

From Muscle to Magic

Surviving and Thriving in Turbulent Times

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Our Research

‘Reinventing the Airport Ecosystem’

- Drivers of change
- Science and technology advances
- Customer expectations
- Innovation priorities
- Strategies and business models
- Surveys to test ideas and scenarios on a global audience
- Models for managing the airport ecosystem



Our Research suggests airports need to see themselves as an ecosystem - An integrated portfolio of models

Conceptual model

considers what the airport is trying to be

- Mini city
- 41% of respondents thought the airport of 2025 would resemble this
- City extension
- Mall concept
- Walkway concept
- Bus station concept



Infrastructure model

examines facilities required and how they will be delivered and managed

- Asset rental
- Temporary facilities
- Modular architecture

Revenue generating model

outlines how revenues will be generated

- Income stream generation
- Pricing innovation
- Profit redistribution

Customer engagement model

sets out the philosophy on developing & managing passenger relationships

- Multi parallel paths
- Cooperative
- Single co-ordinated interface
- Third party solutions

Financing model

sets out how the necessary investment will be sourced

- Community funding
- Diaspora funding
- The world bank estimates that SOSA countries alone could raise up to \$5 - \$10 billion per year through such bonds
- Ecosystem funding
- Public private partnerships

Service delivery model

articulates how resources will be configured to ensure operational excellence

- 41% of people believe that it would require new groupings of partners combining all those involved in the value chain: airlines, airport, leisure, hotel, retail and technology brands
- Delivery and constant renewal of high quality leisure experience

67% Of respondents said they wanted to define the extent of the engagement each entity

‘Future Proofed’ Organisations Work on 3 Horizons in Parallel



1-12 Months

**Operational
Excellence**

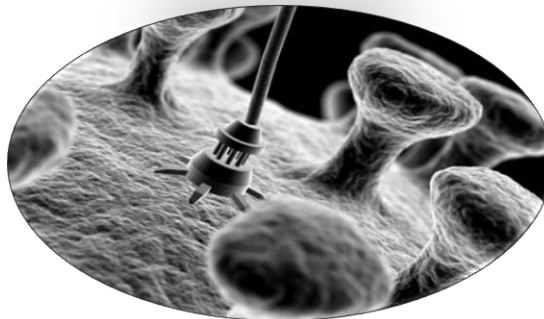
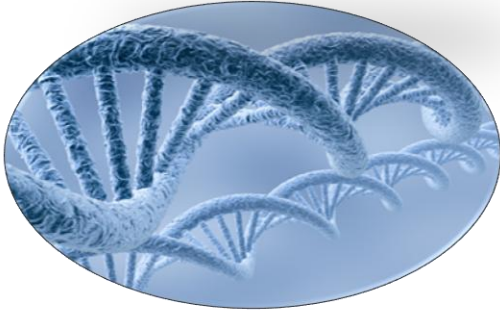
1-3 Years

**Drive for
Growth**

4-10+ Years

**Creating
the Future**

The Next Ten Years



Priorities for Future Proofed Leaders



Markets



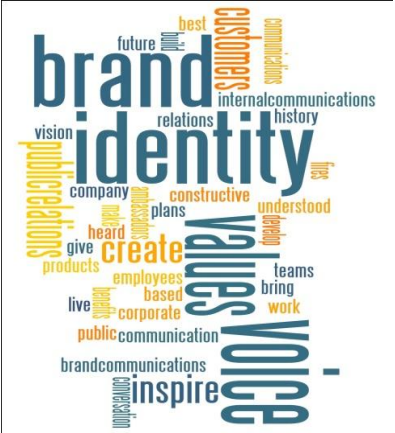
Mastery



Muscle



Magic



Message



Models



Mindset



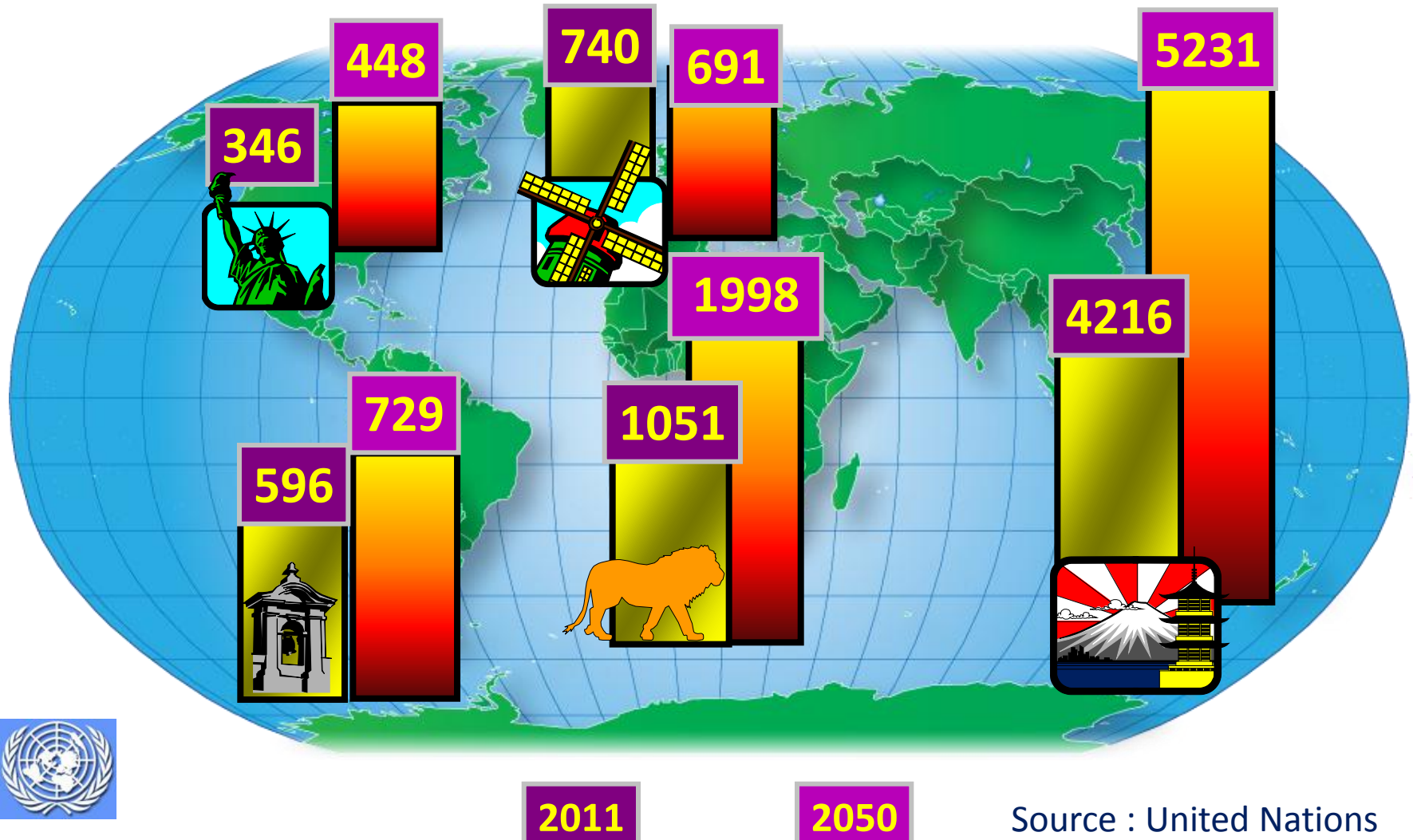
Management

Markets – Drivers of Future Business?



