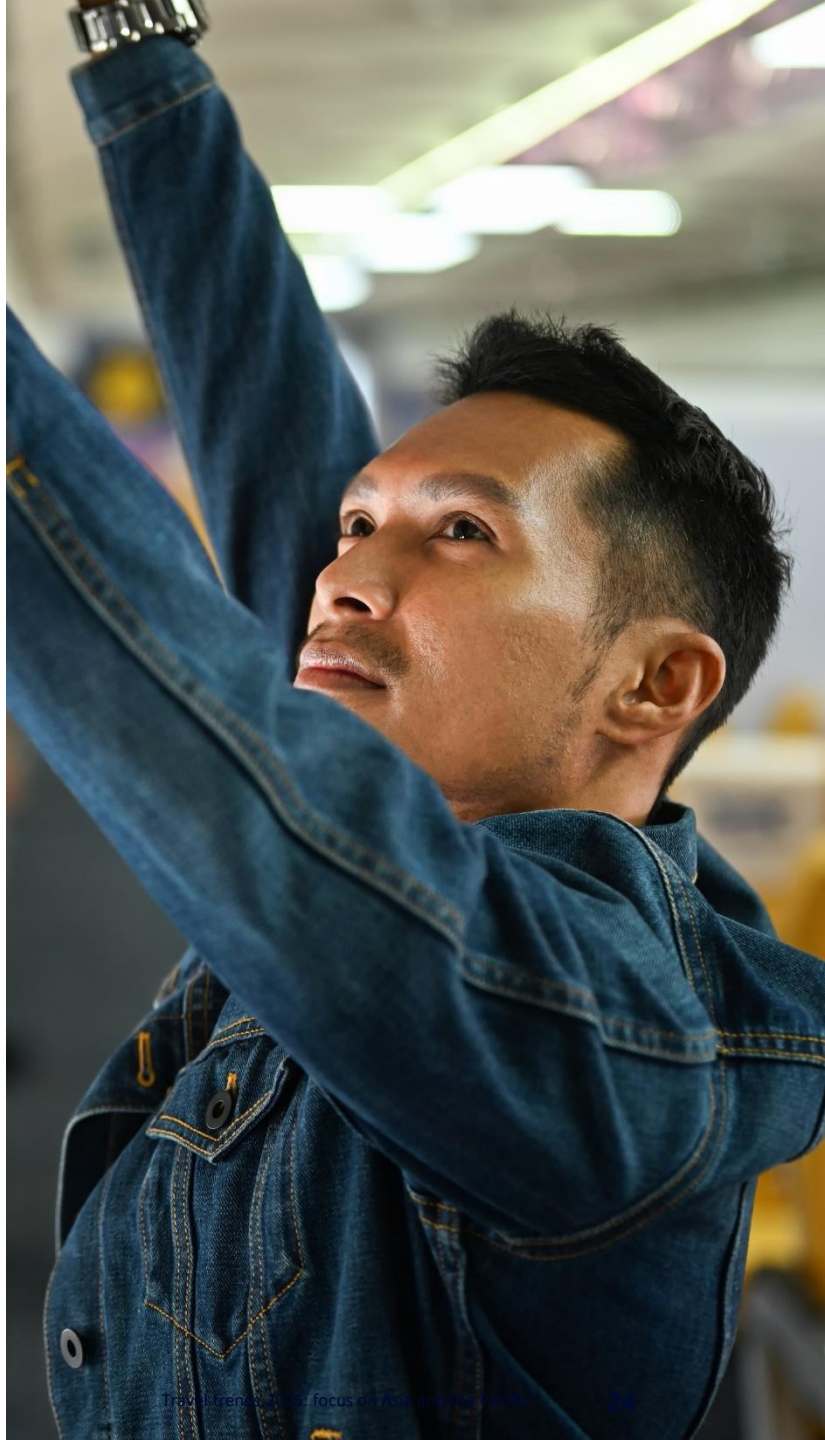
# Are travellers from these markets to South-East Asia already on your radar?

