Opening Plenary

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POLISH AIRLINES

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Network: Hilton Honors or Hilton Honors Meeting

Password: SITA2019

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Welcome

Nick Careen
Senior Vice President,
Airport, Passenger, Cargo and Security, IATA
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Opening Address

Alexandre de Juniac
Director General and CEO, IATA
Opening Address

Rafał Milczarski
CEO, LOT Polish Airlines
What does the future hold?
An economic and passenger outlook

Andrew Matters
Deputy Chief Economist, IATA
The long-term passenger outlook: capturing the benefits of aviation

Andrew Matters
Deputy Chief Economist
IATA
The benefits of aviation:

65.5 million
Jobs supported by aviation worldwide\(^1\)

$2.7 trillion
Aviation’s global economic impact (including direct, indirect, induced and tourism catalytic)\(^8\)

3.6% Global GDP supported by aviation\(^9\)

See country-level reports & analysis at www.iata.org/economics
The longer-term industry outlook is bright...

- **8.1bn**: The total number of air passenger journeys in 2038
- **3.9%**: Average annual growth over the next 20yrs
- **2.1x**: The number of air passenger journeys in 2038 vs today

Source: IATA
...but the regional outlooks are varied

**Emerging Europe:**
- Additional pax journeys per year in 2038 vs 2018 (million): ~250m
- CAGR (% per year): 3.0%

**North America:**
- Additional pax journeys: 589m
- CAGR (% per year): 2.5%

**Europe:**
- Additional pax journeys: 568m
- CAGR (% per year): 2.1%

**Middle East:**
- Additional pax journeys: 273m
- CAGR (% per year): 4.4%

**Latin America:**
- Additional pax journeys: 457m
- CAGR (% per year): 4.1%

**Africa:**
- Additional pax journeys: 208m
- CAGR (% per year): 4.5%

**Asia Pacific:**
- Additional pax journeys: 2,810m
- CAGR (% per year): 5.2%

Source: IATA
The top 10 largest markets will change considerably

Ranking based on the number of passenger journeys to, from and within each market

US 1
China 2
UK 3
Spain 4
Japan 5
India 6
Germany 7
Italy 8
France 9
Indonesia 10

Source: IATA
However…

…growth is not guaranteed

- There are various challenges to growth & fully capturing the benefits of aviation

These include:

- Supply-side considerations;
- Technology (& other shifts in customer preferences); and
- The policy and regulatory environment
Airlines need ~40,000 new aircraft, valued at $6-7 trillion

Airbus: 39,210 new deliveries, 2019-38

Boeing: 44,040 new deliveries, 2019-38

Source: Boeing, Airbus
Ancillaries increasingly helping to recover costs

Source: IATA Economics
Managing congestion is a growing concern…

Runway and terminal capacity limits are based on airport stated capacity limits. This may not be reflective of the most efficient use of existing infrastructure.

Airport congestion is assessed on the basis of annualised runway and terminal capacity and traffic volumes, and does not capture seasonality of traffic.

Airport congestion is assessed on a status quo basis, meaning that expansion plans are not fully accounted for.

Top 100 airports of the world

Source: IATA/Tourism Economics, airport websites & publicly available documents
Demand in Europe to exceed capacity by 1.5m flights or 160m pax by 2040.
Skill shortages?

North America
- Pilots: 212,000
- Technicians: 193,000
- Cabin crew: 176,000

Europe
- Pilots: 148,000
- Technicians: 137,000
- Cabin crew: 194,000

Russia & Cent. Asia
- Pilots: 27,000
- Technicians: 25,000
- Cabin crew: 30,000

Middle East
- Pilots: 68,000
- Technicians: 69,000
- Cabin crew: 104,000

Asia Pacific
- Pilots: 266,000
- Technicians: 266,000
- Cabin crew: 327,000

Latin America
- Pilots: 54,000
- Technicians: 52,000
- Cabin crew: 53,000

Africa
- Pilots: 29,000
- Technicians: 27,000
- Cabin crew: 30,000

Total global
- Pilots: 804,000
- Technicians: 769,000
- Cabin crew: 914,000

Source: Boeing
Technology: cutting costs & increasing efficiency…

Source: Lee
Four digital themes shaping travel & tourism...

