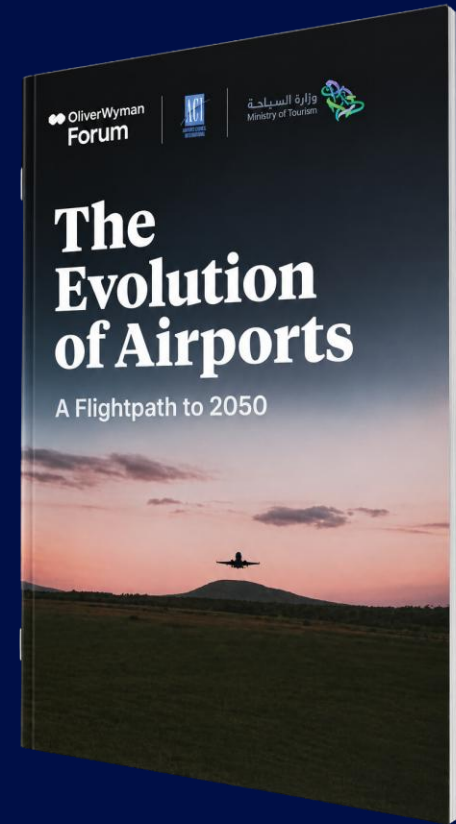
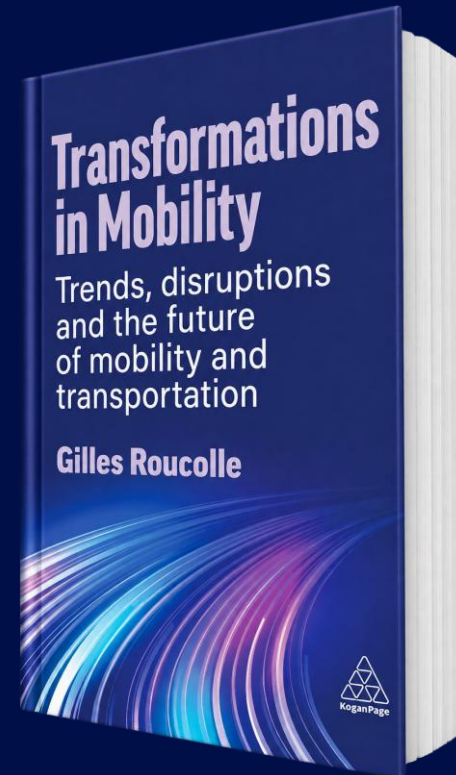


Shaping the spaces of travel with



**Gilles
Roucolle**

Managing Partner,
Global Head of
Industries,
Oliver Wyman



The early days

● **1910s**

First commercial airports open



Moving planes

1910s

First commercial
airports open

1950-60s

The Jet Age makes
more destinations
more attainable



A photograph of a Pan Am Boeing 707 released to the public domain by the San Diego Air and Space Museum