Top origin markets searching for South-East Asia with the highest growth (among the TOP 30)

| Origin market | Nov.24-Oct.25 vs Nov.23-Oct.24 ranking | YoY Growth |
|---|---|---|
| China | 1 | 75% |
| Saudi Arabia | 2 | 68% |
| Malaysia | 3 | 66% |
| Indonesia | 4 | 53% |
| Türkiye | 5 | 51% |
| Italy | 6 | 49% |
| Japan | 7 | 48% |
| Philippines | 8 | 48% |
| Vietnam | 9 | 47% |
| Israel | 10 | 45% |

Top origin markets travelling to South-East Asia with the highest growth (among the TOP 30)

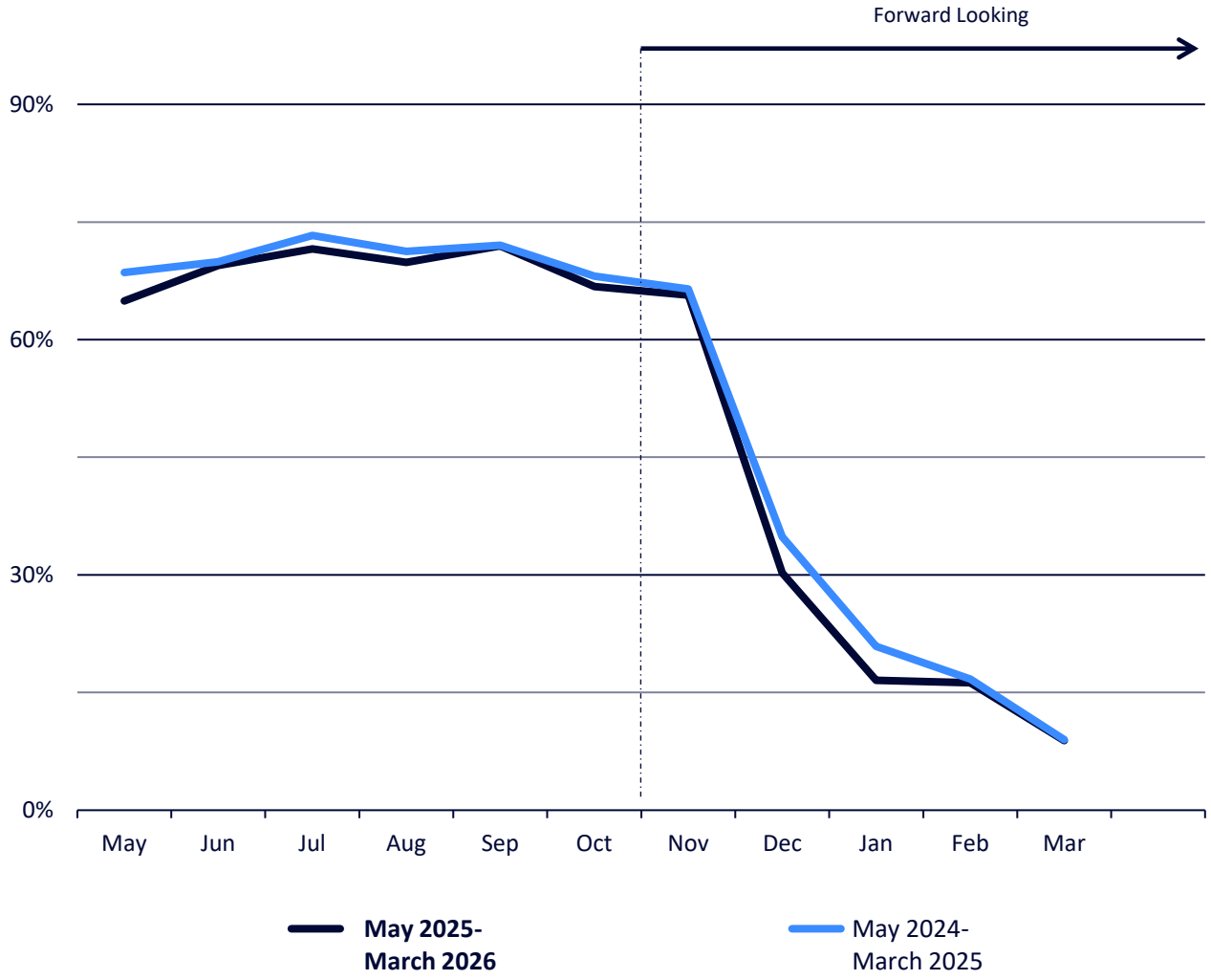
| Origin market | Nov.24-Oct.25 vs Nov.23-Oct.24 ranking | YoY Growth |
|---|---|---|
| Indonesia | 1 | 48% |
| Vietnam | 2 | 30% |
| Russia | 3 | 26% |
| Japan | 4 | 26% |
| Israel | 5 | 24% |
| China | 6 | 17% |
| Pakistan | 7 | 17% |
| Cambodia | 8 | 13% |
| Bangladesh | 9 | 11% |
| United Kingdom | 10 | 10% |



