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TIACA updates brand identity with fresh logo and website redesigns supporting new vision

GLOBAL TRAINING
Photo Gallery

TRAINING CALENDAR

EVENTS CALENDAR

ACI EVENTS AND GLOBAL TRAINING MAP

NEW WORLD BUSINESS PARTNERS

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ACI Europe
Brussels
Belgium

ACI Asia-Pacific
Hong Kong
China
SAVE THE DATE

2019 ACI Asia-Pacific/World Annual General Assembly, Conference & Exhibition

2 - 4 April 2019

HONG KONG
In June for the 28th consecutive time, the global community of airports convened, this year in Brussels, Belgium to discuss how airports should enhance their brands as businesses and face the emerging challenges of our industry. It was another successful event and a well-attended annual meeting, attracting more than 800 delegates, including government officials, aviation regulators, airlines and suppliers from 70 nations. We were all treated to world-class hospitality and superb organisation from the excellent professionals from the Brussels Airport Company, ably led by Mr. Arnaud Feist.

The selection of Brussels as the venue of the conference was stellar. It is not just a popular destination for tourism but is also an international policy centre, a place where big decisions that can affect the airport industry in the European Union are taken. And the decisions made there can affect aviation all around the world.

We conducted the popular pre-conference forums, featuring in-depth coverage of four disciplines vital to our industry: safety and technical operations, cargo, human resources, security and facilitation. Particularly focused on the challenges facing the airport industry, and this included safety and operational issues, cargo handling, human resources and facilitation.

For the conference, we heard provocative insights from a legacy airline CEO, essentially calling for the historical airline-airport business environment, upstart airline executives demonstrating a desire for an evolved business environment and from airport CEO’s heralding the emerging business environment. We launched the new ACI Policy Brief on Creating fertile grounds for private investment in airports which provided objective data on the subject of private sector participation in the airport market.
The second day of the conference treated the delegates to insights on sustainability and corporate social responsibility activities of airports from around the world as well as exciting solutions for airports to confront the digital transformation and airport branding and to understand the burgeoning Chinese travel market. It ended with a reflection by yours truly and IATA Director General Alexandre de Juniac, on the sometimes divisive issues of slot allocation and private sector participation in airports.

The ACI World annual general assembly adopted four business resolutions to express airport objectives on cyber security, safety data, adaptation to climate change and infrastructure investment. As well, the general assembly paid homage to the dedication and generosity of the original founders of the ACI Fund, the original manifestation of the commitment to: “leave no airport behind.”

During the event, we couldn’t help but reflect on the fact that, over the years, the pace of change has continued to accelerate. Airports are a component of an essential and dynamic industry. Today, we remain a pillar of the global aviation ecosystem. We both effect change and adapt to change, whether from: technological developments, generational, regional and local demographic shifts; geopolitical trends and shocks; climate and weather events, and a myriad of other forces.

As the preeminent voice of the world’s airports, we remain committed to bringing together our members, to advance the development of sound public policy and to engage with governments and aviation stakeholders worldwide. Because together, airports are stronger and aviation is stronger.

To this end, I was delighted to announce that Hong Kong International Airport (HKIA) will be the host airport for the 2019 ACI Asia-Pacific/World Annual General Assembly, Conference & Exhibition, 2-4 April, the world’s largest airport meeting tailored for senior and C-level aviation executives. The event will address the latest issues and the future development of the global airport industry. Save the date!

Angela Gittens
Director General
ACI EUROPE・WORLD
General Assembly Congress & Exhibition

18-20 June 2018, Square, Brussels, Belgium

Hosted by: Brussels Airport
the heart of Europe
The first part of the Forum showcased three presentations which addressed the challenge of increasing traffic for airport operators.

1) Alison Bates of Heathrow Airport presented a data-driven case study aimed at unlocking reserves of capacity, performance and efficiency in the system by including airspace constraints. She stressed that arrival punctuality is extremely important especially at the beginning of the day in order to mitigate “hotspots” (periods when demand exceeds capacity).

2) Airport collaborative decision making (A-CDM) for smaller regional airports was the focus of the presentation by Francisco Salguero Alvarez of Aena which involves a reduced form of A-CDM that can bring benefits to smaller airports and increase the connectivity of flight information across the network.
3) Thomas Romig of Geneva Airport illustrated the Total Airport Management concept that integrates all aspects of airport operations and new-generation airport operational control centres.

The second part of the Forum on drones focussed on mitigating risks while facilitating new technologies that may be useful to airport operators:

1) David Gamper of ACI World described ACI’s recently approved policy recommendations for airport operators on drones.

2) Benefits and use cases for using drones for aerodrome operations and maintenance was presented by Ronald Liebsch, Berlin Airports.

3) U-space, the European Unmanned Aerial Systems Traffic Management solution for drone integration, and the need for a seamless framework for drones outside the conventional ATC system was discussed by Ludovic Legros of SESAR.

The final presentation given by Dirk Geukens of Brussels Airport focussed on the value for an airport of being an Airport Excellence (APEX) in Safety Partner.
Significant growth in air passenger traffic in recent years has attracted considerable attention. Air cargo has also experienced a surge in demand with an increase in load factors putting pressure on available belly capacity. The rapid growth of e-commerce, which has shifted commerce to business-to-consumers (B2C), has boosted air cargo traffic. The key players of the supply chain are shipper, forwarder, integrator, airline operator and, of course, the consignee. To efficiently manage air cargo operations, challenges such as congested airports, slot restrictions, capacity...
constraints, complex regulations and ever more demanding customer expectations must be addressed. In order to sustain further growth of the air cargo sector, these issues need to be tackled. Implementation of an electronic air waybill (e-AWB) for freight would simplify the process by no longer needing to print, handle or archive this critical air cargo document. The e-AWB would reduce processing costs and freight wait time, and provide clear visibility for tracking. In addition to the e-AWB, air cargo would need to invest in knowledge, training and retention of human capital. Training courses such as air cargo fundamentals, dangerous goods and supply chain, offered by the industry, would bring added value. Airport infrastructure needs to improve with more dedicated cargo terminals to handle the future demand.

Last, it was noted that airport infrastructure coupled with technology can play an important role in air cargo. Disruptive technologies including the Internet of Things, digital assistants and drones can help to increase efficiency and meet customer expectation for greater transparency throughout the supply chain.
Human Resources Forum
Airports and the Employee Experience (EX)

Participants of the HR Forum break up into groups for practical exercises
We can all agree that our key to success is having engaged and competent employees to work at and run our airport businesses. With the forecast in growth of air travel over the next 15 years, we need innovative employees to deliver differentiated services that will please our customers and grow our businesses. To achieve this, there is a need to focus on the employee experience (EX) and what this could mean for airport business in gaining competitive advantages.

To better illustrate this to the audience, two airport HR thought leaders, Veronique Vogeleer, Director, Human Resources, Marketing and Communications, Brussels Airport Company, and Theresa Fleidl, Vice President, Professional Training Policy and Human Resources Marketing, Munich Airport, Past-Chair ACI EUROPE Leadership and Human Resources Forum, explained how their airports promote employee experience.
Brussels Airport takes an innovative approach by having five key areas of focus that lead to EX and well-being:

1. **Meaningful work** – ensuring employees enjoy what they do and understand how it fits into the big picture;

2. **Supportive Management** – which provides coaching and a clear setting of goals;

3. **Positive work environment** – team spirit;

4. **Growth opportunity** – which looks at personal development, training and talent mobility; and

5. **Trust in leadership** – related to transparency and inspiration of the executive team.