Demographic Destinies

2 billion more people in 40 years – Demographics is Driving Economics



Source : United Nations

Passenger Convenience



Buy Before you Fly

DO & CO

à la carte

Austrian 

PASSENGER

AGENCY

DO & CO menus with the ticket order

DO & CO A la carte on short-haul flights with Austrian Airlines and on selected long-haul.

Order it DO & CO A la carte menu, the same with your online booking at www.austrian.com or alacarte.doco.com until 36h before departure. It is of particular concern to us are your flight a culinary experience can be. Only market-fresh ingredients, dedicated chefs and great attention to detail are the ingredients for the DO & CO A la carte menus.

Booking Code (PNR)

To your menu

Bento Box



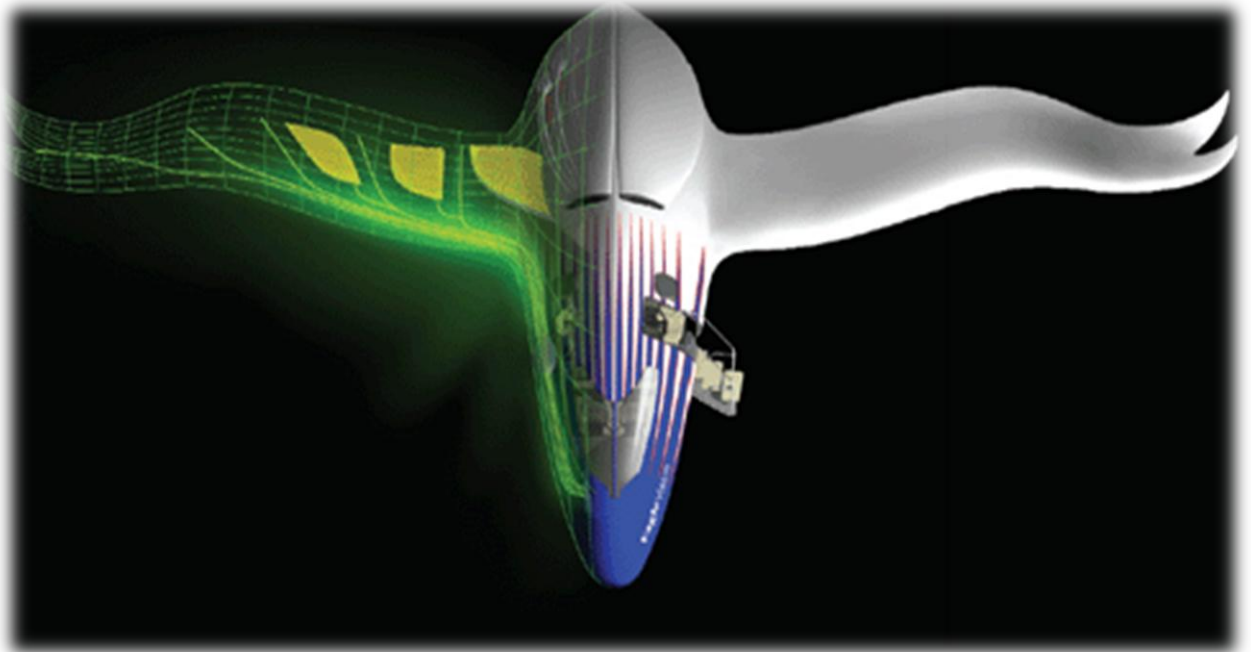
Next Generation Aircraft Boeing Advanced Vehicle Concept



