Shaping the future of travel in Japan
The big FOUR travel effects

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Foreword

This report follows on from our report “Shaping the future of travel in Asia Pacific; The big FOUR travel effects” and analyses the geopolitical, social, economic and technological trends that will have the greatest impact on the travel industry in Japan over the next 20 years. Primarily, we have sought to further understand the implications of changing traveller behaviour on the travel industry – comprising transportation companies (airlines, rail operators and the like), accommodation and entertainment providers and intermediaries such as travel agents.

Although overall travel numbers from Japan are fixed, our research has identified that Japan offers a number of distinct opportunities for travel providers. It is the only country where the population is declining, and has the most significant population ageing across the region, creating a large market for ‘Seniors travel’. And Japanese travellers are different in the way they behave — reflected for example in the much higher incidence of solo travel, in continued reliance on travel agents rather than self-managed travel, and in the potential for greater use of mobile devices for travel.

Despite the unchanged traveller numbers, Japan remains a critical market in the region. It still generates more outbound travellers to Asia Pacific destinations than India and Indonesia combined, and spending per traveller is much higher than in developing markets. So the Japanese market cannot be ignored, but it does need to be understood. At the same time travel providers in Japan need to recognise the increased importance of stimulating inbound travel to compensate for static or declining outbound travel, and to address some of the barriers that are currently impeding this.

Of course, these different effects and the various statistics will be of varying relevance to different elements of the industry — and I would encourage any interested party to review and draw their own conclusions.

The points this research and white paper undeniably highlight, however, are the opportunities that Asia Pacific now has to regain the leading position on the global stage that reaches well beyond travel, but which it is inextricably linked to.

Happy reading!

David Brett
President,
Amadeus Asia Pacific
The importance of the Japanese traveller

Japan is different to other Asian Pacific markets in the way that its travel market has evolved. The Japanese started travelling abroad much earlier than in most other Asia Pacific countries, when Government restrictions on travel were lifted in 1964, but traveller numbers now appear to have peaked. Whereas traveller numbers from most Asia Pacific markets have risen markedly over recent years, and many markets – such as China and India - still have huge growth potential, the picture in Japan has been markedly different. After climbing from 5 million outbound travellers per year in the mid 1980s to over 17 million per year in the early 2000s, traveller numbers have now reached a plateau, and Japanese travellers to many destinations have shown a marked decline. Combined with a lack of growth in overall traveller numbers, the type of traveller from Japan is also changing. Hence destinations that are heavily reliant on Japanese travellers will need to adapt. This includes destinations such as Australia, Hawaii, Guam and Saipan.

This static number of travellers is unlikely to be significantly reversed over the next two decades. The population in Japan will decline, with a particularly steep decline in the 20-39 age group which has the highest propensity to travel. Additionally, a range of cultural and economic factors are also reducing the number of travellers from Japan. However in absolute terms, Japan remains a key travel market in the region. For example Japan still generates almost 50% more outbound travellers than India.

Figure 1: Outbound travellers from Japan, 1970 – 2011

Source: Japan Tourism Marketing Company

These trends in travellers from Japan are being driven by a number of cultural, social and economic factors which are combining to impact the way that Japanese travellers are behaving.

Economic stagnation

For three decades after World War II, overall real economic growth in Japan had been extremely strong - a 10% average growth rate in the 1960s, a 5% average in the 1970s, and a 4% average in the 1980s. However asset prices particularly for property in Japan had reached unreasonably high levels, and from 1990 onwards began a steady deflation that is still continuing. This has reduced economic growth to much more moderate levels. In 2002 Japan emerged from a lengthy period of economic decline and stagnation, but since then economic growth has been extremely moderate when compared to earlier levels. Even since the Global Financial Crisis, Japan has endured three recessions. This much reduced economic growth when compared to earlier years has had a significant dampening effect on the population’s travel behaviours.