Munich Airport has a very competitive employment market and competes for talent with the likes of BMW and Siemens. The airport approaches EX in two phases, the first being the creation of brand awareness and the second consisting of employer value proposition. This latter phase is supported by activities that involve airport staff in two-way communication so as to not only deliver but also receive information. They also host many activities for employees and their families in recognition of their individual and group efforts that include fun onboarding programmes, developing individual career paths and individualized development and training programmes.

The second half of the workshop was led by ACI’s two experienced HR faculty members, Dr. Richard Plenty and Terri Morrisey from This Is. They provided the delegates with an interactive seminar that included practical exercises which, in addition to two excellent airport case studies, could be used by ACI members and world business partners to assist in the development of their own EX programmes.

This workshop set the scene for our World Human Resources Forum that will be held in Hong Kong in April 2019. Additionally, if you wish to learn more on HR or be involved with one of the five ACI regional HR committees/leadership forums, please let us know at training@aci.aero.
A tool specifically designed to help airports be “customer ready”

A survey that can be used year after year

A measure of employee performance and engagement to strive higher

An ideal complementary tool for existing ASQ airport members

KEY BENEFITS OF USING ACI’S ECE

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Growth of revenues, improved productivity and employee retention

FOR THE AIRPORT COMMUNITY

Unified pursuit of a seamless passenger experience

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aci.aero/Airport-Service-Quality/ASQ-Home
Digital transformation and cyber security—two sides of the same coin?

Will integrated passenger identification create a seamless journey? Can the boarding process of an A380 be completed in 20 minutes? Can airport capacity be enhanced through digital transformation? Is simulation training on cyber resilience available for airports? No longer are these questions to ponder for the future. The Security and Facilitation Forum addressed these topics through case studies presented by key actors from airports, airlines, government and vendors.

The first session, moderated by Saba Abashawl, Houston Airports, provided insights on how digital transformation can ensure seamless passenger flow and enhance airport efficiency.
Simon Wilcox, Heathrow Airport and Ivar van Cuyk, Amsterdam Airport, explained how the usage of digital identity at all the passenger touchpoints in Heathrow and Amsterdam Airports has supported seamless passenger flow, unlocked capacity and enhanced airport efficiency using technology. The need for trust and collaboration among stakeholders in sharing data was emphasized, while taking into account the issue of privacy and the General Data Protection Regulation (GDPR).

On the regulatory front, Lisette Looren de Jong, Government of the Netherlands, provided an update on the concept of Known Traveller Digital Identity, developed by the World Economic Forum, which is based on enabling technologies such as mobile devices, biometrics, blockchain and cryptography.

Harvey Tate, International Airlines Group, shared the initiatives of British Airways on the biometric boarding process, simplifying transatlantic travel and enabling an A380 boarding in 20 minutes. Gillian Ormiston, IDEMIA, shared Changi’s innovation in passenger processing through biometrics, and Richard Camman, Vision Box, highlighted the US experience.

Implementing cyber security strategies was discussed in the second session. Michael Zaddach, Flughafen München GmbH, shared the best practices of Munich Airport and highlighted their collaboration with ACI on cyber security training.

Dominic Nessi, Aerotech Partners stressed the need for a proactive approach towards cyber security from a top down and bottom up perspective. It was reiterated that while moving towards airport digital transformation to enhance passenger experience, it is imperative to ensure cyber resilience for they are two sides of the same digital coin.
How many ways can you say Welcome? Bienvenue? Welkom?

Welcome address from Didier Reynders, Deputy Prime Minister, Minister of Foreign Affairs and European Affairs
Brussels is celebrating 60 years of history. In 1958, Brussels hosted the World’s Fair and built the Atomium to celebrate its technical prowess; the Smurfs, also known as the Schtroumpfs, were “born”; and Brussels Airport was inaugurated in the rain. The ACI EUROPE/World Annual Assembly, Congress and Exhibition, opened on a sunny day filled with anticipation in the Square Meeting Centre.

Setting the scene for a full conference agenda, Arnaud Feist, CEO of Brussels Airport; Didier Reynders, Deputy Prime Minister; Bongani Maseko, Chair of the ACI World Governing Board; Olivier Jankovec, Regional Director of ACI EUROPE; and Michael Kerkloh, Chair of ACI EUROPE, delivered opening remarks.

Feist remarked that privatizing the airport in 2004 had been a turning point. Since then, traffic had grown from 15 million to more than 25 million in 2017. Brussels Airport was adding airlines and destinations and building out its infrastructure to benefit all users. The airport has ambitious plans for the future as it seeks to develop the airport as a multi-modal hub to companies and communities as an airport business district.

Reynders spoke of the support from Belgium and the EU for Brussels Airport, recognizing that it was an essential gateway to the country and crucial for its economic development. He added that Brussels was one of the smallest capital cities in the world and yet it was a major diplomatic and conference centre. Belgium fully
supported development of the airport, was proud of the new relationship with Lufthansa, but added that growth needed to recognize environmental concerns.

Maseko recalled that the value of the ACI Assembly was to bring together airport executives and industry leaders from around the world to learn about developments in the industry, visit the exhibitors, build new friendships and rekindle old ones. He said that the agenda for the conference was full and rich with outstanding speakers. He thanked Brussels Airport and Belgium for being such generous and welcoming hosts.

Jankovec said that Brussels Airport always aimed to be the best in class and took us on a whirlwind tour of the activities in ACI EUROPE. In a preview of later sessions, he spoke about the revived growth in traffic and the challenges this brought in terms of both the provision and financing of infrastructure. He said there needed to be a new emphasis in B2P, or business-to-people, to increase the resilience of the airport industry in the face of disruptive changes such as ride share and e-commerce.

Kerkloh spoke of the value of the European project to aviation. He said that the EU had given airports in Europe the wings to fly. Airports were part of their communities and supported local and national GDP growth; it was a blessing, but also brought about challenges. Looking ahead, he commented that the Director General of DG MOVE, Henrick Hololei, had said that airport capacity was the number one challenge for airports and indeed for the aviation system in its entirety. Increasing congestion and disruption was the new normal, and this risked Europe losing ground to other regions.
Addressing the recent shrill protests by the many airline associations in Europe, he said that their complaints were unfounded. Airport charges were a small and steady part of an airlines’ costs and were not reflected in ticket prices. There was no evidence of abuse of market power, and airports needed less, not more, regulation in order to provide the infrastructure necessary to meet future demands for capacity.

Kerkloh then emphasized that it was essential that airports recognize their wider social responsibilities, in particular with gender equality. Airports needed to encourage and give visibility to female airport leaders. In noting that 30% of Munich Airport’s senior executives were women, he remarked that more could and should be done.

He concluded by thanking Brussels for hosting the conference and said that he looked forward to a full two days of fruitful and robust conversation.
Airports must evolve from “unique selling points” to “unique experience points”
In his State of the Industry address during the opening session of the ACI EUROPE/World Annual Assembly, Congress and Exhibition, ACI EUROPE Director General Olivier Jankovec highlighted that the aviation industry must build resilience and be ready for change.

Exploring the challenges for European airports as the sector aims to shape the future, Jankovec noted that the industry had achieved recent remarkable success with +8.5% traffic growth. “The outlook for this year is good with low cost carriers driving growth,” he said. “But oil prices, the risk of a possible recession, as well as the geopolitical situation – the risk of trade wars, possible conflict, terrorism and BREXIT – means that we have to ask if we have reached the tipping point. We are enjoying the benefits but is the party almost over?”