ROLE OF THE AIRPORT

Moving people

1970s-1990s

De-regulation makes flying attainable to the masses



AI generated image

Moving people

1970s-1990s

De-regulation makes flying attainable to the masses

2000s-Today

Globalization drives rapid expansion in demand and capacity



ROLE OF THE AIRPORT

Moving experience

2030+

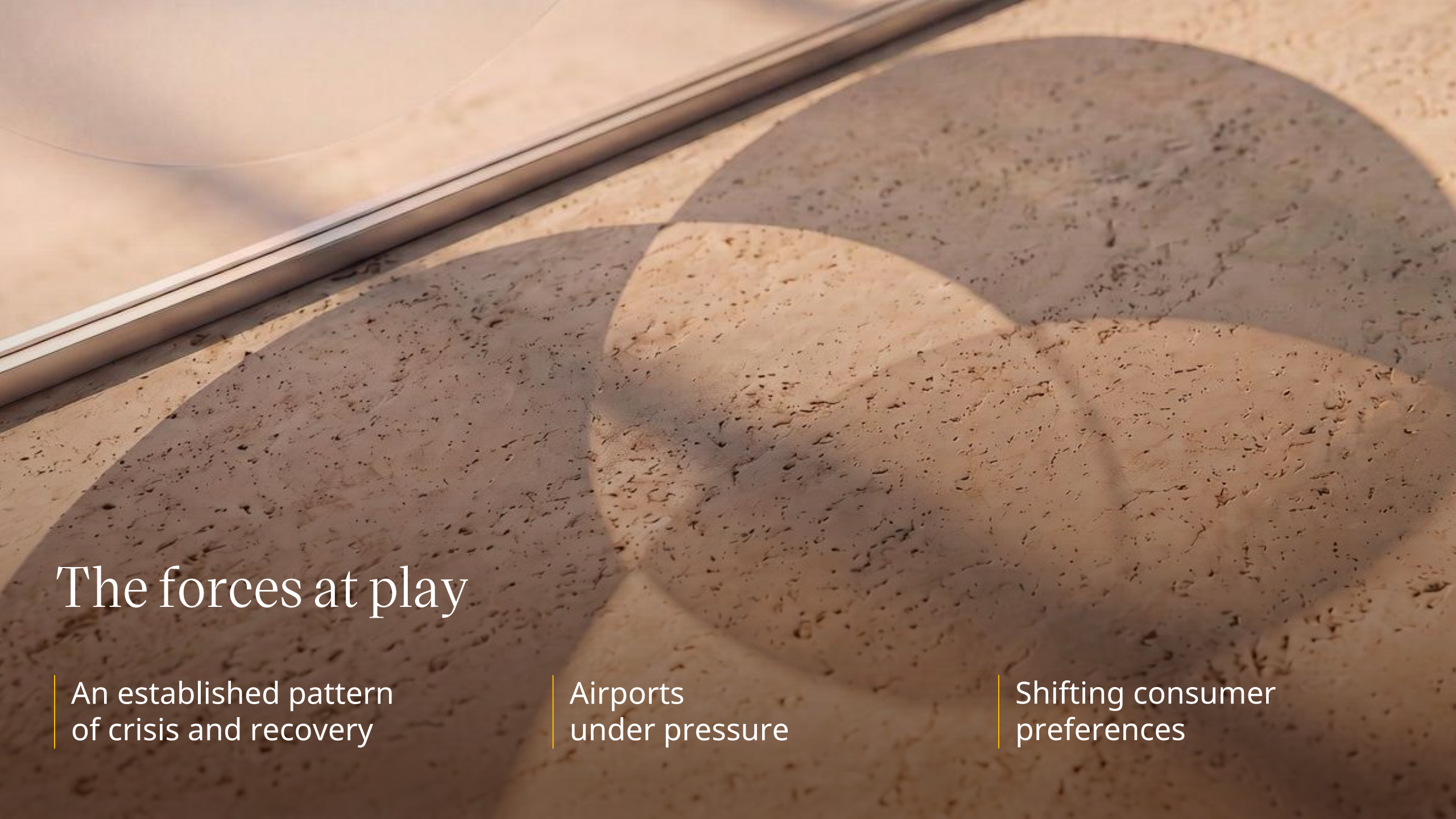
A connected world
that demands a hub
for connection



AI generated image

The next generation of travel
will not be defined by faster
aircraft or larger airports.

It will be defined by
intelligent mobility
ecosystems that seamlessly
connect people, places,
brands and commerce.



