Asia Pacific

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In April 2022, international passenger demand for Asia Pacific airlines crossed the 20% of 2019 levels threshold.

Due to the restriction by the governments, the region is lagging behind other regions.

But we have seen growing momentum with many states easing and lifting COVID-19 restrictions this year.
Momentum to reopen continues to grow

- Most of Asia allows **quarantine free travel** for vaccinated people
- However, COVID-19 testing is still required across many parts of Asia
  - **10** states/territories require pre-departure testing for vaccinated people
  - **12** states/territories require post arrival testing for vaccinated people
- Japan has started to take positive steps forward

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Quarantine is still required for
- Bhutan
- China
- Chinese Taipei
- Hong Kong SAR
- Macau SAR
- Samoa
- Solomon Islands

The states/territories requiring post arriving testing for vaccinated people are
- China
- Chinese Taipei
- Fiji
- Hong Kong SAR
- Republic of Korea
- Macau SAR
- Myanmar
- New Caledonia
- New Zealand
- Papua New Guinea
- Samoa
- Solomon Islands

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The states/territories requiring pre-departure testing for vaccinated people are:
- China
- Chinese Taipei
- Hong Kong SAR
- Japan
- New Zealand (PDT will be removed from 21 June)
- Republic of Korea
- Macau SAR
- Palau
- Samoa
• Solomon Islands
For the states/territories that still require testing for vaccinated travelers (pre-departure or post arrival), we urge them to remove these measures.

Quarantine and COVID-19 testing for unvaccinated travelers should also be removed, especially where there are high levels of population immunity, which is the case in most parts of Asia.

The mask mandate for air travel should also be lifted when it is no longer required in other indoor environments and public transport. Aircraft are designed with features to reduce the potential transmission of viruses on board. Cabin air is refreshed every 2-3 minutes—much more frequently than most other indoor environments.
Opportunities & Challenges for Asia Pacific

• Issues in the recovery

• Focus on sustainability

• Opportunities for digital operations
Airport congestion and staff issues have been limited in the region so far.

But this could change as travel resumes:
- Airport congestion
- Staff resource constraints
- Capacity restoration

Some examples in Asia Pacific:
- **Australia**: Staffing shortages and increase in processing times to deal with COVID-19 requirements.
- **Republic of Korea**: Current congestion largely driven by quarantine processing.
- **Singapore**: Limiting airport slots due to staff shortages to ensure service levels are maintained.
- **Thailand**: Staffing issues especially with ground handling due to previous downsizing.
Focus on sustainability

- Seeing **positive** steps in the region
  Including Japan, New Zealand, Singapore, Thailand

- ASEAN could do more
  Especially in the area of SAF

The positive developments on sustainability in the region:

- Japan – announced budget for green aviation initiatives
- First SAF production facility in Thailand
- Singapore emerging as a leader on SAF
  - New Zealand/Singapore cooperation on green flights
  - Singapore Sustainable Air Hub Blueprint
  - Pilot programs on deployment and credit

On Asean

- Topic coming into focus with new Sustainability Forum at ASEAN meetings
- Look for opportunities to expand SAF production
- ASEAN aviation stakeholders should work together to build up SAF capabilities in the region
Opportunities for Digital Operations

Passenger Processes

Pilots taking place in
• India
• Singapore
• Japan
• Korea
• Australia
• New Zealand

Embrace digital transformation in airline retailing

Customer expectations are changing
• Personalized offers, real-time information, seamless transactions

Passenger Processes/OneID
• The current focus is to digitalize airlines’ document checking process and to facilitate a contactless process with biometric-enabled identification across touchpoints at the airport
• Development of industry standards and guidance is in progress and we are engaging a number of key airlines, airports and governments in the region
• Asia-Pacific can be the leader with India, Singapore, Japan, Korea and Australia and New Zealand already piloting many components.
• India – The ‘Digi Yatra’ processes which adopt most of the One ID components, e.g. digital identity, digital travel wallet, Verifiable Credentials, etc. plan to be launched within this year starting from domestic flights.
• Singapore, Japan, Korea – Biometric recognition at the airports has been implemented for partial departure processes and plans to be expanded.
• Australia, New Zealand – Governments plan to enhance their digital health platforms to include more comprehensive passenger declaration, including arrival card, which would replace the current paper processes.

Airline Retailing
• Globally there are 70+ airlines with retailing capabilities, but only 7 in Asia Pacific
• According to McKinsey, airline retailing can create value up to $7 per passenger or 4% revenue by 2030
• Despite the pandemic, more airlines took the opportunity to continue working on
their plan and started their airline retailing journey with New Distribution Capability (NDC) deployment
• We hope to see more airlines in Asia Pacific embracing this digital transformation.
Questions