Shaping the future of travel in China
The big FOUR travel effects
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China is one of the next frontiers of the Asia Pacific travel market. With its enormous economic growth over the past twenty years, which has seen it rise to be the world’s second-largest economy, China has become increasingly important as both an inbound and outbound travel market. Arrivals from China to other Asia Pacific destinations have been increasing at an annual rate of 12% for the past few years, and China now generates 18% of arrivals to other Asia Pacific destinations, with 57 million arrivals in 2011. Despite this growth, the potential of China is still enormous – arrivals from China are still only 4% of the total Chinese population, a much lower proportion than in developed markets such as Japan and Korea. With China’s middle class forecast to rise from less than 400 million in 2011 to over one billion by 2030, the number of international travellers is likely to grow considerably.

Along with the quantitative change in travellers we expect to see a qualitative change, as the face of the Chinese traveller changes. No longer can Chinese travellers be seen as a monolithic group, travelling in large, organised parties. Chinese travellers will become more individualistic, travelling to a wider range of destinations, often in smaller groups or even alone, and for a broader range of reasons. Technology will support travellers in becoming more confident in making their own travel arrangements, and travellers will use social media to become more collaborative in their travel.

This report follows on from Amadeus’s report on “Shaping the future of travel in Asia Pacific; The big FOUR travel effects” which looked at the key trends that we believe will impact the travel industry across the region over the next two decades, based on research we undertook in seven countries across Asia Pacific. In this report we seek to focus specifically on the Chinese market, identifying which of these trends are relevant to China and the implications of these for the travel industry, comprising the ecosystem of providers, such as transportation companies (airlines, rail operators etc.), accommodation and entertainment providers as well as intermediaries such as travel agents.

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!
Despite this strong growth, the number of outbound travellers each year is still equivalent to only 4% of the total population, and around 15% of the total middle-class population. Therefore China still offers huge potential as an outbound market. As income levels in China rise, the urban middle class will continue to grow exponentially with an estimated one billion Chinese likely to live in middle-class families by 2030. As income levels rise, so does disposable income – and travel is one of the main expenditures for this disposable income.

Combined with the enormous growth in the number of Chinese able to travel, comes an increasing ability to travel, as liberalisation in areas such as visa restrictions and air transport reduces the barriers to travel. More Chinese will both want and be able to travel, driving a huge increase in outbound traveller numbers. Overall, traveller numbers could well approach 200 million by 2030, and although a large portion of these travellers will be travelling within Greater China (i.e. Hong Kong, Macau and Taiwan) there will still be a huge increase in the numbers travelling more widely in the Asia Pacific region – conservatively estimated at over 30 million by 2030, up from 11 million in 2011.

The rise of the Chinese traveller

“The base of travellers has expanded from the previously only government, corporates and rich to a much larger customer base.”

Dr. Li Qiang, General Manager of Information Management Department, Air China

China is becoming an increasingly important source market for travellers, generating 58 million outbound trips in 2010, an increase of 20 million in only five years. China is an increasingly important source of travellers to many Asia Pacific markets. For example, it now accounts for 9% of arrivals to Australia, 12% of arrivals to Singapore and 17% of arrivals to Japan.
The Me Effect
the increasing individualism of the Chinese traveller
“China will grow hugely as a source market as the middle class grows and more people can afford to travel. While group tours will be the starting point for most first time travellers, over time, the Chinese will travel independently.”

John Koldowski,
Head of Research, Pacific Asia Travel Association

The search for new destinations

China generated 57 million arrivals to all Asia Pacific destinations (including Hong Kong, Macau and Taiwan) in 2011, accounting for almost 18% of total visitor arrivals. Over the past five years, arrivals from China have been growing at 12% annually – much faster than any other major source of visitors – as the number of Chinese with the ability to travel increases, and as travel liberalisation enhances their ability to do so. Yet the majority of Chinese travellers are not currently travelling beyond Greater China, with Hong Kong, Macau and Taiwan accounting for 46 million of the 57 million arrivals from China. If we exclude Greater China, China generated only 11 million arrivals to other Asia Pacific destinations in 2011, fewer than was generated by Korea or Japan.