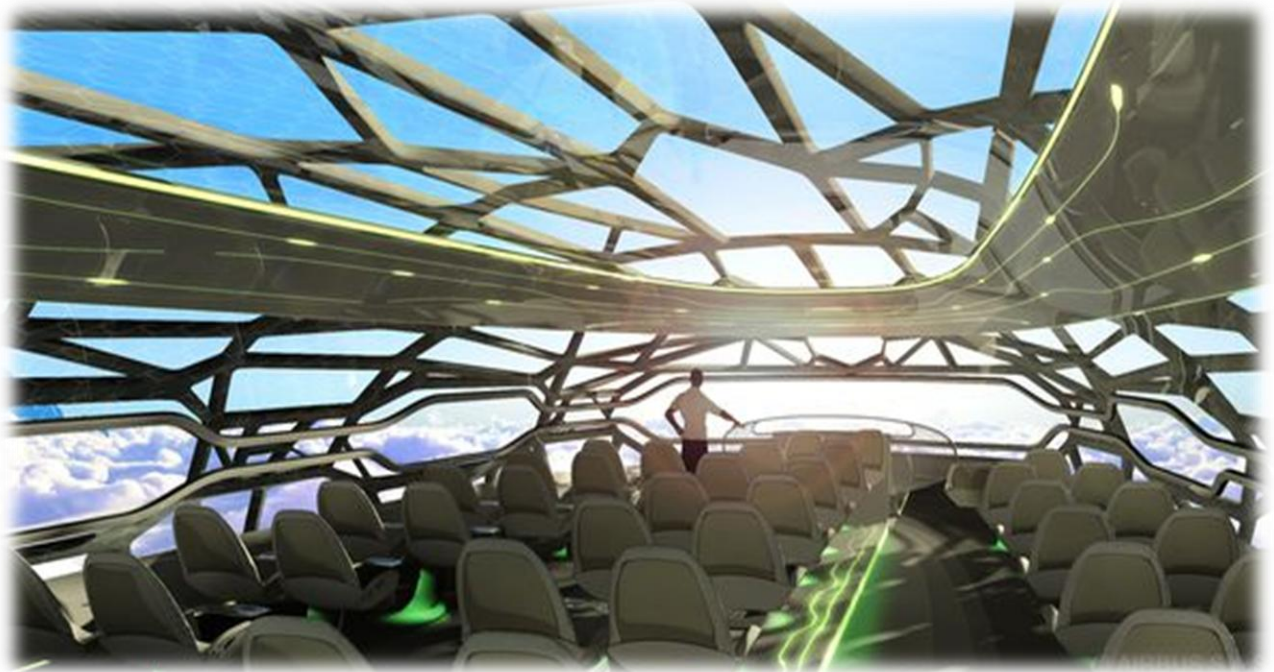
Supersonic Flight – Flying Wing



NASA - Morphing Planes



EADS - Bionic Structures

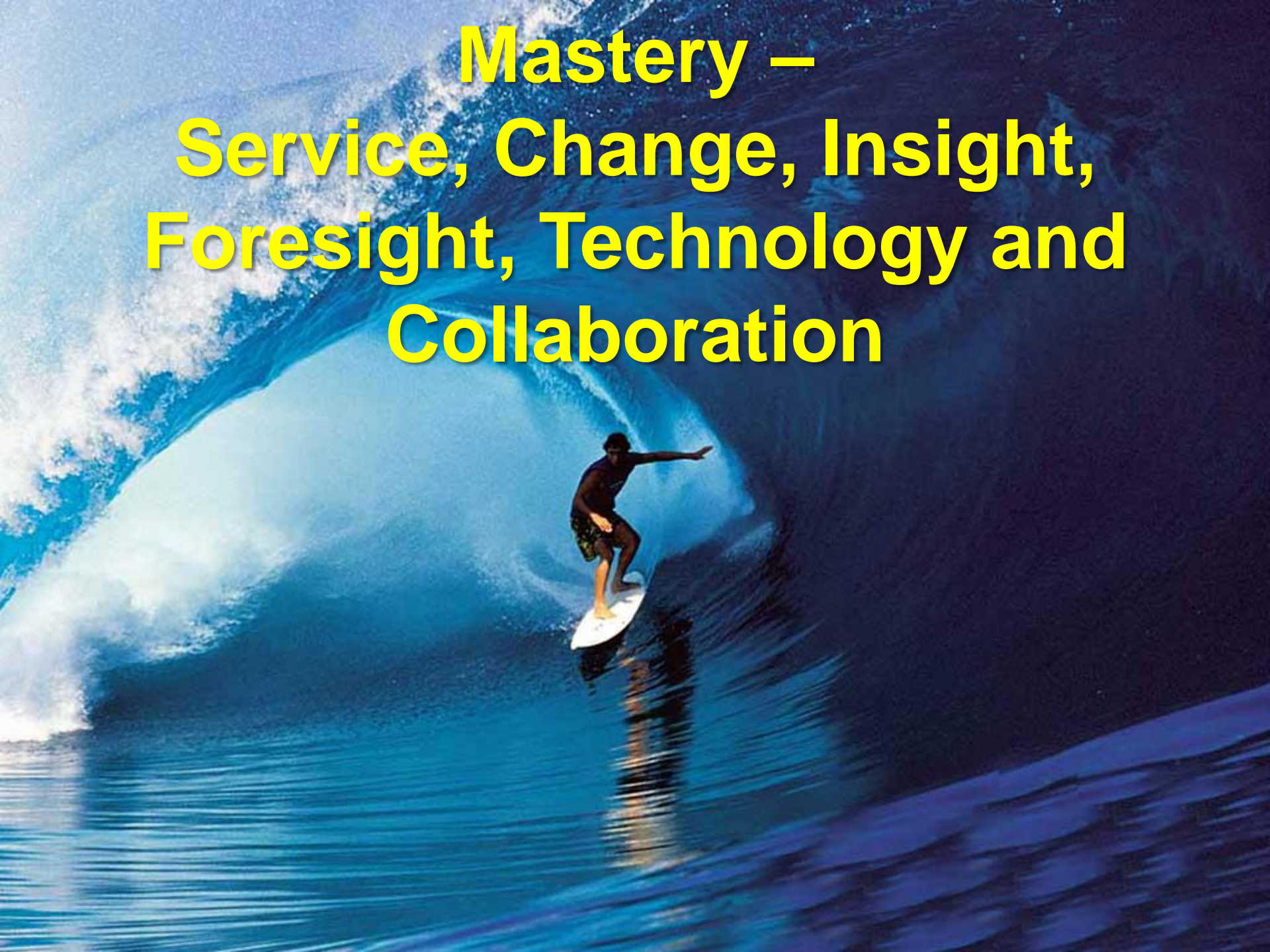


Personal Aircraft – The Puffin

150mph / 50 mile ranger



**Mastery –
Service, Change, Insight,
Foresight, Technology and
Collaboration**



The Ultimate in Collaboration? Sharing of Aviation Profit Pools



Core Technologies

| Used by Pioneers Now | Pioneered by 2015 | Pioneered by 2025 |
|---|--|---|
| Personal Technology | | |
| Mobile phones 3G / 4G smartphones Augmented reality Gesture recognition | Intelligent software assistants Mind control headsets 3D displays (Glasses free) Intelligent interfaces Flexible screens Digital currency | 5G phones Biologically embedded electronics Eyewear embedded screens Intelligent brain-computer interfaces |
| Streamlining the Passenger Journey | | |
| Biometrics –voice / facial / handprint recognition Quick-response (QR) codes RFID Interactive displays Near field communications (NFC) Temporary airports | Biometric signature – heartbeat pattern Body language recognition Robotics and automated services Virtual airports | NFC integrated into all travel documents and passports Use of human genomic profiles |
| Enhancing the Passenger Experience | | |
| Social media Passenger-polling systems Hybrid platforms (i.e. Google Wave) Interactive surfaces Virtual worlds Vertical farming (basic) Next generation cinematic experiences: 6D and beyond | Real-time language translation Reality mining Wearable displays Immersive web 3D printing Biomimetic Design | Haptics technology Touchable holograms Vertical farming (advanced) |
| Information and Communications Technology (ICT) Infrastructure | | |
| Wireless broadband Cloud computing Telepresence Big Data | Machine learning Ambient / Embedded intelligence – the 'Internet of Things' Grid computing MANETS (Mobile Ad-hoc NETWORKS) Swarm intelligence Intelligent web | Semantic web Machine vision Optical computers Collective intelligence |

T-Rays and The VIRTUS Chipset

1.5 - 2 gigabit / sec (~1000 x Bluetooth)

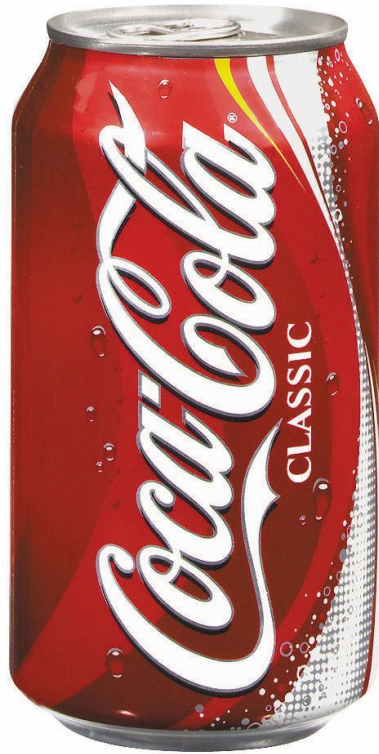


Enabling wireless display, mobile-distributed computing, live HD video streaming, and real-time interactive multi-user gaming

Muscle – Key Survival Capabilities



Rapid Decision Making



Speed of Execution

e.g. Ultra-Quick Construction



Muscle – Rapid Innovation e.g. Naspers' New Media Lab *(“Fail fast and cheaply” – Koos Bekker, CEO)*



*Research at ‘cutting edge of technological media innovation’ e.g.
human-computer interaction, augmented reality, online gaming,
internet television and semantic text processing*