Noting that good efforts in cost reduction are driving growth, he stressed that there are limits and the industry needed to be ready for major costs on the security side.

He remarked that the nature of the industry continues to evolve with growth in direct connectivity coming from low-cost carriers which illustrates that point-to-point service is growing as hubs are being bypassed. Hub-busting airports – secondary and smaller niche hubs – are growing their traffic and connections.

“More airport competition is developing as a result of airline consolidation,” Jankovec said. “Traditional market segmentation is blurring and aeronautical revenue is coming under pressure.” He added that airlines are also resisting investment in more airport capacity, and the airport business model is being affected as commercial revenues are being challenged by digitalization.

Jankovec underscored the importance of having a renewed focus on customer experience based on efficient operations and placing the customer at the core of operations. To do this, he said that airports must evolve from being “unique selling points” to “unique experience points” and must develop real brands associated with unique passenger experiences.

“Innovation and airline cooperation must be pursued,” he remarked. “The opportunity is there to grow revenue together with airlines – grow the whole pie – rather than fighting over the pieces.”

In pursuing growth, Jankovec remarked that corporate social responsibility and limiting the local impacts of airport operations must be placed at the core of the airport industry’s business model. He stressed, however, that in the context of the global impact of aviation, corporate social responsibility is no longer good enough as we face a backlash to globalization. In his view, a paradigm shift was needed to contribute more to society or risk losing support.

In highlighting that sustainability must be at the core of business strategy, Jankovec remarked that airports must:

• reinforce their positive social purpose;
• reinforce outreach to the local community of airports on corporate social responsibility;
• leverage this integration with local community airports and fully communicate the positive contributions of airports to the community; and
• look at airport brands in societal terms and not only in commercial terms.

“We must act global and think local – we must be GLOCAL – and be businesses that care,” he concluded.
“We might not always be friends but we are always family”—Carsten Spohr, CEO, Lufthansa
In the first keynote address at the ACI EUROPE/World General Assembly, Congress, and Exhibit, Carsten Spohr, CEO of Lufthansa told the audience of mostly airport representatives that, while it might seem like airlines and airports are not always friends, they are “always family”.

“It is often said that we in the airline industry have three things that bring us together: complaining about ATC, complaining about pilot unions, and complaining about airports,” he said. “But we must work together to deliver the benefits of globalization.

“We must never forget that families stick together in a crisis and we are facing a crisis of growth.”

Mr Spohr said that, to meet the challenges of growth, there needs to be investment but this must be done “fairly”:

“We strongly believe in open competition but we do need to regulate dominant airports,” he said. “Those airports might be in the minority of airports in Europe but they handle most passengers.

“Infrastructure charges are a bigger issue for us than fuel and labour costs and we don’t see decreasing charges anytime soon.”

Dual till system is not the best way to operate, he said, and to meet the needs of passengers better, he believes that a single till approach would align better the interests of both airports and airlines to benefit passengers.

“Airports and airlines must make use of existing infrastructure before investing in new infrastructure and we must move away from the classic fight between airlines and airports fighting over the returns,” he said.

“The primary goal for airports and airlines must be the quality of service we deliver to passengers.”

One area where investment is important is in innovation, especially in security and facilitation, he stressed. Mr Spohr said that Lufthansa had seen progress where the airline had boarded an A380 at LAX in 18 minutes recently but more needed to be done.

“Innovation is fast, implementing innovation is slow,” he said. “We must move faster, more jointly, and embrace new technology and not live in the past and bring energy back to our operations.”

On the perennially discussed issue of slot allocation, Mr Spohr stressed that the system must ensure continued access to capacity constrained airports and that the World Slot Guidelines had “worked well” and that the outcome of the current review must be transparent.

Mr Spohr said airlines questioned the benefits of privatization and added that corporatization can deliver similar benefits without privatization. Munich Airport is the benchmark for this approach in Europe, he said.

“Privatization can only be a success where there is competition and there is no one size fits all approach,” he said.

Mr Spohr concluded his assertive and provocative address by outlining what he believed is the main problem in the industry.

“We as airlines are jealous because airports have better profit margins and you are jealous because you think we are too sexy,” he said. “Let’s move past that jealousy!”
“Passengers should be the winners”—Norwegian CEO Bjorn Kjos interviewed by Victoria Moores
During ACI World’s World General Assembly, Bjorn Kjos, CEO of Norwegian, gave his views on the present and future challenges facing airlines and airports to Victoria Moores, Air Transport World’s London-based European Editor/Bureau Chief.

**How do you respond to stories in the press which suggest Lufthansa wants to buy Norwegian?**

The European airline market is becoming more consolidated but we have not put the for sale sign out. We take the interest as a good sign that we are successful. We have set the standard.

**You are in a period of considerable growth, are you overstretched?**

No, they have said this about us for 15 years. We are building up more long haul services and we are reaching the peak now. We have a good growth base going forward and that means we are set for further growth.

**Do you need an airline partner to consolidate and grow further?**

We’ve never had a partner. It’s clear airlines need size to stay alive and we are about to reach that size. Our size now facilitates what we want to do. We can now refine our business going forward. We are well-off going forward. We are guided on costs at the moment.

**How is your partnership with easyJet developing?**

We see bookings coming through, we are fixing our systems, we have started at Gatwick and hope to do more. Airports are a central part of this - they need to facilitate the connection of passengers. They do it well at Gatwick but other airports must work to do this too so passengers have the opportunity to travel all over the world. We need airports to have the right feeder networks for this to work.

**What do airports need to do to enable this?**

We need baggage transfer facilitation. Systems can be old fashioned so we need modern systems. They need to invest in this make it easier for people to travel. Autonomous vehicles can help facilitate this. Need investment in the block chain. Airport and airlines are lagging behind in adopting new innovation and technology.

**What can Airports to do to be better partners?**

This is a globalized world so we need better infrastructure to facilitate transfer through airports. Some airports do security very well, some are very bad. Airports must prioritize ease of travel for passengers Some airports listen to airlines carefully and set up a system to help this, others don’t care about our concerns! What’s coming is low cost carriers coming together to create large networks - not alliances but collectives - in North America and Asia to go intercontinental. Airports must be ready to facilitate for this. They will be huge part of the future. The low cost carriers will fly together to link low fares the whole journey - the legacy carriers charge a hell of a lot of money.
**What are your thoughts on airport charges?**

Airport charges are a monopoly! In the London system, there is choice but this is not the case everywhere, only a small number places where this is true airport completion.

**Where to for your Argentinian service, are you going to expand into South America?**

South America is under-served. We need to develop a feeder network or start to link to new cities in South America. We need to do both and link to a larger catchment area.

**What next for Norwegian, are you looking at Africa?**

We are looking at areas that are underserved. I can’t say more than that.

**What is the challenge for European aviation going forward?**

Obviously, it is traffic rights. We must have access to European market to allow travellers to access countries to support tourism and trade. Open Skies is the only route to competition and fair trade. Without this the people are the losers, they shouldn’t be the losers, they should be the winners.
Every passenger is different, and airports that know who their passengers are can better cater to their wants and needs. Through extensive study and data analysis of ASQ Survey data, ACI has created an ASQ add-on based around six passenger typologies that will help you to:

- know what current and prospective customers are thinking and doing;
- highlight the passenger types that are most inclined to spend at your airport;
- help you understand the specific attitudes, needs, expectations and concerns of your passengers;
- address gaps in service and,
- benchmark your results with other participating airports.