Over the next two decades we expect to see a marked shift in this picture, as Chinese travellers increasingly travel further afield. Our research shows that Europe, North America and Australia are the preferred destinations for both business and leisure travellers, with these destinations particularly popular amongst the middle age groups (31-65).

Table 1: Preferred destinations for travellers (China)

<table>
<thead>
<tr>
<th>Business</th>
<th>Leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe 49%</td>
<td>Europe 48%</td>
</tr>
<tr>
<td>North America 42%</td>
<td>North America 38%</td>
</tr>
<tr>
<td>Australia 31%</td>
<td>Australia 36%</td>
</tr>
</tbody>
</table>

Source: Survey of 244 Chinese travellers, August 2012

While these are the preferred destinations, many other destinations in Asia Pacific will see continued strong growth in arrivals from China, driven by both leisure and business travel. With Chinese companies increasingly looking for sources of natural resources, travel to markets such as Indonesia, Papua New Guinea, Myanmar and Mongolia will grow strongly. And Leisure travellers will increasingly travel to SE Asia, Australia and the Pacific, as well as South Asia.

The Chinese traveller therefore represents a huge growth opportunity for travel providers, but one that will require adaption of existing business models to be fully exploited.

“The biggest growth in outbound travel is from China. China is now the biggest outbound market to New Zealand, as well as to Japan and Korea. Our hotels are gearing up to better serve the Chinese market with specific service standards, but it also requires a new strategy across all aspects of hotel operations – including sales and marketing.”

Markus Keller, Regional Director of Sales & Distribution, Accor Asia Pacific
The business traveller

While in the past few Chinese companies played on the global stage, that picture is changing rapidly as Chinese companies have started to become more aggressive in selling into global markets. Chinese companies such as Huawei, Cherry, Great Wall, Haier and Dongfeng are becoming increasingly internationalised – driving requirements for travel by their employees. Yet while business travel is dominated by employees of larger corporates, the small business traveller market is likely to emerge as Chinese small-to-medium businesses also begin to operate outside China. Small businesses account for 75% of China’s labour force, and as they become increasingly interested in international markets, we expect to see a developing market for small business travellers from China.

So the Chinese business traveller will become a much more significant force in Asia Pacific over the next few years, as Chinese companies, including small-to-medium businesses, increasingly seek to do business regionally.

The female business traveller

Although business travel from China has traditionally been male-dominated, the growth of female business travellers is one of the major themes in business travel in the next 20 years. Already females account for well over one-third of business travellers from China – a much higher proportion than from markets such as Japan and Korea. The number of female business travellers from China will grow strongly over the next 20 years.

The representation of women in mid - senior management in China is higher than in other Asian countries, and women now account for over 50% of all graduates in China. With more women reaching the executive ranks where travel is required, the proportion of female business travellers will increase. When combined with strong growth in business travel overall, as Chinese companies become more internationalised, the net result will be enormous growth in female business travel from China.

This will require new strategies from travel providers who seek to capitalise on this growing trend – not just in the provision of facilities but also in the way that providers interact with customers – with female travellers often using different processes to make travel decisions.
“Overall the women’s market is a huge 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 amongst 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.”

Siew Hoon, Editor and Founder, Web-in-Travel

The rise of Generation ‘S’ (Senior)

While the ageing of the population is often considered a trend impacting developed economies such as Australia and Japan, it is also noticeable in China. By 2030 the number of over 65s will double to reach almost 20% of the population. While seniors travel is still a nascent market in China, we expect to see it develop strongly over the next two decades driven by two main factors – the entering into retirement of the first generation with enough wealth to travel after retirement, and the increasing internationalisation of families.

Our research shows that the over 65s account for less than 5% of Chinese travellers now, compared with over 20% in markets such as Japan and Australia, but we expect to see growth in China to match these levels over the period to 2030. Around 40% of Chinese travellers currently have close family members living overseas — a major driver for travel as a clear majority of older travellers express the expectation to visit them over the next five years.