Magic – Creating the Wow Factor



Magic – Ideas that Delight

E.g. Virtual Grocery Shopping – Tesco South Korea



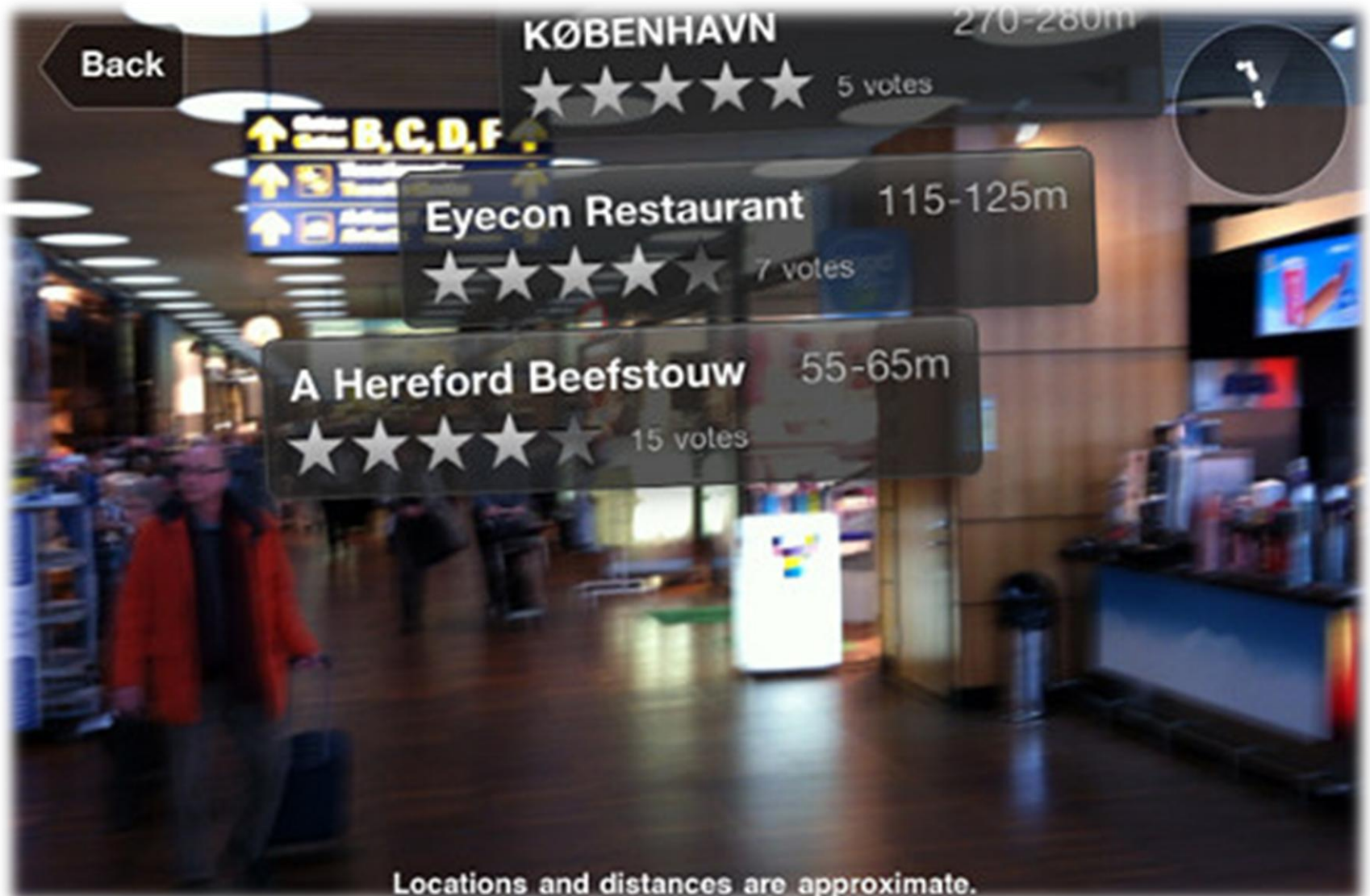
Tesco Gatwick Virtual Store



Come home
to a full fridge

[tesco.com](https://www.tesco.com)

Augmented Reality at Copenhagen Airport



Next Gen Qantas Check-In



Customer Centred Solutions e.g. Helsinki Lounge



Message

Impact, Innovation and Ethics

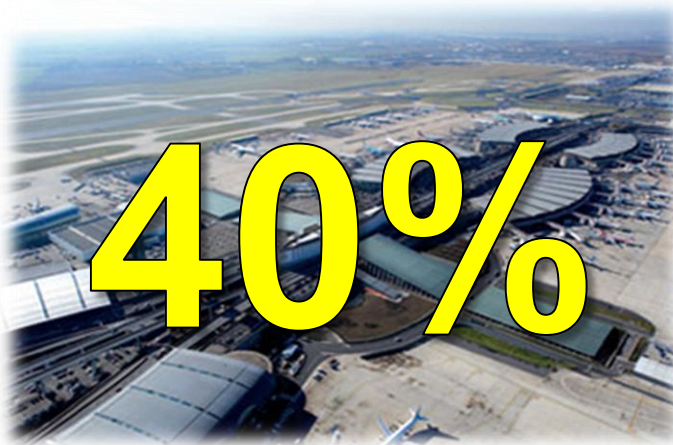


Models for Tomorrow's Airport System

- Governing Concept
- Infrastructure
- Revenue Generation
- Financing
- Customer Engagement
- Service Delivery



Conceptual Model - The airport of 2025 will most resemble?



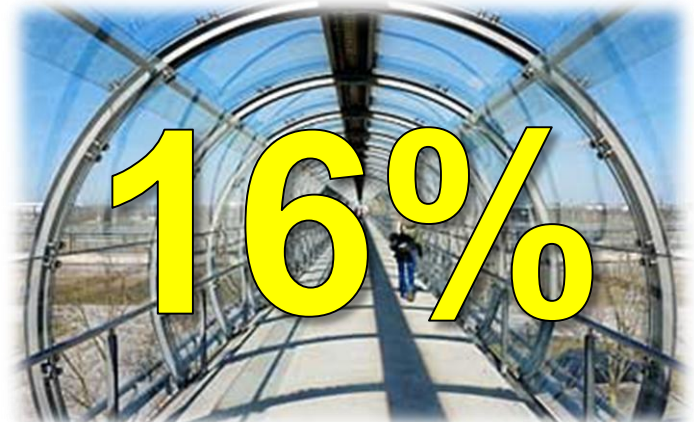
A mini-city, separate from its local surroundings



An extension of the local city



A shopping mall with runways

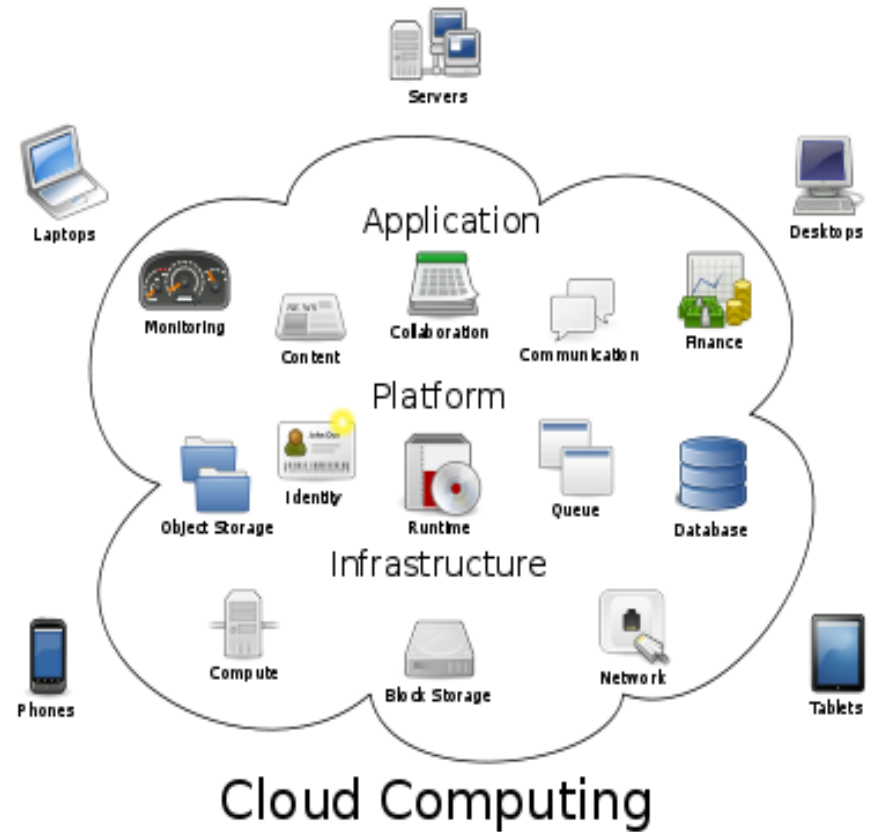


Bus Stop - A walkway to pass through security

Infrastructure Models - Sustainable, Fast Build, Flexible, Modular and Temporary Terminals