Participating ASQ airports can now take part in the add-on ASQ Arrivals Survey that offers vital learnings related to arriving passengers’ satisfaction levels. The ASQ Arrivals Survey takes place on the day of travel as passengers are in the airport, ensuring that impressions are fresh and opinions are accurate. The ASQ Arrivals Survey will:

- help you understand arriving passengers’ moods and impressions of the airport, from walking distances and washroom cleanliness to wayfinding, immigration, baggage claim and much more;
- help differentiate the key drivers of satisfaction among arrivals passengers, which can be distinct from the needs of departures passengers; and,
- give you the actionable intelligence to enhance your service offering to arriving passengers, and gauge the effectiveness of these enhancements.

Do not wait to take the next step in improving the customer experience journey at your airport.

Contact ACI’s ASQ team for more information by emailing aciasq@aci.aero.
“Airports are Sexy”
—Airports as Brands and Businesses

From left to right: Moderator David Feldman, Managing Partner, Exambela Consulting; Panelists: Martin Eurnekian, Executive Director, Corporacion America and President, ACI-LAC & Vice Chair, ACI World; Arnaud Feist, CEO, Brussels Airport Company; Fred Lam, Second Vice President, ACI Asia-Pacific Regional Board and CEO, Hong Kong International Airport; Joseph Lopano, CEO, Tampa International Airport; Bongani Maseko, Chair, ACI World and CEO, Airports Company South Africa; Dr. Michael Kerkloh, President, ACI EUROPE and CEO, Munich Airport; Thomas Woldbye, CEO, Copenhagen Airports A/S
Do airports have a brand? To answer this question, David Feldman, Managing Director, Exambela Consulting, moderated a panel of airport CEOs made up of Arnaud Feist (Brussels Airport), Thomas Woldbye (Copenhagen Airports A/S), Joseph Lopano (Tampa International Airport), Martin Eurnekian (Corporacion America), Bongani Maseko (Airports Company South Africa), Dr. Michael Kerkloh (Munich Airport) and Fred Lam (Hong Kong International Airport).

Airports have become commercial businesses and are no longer just engineering driven. In this context, each airport must find its identity and personality—starting with gaining an understanding of who its customers are. Brussels Airport changed its branding a few years ago to reflect its important leisure customer base, for instance.

In addition to passengers, airports need to position themselves towards airlines and local communities. The latter involves acting as “global citizens” and taking positions on sometimes difficult issues, such as the movement of refugees in Europe.

Airports are also major employers and can provide wide-ranging careers. What does it take to work at an airport today? Applicants need to be people-focused, innovative, able to work under stress and build relations between different actors. But continuing to attract talent will rely on airports being responsible companies. This includes sustainability initiatives but also, in some countries, helping to narrow the gap on education, health and housing.

Airports are sexy. After all, as Lopano reminded the audience, airports receive more kisses and hugs per square foot than anywhere else in the world.
Challenges of Growth

Eamonn Brennan, Director General, EUROCONTROL
Passengers in Europe are set for increasing delays in the coming years. System-wide average delays will increase from 12 minutes to 20 minutes per flight by 2040. Delays of between one and two hours will increase by a factor of seven. Congestion is expected to constrain demand throughout the European airspace, meaning that 160 million people who want to fly will not be able to do so. And, climate change is already affecting airports in terms of more severe weather events leading to increased unpredictability of service.

Eammon Brennan, Director General of the European Organisation for the Safety of Air Navigation (EUROCONTROL), painted this rather pessimistic picture as he launched EUROCONTROL’s latest study – “Challenges of Growth.” This was the fifth in the series, with previous editions having been published in 2001, 2004, 2008 and 2013. He said that previous forecasts of a capacity crunch had been “rescued” first by the reduced propensity to travel after the terrorist attacks in 2001, and then again by the global recession in 2008. But traffic was again on a strong upward trajectory.

He said that EUROCONTROL had modelled future growth based on a number of economic scenarios and suggested that the most likely was one of “Regulation and Growth.” The average increase in traffic was expected to be 1.9% each year as a result of renewal and expansion of fleets. But that growth would not be distributed evenly, leading to extreme pressure on 16 major airports, up from 6 now. However, the effects would be felt throughout the system.

Brennan remarked that there were no easy answers because the existing infrastructure was already stretched, existing plans for expansion were insufficient and new pressures were expected from drones and other innovative operations. The additional capacity would need to come from new runways and other infrastructure development, innovative ways of using existing infrastructure through a network approach, less regulatory fragmentation in Europe, deployment of new technology to increase efficiency, and most of all a willingness of States to put aside national considerations to develop a Single European Sky – which had been proposed by Loyola de Palacio, the former Transport Commissioner, in 2001.

In conclusion, there were no easy answers. It would require all stakeholders to work together to address the capacity crunch – it would not solve itself.
Andrew Charlton, Managing Director of Aviation Advocacy, kicked off the Airline Leaders’ Symposium by highlighting some of the key challenges facing the aviation industry around capacity, including air traffic control and on-the-ground elements. Recognizing that airlines operate in very different markets with distinct constraints and service expectations, he asked his panel to comment on whether airports should try to deliver all things to all airlines, and how growth can be funded. He also highlighted the symbiotic relationship between airlines and airports, likening it to a rhinoceros and the bird that perches on its back to clean it – both benefit from this association.

Tewolde Gebremariam, CEO of Ethiopian Airlines, Kresimir Kucko, CEO of Gulf Air, and Jochen Schnadt, CCO from BMI, discussed a range of issues on this topic, beginning with the need for an immediate solution to capacity constraints, including investment in airports. The panel
debated where that investment could come from, whether all players in the ecosystem should need to be profitable, and whether air travel could be considered an essential service.

Recognizing that ownership and investment are only part of the issue, the panel discussed noise and pollution as barriers to expansion, highlighting that both airlines and airports need to do more on corporate social responsibility issues. Conversely, new technologies in aircraft have drastically reduced noise, but restrictions from thirty years ago still remain in place.

Challenges with interlining were considered, from both physical and distribution angles, especially where low-cost airlines are concerned. The panel recognized that passengers expect a simpler seamless journey and asked what airports can add. Distribution costs and government taxation were also identified as issues, especially in a low-cost environment where fares are low. Regulation, building restrictions and lack of government investment were discussed as further constraints. The need for government taxes on aviation to be reinvested in infrastructure was called out as a major frustration.

The panel concluded with a discussion on what ACI should do. The need for the silos to be broken down, airlines and airports to treat customers holistically and a focus on airside infrastructure were identified as priorities.

Although who plays the role of the rhinoceros and the bird (or even the flea) in the aviation ecosystem is up for debate, the fact remains that we are part of the same ecosystem, and we rely on each other to be successful.
The future of travel and airports (Skyscanner)

Special Briefing from Hugh Aitken, Senior Director, Skyscanner
The world of distribution has changed. With the increased diversity in digital channels for access to information, the opportunity for a much more personalized marketplace has appeared. The challenge is now to be able to keep up with change, move from various very decentralized platforms and integrate tools and applications.

Smart phones deployments, accessibility to the Web and new types of voice recognition devices such as Alexa, are providing customers/travellers enhanced end-to-end platforms with hyper-customization and traveller centricity opportunities. Innovation in such fields is mainly coming from the East, from China, where, for example, use of QR codes and mobile e-commerce payments have become the standard. “Mobile First” is now the mindset. People trust Artificial Intelligence (AI) and the information it provides through various web information and data integration platforms. The transition to smart phones now dictates prioritization towards e-tool developments, being designed based on mobile requirements rather then larger types of screens found on more traditional laptop and desktop types of hardware.