The self-managed traveller

Use of a travel agent to make bookings and travel arrangements is still the predominant approach to travel booking by Chinese travellers, with our research showing that 56% of leisure travellers are currently using an agent to make bookings, with the balance generally making their own bookings over the internet. The main reasons that Chinese travellers use agents are that agents make complicated itineraries easier, and that the overall booking process is smoother, particularly for first-time travellers.

However, an increasing number of travellers report that in future they are more likely to make their own bookings with over 50% of travellers reporting that they are likely to do so in the future, generally via the internet. This percentage reflects more experienced travellers who feel more confident with the overall travel process. Online booking gives travellers more flexibility, and this is reported as the main reason for online booking by Chinese travellers.

Figure 2: Proportion of travellers who make online bookings

Source: Survey of 1,531 Asia Pacific Travellers, August 2012
The Red Tape Effect
the breaking down of barriers to travel within the Asia Pacific Region
“Travellers want more convenience. Visa processes - get rid of the red tape. This will help boost travel.”

David Brett, President, Amadeus Asia Pacific

Visas have traditionally been a major impediment to travel for the Chinese traveller, being required for virtually all overseas destinations. Our research shows that 7% of Chinese travellers report that visa restrictions is the main reason that they do not travel as much as they would like – one of the highest proportions in any country. However we anticipate that these impediments will be gradually reduced – for example APEC has established a Business Mobility Group which seeks to reduce barriers to mobility by business travellers across the region through initiatives such as the APEC Business Traveller Card. Some countries, such as Singapore, have relaxed visa restrictions on Chinese passport holders, recognising the increased importance of this group. In another example, the Australian Government will build on a recent trial and China’s recent agreement to label-free visa arrangements to streamline access for independent Chinese tourists. This follows the successful conclusion in 2011 of the Memorandum of Understanding on Strengthening Tourism Cooperation with China. We anticipate further liberalisation of visa restrictions as destinations seek to reduce the barriers that impede exploitation of the Chinese traveller opportunity.

The impact of liberalisation on the Chinese traveller

China currently remains a heavily-regulated air travel market. However liberalisation is slowly occurring – for example, the recently announced Open Skies agreement between China and Japan and a similar arrangement with ASEAN. There is clear evidence that liberalisation of air traffic markets provide substantial benefits for air passengers and the wider economy – increasing competition, reducing fares and leading to the opening of new routes, all of which provide a significant stimulus to travel.

With Open Skies agreements stimulating competition, a broader range of airlines may start to serve the Chinese market, providing greater flexibility for travellers and greater stimulus to travel, although the Chinese aviation market is likely to remain regulated for several years. A particular dynamic is likely to be the emergence of budget carriers in China – which still account for a relatively small amount of international air capacity and virtually none in the domestic market. Globally budget carriers account for around 25% of the aviation market, but only 5% in China where only one major budget carrier currently operates. Our research shows that 32% of Chinese business travellers and 50% of leisure travellers have travelled internationally on a budget airline in the past year, primarily because of the lower fares that budget airlines offer.

Figure 3: Proportion of travellers that have used budget airlines in past year

Source: Survey of 1,531 Asia Pacific Travellers, August 2012
The Leapfrog Effect
the increasing use of technology and infrastructure in the travel process
As outlined in the Amadeus report, “From Chaos to Collaboration”3, an emerging set of technology and infrastructure changes will have a transformative effect on travel over the next 20 years. Asia Pacific, often with little to no legacy systems, processes and infrastructure, has the opportunity to leapfrog, and indeed learn from, legacy processes and technologies in North America and Europe, particularly through the growth of ‘intermodal’ travel. These developments will be particularly noticeable in China where technology will change both the ways that travellers behave and the ways that they travel.

**Use of the internet for travel**

China now has the largest number of internet users in the world, and the internet is revolutionising the travel experience for many Chinese travellers. Although use of travel agents by Chinese travellers is more widespread than in other markets in the region, as travellers become more travel savvy we expect to see internet usage for travel arrangements increase significantly. The proportion of Chinese travellers who report that they will use the internet more in future for travel-related arrangements and bookings is the highest in the region.