Infrastructure Financing – Access is Key ‘Usership’ vs. Ownership



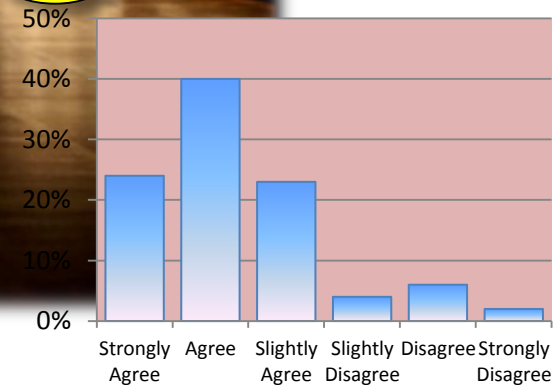
Revenue Generation Models

In an increasingly uncertain economic environment with volatile fuel prices, airports will be under constant pressure to reduce or eliminate landing charges for airlines and fund themselves through other commercial income such as retail and leisure.



87%

781 respondents



Leveraging Customer Insight – What retail developments would most encourage you to do your shopping at the airport rather than elsewhere?



Discount outlet stores



Greater use of discounts,
sales and best price
guarantees



Themed retail (e.g.
reflecting local region)

Revenue Models - the Power of Auctions

| Item | RRP | Auction Time | Time to Bid | Final Bid | Highest Bidder | Bidding Instructions |
|------------------------|------|--------------|-------------|-----------|----------------|---|
| Sony Bravia 37" TV | £630 | 1 min | 25 s | £20.59 | zannisalvatore | Bid via mobile (£1.50 per SMS), text MAD SOH1Y3 to 80160. |
| Sony 15.5" 4GB Windows | £614 | 30 s | 26 s | £58.61 | weegie75 | Bid via mobile (£1.50 per SMS), text MAD SOH1Y7 to 80160. |
| £125 Cash | £125 | 1 min | 56 s | £0.54 | badassjay | Bid via mobile (£1.50 per SMS), text MAD CH12S to 80160. |

£3088

£8791.50

£81

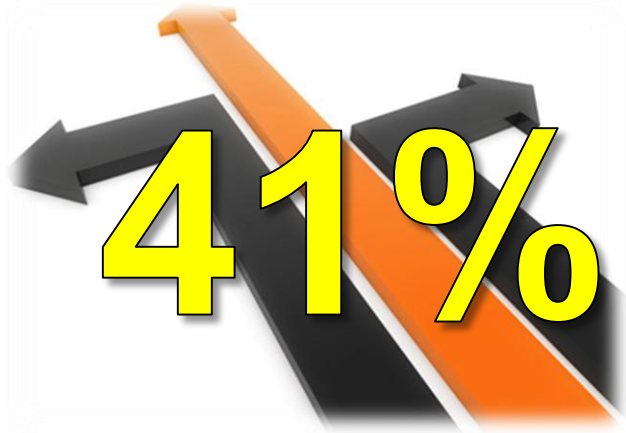
How do you see technology being integrated into your airport shopping experience?



Personalized advertisements and discounts



QR code store windows – purchase by mobile and collect on return / home delivery



Multichannel – search online, try in store, buy via mobile



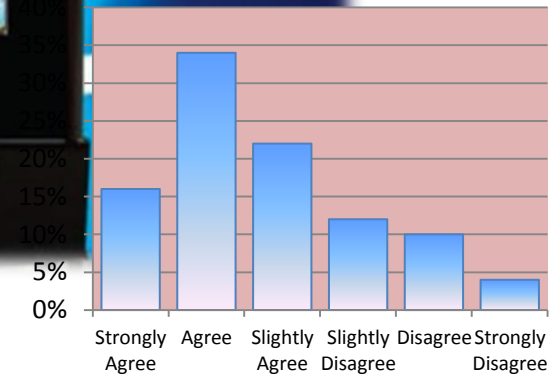
Collection on arrival of goods purchased from online-only retailers

All Inclusive

By 2025, to survive commercially, airports will increasingly try to be retail, dining and leisure destinations in their own right and seek to attract non-flying customers as well.



72%



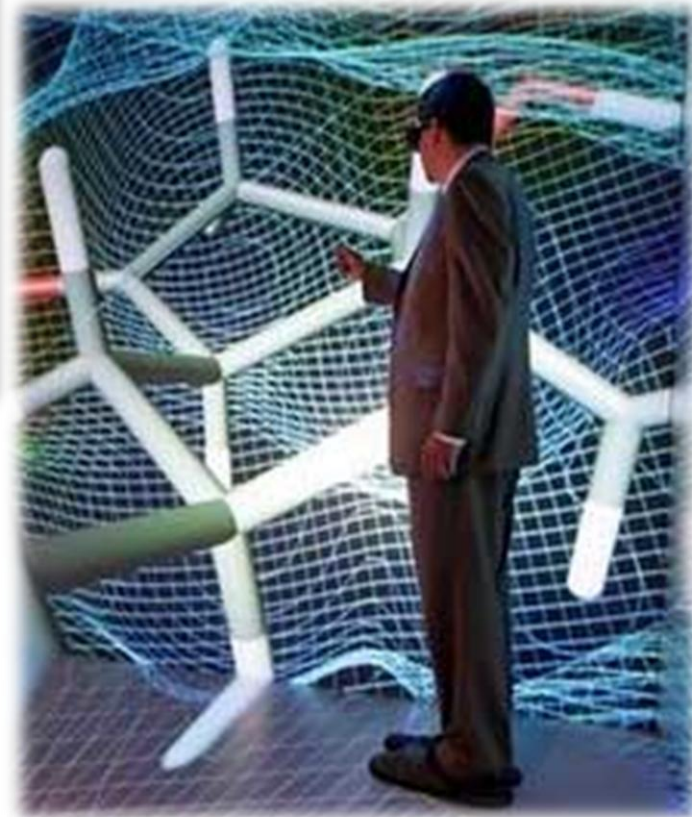
783 respondents

Financing Models

- Ecosystem
- Community
- Public-Private Partnership
- Securitisation
- Diaspora



Customer Engagement – Deep Personalization



Personalization

AA.com

Reservations | Award Booking | My Account | Fare Sales & Offers

PERSONAL ONE-ON-ONE AIRPORT ASSISTANCE.

FIVE STAR SERVICE™ GOES BEYOND MEET-AND-GREET FOR A TRULY CUSTOMIZED SERVICE EXPERIENCE

Dear **Michelle**,

Experience VIP treatment that was once reserved for celebrities. Now with Five Star Service™ from American Airlines, you can enjoy your life and leave the details to us.

Five Star Service™ offers a choice of personal one-on-one arrival, departure or connection airport assistance to help make your trip go more smoothly.