Security concerns

Additionally security concerns have had a significant impact on Japanese travellers. From 2001 onwards a series of both internal and external shocks – including 9/11, SARS, the Bali bombing and the 2011 earthquake and tsunami in Japan – have deterred many Japanese leisure travellers from overseas travel. While in many countries the impact has been short-term, Japan has endured a longer term effect. As well as deterring some Japanese from travelling altogether, it has driven a switch to destinations that are closer and perceived as more secure and “Japanese-friendly”, such as Korea. In addition recent territorial disputes with China have added to travellers’ insecurity.
Changing patterns of employment

From the 1990s onwards, the pattern of employment in Japan changed, as the previous pattern of long-term fixed employment for a single employer started to wane. Many companies reduced or froze pay and benefits and employed much reduced numbers of graduates, resulting in large numbers of employees working on casual or other non-permanent bases. Compounded with the declining numbers of people in the younger age groups – which were the main travellers in Japan - the number of outbound travellers in the key demographic group has reduced.

Reduced interest in travel

“In Japan there is a large part of the population who are comfortable in Japan and see no need to travel. The airline industry relies on people moving around so the industry needs to find a way to promote travel among all Japanese.”

Mr. Okada, EVP Alliances & International Affairs, All Nippon Airways

Lack of budget airline capacity

A major stimulus to travel in many countries has been the advent of budget airlines, which by virtue of lower costs have offered significantly reduced air fares. However the budget airline model has been slow to develop in Japan, and although a number of budget carriers have now launched, they are yet to have a significant effect on stimulating traveller numbers.

In the 1980s and early 1990s, younger adults were the mainstay of outbound travellers from Japan, however demographic changes, changing patterns of employment and different consumption patterns have contributed to reduced interest and ability to travel. The number of younger people is declining and will continue to decline with the 20-39 age cohort falling from 31.6 million in 2011 to 23.3 million by 2030. This is the age cohort that has the highest propensity to travel. However with less secure employment than was enjoyed by their parents, and with a switch in consumption towards electronic gadgets and other forms of local entertainment, younger Japanese are less able and willing to travel than in the past.
The Me Effect
Japanese travellers are unique
While the decline in the younger age cohorts in Japan will create a reduction in younger solo travellers this will partly be offset by an increase in the number of solo travellers in older generations who are more comfortable with solo travel.

**The solo traveller**

Japan is unique among Asia Pacific markets in having a high portion of solo leisure travellers. Our research indicates that one-third of Japanese leisure travellers generally travels alone and a similar portion intends to in the future. This ratio is consistent for both male and female travellers, and indicates a large market for solo travel that does not exist in other countries, especially by women. For example while one third of Japanese female leisure travellers generally travels alone, only 10% does so in Korea and 6% in Singapore. Solo travel is particularly strong among younger age groups (under 30s), where almost half of leisure travellers do so alone – but it is also common among older generations with over 20% of over 65s generally travelling solo.

Younger Japanese single females – sometimes characterised as “Office Ladies” – have traditionally had a high propensity to travel, often alone, knowing that after they are married their ability to travel will be significantly reduced. Similarly, younger males have a high propensity to travel before entering permanent employment when ability to travel for leisure may be significantly reduced, with employment policies often being rigid and many Japanese men not taking their full holiday entitlements.

Source: Survey of 1,531 Asia Pacific Travellers, August 2012

We are seeing the Amazonification of the world: this means that service suppliers are having to customise their offerings more and more to the needs of specific individuals (segments of one). So a hotel needs to tailor its offer to each customer, based on the customer’s profile and past behaviour.”

Puneet Mahindroo, Ex-Corporate Director of Revenue Management and Global Distribution, Taj Hotels, Resorts and Palaces

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**Figure 2: Typical format of leisure travel, by country**

Source: Survey of 1,531 Asia Pacific Travellers, August 2012
The destination switch

These changing demographics will create a switch in the destinations most commonly visited by Japanese travellers away from beach-focused destinations, such as Australia, Hawaii, Guam and Saipan, towards more urban destinations such as Hong Kong and Macau that may be perceived as more “Japanese-friendly”, and which are closer and better served with lower air fares. The appreciation of the Yen over recent years has also favoured shopping-related destinations, such as Hong Kong.