Voice interaction and integration with AI is now the most interesting trend. The new generation is defaulting from typing and moving to voice interaction and commands, which they much prefer. Interactive information can now be available where and when customers want it and businesses therefore need to be accessible wherever the customer is. How airports may be able to brand themselves through such brand agnostic tools remains a challenge but leveraging such technologies may offer great opportunities to airports to provide integrated and on-demand information at various stages of the travel journey: traffic information, directions, suggested airport parking, check-in process, commercial offers, tailored accessibility options and numerous others.

Tools are being deployed, information is available from anywhere and at any time; personalization is what customers want. Such changes are an opportunity for the industry, but we need to get involved rapidly and ensure that the information for our passengers is integrated in Alexa.
Creating fertile grounds for investment

From left to right: Moderator Mike Tretheway, Executive Vice-President and Chief Economist, Intervistas; Panelists: Nicolas Notebaert, Chairman, VINCI Airports; Holger Linkweiler, Managing Director, Avialliance; Andrew Carlisle, Airports Business Planning Director, Ferrovial Airports; Stephen O’Driscoll, Head of Division: Air, Maritime & Innovative Transport, European Investment Bank; Sidharath Kapur, President (Finance and Business Development) of Airport Sector, GMR Group; Henrik Hololei, Director General for Mobility and Transport, European Commission
Economics is the study of scarcity and incentives. “Scarcity” is comprised of the management of limited resources such as labour, commodities, land and capital. “Incentives” refers to the motivated transactions and activities between economic actors, be it consumers, firms or governments as they respond to price signals regarding the relative scarcity of these resources. Steven Levitt, University of Chicago economist and winner of the John Bates Clark Medal, best describes the importance of incentives in understanding economic behavior. In his best-selling book, *Freakonomics*, his assertion is that, “An incentive is a bullet, a key: an often tiny object with astonishing power to change a situation.”

At its core, the recently released ACI “Policy Brief: Creating fertile grounds for private investment in airports,” has everything to do with the notions of crafting effective economic incentives to manage scarce resources. The airport industry has an infrastructure gap. This is a fact. In essence, governments need to attract the required capital to finance this much needed infrastructure. Although ACI does not prescribe any specific ownership or financing model, government financing and full ownership of airports are not always viable and sustainable options. This was one of the main underlying themes that resonated with the audience during the interactive panel discussion for the launch of the Policy Brief at the ACI EUROPE/World General Annual Assembly, Congress and Exhibition.

Mike Tretheway, Executive Vice-President and Chief Economist for Intervistas, an aviation consultancy, moderated the session and provided a data-driven overview of the latest processes and developments in airport privatizations. As one of the collaborators on the Policy Brief, he summarized the practical policy recommendations listed in the Policy Brief that aim to support government initiatives in attracting private capital. He also asked the panel members some fundamental questions that go to the core of investor expectations and what constitutes a sound investment in the airport sector. These included the following discussion questions: What are the challenges related to growth, capacity and long-term vision of airports? What is some of the fact-based evidence that suggests investments in private airport extend benefits beyond shareholders to other segments of the economy and society? How is risk assessed when investing in the airport sector? What are some of the key attributes that make airports a sound investment? How is the European Commission and European Investment Bank stimulating private investment in airports?

With an all-star panel of airport experts from around the world made up of investors, regulators and leadership from private airports, panellists agreed that private capital can be a viable solution to address the infrastructure gap over the long run, provided that the necessary incentives are in place to attract these investments. Much of this has to do with the existence of a clear and consistent legal framework prior to the privatization process. This provides a roadmap for investors to project future cashflows and to manage risks in recovering the often-significant capital outlays.

Serving as nexuses in the air transport value chain, airports are gateways to major destinations and centers of commerce. While each circumstance may vary from one jurisdiction to the next, panellists shared the view that the flow of private capital into the world’s airports and infrastructure projects continues to generate multiplier effects with far reaching socio-economic benefits across many sectors.
Sustainability and CSR values

From left to right: Moderator Mike Boonen, Partner, KPMG Belgium; Panelists: Andrew O’Brian, President & Chief Executive Officer, Aeropuerto Internacional Mariscal Sucre; André Schneider, CEO, Geneva Airport; Yiannis Paraschis, CEO, Athens International Airport
CEOs from Quito, Geneva and Athens Airports discussed how corporate social responsibility (CSR) and sustainability values have been incorporated at the core of their business strategies, going beyond “business as usual.”

They explained that the mandate given to an airport includes their communities’ acceptance of a responsible business. This means that the airport is conscious of its impacts and works to limit or reduce the environmental footprint. It is also considered an important piece of the local economy and social and cultural developments.

For instance, Quito was the first Latin American airport to create a shared value project, in partnership with the Inter-American Development Bank (IDB), where small local producers have their products available onsite at the airport. The project promotes the local economy and supports fair business.

Likewise, Geneva airport has also been a pioneer in its own way. It is one of the first airports worldwide to supply sustainable aviation fuels (SAFs) onsite, a sustainability commitment beyond the airport’s own environment footprint. In partnership with several stakeholders, including local authorities and businesses, they have proved a business case for providing at least 1% of annual jet fuel consumption in SAFs.

Moreover, in Athens, the airport operator acted as a steward of the region-rich cultural heritage during the construction of the airport, when 17 archeological excavations were held and findings were catalogued, preserved and displayed at a museum created inside the airport’s main terminal building.

All agreed that the above examples were just one element of their responsible business and that they were challenged to continuously represent their airport’s commitment to serve their communities in a sustainable manner.
Airport brand and digital transformation: Where does the passenger journey begin and end?
Airport brand and digital transformation are important topics these days, not only in the airport industry but in any business. According to our panel, digital transformation is how to integrate digital technologies into the airport business by focusing on mobility, information, efficiency and delivering a better experience for the customer.

But why is the brand so important for an airport? A brand is the idea or image of a specific product or service that consumers connect with by identifying the name, logo, slogan or design of the company that owns the idea or image. Branding is when that idea or image is marketed so that it is recognizable by more and more people and identified with a certain service or product when there are many other companies offering the same service or product. A well-defined and executed brand strategy affects all aspects of a business and is directly connected to consumer needs, emotions and competitive environments. As marketer, we want the consumer to engage with the brand on an emotional level, which has the same objective as customer experience management. This is why brand and customer experience were integrated and inseparable topics during the panel discussion. Customer experience is the practice of designing and reacting to customer interactions in order to increase customer satisfaction, loyalty and advocacy.

Digitalization allows airports to capture data from the passengers in context and become more relevant for them. The passenger journey starts much before arrival at the airport, when the passenger decides to travel. Internet and mobile tools help the airport to gather the information and track the passenger on different channels. The technology allows the airport to understand in advance why the passenger is travelling and to deliver a customized and memorable experience.

Furthermore, as discovered by ACI, an increase of 1% in the global passenger satisfaction mean, as defined in the Airport Service Quality (ASQ) survey, generates on average a growth of non-aeronautical revenue of 1.5%. Fundamentally, this analysis suggests that an improvement of the client experience in airports results in a more than proportional growth of non-aeronautical revenues. As such, these findings carry implications for the role of the customer experience management team within the strategic approaches taken by airports in seeking to maximise their non-aeronautical revenue.