**Living travel experience**
Travelers will experience seamless journeys tailored to their habits and preferences.

**Digital enterprise**
Digital technologies that revolutionize manufacturing, optimize asset use and augment the workforce will transform operations.

**Enabling the travel ecosystem**
Ecosystem roles are blurring as stakeholders throughout the customer journey vie to own the customer relationship.

**Safety & Security**
As identity management becomes increasingly digital, cybersecurity and data protection will be crucial to maintaining customer trust and public safety.

Source: WTO
The ‘duality of digital’

**Digital capital allocation, past 3yrs (%)**

- **Top performers**
  - Developing new digital businesses: 50%
  - Digitizing core businesses: 50%

- **Other**
  - Developing new digital businesses: 37%
  - Digitizing core businesses: 63%

**Digital offerings by category (%)**

- **Top performers**
  - Digital versions of formerly analog P&S: 33%
  - Existing P&S enhanced with new features: 39%
  - Entirely new digital offerings: 28%

- **Other**
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  - Entirely new digital offerings: 46%

Source: McKinsey
Passenger preferences & digitalisation

Source: SITA
License to grow – responding to customer preferences…

Airline CO2, RTKs and fuel efficiency

RTKs flown: +5.3% p.a.
CO2: +2.5% p.a.
Fuel use per RTK flown: -2.6% p.a.

Source: UN, IATA/Tourism Economics
Ageing populations create new challenges…

### Old-age dependency ratios*

<table>
<thead>
<tr>
<th>Country</th>
<th>2015</th>
<th>2035</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>6.3</td>
<td>7.4</td>
<td>1.1</td>
</tr>
<tr>
<td>Asia</td>
<td>11.1</td>
<td>20.7</td>
<td>9.6</td>
</tr>
<tr>
<td>Latin America</td>
<td>11.4</td>
<td>20.8</td>
<td>9.4</td>
</tr>
<tr>
<td>World</td>
<td>12.6</td>
<td>20.3</td>
<td>7.7</td>
</tr>
<tr>
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*Calculated as the ratio of the population aged 65+ and the population aged 15-64, multiplied by 100.

Source: UN, IATA/Tourism Economics
The policy and regulatory backdrop matters

Source: IATA/Tourism Economics
The markets of tomorrow

Source: IATA
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Number of aircraft

Source: Boeing, Airbus
Ancillaries increasingly helping to recover costs

Source: IATA Economics

Airline revenue per passenger, US$

- Ancillaries
- Cargo
- Surcharges
- Base fare

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Demand in Europe to exceed capacity by 1.5m flights or 160m pax by 2040

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<th>Cabin crew</th>
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<td>212,000</td>
<td>193,000</td>
<td>176,000</td>
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Source: McKinsey
Passenger preferences & digitalisation

Satisfaction rate out of 10

- Booking: 8.45 (2.05%)
- Check-in: 8.49 (3.03%)
- Bag tag: 8.40 (0.7%)
- Self-bag drop: 8.39 (0.7%)
- Passport: 8.36 (3.85%)
- Dwell time: 8.27 (2.2%)
- Boarding: 8.40 (8.1%)
- On board: 8.31 (8.6%)
- Bag collection: 8.48

Source: SITA
License to grow – responding to customer preferences…

Airline CO2, RTKs and fuel efficiency

- CO2: +2.5% p.a.
- RTKs flown: +5.3% p.a.
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Source: UN, IATA/Tourism Economics
The policy and regulatory backdrop matters

Source: IATA/Tourism Economics

Passengers (billion, O-D basis)

- Current trends scenario
- Protectionism deepens scenario
- Return to globalization scenario