To learn more about Five Star Service features, pricing and availability, visit www.aa.com/fivestarservice

Admirals Club | AAdvantage | Twitter | Facebook | YouTube | LinkedIn | Instagram

American Airlines® FIVE★STAR SERVICE™

United States Airports



\$125 Per Person



\$200 For Two People

International Airports



\$200 For Up To Two People

Additional Travelers



\$125

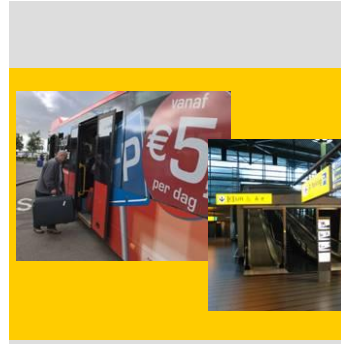
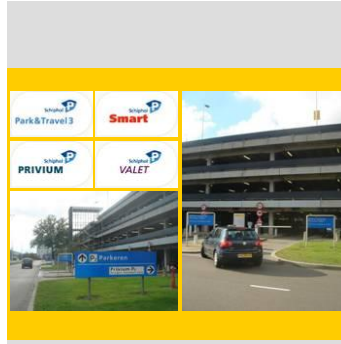
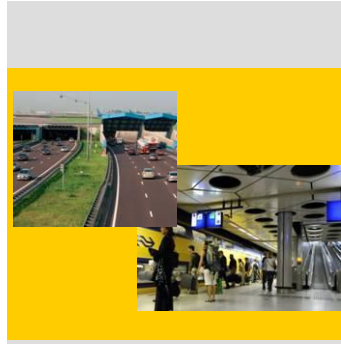
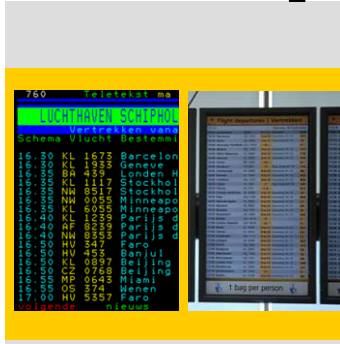
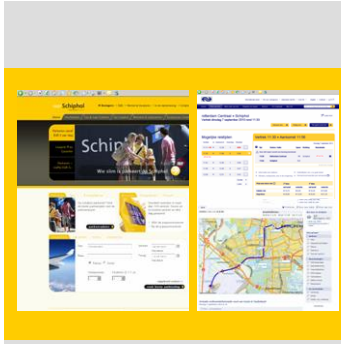
International or United States

Service Delivery Model – Start with Customer Journeys and Experiences

- Stimulus / Search / Booking
- Transport to and from the Airport
- Check in to Flight Departure
- Flight Arrival to Airport Exit
- Flight Transfer - Arrival to Departure
- Airport Experience
- In Flight Experience
- Relationship Management



Mapping Customer Journeys & Experiences



Sub process
KPI
Score

- Traffic information
- Traffic jams

73%

- Off airport flight information

- Arrival at airport by car/train
- Accessibility

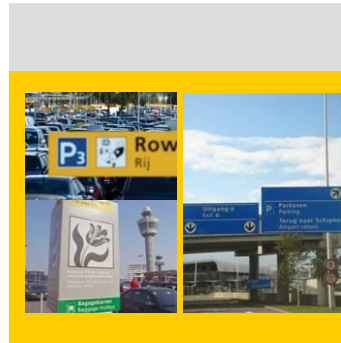
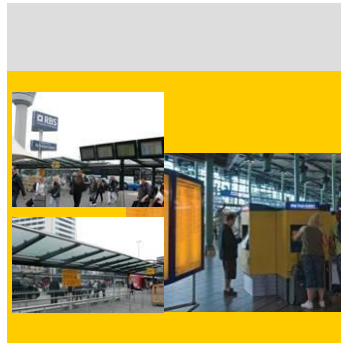
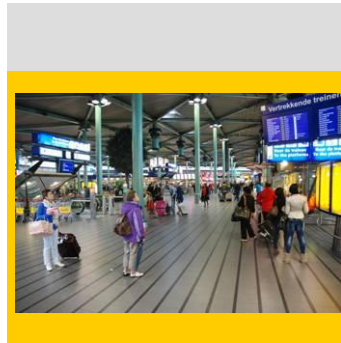
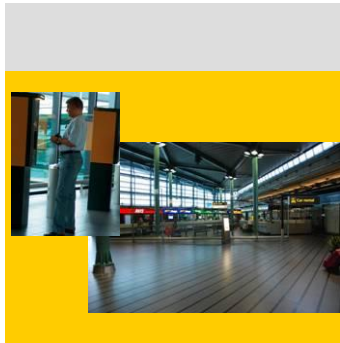
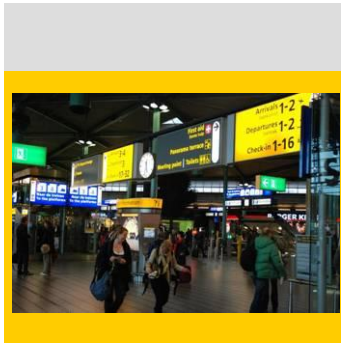
91% / 90%