The exchange of data between airports and stakeholders is crucial for the delivery of a better customer experience and improved airport capacity management. Using standards and tools to share this information will change the way airports work with stakeholders and bring the airport into a new era.
Special briefing: Chinese aviation market developments

Special briefing by Dr. Zheng Lei, President, Institute for Aviation Research
As aviation passenger traffic is forecast to double over the next decade, China is leading the way in being the market that will see the most significant growth. With existing airlines aggressively growing their fleet and increasing services and new airlines emerging, the pressure is on to be able to accommodate that traffic with safe and adequate infrastructures.

It was less than 10 years ago that traffic connecting China to Europe was seen as moderate while its potential for growth was very well known. A major shift occurred in 2014 with an average increase of 10 routes a year between Europe and China. From 2017 to 2018, however, traffic grew by 20 new routes, now reaching 103 while only 47 routes were active at the beginning of 2014. This shift was mainly due to the investment of funds and amendment of policies to promote the growth of the China-Europe market by the Chinese Government.

This brought about an increase in flights heading to a broader range of airports all over Europe and also began to exert enormous pressure on airports to enhance, modify or simply expand its infrastructures in order to increase capacity and meet the demand.

While European carriers traditionally kept a higher frequency on the routes, the shift in 2014 allowed Chinese carriers to develop and take a strong lead in the market, having twice as much as the European carriers, remarked Dr. Zheng Lei, President of the Institute for Aviation Research, during a special briefing on the Chinese aviation market.

These significant changes are shifting the paradigms on many levels. With airline network expansion and airports that are able to accommodate the current growth, China also surpassed European and Middle Eastern airports on passengers transferring through major hubs, while Frankfurt in 2017 had 23.6% of the transfer passenger share. The numbers recorded in 2016 showed China’s Capital Beijing Airport claiming first place with 14% and Frankfurt at 9.6% of the transit market. This is also good news for Middle Eastern airports as they are also making slight gains by welcoming passengers connecting through their airports in order to reach China or Europe.

One important aspect of this change is to the European tourism industry, said Istvan Ujhelyi, member of the European Parliament, Vice-chair of the Committee on Transport and Tourism and Member of the Delegation for relations with the People’s Republic of China. The Chinese tourist numbers should rise to the 200 million passengers a year mark within the next few years and this creates a great potential for Europe.

As airports will need to make significant investments on increasing its capacities, keeping up with the growth and providing unique experiences for passengers travelling through their terminals, travellers should be the big winners in the end as fares have been decreasing since new players came onto the scene.
“Despite all the rhetoric, behind the scenes, we work together collaboratively” —Angela Gittens
In one of the most anticipated parts of the ACI EUROPE/World General Assembly, Congress and Exhibition, ACI World Director General Angela Gittens and IATA Director General Alexandre de Juniac sat down with FlightGlobal senior reporter Oliver Clark for a closing interview.

Recent debate in the media has focussed on the differences of opinion between ACI and IATA on key issues of airport ownership, charges and slots, but Gittens and de Juniac both stressed that there are many areas in which the two organizations worked collaboratively.

“You may be surprised to know that, despite all the rhetoric, behind the scenes we work together collaboratively,” Gittens said. The IATA Director General agreed, saying that the organizations cooperate every day. “An airport without an airline or an airline without an airport is not anything,” he said. “The relationship is often seen as airlines do not want to pay, airports want us to pay more — this is business. It does not mean that we do not work together cooperatively.”

Through the New Experience in Travel and Technologies (NEXTT) programme, IATA and ACI work together to make the journey for passengers and cargo quicker and more efficient. “With passenger numbers doubling, we cannot just double our infrastructure. We need to get more efficient,” Gittens said. “With NEXTT and Smart
Security, we have divided the tasks on this with IATA. Airports are already using the learnings from this project, making the process more efficient and with less space.”

Gittens added that the current regulatory environment often exacerbated the differences between the organizations. “It is like it infantilizes the industry where the regulator is seen as the parent and keeps us fighting and, in that way, we are a family but not in the way we would like,” she said. “I believe that regulation should be the exception, not the rule; it should be designed to address market abuse, not set the price. I would like to see the regulatory environment to be more normal, where a competent authority can oversee it rather than a regulator treating us like children.”

In his view, de Juniac remarked that regulation was needed when big airports have a local monopoly. “But we have not seen a regulatory system that is working well anywhere in the world,” he said. “The voice of airlines and airports must be heard in establishing regulation—at local and International levels—so that we have a body that is heavily specialized, independent from everyone, listening to everyone.”

On the issue of airport ownership and private investment, Gittens stressed that ACI’s position covered the areas to build, operate, transfer and lease concessions—not just “selling the crown jewel.”

Referring to the trend towards privatization, de Juniac noted that while there have been some good outcomes with the renovation of airports, he had also seen instances where he believed charges had risen higher than the levels of service.

“We say to governments that privatization is not the magic solution,” he said. “They need to think properly so privatization should not be just for raising money and, when privatized, governments should not wash their hands of the asset. The interest of passengers and airlines need to be considered, not just the sale price.”

Gittens agreed that governments must be clear on their objective on privatization, but added that the potential for higher charges as a result of investment should not be fixated upon. “If airports can increase efficiency, airlines will benefit from less time on the ground and charges will be less of an issue,” she said.

On the key issue of slot allocation, de Juniac remarked that the existing Worldwide Slot Guidelines had worked properly, but admitted that no system is perfect, which is why the guidelines were under review. “Airports should be part of the governance body for the slot allocation system and we want that,” he said. “We are against any monetization for primary slot allocation—the link between slots and ownership and money is an explosive question.”

From ACI’s perspective, Gittens said that at a minimum, airports should be part of the governance process of slot allocation. “It is complex and a lot of work needs to be done so we need to be on the inside,” she said. “It needs to be pragmatic because we need to use what we have to the maximum potential, and that is primarily our objective here.”
Angela Gittens, Director General, ACI World, Oliver Clark, Senior Report, Flightglobal and Alexandre de Juniac, Director General and CEO, IATA
Munich Airport collaborates with ACI to provide a full suite of cyber security programmes

By John Webster, Senior Manager, Global Training, ACI World

With the rapid evolution of the digital age, there is also an alarming increase in the number of cyber-attacks on information technology (IT) systems within public and private sectors. As such, more and more airports are taking a proactive role in addressing these challenges with Munich Airport, operated by Flughafen München GmbH (FMG), being at the forefront in developing its own dedicated training centre to tackle the threat of cyber-attacks.

Munich Airport’s new training centre, which officially started operations in January 2018, will bring together IT experts from its own organization (FMG) as well as specialists from high-profile tech companies to test defensive strategies and look for new solutions in the fight against cybercriminals. With the support of three renowned European IT security companies - ERNW INSIGHT, HvS-Consulting and IT-CUBE SYSTEMS - this new facility is known as the “Information Security Hub or ISH”.

Cybersecurity training venue
Cybersecurity threats

In response to existing cyberthreats, Thomas Weyer, the CFO and Director of Infrastructure at FMG stated, “As an airport operating company, we are responsible for the functionality of critical infrastructure and must take up the fight every day to ensure protection against cyber-attacks.”

ACI recognizes the importance of promoting training programmes and strategies to mitigate these cybersecurity threats. ACI is pleased to accredit and recognize those cybersecurity courses offered by FMG’s Airport Academy under the ACI Accredited Training Institute (ATI).

Kevin Caron, Director, Capacity Building Programmes for ACI, stated, “The cybersecurity programmes endorsed by ACI under the ATI framework are in keeping with the mandated training needs outlined by the ACI Security Standing Committee to ensure a safe, secure and efficient transportation system.”