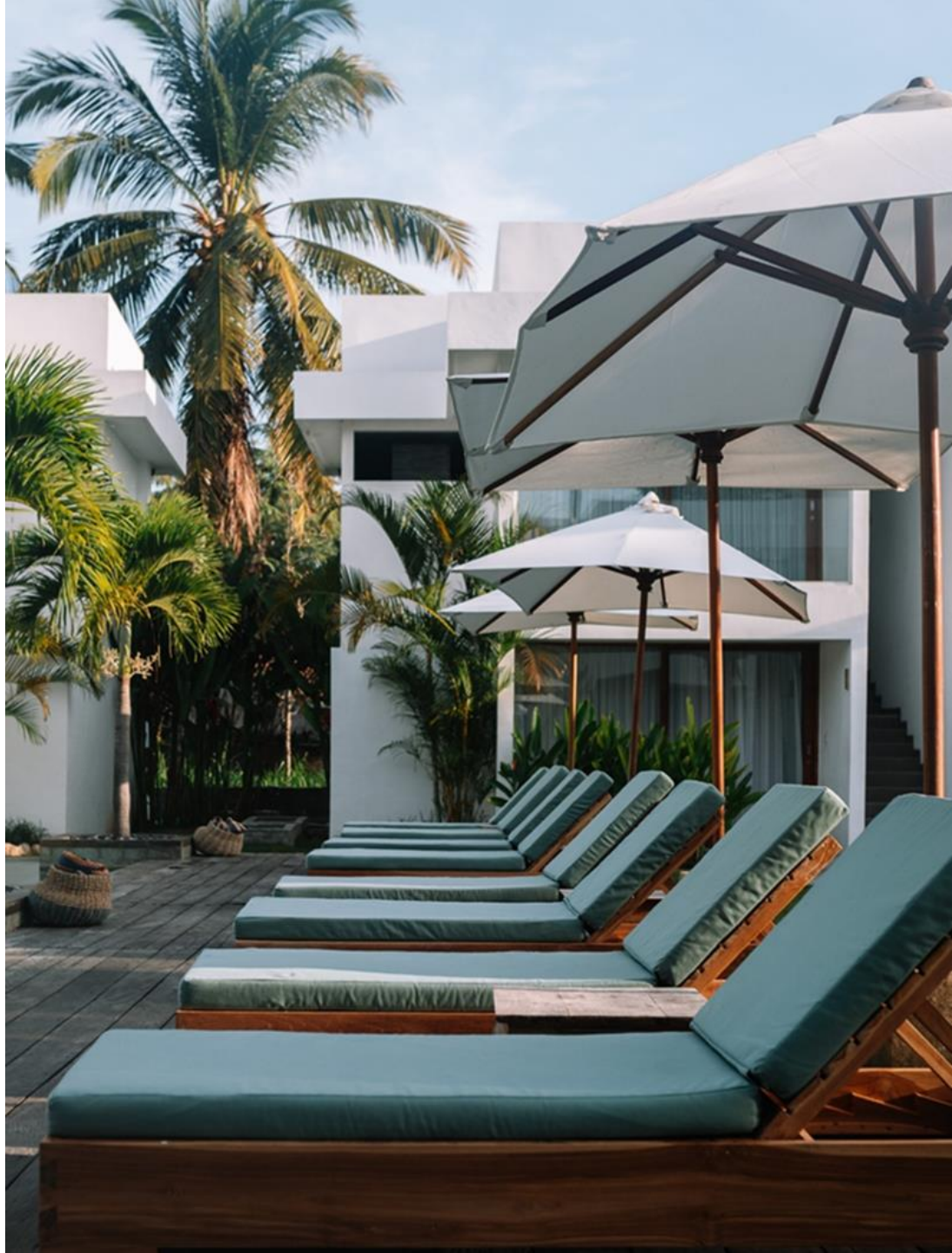
Source: Destination Gateway™ as of Sunday, 16 November 2025