![Figure 4: Future use of Internet for travel arrangements](image)

Source: Survey of 1,531 Asia Pacific Travellers, August 2012
Increasing use of mobile devices for travel

“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

Although the majority of internet access in China is still by way of personal computers, mobile devices such as tablets and smartphones are creating a fundamental change in the way that travellers make travel arrangements and bookings. China is now the largest smartphone market in the world, offering much greater flexibility to the traveller who is able to research and make arrangements on the move, facilitated by the growth in WiFi networks across many parts of the region. Our research shows that Chinese travellers are amongst the most avid users of mobile devices in the region, with 45% of business travellers and 33% of leisure travellers using these devices for travel arrangements.

Younger age groups are the most enthusiastic users of mobile devices in China with almost half of younger travellers now regularly using them. Mobile devices are used for both research and bookings, with Chinese travellers seemingly less concerned about security and network reliability than their counterparts in other countries.

For travel providers, therefore, developing a mobile channel will become increasingly important to target the Chinese traveller, including both a mobile web site or app, with booking capability.

“Mobile will change the future of travel in Asia. 3G / 4G is very closely linked to the use of mobile. As a traveller today, roaming charges are a big factor in the use of mobile apps for travel. As people travel more and more, they will need to be more accessible and do more with their phones, which will need to be ever more integrated into daily tasks.”

David Brett,
President, Amadeus Asia Pacific
### The collaborative traveller: social media enhancing the travel experience

“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

Social media is revolutionising the travel experience and causing a fundamental shift in the way that travel providers need to interact with travellers, as travellers increasingly use social media as a source of information, but also as a means to undertake travel-related transactions. China has one of the world’s most social media active populations, with over 90% of internet users having used a social media site in the past 12 months, a higher proportion than all other countries in the region. China has a vibrant ecosystem of social media sites, such as Renren, Kaixin and Sina Weibo. And an important aspect of social media usage in China is that social media here has a greater impact on purchase decisions than anywhere else, as Chinese consumers particularly prize peer-to-peer recommendations. This means that social media is becoming an increasingly important channel for influencing purchase decisions, including for travel. Our research confirmed that for Chinese travellers use of social media is widespread, with 84% of travellers currently using social media during their travel, and 54% of travellers intending to use it more in future – the highest number in the region.

For travel providers seeking to serve the Chinese traveller social media will, therefore, be increasingly important, and this will require providers to develop and implement social media engagement strategies specific for the Chinese audience.

“The hotel industry is not really using social media as a transactional channel. However it is important for brand enhancement as it is really about story telling. Social media offers the opportunity to create a wider perception of the brand and enhance the dialogue with the customer.”

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

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*McKinsey & Company, China’s Social Media Boom, 2012*
Continued growth in high-speed rail (HSR)

“Technological changes also make travel more affordable and accessible to the mass. For example, in China, this is represented by the development of High Speed Trains (HST). The rapid development of high speed trains has offered more options to customers. For example, a greater number of business customers now tend to choose HST instead of flying for the trips under 1000km, for the convenience and comfort. This, on the other hand, also has driven changes in the services offered by travel industry. For instance, the air-rail connection ticketing has emerged as a new way to serve the customers.”

Dr. Li Qiang,
General Manager of Information Management Department, Air China

The boom in rail travel in China is extraordinary, and will create fundamental changes in the travel eco-system especially for domestic travel. China now has the largest high speed rail (HSR) network in the world at 13,000km, and a further 27,000km is planned to be built before 2030. High speed rail (HSR) is generally highly competitive for journeys up to 800km, with rail gaining a dominant market share over air for journeys up to 500km. So in China, HSR will have a significant impact on the domestic air travel market, stimulating the development of budget airlines which have the fast turnarounds and low fares to compete with rail. It will also drive the development of multi-modal travel (for example combining a flight and rail journey on the same itinerary) requiring travel service providers to offer a broader range of ticketing options.

The cruise opportunity

Cruise represents a hugely untapped market in China as the Chinese government continues to liberalise the industry – for example, by allowing foreign cruise vessels to dock at more than one port in China during a single voyage and allowing Chinese companies to operate cruises. Since 2007, Chinese citizens have been allowed to holiday onboard international vessels, and this has stimulated growth, albeit from a small base. Cruise passenger visits to China are also increasing rapidly, at over 600,000 in 2011, up from 200,000 in 2009.