Korea has been the other major winner for Japanese travellers with a 33% increase over the past decade, reflecting the growing preference of Japanese travellers for closer, more Japanese-friendly locations. But many markets have seen a significant decline in Japanese travellers over the same period, with the switch most marked in Australia and New Zealand where Japanese travellers have reduced by over 50% since 2000.

The destination switch also includes significant growth in travel to China, partly stimulated by leisure travel but also by a significant increase in business travel as many Japanese companies have become increasingly focused on the Chinese market, both as a source of demand and supply. In 2011, about 40% of departures from Japan were to greater China, up from about a quarter in 2000, with departures to China increasing about 10% annually during this period. A higher portion of travel to China has been for business reasons than to other destinations.
The Me Effect

Japan is the country most impacted in the Asia Pacific region by the ageing population. The percentage of the population over 65 will increase from 28% of the total population in 2011 to over 38% by 2030, by which date there will be over 51 million seniors in Japan (over 65s). This large and growing group is potentially the most important travel market segment in Japan, as over 60s own over half the personal assets in Japan, and as individuals entering the over 65 age cohort through the next 20 years are coming from the generation for whom overseas travel was an important aspect of life. However, while the seniors market may be an attractively large demographic group, serving it cost-effectively can be challenging for travel providers.

Our research indicates that Japan has the highest portion of leisure travellers who are over 65 than any other country in Asia Pacific, at 25% of all leisure travellers – a much higher portion than in all other markets. With the growth in the age cohort of over 65s in Japan, the number of senior travellers will increase by a third to over 4.5 million by 2030, even as there is no overall increase in traveller numbers.

This will create opportunities for destinations to market themselves to seniors, who may be concerned about language issues, as well as health and hygiene. With an anticipated fall in the number of younger travellers, Generation ‘S’ offers the only significant growth market from Japan for travel providers and intermediaries.

“Japan is going backward in population, not forward, people don’t want to have babies and get married”

Miho Ohtake, General Manager, Amadeus Japan

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Figure 5: Proportion of travellers who are over 65 by country

Source: Survey of 1,531 Asia Pacific Travellers, August 2012
The decline of the male business traveller

Matching the strong growth in Generation S is a decline in the working population that will create a reduction in the number of business travellers from Japan. Currently, business travellers account for about 20% of departures from Japan – about 3.3 million business trips each year, and spending in total about $5 billion annually on overseas travel. But with the 25-60 age cohort falling by 10 million individuals from 2011 to 2030, the number of business travellers will potentially reduce by as much as 20%.

“In Japan, the population is ageing and declining. In the medium term this will change the market – there will be less business travel (i.e. fewer business people travelling) and more leisure travel (more seniors wanting to travel). But in the longer term, travel overall will decline.”

Mr. Okada, EVP Alliances & International Affairs, All Nippon Airways

These developments will drive a switch in focus for travel providers in Japan, away from business travellers towards leisure travellers and international travellers. To offset the decline in traveller numbers from Japan, Japanese travel providers, such as airlines, will need to focus more on inbound markets, and address some of the barriers that currently impede travel to Japan.

The female business traveller

As with other Asia Pacific markets, Japan is likely to see growth in female business travellers which may help to offset the decline in male business travel. Business travel in Japan remains heavily male-dominated. Our research identified that currently only 13% of business travellers in Japan are female - the lowest portion in the region. However with the working age cohorts declining in Japan, women are increasingly likely to be represented in the mid-senior management ranks where business travel is expected. Again this offers opportunities for travel providers, but requires changes in the way that travel providers approach the female traveller. Women use different processes to men to make travel decisions – for example greater reliance on peer recommendations or advice – so responding to this will be critical for travel providers to win over the female traveller.