<table>
<thead>
<tr>
<th>Year</th>
<th>Current trends scenario</th>
<th>Protectionism deepens scenario</th>
<th>Return to globalization scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>3.8bn</td>
<td>3.8bn</td>
<td>3.8bn</td>
</tr>
<tr>
<td>2020</td>
<td>4.0bn</td>
<td>4.1bn</td>
<td>4.1bn</td>
</tr>
<tr>
<td>2022</td>
<td>4.3bn</td>
<td>4.3bn</td>
<td>4.3bn</td>
</tr>
<tr>
<td>2024</td>
<td>4.6bn</td>
<td>4.6bn</td>
<td>4.6bn</td>
</tr>
<tr>
<td>2026</td>
<td>5.0bn</td>
<td>5.0bn</td>
<td>5.0bn</td>
</tr>
<tr>
<td>2028</td>
<td>5.4bn</td>
<td>5.4bn</td>
<td>5.4bn</td>
</tr>
<tr>
<td>2030</td>
<td>5.9bn</td>
<td>5.9bn</td>
<td>5.9bn</td>
</tr>
<tr>
<td>2032</td>
<td>6.4bn</td>
<td>6.4bn</td>
<td>6.4bn</td>
</tr>
<tr>
<td>2034</td>
<td>6.9bn</td>
<td>6.9bn</td>
<td>6.9bn</td>
</tr>
<tr>
<td>2036</td>
<td>7.5bn</td>
<td>7.5bn</td>
<td>7.5bn</td>
</tr>
<tr>
<td>2038</td>
<td>8.1bn</td>
<td>8.1bn</td>
<td>8.1bn</td>
</tr>
</tbody>
</table>

Source: IATA/Tourism Economics
The markets of tomorrow

Source: IATA
Keynote Address

David Rowan
Author, Non-Bullshit Innovation (2019)
Our vision relies on a happy passenger

% OF SATISFIED PASSENGERS

General satisfaction (scores 7-10)*

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2037</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>74%</td>
<td>75%</td>
<td>75%</td>
<td>...</td>
</tr>
</tbody>
</table>

Highest satisfaction (scores 8-10)*

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2037</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>52%</td>
<td>49%</td>
<td>52%</td>
<td>...</td>
</tr>
</tbody>
</table>

* On a scale 1-10, where 1 - completely dissatisfied, 10 - completely satisfied
PASSENGER SATISFACTION
Regional outlook

North America: 73%
Latin America: 73%
Africa: 67%
Asia Pacific: 76%
Europe: 76%
North Asia: 81%
Middle East: 71%

Top 3 concerns:
Security
Border control/Immigration
Baggage collection
enable innovation
facilitate seamless journey
streamline baggage handling process
improve disruption management
address the needs of passengers with disabilities
On-line via my smart phone/device continues to rise as the most preferred way to check in.

SMART CHECK-IN

51% vs 47% in 2018

North Asia: 65%
Latin America: 53%
Middle East: 50%
North America: 50%
Europe: 49%
Asia Pacific: 47%
Africa: 37%
27% would pay for last-minute purchases such as additional bag, upgrade or lounge access with an airline app.

Preferred options for receiving notifications:

- Smartphone app
- SMS

AIRLINE APP KEEPS RISING
Biometric identification replacing favored passport as my travel document

46% vs 45% in 2018
Biometrics supporter profile

Frequent flyer +10 trips / year
Male
35-44 years old
Experienced travel disruption
Willing to share personal information
THUMBS UP FOR IMMIGRATION E-GATES

74%
Faster than regular immigration

61%
Intuitive

50%
Enhance security

72%
Satisfied with an overall experience

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LET'S TALK ABOUT MY TIME

**BAG DROP-OFF**
- 80% (vs 76% in 2018)
- < 3 minutes

**IMMIGRATION / CUSTOMS**
- 79% (vs 75% in 2018)
- < 10 minutes

**BAG COLLECTION**
- 74% (vs 70% in 2018)
- < 10 minutes

25% < 5 minutes
19% < 5 minutes
60% Efficient queuing process at the boarding gate
51% Not needing a coach/ bus to get to the aircraft
46% Availability of overhead space for on-board hand luggage (vs 42% in 2018)

WHEN BOARDING...