# Hotel Occupancy in South Asia

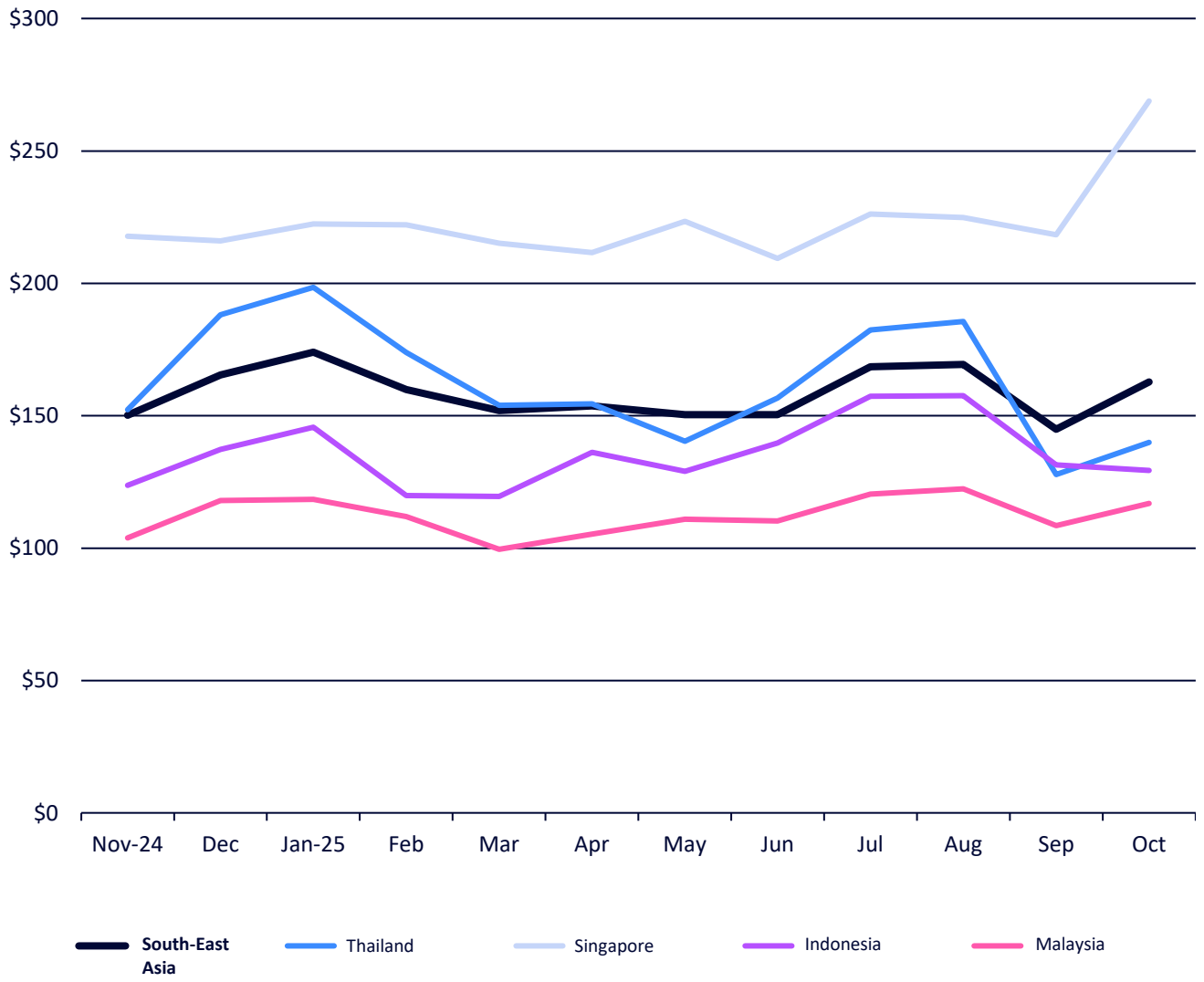
On-the-books by month compared to same month last year




Source: Destination Gateway™ as of Sunday, 16 November 2025



# Average Daily Rate (ADR) in USD






Source: Destination Gateway™ as of Sunday, 16 November 2025

amadeus

# Key takeaways

**Travel to Asia continues to accelerate,** with solid YoY growth across all subregions and airlines adding more capacity.



amadeus

# Key takesways

**Travel to Asia continues to accelerate,** with solid YoY growth across all subregions and airlines adding more capacity.

**Hotel demand is strengthening,** as forward-looking occupancy rises sharply into early 2026, especially in Japan, Thailand, China and Australia.



amadeus

# Key takeaways

**Travel to Asia continues to accelerate,** with solid YoY growth across all subregions and airlines adding more capacity.

**Hotel demand is strengthening,** as forward-looking occupancy rises sharply into early 2026, especially in Japan, Thailand, China and Australia.

**ADR patterns show mixed pricing,** with premium destinations pushing higher rates while others remain more affordable, supporting broad traveler segments.



amadeus

# Key takeaways

**Travel to Asia continues to accelerate,** with solid YoY growth across all subregions and airlines adding more capacity.

**Hotel demand is strengthening,** as forward-looking occupancy rises sharply into early 2026, especially in Japan, Thailand, China and Australia.

**ADR patterns show mixed pricing,** with premium destinations pushing higher rates while others remain more affordable, supporting broad traveler segments.

**Demand is coming from a more diverse set of origin markets,** led by strong growth from China, Malaysia, Saudi Arabia, Vietnam and Indonesia.



amadeus

# Request your own market landscape report to know:

- 2025/2026 Travel Trends
- Who is searching and visiting your destination
- What was your Hotel occupancy and ADR (12 months)

© Amadeus IT Group and its affiliates and subsidiaries