The forces at play

An established pattern
of crisis and recovery

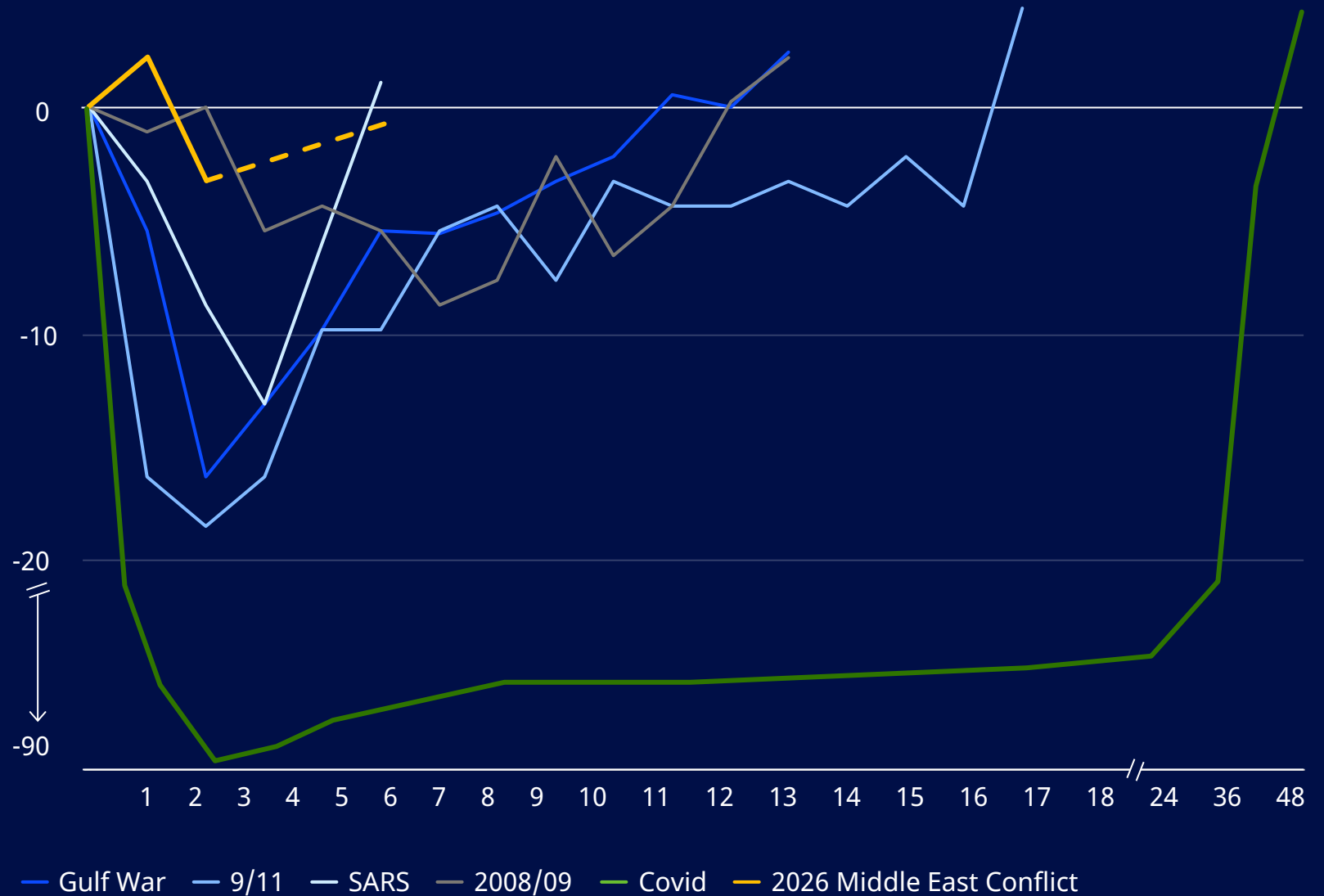
Airports
under pressure

Shifting consumer
preferences

Established pattern of crisis and recovery *Requiring airports to manage the cycle*