... I want efficiency and comfort
Not having to go through security again

Not having to pick up and re-claim my bag

Receiving notifications on a smart device that my bag has successfully transferred

Not having to go through immigration again

AT THE TRANSFER AIRPORT
WHEN FLYING WITH MULTIPLE CARRIERS

4 out of 5 passengers

I clearly understood which airline is operating the various flights

I knew which airline to check-in with
...WHILE

I received boarding passes for all my flights at my initial check-in.

3 out of 5 passengers

I knew which airline to contact if I had an issue during the journey.
Bag collection identified as a main point of attention for the industry
IF I COULD TRACK MY BAG...

46% would want their bag delivered directly to the final destination.

Of the remaining 54%, 1 out of 2 would still travel with cabin baggage.
<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need my essentials</td>
<td>30%</td>
</tr>
<tr>
<td>I packed restricted items</td>
<td>27%</td>
</tr>
<tr>
<td>I am afraid of damage</td>
<td>26%</td>
</tr>
<tr>
<td>I don’t want to pay</td>
<td>24%</td>
</tr>
<tr>
<td>I am afraid of a loss</td>
<td>23%</td>
</tr>
</tbody>
</table>

52% I don’t want to wait for my bag at arrival
55% experienced a travel disruption in the past 12 months
HOW CAN WE IMPROVE?

55% vs 54% in 2018
Real time & accurate travel information
Flight status
Bag information

53% vs 47% in 2018
Automatic flight re-booking

disruption management

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<table>
<thead>
<tr>
<th>Service</th>
<th>ALL PASSENGERS</th>
<th>PASSENGERS WITH DISABILITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking</td>
<td>77%</td>
<td>76%</td>
</tr>
<tr>
<td>Payment</td>
<td>71%</td>
<td>71%</td>
</tr>
<tr>
<td>Check-in</td>
<td>78%</td>
<td>72%</td>
</tr>
<tr>
<td>Bag Tag</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>Bag Drop</td>
<td>73%</td>
<td>66%</td>
</tr>
<tr>
<td>Security</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Border Control/Immigration</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Boarding</td>
<td>61%</td>
<td>62%</td>
</tr>
<tr>
<td>In-Flight Entertainment</td>
<td>68%</td>
<td>68%</td>
</tr>
<tr>
<td>On-Board Service</td>
<td>65%</td>
<td>68%</td>
</tr>
<tr>
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<td>62%</td>
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% of satisfied passengers

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Prefer an agent to drop off their baggage for them

When their travel is disrupted, they want to have baggage tracking information available

Having wi-fi on-board is important

Tell us more: PASSENGERS WITH DISABILITIES
Less willing to replace passport with biometrics

Access to essentials during the flight and additional fees are the main reasons for not checking in a bag

Less willing to share personal information

Prefer to have baggage delivered to their final destination, provided that they can track it

When the trip starts, being notified about time to the gate and baggage status is important

Tell us more: FEMALE
Enjoy collecting passport / visa stamps

Prefer to pay with a wallet on their smart device

Do not check-in their baggage because needs essentials during flight

Having Wi-fi on board is important

Pre-travel: want to be notified about regulations and requirements (e.g. visa requirements, health advisories)

Tell us more: MILLENIALS
2019 Global Passenger Survey

iata.org/gps

Passenger Satisfaction Benchmark

iata.org/airsat
Spotlight interview:
Collaborating on a Sustainable Transport Hub for Europe

Mikołaj Wild
Secretary of State, Ministry of Infrastructure, Plenipotentiary of the Government for the Matters of the Central Transport Hub for the Republic of Poland

Rafał Milczarski
CEO, LOT Polish Airlines

Interviewer: Kasia Madera, Presenter, BBC World News
Networking Break

Kindly sponsored by

[Bechtel logo]
Thought-leadership roundtable: Building Capacity for the Future

Susan Doniz, Chief Information Officer, Qantas
Sebastien Fabre, Vice President, Airlines and Airports Portfolio, SITA
Leen van Duijin, Vice President of Security Service, KLM
Simon Wilcox, Head of Transformation, Automation and Innovation, Heathrow Airport

Moderator: Kasia Madera, Presenter, BBC World News
Join us for lunch in the exhibition
SHOWCASE: THE PASSENGER’S VOICE

