

*east-west center east-west center special reports number 4 october s the asia-pacific airline industry: economic boom and political conflict sumner j. la croix david jonathan wolff.*

At a time of industry upheaval, our winners are adopting strategies that offer new directions for others to take up. From , when the Awards were established, through until they were limited to Asia Pacific including the Middle East. In the Awards became global and began including recipients from all regions. JAL was selected for several new strategic initiatives the group has pursued since restrictions that had been imposed as conditions of a government bailout were lifted in JAL has since resumed expansion with several new long-haul routes including Melbourne and Kona. JAL established earlier this year a low cost long haul subsidiary, which plans to launch in with s focusing on opportunities in Southeast Asia. JAL is now well positioned for future growth as it implements a well crafted new long-term strategy. Thai Lion turns only five years old this month and will end this year with a fleet of 35 aircraft and more than 10 million annual passengers. Thai Lion has already overtaken Nok Air , which launched operations nearly a decade earlier, to become the second largest LCC in Thailand. Over the last year it has pursued rapid and successful expansion in the international market, with a focus on China. Thai Lion only began serving China in and has already become the largest airline from Thailand “ and all of Southeast Asia “ in the strategically important Chinese market. Thai Lion has been able to expand its China network rapidly by working closely with Chinese travel agents, including OTAs. Thai Lion provides complimentary check-in bags but is a typical LCC with its sale of seat assignments, meals and drinks. Alliance Airlines was selected for its flexible approach, offering wet lease, contract and charter flights as well as scheduled passenger services which are sold under a Virgin Australia codeshare. It also has an expanding aviation services business. Alliance has been consistently profitable the last three years and turned an AUD26 million profit before tax in the fiscal year ending Jun It expanded its fleet from 29 to 33 aircraft in FY and plans to another six aircraft in the current fiscal year. Saudia also known as Saudi Arabian Airlines was selected for its successful transformation, which has resulted in significant efficiency improvements, in-flight product upgrades, fleet renewal and an accelerated growth rate. Saudia embarked on an ambitious transformation programme three years ago aimed at improving its efficiency and product. The airline has since taken delivery of more than 70 aircraft, resulting in a young new fleet with new in-flight products and higher service standards. Saudia now has one of the youngest fleets in the world, with an average age of less than five years. The transformation also included a new dual brand strategy, resulting in the launch of LCC flyadeal in This year Saudia has moved into a new terminal at its Jeddah hub, resulting in massive customer service improvements particularly for transit passengers. More than a dozen international destinations have been launched in the last two years while capacity has been added to several existing destinations. The LCC currently operates eight As to eight domestic destinations and is close to finalising an order for up to 50 aircraft, positioning it for rapid growth over the next several years. Long haul services are also under consideration for the medium term. The model has worked, stimulating demand and capturing high load factors from the first day with a strong following particularly among young Saudis. The spacious high-tech terminal is the new hub for Korean Air and its SkyTeam partners. Traffic has more than doubled since , when the airport handled less than 29 million passengers. Incheon currently has nonstop passenger flights to over international destinations. Mactan-Cebu was selected for the successful opening of Terminal 2, which provides ample capacity to support international growth and offers the best airport passenger experience by a wider margin in the Philippines. Terminal 2 is being used for international operations, which has grown rapidly in recent years, while the original terminal is being used for domestic flights. Annual traffic reached the 10 million passenger milestone in , putting Mactan-Cebu in the medium airport category. All three main Philippine airline groups have been pursuing rapid expansion at Cebu, which they are now using the airport as an alternative hub for transfer traffic. The airport also has attracted eight new foreign airlines over the last three years and is currently served by 16 foreign carriers. Senai Airport was selected for its leading role in using new biometrics technology and its support of the LCC model, which has

driven rapid growth. In early Senai became the first airport in Asia to use biometric facial recognition technology, providing a seamless self-service travel experience from check-in to boarding. By embracing the new technology, Senai has improved customer service and efficiency, enabling the airport to accommodate further rapid growth. Senai overall now has 19 routes, including 12 domestic and seven international links. Passenger traffic has nearly tripled over the last six years, from only 1. The airport handled 3. International traffic has grown from only 17, passengers in to , passengers in Senai has been privately owned since and is the only airport in Malaysia outside the Malaysia Airports portfolio. It has grown faster than the Malaysian market average the last six years. While an earlier strategy involved it targeting passengers heading to or from Singapore , Senai in recent years has successfully focused on the local market, attracting several new LCC services which have helped stimulate demand. This year the Aviation Awards for Excellence are being presented at two gala dinners – one for the global industry in Berlin, to be held on Nov, and one for Asia Pacific, which was held on 8-Nov in Singapore. CAPA Membership provides access to all news and analysis on the site, along with access to many areas of our comprehensive databases and toolsets.