“Overall the women’s market is a huge growing one for the travel industry, but the industry remains male-dominated and has yet to understand the psyche of the woman traveller. Solo travel is a growing trend among women, particularly from countries where English is spoken. Younger women are increasingly confident travelling on their own or in small groups. Women make most travel decisions anyway and are more likely to make decisions based on social media e.g. reviews. So the social media channel will become increasingly important for travel.”

Yeoh Siew Hoon, Editor and Founder, Web-in-Travel
The Red Tape Effect
the breaking down of barriers to travel
Traditional distribution still critical in Japan

Our research indicates that the travel agent retains a more important role in making travel arrangements and bookings in Japan than in other Asia Pacific countries, with the incidence of self-managed travel much lower in Japan. 66% of leisure travellers and over 50% of business travellers use an agent to arrange travel (with a further 32% of business travellers having arrangements made by a colleague or secretary). Only 14% of business travellers and 20% of leisure travellers in Japan are currently making their own bookings directly with travel providers.

The fact that travel agents make booking easier, particularly for complicated itineraries, is the main reason that Japanese travellers mainly use agents. Our research indicates that the proportion of travellers in Japan who are likely to make their own bookings in the future is also low – only 12% of business travellers and 16% of leisure travellers. This compares with an average across the region of 24% and 38% respectively.

Figure 6: Proportion of travellers that use a travel agent by country

The need to open the doors

With traveller numbers outbound from Japan likely to remain static or even fall over the next two decades, travel providers in Japan will need to increasingly shift focus from outbound to inbound markets. Currently there are twice as many outbound travellers from Japan as inbound travellers, although inbound travellers have increased at around 10% annually over the last 5 years. However Japanese travel providers, faced with static or falling numbers of outbound travellers, will need to increasingly focus on the inbound market.

This will mean increasing the attractiveness of Japan as a destination to overseas travellers, and particularly to Asia Pacific travellers. This primarily involves attracting leisure visitors as Japan’s relative economic stagnation could mean it is less attractive as a business destination. The number of business visitors to Japan has decreased by 8% over the last 5 years, and accounts for only 16% of total visitors. Conversely visitors for personal reasons, mainly holiday-makers, have increased by 24% over the same period.

Most Asia Pacific travellers face visa impediments when travelling to Japan, with only Australia, New Zealand, Hong Kong and Singapore currently having reciprocal visa exemption arrangements in place. Coupled with other impediments, such as high costs for items such as local travel and accommodation in Japan, and lack of budget airline alternatives, these are significant barriers to increasing traveller numbers.

“In the longer term, Japanese airlines need to become more focused on international travellers – people who will travel to Japan or through Japan. The industry needs to encourage travel to Japan and address the barriers that currently impede this e.g. visas.”

Mr. Okada,
EVP Alliances & International Affairs, All Nippon Airways

2Source: WTO, Compendium of Tourism Statistics, 2012
The Leapfrog Effect
technology & infrastructure in Asia Pacific
A key aspect of travel over the next two decades will be the revolutionary impact that technology will have on the travel experience. This effect will be particularly marked in the Asia Pacific region, where technologies such as the high-speed mobile internet will create a significant shift in the way that travellers research and manage their travel. In many respects the Asia Pacific region will leapfrog the rest of the world in adoption of mobile technologies.

Japan is a technologically advanced society and this offers significant opportunities for travel service providers to interact with travellers in new ways. For example, the growing usage of mobile devices for researching and making travel arrangements by travellers will increasingly require travel providers to provide mobile solutions or risk losing the emerging wave of tech savvy travellers.

The opportunity from mobile devices

Japan was the first country in the world to adopt a widely-used mobile internet service, through NTT DoCoMo’s i-mode service, launched in 1999 and which now has over 50 million users in Japan. Overall smartphone ownership is still lower in Japan than in other developed markets (14% penetration compared to 34% in Korea). However as penetration of mobile devices increases in Japan we expect to see increased usage for travel. Our research shows that only 22% of Japanese business travellers and 13% of leisure travellers currently use their smartphone to make travel related arrangements and bookings – a much lower portion than in all other Asia Pacific markets, which indicates a significant growth opportunity in the Japanese market.