2019 IATA Global Survey Results Revealed

Pierre Charbonneau
Director Passenger Experience and Facilitation, IATA
IATA Global Passenger Survey

2019 Highlights
Our vision relies on a happy passenger.

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General satisfaction (scores 7-10)*

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Enable innovation
Facilitate seamless journey
Streamline baggage handling process
Improve disruption management
Address the needs of passengers with disabilities
On-line via my smart phone/device continues to rise as the most preferred way to check in

51% vs 47% in 2018
 Preferred options for receiving notifications:

AIRLINE APP KEEPS RISING

27% would pay for last-minute purchases such as additional bag, upgrade or lounge access with an airline app.
Biometric identification replacing favored passport as my travel document.

46% vs 45% in 2018
READY FOR A CHANGE

Biometrics supporter profile

- Frequent flyer +10 trips / year
- Male
- 35-44 years old
- Experienced travel disruption
- Willing to share personal information
THUMBS UP FOR IMMIGRATION E-GATES

74%
Faster than regular immigration

61%
Intuitive

50%
Enhance security

72%
Satisfied with an overall experience
<table>
<thead>
<tr>
<th>Service</th>
<th>Time 1</th>
<th>Time 2</th>
<th>Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bag Drop-Off</td>
<td>80%</td>
<td>76%</td>
<td>4%</td>
</tr>
<tr>
<td>Immigration / Customs</td>
<td>79%</td>
<td>75%</td>
<td>4%</td>
</tr>
<tr>
<td>Bag Collection</td>
<td>74%</td>
<td>70%</td>
<td>4%</td>
</tr>
</tbody>
</table>

"< 3 minutes" for Bag Drop-Off, "< 10 minutes" for Immigration / Customs, "< 10 minutes" for Bag Collection, and "< 5 minutes" for 25% and 19%.
60% Efficient queuing process at the boarding gate
51% Not needing a coach/ bus to get to the aircraft
46% Availability of overhead space for on-board hand luggage (vs 42% in 2018)

WHEN BOARDING…

… I want efficiency and comfort
Not having to go through security again

AT THE TRANSFER AIRPORT

Not having to go through immigration again

Receiving notifications on a smart device that my bag has successfully transferred

seamless journey
WHEN FLYING WITH MULTIPLE CARRIERS

4 out of 5 passengers

I knew which airline to check-in with

I clearly understood which airline is operating the various flights
...WHILE I received **boarding passes** for all my flights at my initial check-in

3 out of 5 passengers

I knew which airline to **contact** if I had an issue during the journey

seamless journey
Bag collection identified as a main point of attention for the industry
IF I COULD TRACK MY BAG...

46% would want their bag delivered directly to the final destination.

Of the remaining 54%, 1 out of 2 would still travel with cabin baggage.
WHY DON’T YOU CHECK-IN YOUR BAG?

52%

I don’t want to wait for my bag at arrival

30%  I need my essentials

27%  I packed restricted items

26%  I am afraid of damage

24%  I don’t want to pay

23%  I am afraid of a loss
55% experienced a travel disruption in the past 12 months
HOW CAN WE IMPROVE?

55% vs 54% in 2018
Real time & accurate travel information
Flight status
Bag information

53% vs 47% in 2018
Automatic flight re-booking
<table>
<thead>
<tr>
<th>Service</th>
<th>ALL PASSENGERS</th>
<th>PASSENGERS WITH DISABILITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking</td>
<td>77%</td>
<td>71%</td>
</tr>
<tr>
<td>Payment</td>
<td>78%</td>
<td>72%</td>
</tr>
<tr>
<td>Check-in</td>
<td>71%</td>
<td>72%</td>
</tr>
<tr>
<td>Bag Tag</td>
<td>76%</td>
<td>71%</td>
</tr>
<tr>
<td>Bag Drop</td>
<td>72%</td>
<td>73%</td>
</tr>
<tr>
<td>Security</td>
<td>66%</td>
<td>61%</td>
</tr>
<tr>
<td>Border Control / Immigration</td>
<td>66%</td>
<td>62%</td>
</tr>
<tr>
<td>Boarding</td>
<td>72%</td>
<td>62%</td>
</tr>
<tr>
<td>In-flight Entertainment</td>
<td>68%</td>
<td>58%</td>
</tr>
<tr>
<td>On-board Service</td>
<td>65%</td>
<td>62%</td>
</tr>
<tr>
<td>Bag Collection</td>
<td>66%</td>
<td>62%</td>
</tr>
</tbody>
</table>

% of satisfied passengers

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Prefer an agent to drop off their baggage for them.