With liberalisation of cruise regulations and investment in vessels and facilities the number of cruise passengers in China is likely to increase significantly. Currently only 1% of Chinese have ever been on a cruise and the majority of these are domestic river cruises. However, in our research 37% of Chinese travellers report that they are likely to go on a cruise holiday in future.

Cruise penetration in China, as elsewhere in Asia, is still very low by global standards. But Chinese travellers have a clear interest in a cruise holiday, and as investment in and liberalisation of the sector continues we expect to see a huge increase in cruise passengers.

Figure 7: Asia Pacific high speed rail networks (km)

Source: Frost & Sullivan estimates
The Barbell Effect
growth at the upper and lower ends of the travel market
Growth at the upper and lower ends of the travel market

Throughout this report we have referred to the enormous growth in the numbers of travellers from China over the next two decades, and the increasing divergence of the Chinese traveller. This is reflected in what we have termed the “Barbell Effect”, with Chinese travellers mainly being concentrated at the luxury or budget ends of the travel spectrum.

While the rapid growth in the middle class in China will fuel huge growth in overall traveller numbers, the average Chinese family will still have a disposable income well below those in mature markets and will generally be travelling on a budget. At the same time, economic growth is producing a burgeoning number of the very wealthy, creating a rapidly growing market to service the Chinese luxury traveller.

The Chinese luxury traveller

China now has the fourth highest number of High Net Worth Individuals (with investable assets of at least $1 million) in the world, and the second largest in the Asia Pacific region after Japan. Over the next 20 years the number of High Net Worth Individuals (HNWIs) in China will increase six-fold as rapid economic growth continues.

For the wealthy in China, travel is the most preferred leisure activity, and accounts for 25% of total expenditure with the average HNWI in China making 2.5 international trips per year. Australia, Japan and Singapore are the most preferred travel destinations within the region.

Luxury travellers from China, therefore, represent a growth segment for travel operators and destinations, but one that is likely to be increasingly competitive with Asia Pacific destinations from Singapore to Sydney actively targeting this group of travellers.

The budget traveller

Whilst the number of HNWIs in China is growing at an exponential rate, the majority of Chinese travellers will be travelling on a budget that is, by Western standards, relatively tight. In 2011 on average Chinese travellers spent only $1,000 per trip, about one-quarter of the spending of Australian travellers. And despite strong economic growth even by 2030 per capita incomes in China will be well behind those in developed countries such as Australia, Japan and Singapore.

Many high-cost destinations will therefore find it increasingly difficult to target the majority of Chinese travellers in the future, unless capacity is expanded in the lower ends of the travel spectrum – in areas such as budget airline terminals and economy hotels. Without cost-competitive facilities, destinations such as Australia, Japan and Singapore are likely to increasingly lose out to more economical destinations, better suited to the budget traveller from China.
Summary
The changing face of the Chinese traveller

Along with India, China will be one of the two main growth engines of travel in the Asia Pacific region over the next two decades. Already the number of travellers from China to the region is growing at over 10% annually, and although most travel is currently concentrated within Greater China, Chinese travellers are increasingly travelling further afield. Continued economic growth, coupled with liberalisation of travel restrictions and greater travel capacity, will continue to stimulate this market.

Alongside the growth in traveller numbers, our core observation is that the Chinese traveller will become more diverse. Chinese travellers will be travelling to a wider range of destinations, for a broader range of reasons, and with differing expectations from the travel experience. The travel process will also become increasingly diverse, with increasing self-management of travel enabled by the internet and particularly mobile devices. Modes of travel will become more varied, as high-speed rail continues to expand rapidly, budget carriers expand their foothold in the Chinese market, and cruise facilities will multiply.

This increasing diversity offers challenges but also opportunities for travel providers. Rather than traditional centrally-organised relationships with groups such as travel agents, service providers will need to deal with Chinese travellers on a more individualistic basis, offering more tailored products distributed in new ways. By adapting to the changing face of the Chinese traveller, travel providers are best placed to capitalise on the opportunity that this shift presents.
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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