“Travellers will increasingly wish to interact via a mobile device. In some countries such as Indonesia and Thailand they have skipped the fixed internet phase and moved direct from face-to-face contact to contact via a mobile device (tablet, smartphone, etc.). Agents and travel providers will need to provide mobile solutions or become irrelevant.”

Mark Dougan, Managing Director, Australia & New Zealand, Frost & Sullivan
As with use of mobile devices, Japanese travellers have yet to embrace the use of social media in planning and organising their travel to anywhere near the same extent as their counterparts in other countries in the region. This, therefore, offers an opportunity to travel service providers and intermediaries as usage of social media in Japan grows to match other countries. Just over 10% of Japanese travellers currently use social media during travel, and only 14% plans to do so in the future — significantly fewer than in all other countries. Engrained cultural attitudes towards privacy together with the ageing population explain the lower usage of social media in Japan, which is among the lowest in the developed world.

For travel providers and intermediaries this will drive a different model of engagement with Japanese travellers who are more traditional in their travel research and booking behaviour than travellers in other countries.

“The line between online and personal contact from travel agencies for travellers will become more and more blurred – face-to-face and online travel will merge”

David Brett, President, Amadeus Asia Pacific
The Barbell Effect
growth at the upper and lower ends of the travel market
The rapid growth in emerging markets

“Big population exists – in India, China. It’s a basic numbers game. We need to focus our radar on bigger traffic areas like this”

Miho Ohtake, General Manager, Amadeus Japan

As outlined in our report “Shaping the future of travel in Asia Pacific: The big FOUR travel effects”, the bulk of growth in traveller numbers across the Asia Pacific region over the next two decades will come from the emerging economies of China, India and Indonesia. Economic growth will create an enormous increase in the middle classes in these countries who will want to and be able to travel for the first time. But despite the rapid growth in traveller numbers, most travellers from emerging economies will still be travelling on a budget, as even by 2030 per capita average incomes will be well below Western levels.

Hence to capture the growing traveller numbers from emerging economies, destinations such as Japan will need to increasingly cater for the budget traveller with facilities such as budget airlines and hotels. Japan faces a major challenge, not just through its high costs but through the relative lack of infrastructure for budget travellers.

The need for capacity at the budget end of the market

“In Japan, growth of LCC market will be critical and essential to stimulate the Japan market, because Japanese air tickets are too expensive compared to other Asia Pacific regions.”

Mitsunori Nobe, President and CEO, JTB-CWT Business Travel Solutions, Japan

An important factor behind the non-existent growth in outbound travel from Japan over recent years has been the lack of budget airline capacity which has yet to develop in Japan to the same extent as in other markets. Budget airlines have a market share of only 12% in Japan, well behind the global average of 26%, and well behind other markets in Asia such as Malaysia and Indonesia. But with a number of budget airlines now available in Japan, such as Jetstar Japan, Peach and Air Asia, this will provide a significant stimulus to the overall travel market.

With outbound air tickets from Japan being very expensive in comparison to other Asia Pacific markets, the emergence of budget carriers will provide a necessary stimulus to travel, especially for leisure travellers. Our research shows that only 16% of Japanese business travellers and 31% of leisure travellers have used budget airlines in the past 12 months, with lower fares being the main reason.
“But penetration rates are low in Japan, Korea and China – this is where the huge potential is. In 2012 three LCCs were launched in Japan and there will soon be 50 in the Asia Pacific region.”

Peter Harbison,
Executive Chairman, Centre for Aviation (CAPA)

Source: Survey of 1,531 Asia Pacific Travellers, August 2012

The need for greater budget airline infrastructure

“LCCs will boom because of the meeting between declining fares and significant increases in middle classes with income levels sufficient to travel. This will mean an enormous growth in the number of people who can travel.”