- Parking
- Price/Quality LT

41%

- Transport from parking to Plaza
- Ease of wayfinding

90%



Sub process
KPI
Score

- Entering Plaza
- Clarity

77%

- Services; rental, parking

- Leaving Plaza
- Clarity

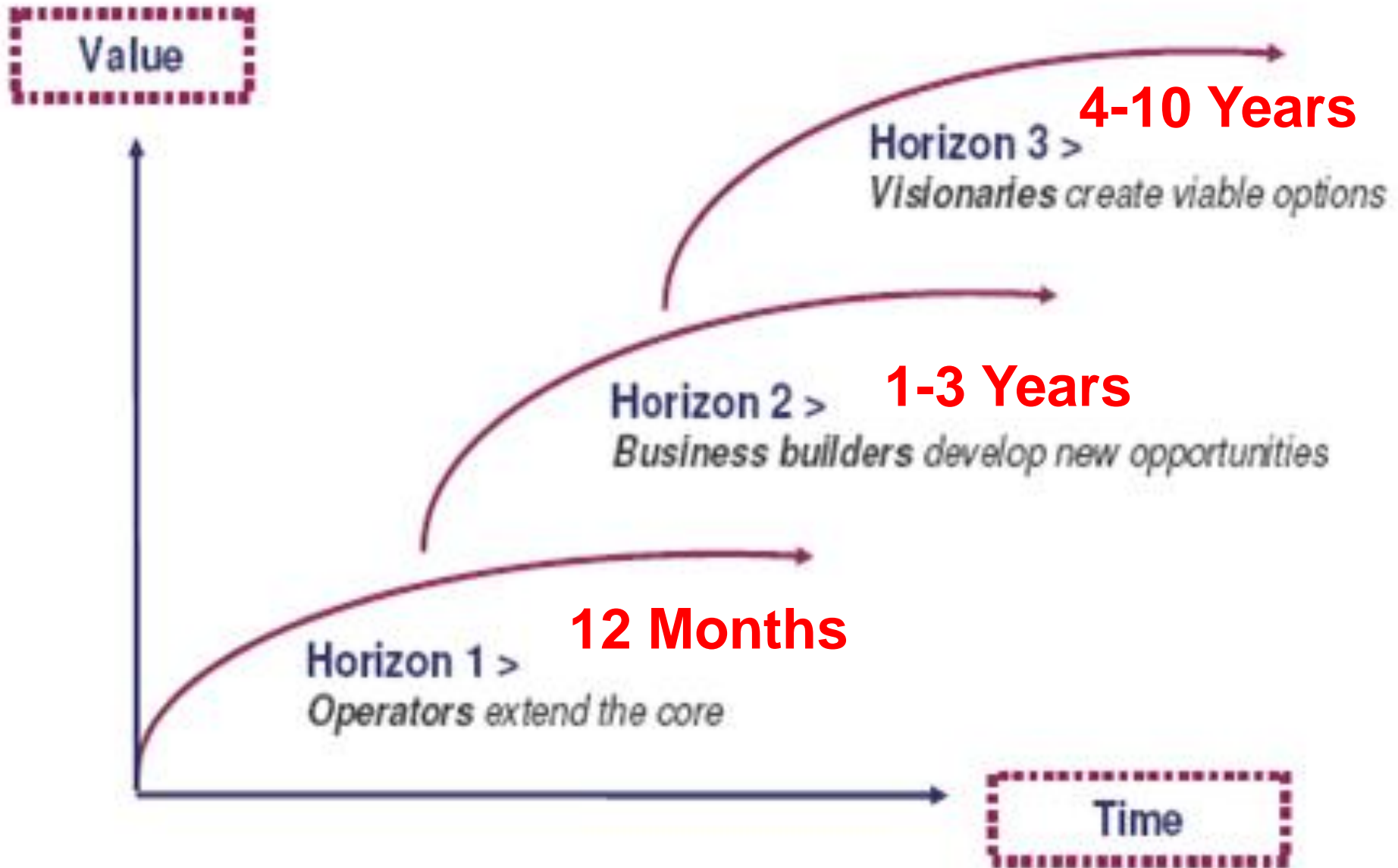
77%

- Departure from airport by bus/train
- Accessibility

90% / 80%

- Retrieving car & Leaving airport

Mindset - 3 Horizon Thinking



Mindset – Uncertainty Tolerant, Experimental, Curious, Sticky and Magnetic

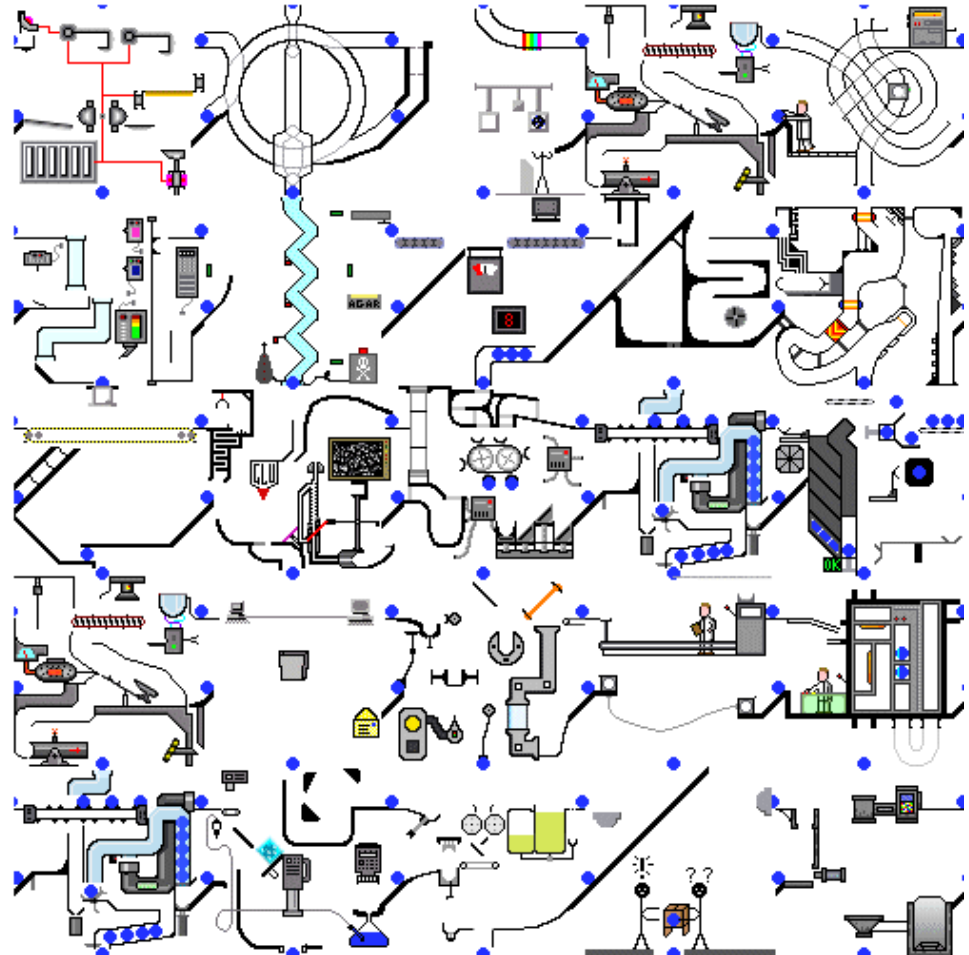


Management - Lead or Follow?



Management - Make Time and Space for Change and Tackle Complexity

- Customer Interface
- Process
- Organisation
- Information / Systems
- Regulatory
- Human



Priorities for Future Proofed Leaders



Markets



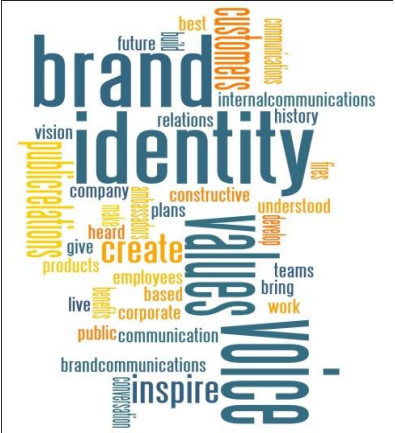
Mastery



Muscle



Magic



Message



Models



Mindset



Management

Conclusions

Huge untapped potential

Technology is a key enabler

Encourage innovation and curiosity

Experiment with business models

Work with and for tomorrow's passenger



rohit@fastfuture.com

About Fast Future

Fast Future – Core Services

- **Live Events** - Speeches, briefings and workshops for executive management and boards of governments, investment funds, development agencies , companies, airlines, airports, hotels, venues, CVB's and associations
- **Future Insights** - Customised research on emerging trends, future scenarios, technologies and new markets
- **Immersion** - 'Deep dives' on future trends, market developments, emerging issues and technology advances
- **Strategy** - Development of strategies and business plans
- **Innovation** - Creation of business models and innovation plans
- **Engagement** - Consultancy and workshop facilitation

Fast Future

- Research, consulting, speaking, leadership
- 5-20 year horizon - focus on ideas, developments, people, trends and forces shaping the future
- Clients
 - ING, ABN Amro, Laing O'Rourke
 - Marks and Spencer
 - Airports - Aeroports de Paris / Schiphol Group
 - Vancouver Airport Services
 - Industry Associations – ICCA, ASAE, PCMA, MPI
 - Corporates - GE, Nokia, Pepsi, IBM, Intel, Orange, O2, Siemens, Samsung, GSK, SAPE&Y, KPMG, Amadeus, Sabre, Travelport, Travelex, ING, Santander, Barclays, Citibank, DeutscheBank
 - Governments - Dubai, Finland, Nigeria, Singapore, UK, US
 - Convention Bureaus – Seoul, Sydney, London, San Francisco, Toronto, Abu Dhabi, Durban, Athens, Slovenia, Copenhagen
 - Convention Centres – Melbourne, Adelaide, Qatar, QEIICC
 - Hotels - Accor Group, Preferred,
 - Intercontinental
 - PCO's - Congrex, Kenes