## Chapter 2 : Asia-Pacific: Airlines Industry Report

*IATA Asia Pacific represents, serves and leads our airline members from our regional office in Singapore. From this office, the IATA team drives the industry's priorities in 26 countries with the support of 11 country and area offices, across 8 time zones.*

These are explored in the context of four potential scenarios; new frontiers, sustainable future, resource wars, and platforms. The scenarios envisage different outcomes for the world. One explores the eastward shift of power, another sees the world prospering through successful sustainability, a third predicts a war over resources and the final scenario assesses a world dominated by elite agendas. The study allowed us to consider a variety of implications for the industry and to set out the industry-level recommendations. All present challenges and opportunities for the airline industry. The study purposely makes these scenarios extreme and accepts that the more likely future will combine elements of all four. But pushing boundaries provides a wider perspective. Whatever the scenario, for example, the fallout from geopolitical tensions necessitates global institutions, such as ICAO, and global standards remain relevant. A recommendation stemming from this development is that IATA engages early with such emerging institutions as the New Development Bank to influence aviation policy in the years ahead. In other words, the future of aviation will not be influenced by Ministries of Transport alone. We need to get everybody around the same table. The Future of the Airline Industry is nevertheless an essential companion in deliberations at airline and industry level. Most importantly, it can help guide airline strategy by introducing the many elements that must be considered in the longer term. There is no last word on the future. Airports of the future Airports are not certain to expand into cities in their own right, so-called aerotropoles, with their own hinterland of associated businesses. Of course, it is equally possible that rather than being eliminated, human resources could be redeployed to improve the flight and airport experience and capitalize on passenger flows, extending the airport shopping experience to a range of other facilities. Airports are no longer just a point of departure; they are leisure facilities that offer dining, shopping, and much more. Ensuring airline needs are considered with all airport planning is the key recommendation emerging from the Future of the Airline Industry study. It is also recommended that IATA uses the strategic review of the Worldwide Slot Guidelines to improve the efficient use of capacity and guard against proposed revenue commitment from airlines and the market allocation of slots. Privacy and trust The Future of the Airline Industry study argues that airlines could be deeply affected by drivers of change that may as yet be under the radar. Privacy and trust, for example, refers to the tension between the potential offered by big data and other forms of technology development—in terms of how people and devices are monitored and marketed—and the threat of fraud, cyber-terrorism and espionage. Put simply, if we mismanage their data, they are going to stop providing it. In short, will people be willing to give up increasing amounts of data to capture potential benefits? Data privacy and surveillance will doubtless be major topics as people redefine their relationship with companies, governments, and each other. Ensuring privacy and sound management of the information our customers provide should be fundamental to the management of the data. It cannot be that the retailer alone profits. Those consumers that provide a comprehensive array of data need to benefit in a definable way, perhaps by the offer of a discounted price.

## Chapter 3 : Asia Pacific: The World's Strongest Aviation Market | Pilot Jobs at Brookfield Aviation

*The Asia Pacific airline industry witnessed a boom in the 's that can only be termed as remarkable especially when compared to the performance of other airline markets such as the USA and Europe (Sumner et al. ).*

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## Chapter 4 : The future of the airline industry | Airlines.

*Asia-Pacific airlines urge co-operation on cyber-threats. Image: SITA. The Association of Asia Pacific Airlines has called on the region's aviation industry to co-operate on strengthening cyber-security as increasing digital connectivity makes it a bigger target for hackers.*

## Chapter 5 : APATS | Asia Pacific Airline Training Symposium September

*Airlines in Asia-Pacific industry profile offers broad overview information containing: market size (value and volume , and estimate to ). The report also offers details of the top players, including main business metrics and analysis of the competitive environment within the market.*

## Chapter 6 : AAPA – Association of Asia Pacific Airlines

*In July Association of Asia Pacific Airlines (AAPA) reported the region's airlines carry 1, million passengers and 20 million tons of cargo, represent one-third of world passenger traffic and two-fifths of world air cargo traffic respectively.*

## Chapter 7 : Asia-Pacific : Aviation: Benefits Beyond Borders

*Asia Pacific AviationAsia Pacific Aviation Industry Overview & Regulatory Challenges Andrew HerdmanAndrew Herdman Director General Association of Asia Pacific Airlines.*

## Chapter 8 : Asia-Pacific airlines want industry co-operation on cyber-security threats - Airline Ratings

*About us. Asia Pacific Airlines was formed in to serve Micronesia and the Western Pacific with much needed all-cargo jet service. The Fleet and Service has grown to encompass the entire Pacific theatre, providing scheduled and ad-hoc charter service, with bases in Guam and Honolulu.*

**Chapter 9 : Asia-Pacific airline industry may deliver over \$8 billion profit this year: IATA - Livemint**

*The Asia Pacific Airline Training Symposium (APATS) continually shares the latest training technologies and best practice in aviation training from around the world. Each conference session addresses the here and now, whilst also providing key insights into the future of the industry from renowned subject matter experts.*