When their travel is disrupted, they want to have baggage tracking information available.

Having wi-fi on-board is important.

Tell us more: PASSENGERS WITH DISABILITIES

Prefer to check-in at the airport.
Less willing to replace passport with biometrics

Less willing to share personal information

Access to essentials during the flight and additional fees are the main reasons for not checking in a bag

Prefer to have baggage delivered to their final destination, provided that they can track it

When the trip starts, being notified about time to the gate and baggage status is important
Enjoy collecting passport / visa stamps

PREFER TO PAY WITH A WALLET ON THEIR SMART DEVICE

Do not check-in their baggage because needs essentials during flight

HAVING WI-FI ON BOARD IS IMPORTANT

Pre-travel: want to be notified about regulations and requirements (e.g. visa requirements, health advisories)

Tell us more:
MILLENIALS
2019 Global Passenger Survey

Passenger Satisfaction Benchmark

iata.org/gps

iata.org/airsat
THANK YOU
SHOWCASE: THE PASSENGER’S VOICE

Rob Broere, Vice President, Industry Change, Emirates
Taras Buchynskyi, Student, Polish-Japanese Academy of Information Technology
Nick Careen, Senior Vice President, Airport, Passenger, Cargo and Security, IATA
John Glick, Partner, PwC
Vicky Scherber, Senior Director Passenger and Baggage Process, Lufthansa
Joanna Witkowska, Fundacja Vis Maior

Moderator: Kasia Madera, Presenter, BBC World News
Join us for a coffee break in the exhibition
Anne Carnall
Program Manager NEXTT, IATA

Nina Brooks
Director - Security, Facilitation and IT, ACI World

Will Squires
Digital Lead: Cities and Aviation, Atkins Global
How can we accommodate growth, maintain manageable operations, provide an excellent passenger experience and make the most of our infrastructure?
The NEXTT vision

Moving more off-airport

Using advanced processing technology

Harnessing interactive decision-making
Just a collection of projects?
Deployment Scenarios

- Defines the ‘when’
- Assessment of technological readiness
- Driven by regulatory and business change
- Road-tested with IATA SMEs and industry expert
- Segmented by region

Blueprint

- Defines the ‘what’
- Splits benefits into quantitative, monetized and qualitative
- Connects technology back to economic benefit
- Highlights relative importance
- Built on robust assumptions
Example Deployment Scenario: Data Processing
Monetized assessment of time savings for passengers from improved information exchanges to eradicate queues e.g. digitized passport controls & seamless boarding

Data processing efficiencies in bag journeys reduces airline station costs

* Only qualitative assessment for Cargo user benefits
Data processing unlocks the full benefits

- Data processing: 71%
- Off-airport: 14%
- Automation: 15%
Compelling case for transformation

- Strong Net Benefit
- Reduced airport infrastructure investment
- Commonalities in digital transformations unlock the greatest efficiencies
What does the 2\textsuperscript{nd} T in NEXTT mean?

- Teleportation
- Technologies
- Tourism
- Travel
NEW EXPERIENCE TRAVEL TECHNOLOGIES

NEXTT

New experience Travel Technologies
What’s the primary reason your organization would adopt the NEXTT concepts?

- Competition
- Need for greater efficiency and capacity
- Drive for better customer experience
- Customer demand
- Regulatory requirements
- Other
Join the discussion on our LinkedIn Group: NEXTT New Experience Travel Technologies

#NEXTTjourney

nextt.iata.org
Join us on our journey for the stars

Pick-up time from the Hilton hotel lobby: 18:20
Dress code: Cocktail Attire

Kindly Hosted by:

POLISH AIRLINES

A STAR ALLIANCE MEMBER