Peter Harbison,
Executive Chairman, Centre for Aviation (CAPA)

With budget carriers likely to be increasingly important in Japan’s aviation sector, the need for greater budget airline infrastructure is apparent. Most international air traffic in Japan is currently funnelled through Tokyo Narita or Haneda airports, and while recent expansion at Haneda has increased capacity, landing charges at Tokyo airports are among the highest in the world, a significant disincentive to budget carriers. To fully stimulate the budget carrier opportunity, a range of second tier airports need to be established to cater for international budget airlines serving short and mid-range destinations.

Expansion of second tier airports outside Tokyo will provide significant benefits for both outbound and inbound travellers – providing increased viability for budget airlines and helping to stimulate traveller numbers.
Summary

The changing face of the Japanese traveller

Japan is a unique travel market in the Asia Pacific region. It is one of the only markets where traveller numbers have declined in recent years, and given the demographic changes that will impact Japan over the next two decades, traveller numbers are likely to remain static at best. This is the result of a number of factors including economic stagnation, security concerns and relative lack of low-cost airfares from Japan. Destinations that have previously been heavily reliant on Japanese travellers are therefore likely to experience continued decline in traveller numbers. This is also being driven by a destination switch, as Japanese travellers increasingly focus on destinations such as China and Korea, away from markets like Australia.

The Japanese traveller is also quite distinctive to travellers from other Asia Pacific markets in travel behaviour. There is a much higher portion of senior travellers from Japan, and with the demographic changes underway this traveller group will get larger. The number of younger travellers in the 20-39 age group will decline, as will the number of business travellers, although female business travellers will increase. Japanese travellers also tend to be more conservative in their travel behaviour, reflected for example in a strong propensity to use travel agents rather than self-manage, and in lower usage of mobile devices for travel arrangements and bookings.

These changes will need a response from travel providers. Outbound travel from Japan can be stimulated by developments such as budget airlines, providing lower cost options for Japanese travellers. Similarly the Seniors market can be capitalised upon by addressing some of the concerns that senior travellers have, such as language, hygiene and security. Additionally Japanese travel providers will need to focus more on inbound rather than outbound travel – addressing some of the barriers that currently deter travellers from the emerging markets in the region to travel to Japan.

Travel service providers also have the opportunity to interact with Japanese travellers in new ways – through the internet or via mobile devices or social media, as Japanese travellers take up these channels in the same way that their counterparts in other countries around the region are doing. While the Japanese travel market may not grow, service providers will need to become increasingly innovative in the way that they interact with travellers.
Appendix

Our approach

We sought qualitative and quantitative input from three sectors; travel service providers, industry associations and travellers themselves.

Specifically, we undertook 13 in-depth, one-on-one interviews with thought-leaders from the travel industry across the region, including inputs from industry associations, national tourism bodies, airlines, hotels, travel agents and consultants. We also interviewed several of Amadeus’ own thought-leaders. Contributors are listed at the back of the report.

We undertook quantitative research with 1,531 business and leisure travellers (defined as individuals who have travelled overseas at least once in the past 12 months) from the seven key markets of Australia, China, India, Indonesia, Japan, Korea and Singapore. The research therefore involved travellers from both developed markets (the OECD members of Australia, Japan and Korea, plus Singapore) and the emerging and highly populous markets of China, India and Indonesia. Research was undertaken by means of an online survey.

We also reviewed existing published sources on the travel industry in the region, from sources such as the World Tourism Organisation (WTO), Centre for Aviation (CAPA) and the Pacific Asia Travel Association (PATA), as well as from broader data sources such as the Asian Development Bank (ADB) and the Organisation for Economic Co-operation and Development (OECD).

Contributors

We are extremely grateful to all the individuals who contributed their time and ideas to the development of this report:

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The opinions and viewpoints expressed in this report do not necessarily wholly reflect those of the contributors.

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