Recovery in global traffic after various shocks

% of passenger volume against the same month before the shock



THE FORCES AT PLAY

Airports under pressure

*Operational
challenges
abundant*



*Thousands of
bags ... sit idle*



*...there was
no one to unload
the planes*



*7.7% of flights
were canceled*



*off-airport facilities used to manage
the flood of cargo*



*Loaders overworked, poorly paid, and
Some were cutting corners*

*Shortage of
security personnel*



Airports
under pressure

*Financial
Pressure ongoing*

~50%

Cost Recovery comes from Non-Aero Revenue

-15%

Vs. Pre-Covid Levels

THE FORCES AT PLAY

Airports under pressure

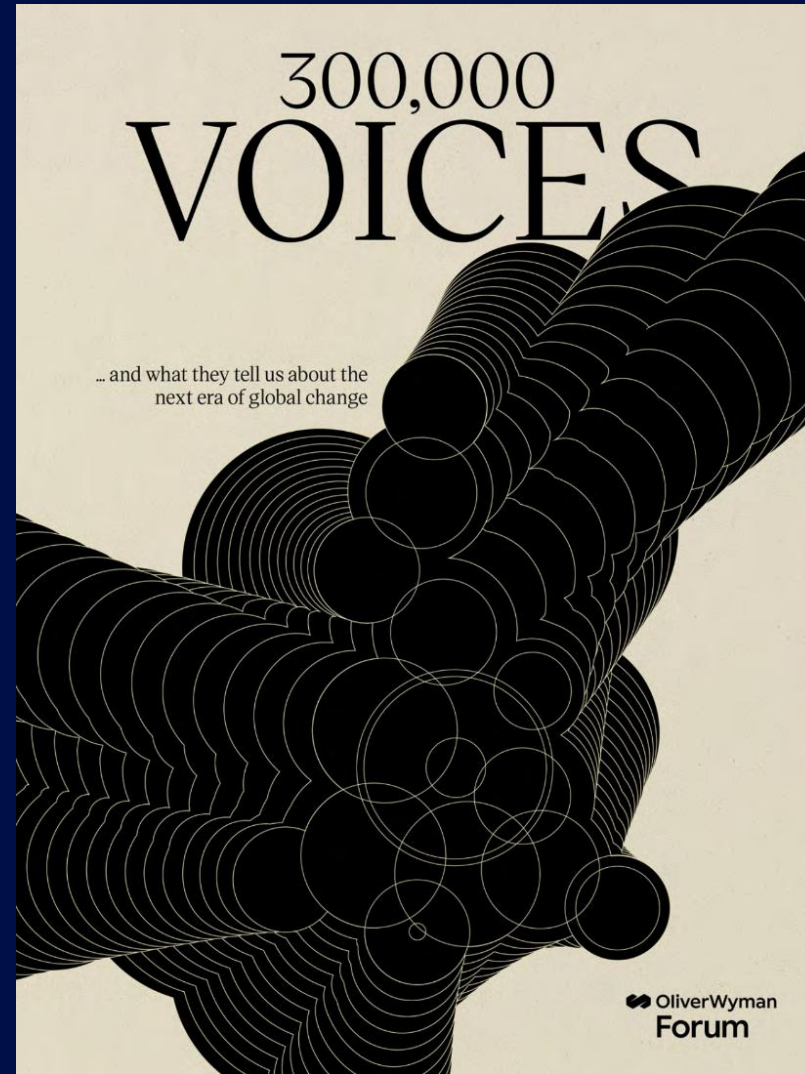
The rise of ULR aircraft



Airbus A321 XLR (F-WXLR) at ILA Berlin Air Show 2024, public Domain

THE FORCES AT PLAY

Shifting consumer preferences



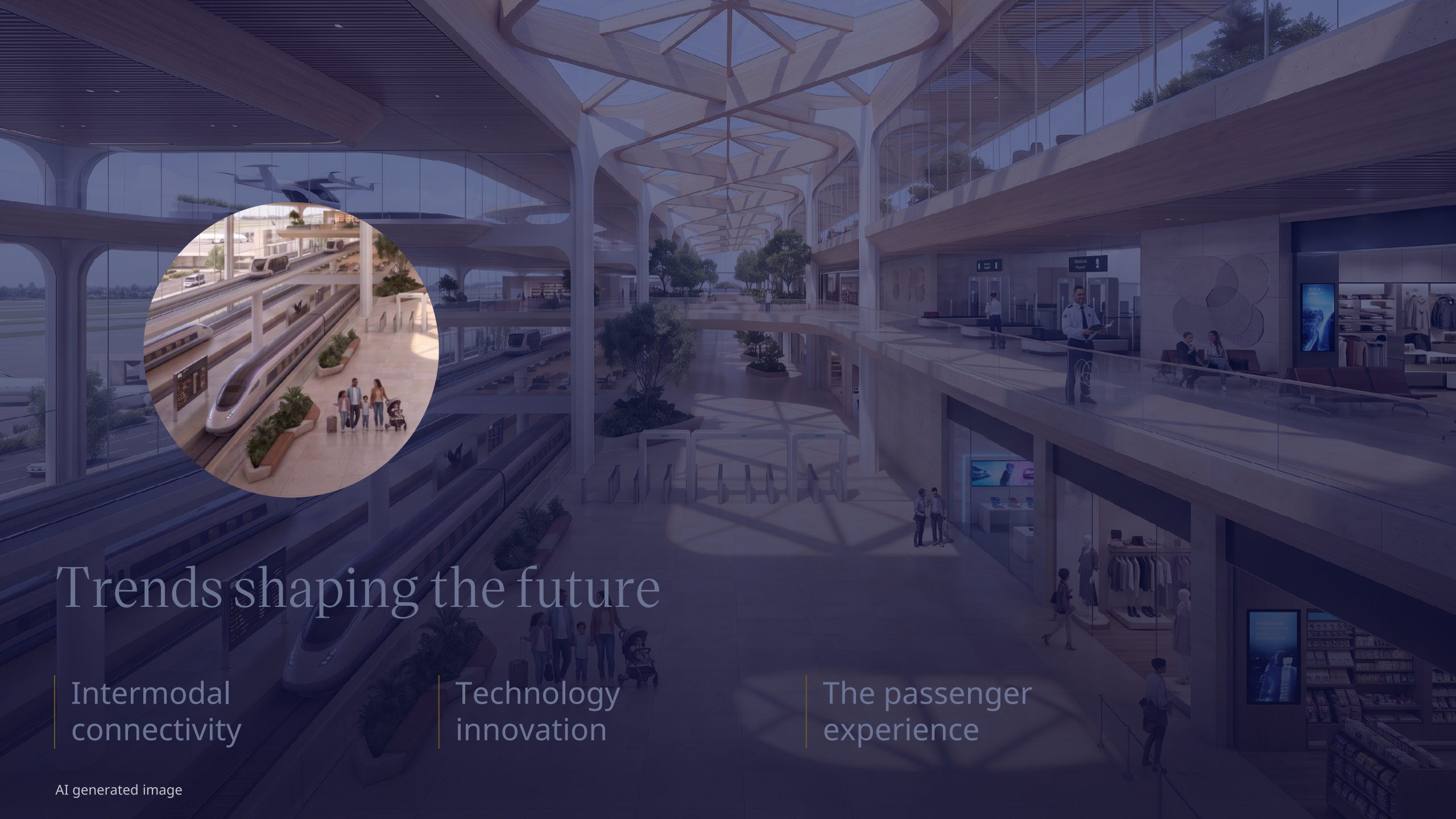
Shifting consumer preferences

62%

Of consumers use
AI for product
recommendations

AI is now the leading
source of product
research &
recommendation

Can we re-think the
duty-free shopping
experience?