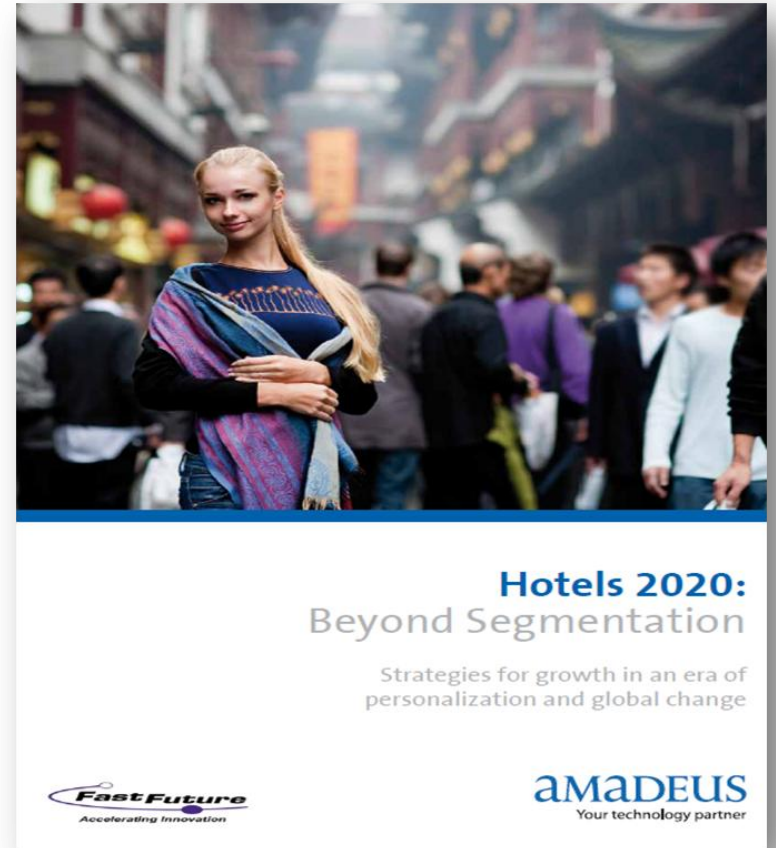


Hotels 2020 – Objectives

Identify key drivers of change
for the globally branded hotel
sector over the next decade

Examine the implications for:

- Hotel strategy
- Brand portfolio
- Business models
- Customer targeting
- Innovation



Convention 2020

- Global strategic foresight study to help the meetings industry prepare for the decade ahead - Industry-wide sponsors
- Multiple outputs Nov 2009 – December 2011
- Current studies on future strategies for venues and destinations



Rohit Talwar

- Global futurist and founder of Fast Future Research.
- Award winning speaker on future insights and strategic innovation – addressing leadership audiences in 40 countries on 5 continents
- Author of *Designing Your Future*
- Profiled by UK's Independent Newspaper as one of the Top 10 Global Future Thinkers
- Led futures research, scenario planning and strategic consultancy projects for clients in telecommunications, technology, pharmaceuticals, banking, travel and tourism, environment, food and government sectors
- Clients include 3M, BBC, BT, BAe, Bayer, Chloride, DTC De Beers, DHL, EADS, Electrolux, E&Y, GE, Hoover, Hyundai, IBM, ING, Intel, KPMG, M&S, Nakheel, Nokia, Nomura, Novartis, OECD, Orange, Panasonic, Pfizer, PwC, Samsung, Shell, Siemens, Symbian, Yell , numerous international associations and governments agencies in the US, UK, Finland, Dubai, Nigeria, Saudi Arabia and Singapore.
- To receive Fast Future's newsletters please email rohit@fastfuture.com



Designing Your Future

Key Trends, Challenges and Choices

- 50 key trends
- 100 emerging trends
- 10 major patterns of change
- Key challenges and choices for leaders
- Strategic decision making framework
- Scenarios for 2012
- Key futures tools and techniques
- Published August 2008
- Price £49.95 / €54.95/ \$69.95
- Email invoice request to rohit@fastfuture.com



Our Services

Bespoke research; Identification & Analysis of Future Trends, Drivers & Shocks

Accelerated Scenario Planning, Timelining & Future Mapping

Expert Consultations & Futures Think Tanks

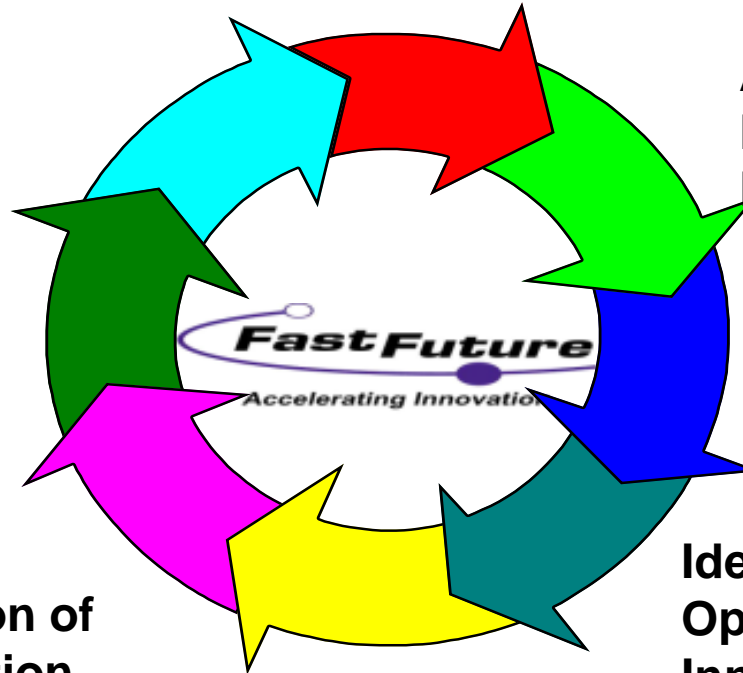
Identification of Opportunities for Innovation and Strategic Investment

Strategy Creation & Development of Implementation Roadmaps

Design & Facilitation of Innovation, Incubation & Venturing Programmes

Personal Futuring for Leaders and Leadership Teams

Public Speaking, In-Company Briefings, Seminars and Workshops



Example Projects

- Public and private client research e.g. :

- *Reinventing the Airport Ecosystem*
- *Development of Market Scenarios, emerging trends and strategies for key clients*
- *Government and OECD Scenario Projects – e.g. Migration 2030, Future of Narcotics, Chemical Sector, Family 2030*
- *Scenarios for the global economy for 2030 and the implications for migration*
- *Designing Your Future (Published August 2008) – book written for the American Society of Association Executives & The Center for Association Leadership*
- *Global Economies – e.g. The Future of China – the Path to 2020*
- *The Shape of Jobs to Come – Emerging Science and Technology Sectors and Careers*
- *Winning in India and China*
- *The Future of Human Resources*
- *Exploiting the Future Potential of Social Media in UK Small to Medium Enterprises*
- *Convention 2020 – the Future of Business Events*
- *Future Convention Cities Initiative – Maximising Long-term Economic Impact of Events*
- *One Step Beyond – Future trends and challenges for the events industry*
- *Hotels 2020: Beyond Segmentation – Future Hotel Strategies*
- *The Future of Travel and Tourism in the Middle East – a Vision to 2020*
- *Future of Travel and Tourism Investment in Saudi Arabia*

Example Clients



Deutsche Bank



Associated British Foods plc



GlaxoSmithKline



THE ACADEMY FOR CHIEF EXECUTIVES

Image Sources

Image Sources Page 1

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