Munich Airport training centre

The new centre at Munich Airport has four training rooms and IT labs, a control room and an amphitheater for presentations and briefings. All of the facilities are equipped with computers, network hardware, cameras and projectors.

With this fully equipped cyber simulation range equipment, a group can carry out realistic attacks on IT systems for training purposes, for example, with a second group assigned to take defensive measures.

The main target group of the ISH will be airports. However, airlines and other partners from the aviation industry that must meet the new regulatory requirements for the transportation sector are invited to participate and attend these programmes.

Airports that have properly trained staff and have access to the right tools in order to address the current technological challenges stand to benefit from better incident prevention by ensuring a seamless customer service experience for the end user, the travelling public.
Airport Service Quality (ASQ) interview feature: Brussels Airport

By Sevda Fevzi, Manager, ASQ Strategic Marketing, ACI World
ACI’s Airport Service Quality (ASQ) programme is now in its 12th successful year and, as we celebrate this milestone, we are focusing on how airports are increasingly putting the passenger at the forefront of the airport experience.

In 2018, we will be evaluating how the ASQ programme and its series of optional tools helps our airport members by guiding high-level decision making, optimizing and prioritizing initiatives and closely monitoring customer experience service levels.

In this edition, I speak with Karin Schreurs, Market Research Manager at Brussels Airport Company.

Questions

1. What is the mission / vision of Brussels Airport?

The future of aviation holds enormous growth opportunities in the coming years. Over the next 20 years, passenger traffic is expected to increase by 3.8% per year and cargo traffic by 4.7% per year at the global level. We want to grasp these opportunities in order to offer new destinations and services to our passengers, more import/export options for European companies, and to attract more tourists and business travellers to our country.

To strengthen the global position of Brussels and Belgium today and in the future, Brussels Airport has developed Strategic Vision 2040 that offers the possibility of creating 10,000 new jobs in the next five years and up to as many as 60,000 additional jobs by 2040. The plan outlines developments for Brussels Airport that will meet the expectations of its customers, passengers and air carriers, and strengthen its competitive position in Europe and the rest of the world. This ambitious plan aims to solidify the role of Brussels Airport as Belgium’s second economic growth hub.

2. What does customer experience mean to Brussels Airport?

We place our customers at the centre of everything we do and collaborate with companies and departments to ensure that their expectations are surpassed. We want our passengers to enjoy a memorable, outstanding experience and take home a unique “souvenir” of our airport and our country. The essence of Brussels Airport’s strategy is to enhance passenger experience by offering excellent services, smooth operational processes and the famous Belgian touch of hospitality, gastronomy and culture.

Besides our passengers, it is also important to develop a sustainable customer-centric partnership with our airlines, tenants and logistics partners at the airport.

Karin Schreurs, Market Research Manager, Brussels Airport
3. **Why is this important to your airport?**

In a hypercompetitive catchment area, it is important to differentiate your brand and translate this into a distinctive customer promise. For Brussels Airport, we want to provide customers with an excellent offer that is tailored to their needs. To achieve this, we need to understand and know our customers very well. Based on the data we obtain, through the ASQ surveys and other means, we are able to develop such a tailor-made offer.

4. **Brussels Airport currently subscribes to the ASQ Departures and the new Arrivals Survey.**

   A. **How is each survey being used to guide decision-making?**

   As a customer-centric airport, passenger feedback is a crucial guide in decision making. Measuring passenger satisfaction has therefore become a daily practice at Brussels Airport to understand our customers by capturing their needs, wants and expectations. ASQ provides an essential skill set for making passenger experience at Brussels Airport more personal.

   We joined the ASQ departure programme in 2007. At first, ASQ was no more than an exploratory tool to understand the concept of passenger satisfaction and how certain improvements or events impact satisfaction rates, either in a positive or, at times, negative way. We soon discovered the tremendous opportunities that ASQ insights deliver when identifying and prioritizing actions at the airport.

   Personally, I believe that one of the strongest advantages of the programme is to be able to compare our own airport performance to that of other airports around the world by traffic type, size and region. This comparison allows us not only to identify gaps, but also to keep a close eye on how passenger expectations evolve over time around the world. The benchmarking aspect was a key factor in our decision to sign up for the ASQ arrival programme earlier this year.

   B. **How are the survey findings used for strategic or tactical reasons, and for actionable plans?**

   I would like to answer your question by using a specific case. The “Seating Case” is exemplary of how we used ASQ insights to highlight an area of dissatisfaction and to formulate a solution that meets, and even exceeds, the passengers’ wants and needs.

   ASQ results in 2014 showed that our passengers were not that keen on our waiting areas at the gates. Furthermore, and maybe most alarming, was learning that the feeling about the seating areas was correlated to a high extent with their general satisfaction of Brussels Airport. Analyzing the ASQ results in depth, we discovered that it was not only about the actual comfort of the seating, but also that it was too homogeneous and did not meet the heterogeneous needs of resting, reading and working.

   Centring on customer feedback, Brussels Airport decided in 2014 to replace the old seating and involve passengers in the seating choice. Since Brussels Airport believes in VIP treatment for all passengers, they were invited to visit a “Seating Test Zone” in the terminal where they could try out different types of seating and vote for the most comfortable and attractive seats.

   In 2015-2016, more than 10,000 seats throughout the airport were replaced by new bench seating.
and lifestyle seating that met the needs of business travellers, families with kids and transfer passengers, and all were fitted with power plugs for charging personal mobile devices while seated. This resulted in a significant increase in satisfaction regarding comfort of waiting areas from 3.17 in 2013 to 3.66 in 2017.

C. How does the ASQ programme help to achieve Brussels Airport’s objectives?

ASQ programmes help us to measure and manage passenger satisfaction. Furthermore, ASQ results provide an objective and solid basis to set and monitor service standards for partners.

Using ASQ-based service level agreements in contracts with service providers promotes superior customer satisfaction. Achieving this objective may not always be easy, but the end result is always rewarding for both passengers and employees.

5. Brussels Airport subscribes to the additional optional reports of ASQ Comprehensive Insight Report, which is one of the many enhanced services derived from the ASQ Departures programme. Why was the Comprehensive Insight Report chosen amongst all the optional reports?
We value the ASQ Comprehensive Insight Report (CIR) to a great extent as an addition to the ASQ data. It gives clear-cut insights on which elements have the most impact on passenger satisfaction and how Brussels Airport performs on these elements. Combining both dimensions (importance and performance) allows us to draft priority matrices for different target groups. It goes without saying that we place top priority and focus our efforts and resources on those elements which represent the highest importance but have the relatively lowest level of satisfaction.

Based on the CIR, we make an annual bucket list of possible vulnerabilities to be addressed in order to enhance overall satisfaction, put into place action plans and monitor the ASQ results very closely every month to remedy any shortcomings.

I can tell you that month after month the ASQ reporting moment is a very exciting time for all of us. We definitely breathe ASQ at Brussels Airport!

**Airport code:** BRU

**What year your BRU airport opened:** 1919  
**Number of passengers in 2017:** 24.8 million  
**Number of employees:** 950 by the end of 2018  

**Did you know?** Fun facts of Brussels airport:

- Brussels Airport is the biggest chocolate store in the world: 1.5 kilograms sold every minute 24/7.
- There are 181 tennis courts of solar panels that generate electricity.
- Brussels Airport serves 5,600 beers each day.
- 12.6 million pieces of luggage are handled per year.
- We serve 164.5 kilograms of French fries each day.
- Brussels Airport recycles 25% of its waste.