Trends shaping the future

Intermodal
connectivity

Technology
innovation

The passenger
experience

TRENDS SHAPING THE FUTURE – 2030 AND BEYOND

Intermodal connectivity

Fully integrated multi-modal hubs

The Future is Here

GENEVE
AÉROPORT



AI generated image

TRENDS SHAPING THE FUTURE – 2030 AND BEYOND

Technology innovation

Zero-Queue Airports

The Future is Here



AI generated image

TRENDS SHAPING THE FUTURE – 2030 AND BEYOND

The passenger experience

Integrated, personalized e-commerce

The Future is Here



Heathrow
Making every journey better



AI generated image



TRENDS SHAPING THE FUTURE – 2030 AND BEYOND

Maya's journey today

Expecting disconnected steps

"Great" means "uneventful"



TRENDS SHAPING THE FUTURE – 2030 AND BEYOND

Maya's journey 2030+

Maya is the same...

What has changed is the world around her

"Great" means "a truly enjoyable and unique" experience

The journey beyond 2030

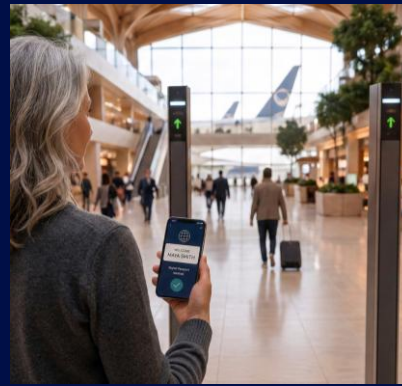
Scope to expand time



Preparing



Check-in



Immigration
and security



Dwelling



Boarding

Thank you
Q&A

