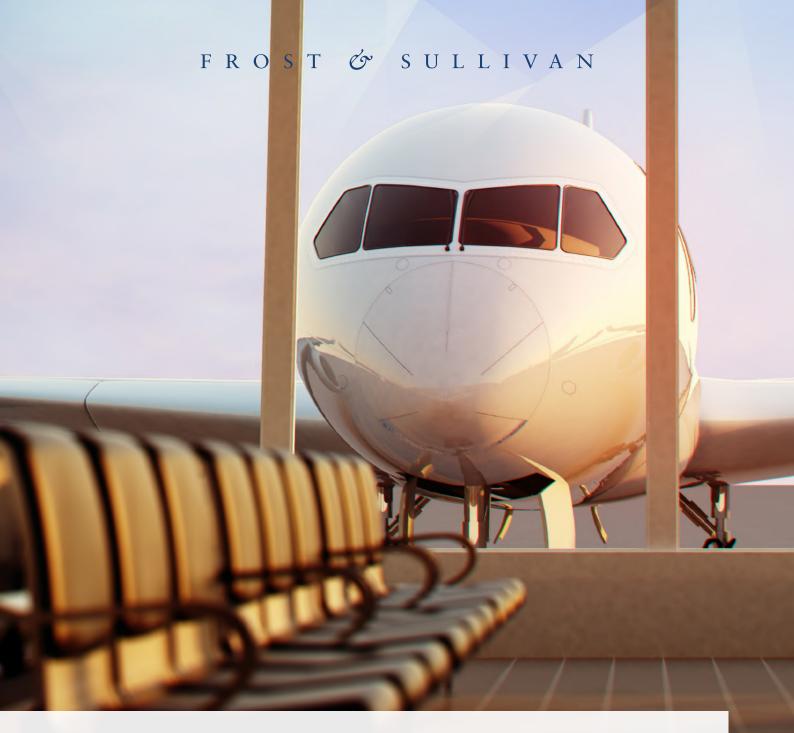
FROST & SULLIVAN

AIRPORTS 2030

FROST & SULLIVAN
RESEARCH PROGRAMME OVERVIEW



Airport operations and business models are rapidly changing, driven by competitive forces and capacity constraints.

Outside the airport terminal, congested airspace and obsolete air traffic management (ATM) infrastructure will necessitate investment in next-generation equipment and information management systems.

Within the airport terminal, increasing reliance on non-aeronautical revenues puts pressure on airport managers to remove operational inefficiencies and invest in the digital transformation of the airport ecosystem. As airports gradually evolve from pure transit points into customercentric organisations, the focus shifts to the passenger journey and improving the overall passenger experience.

Frost & Sullivan has worked with technology vendors, system integrators and airport operators to identify technology solutions, recommend business improvement and growth opportunities and develop strategy plans.

AIRPORT MARKET POTENTIAL

- Over 6.3 billion passenger journeys on 30,000 aircraft
- Almost 100% remote completion of passenger processing tasks
- Majority of airport revenues from non-aeronautical activities

AIRPORT 2030







Airport Check-In Market Worth \$5.0 Billion



Business Intelligence at The Core of **Airport Operations**

TRANSFORMATIONAL SHIFTS









Connected Traveller

Airport Cities Become Reality Big Data will Revolutionise Business Models Retail - A New Business Paradigm

A key consideration for airports is how to interact with the connected traveller. This is leading to the introduction of interactive mobile applications, location-based services (LBS), mobile location analytics (MLA) and investment in the expansion of loyalty programmes. New technologies allow improved management of passenger flows and more targeted and effective marketing.

DIGITALISATION - MARKETING TO THE TRAVELLER

WHEN TO INTERACT?

Identification of passenger journey stages that provide the most attractive marketing opportunities.

WHAT LEVEL OF PERSONALISATION?

Customise solutions by building long-term relationships and making sense of past interactions.

WHAT TYPE OF OFFER?

Develop the right products and services and deliver at the right time and place.



WHAT LEVEL OF INTERACTION?

What is the right level of interaction with passengers, to enhance their experience and improve commercial revenues.

HOW TO INTERACT?

Understand the right technologies and mediums to interact with passengers.

WHAT EXPERIENCE?

Understand the passengers needs and wants. Business travellers are different to leisure travellers.

Source: Frost & Sullivan and Amadeus

WHY FROST & SULLIVAN?

PROVIDING CUSTOMERS ACROSS THE AIRPORT ENVIRONMENT WITH INSIGHTS ACROSS THE ENTIRE PASSENGER JOURNEY

STRATEGIC APPROACH TO AIRPORTS

Vertical Market Depth

AIRPORT SUPPORT SYSTEMS:

- Air Traffic Management
- Baggage Management
- Security Management
- Mobility
- Information Technology

AIRPORT AIRSIDE/LANDSIDE OPERATIONS:

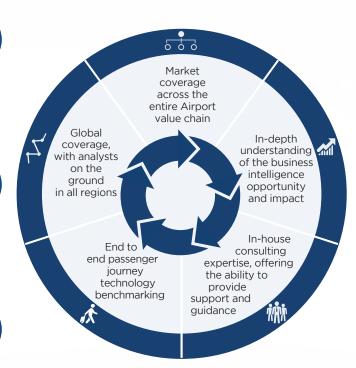


- Retail
- Cargo
- Passenger experience
- Ground Handling
- Infrastructure Management

AIRPORT MANAGEMENT FUNCTIONS:



- Master Planning
- Loyalty Programmes



KEY PROGRAMME COMPONENTS

STRATEGIC INSIGHT

Analysis of key topics driving market development

MARKET SIZING (TECHNOLOGY)

Technology
Across the
entire Airport
Passenger
Journey

AIRPORT BENCHMARKING

Insights into new developments of the major hubs

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HOW
FROST & SULLIVAN
CAN SUPPORT
YOUR STRATEGIC
PLANNING
PROCESS:

Define Growth Opportunities Through 'Macro to Micro' Mega Trends Workshops





Support
Performance
Management Systems,
e.g. Balanced
Scorecards, By
Providing Industry
KPI Benchmarks

Document
The Passenger
Journey and Identify
'Pain Points'
Through the Airport





Perform Market
Research and
Competitor Analysis,
to Assess Size of
Opportunities and
Business Threats

Identify Future
Passenger
Segments and Assess
Needs and Wants





Develop New Business Models and Assist in Monetisation of Non-Aeronautical Opportunities

Support in Strategy Execution

INDUSTRY AND TECHNOLOGY RESEARCH DELIVERABLES FOR AIRPORTS

- Airport Terminals
- Cargo Handling
- Ticketing
- Perimeter Security
- Information Technology
- Sustainability
- Infrastructure Development

- Smart Airports
- Baggage Handling
- Airside Services
- Passenger Screening
- Passenger Experience
- Air Traffic Management
- Privatisation



With the pressure mounting on airports to increase profits whilst becoming more environmentally friendly, there will be increasing investment in connecting the airport and using data analytics to improve efficiency and increase automation. As the Internet of Things continues to develop, the airport environment is going to experience significant digital transformation, impacting people, businesses and processes.

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