**Twitter:** @BrusselsAirport  
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**Photos of BRU:** [https://www.brusselsairport.be/pressroom/media-library/](https://www.brusselsairport.be/pressroom/media-library/)
Benefits of planning the food and beverage experience by segmentation

By Fernando Díaz, Marketing Director for MERA Corporation
The Cancun Airport in Mexico receives just over 23 million passengers per year. This high-traffic airport mainly handles tourists that visit either Tulum, Playa del Carmen, Riviera Maya or Cancún itself.

The airport, operated by Grupo Aeroportuario del Sureste, S.A.B de C.V. (ASUR), recently opened its new Terminal 4 and shifted airlines from the other terminals to provide room for expansion. This has allowed airport capacity to grow to 32 million passengers per year.

MERA Corporation was selected by ASUR as the master concessionaire to manage the food and beverage offering for this new terminal. To plan the brands and types of restaurants, MERA Corporation started by clearly segmenting the projected type of passengers. It began by understanding the current consumers in the other terminals and ran numbers based on the airlines that were to be moved to this new terminal. MERA Corporation found four different types of buyer personas for international travellers and the same four for national travellers. Employing methods such as surveys, focus groups and some analysis, MERA Corporation achieved a perfect match of location types and their price points for future passengers. A proprietary blend of technology and human resources was used for this analysis with the hardest part being to make sure that the surveys were not skewed toward any specific direction. While it was important to be completely objective, we needed to keep in mind that consumers did not always state what they really wanted. Some years ago, for example, when MERA Corporation ran a survey asking people what type of food they preferred, they would answer “healthier options” and then line up to buy hamburgers instead of salads.
On this occasion, MERA Corporation used big data analysis tools, which is actually enterprise resource planning (ERP) completely designed from the ground up. Through this ERP, MERA ran data on airlines, customer types, ticket averages, destinations, etc., and came up with the perfect match.

After eight months of operations, MERA Corporation is pleased to conclude that this innovative way of segmenting customers has been a complete success. Each of the restaurants has overperformed their budgets. The portfolio of restaurants is much more profitable than restaurants in other terminals that opened along with the organic growth of the terminal or have not performed as well because of the relationship of location versus potential customers and the existing offer of the terminal.

Although planning for airport expansion can be extremely difficult, it offers opportunities for profitable ventures to concessionaires and airport operators alike.
Disrupting Illegal Wildlife Trafficking through the air transport sector Q&A with Michelle Owen, Lead, TRAFFIC, USAID ROUTES

A southern white rhinoceros grazing. In recent years, rhino poaching has escalated significantly. Every seven hours a rhino is killed for its horn as part of the illegal wildlife trade. © naturepl.com / Mark Carwardine / WWF
Michelle Owen – TRAFFIC, USAID ROUTES Lead

At the 26th Meeting of the ACI World General Assembly, ACI member airports adopted a resolution against illegal wildlife trafficking, reaffirming their commitment to the United for Wildlife Transport Taskforce Buckingham Palace Declaration and their support to the USAID Reducing Opportunities for Unlawful Transport of Endangered Species (ROUTES) Partnership. ACI has been partnering with ROUTES since 2016 to raise awareness among members and broader aviation stakeholders, and support ROUTES’ initiative to disrupt illegal wildlife trafficking using transportation supply chains.

In this edition of ACI World Report, we asked Michelle Owen, USAID ROUTES Lead to share her view on why airports need to care and what airports can do to disrupt illegal wildlife trafficking.

Q: What is the USAID Reducing Opportunities for Unlawful Transport of Endangered Species (ROUTES) Partnership?

The USAID Reducing Opportunities for Unlawful Transport of Endangered Species (ROUTES) Partnership brings together transport and logistics companies, government agencies, development groups, law enforcement, conservation organizations, academia and donors, to disrupt wildlife trafficking activities.

ROUTES is excited to work with ACI as a key partner and support ACI’s efforts to develop a framework for their members to fight wildlife trafficking.

Q: How Widespread is Wildlife Trafficking?

Wildlife trafficking is a global epidemic, affecting communities and wildlife populations in every region of the world. Often run by organized international criminal networks, the illegal wildlife trade has been linked to other illicit activities, such as human and drug trafficking, with the profits being used for all manner of criminal activity. Unabated, illegal wildlife trade threatens to wipe out some of the world’s most iconic species in our lifetime.

Q: Why Should Airports Care About Wildlife Trafficking?

As the world becomes more interconnected, traffickers are increasingly abusing transport systems to move their products quickly and securely. During the journey from source to market, airports may be used in the transit. It is crucial that airport users and staff are aware and vigilant, and there are ways that they can report observations. This provides airports with an important opportunity to play their role in preventing wildlife trafficking.
Q: How Far-reaching is Wildlife Trafficking in Airports?

Wildlife trafficking is a global issue. In the past decade, airports in 130 countries reported incidents of wildlife trafficking. In 2016, over 5,000 kilograms of ivory tusks were seized at airports, the equivalent to two dead elephants a day, and over 180 kilograms of rhino horn were seized at airports in March 2017 alone, which represents at least 60 rhinos killed. However, it is not only ivory and rhino horn being smuggled through airports; over 7,000 species are affected by the illegal wildlife trade, including birds, reptiles, tortoises and apes.

Q: What Can Airports Do About Wildlife Trafficking?

ROUTES is encouraging aviation companies and CEOs to be active leaders in preventing wildlife trafficking by making short steps to long-term change.
Airports can make a difference in their supply chains by:

- collaborating with ROUTES and other global leaders in the collective fight against wildlife trafficking;
- increasing leadership’s understanding of the status, trends and patterns in illegal wildlife trade;
- training staff and airport employees on how to detect and report wildlife trafficking;

African elephant. Across Africa, 55 elephants are killed every day for their tusks which are considered a symbol of status in parts of Asia. © Martin Harvey / WWF

Border Force at Heathrow International Airport with a seized elephant tusk. Wildlife trafficking commonly smuggle wildlife products such as ivory through airport hubs in Europe and the Middle East before traveling to Asia as a method to disguise their transit routes. © WWF-UK / James Morgan
Madagascar radiated tortoises. Tortoises and other reptiles such as snakes and lizards are often smuggled onto flights while alive to be sold as exotic pets. © Martin Harvey / WWF

- raising awareness of illegal wildlife trade amongst employees, passengers and corporate leaders globally; and
- reviewing current policies and protocols to better intervene and report instances of wildlife trafficking.

For more information visit routespartnership.org.

Pangolin. The pangolin is the world most trafficked mammal. Every year, traffickers smuggle 20 tonnes of pangolin and pangolin scales (about the weight of two and a half African elephants) into illegal markets. © David Brossard
Amur leopard. Poached to near extinction, there is estimated to be fewer than 100 Amur leopards remaining in the wild. © Ola Jennersten / WWF-Swede

Eclectus parrots rescued from smuggling. Parrots and other bird species are commonly smuggled onto flights while alive to be sold as exotic pets. To disguise the contraband, smugglers often drug the animals and hide them in plastic or paper tubes. © USFWS

Confiscated Blue-and-yellow macaw. Parrots and other bird species are often smuggled onto flights while alive to be sold as exotic pets. © Rob Webster / WWF
The International Air Cargo Association (TIACA) is rolling out a new look with a fresh logo and redesigned websites to underpin its new vision supporting the development of an efficient, modern and unified air cargo industry.

The Association has adopted a logo which reflects its global membership, whilst building on a proud 24-year history of representing, supporting, connecting and informing every element of the air freight supply chain. The new logo includes a globe drawn using a 3D version of the kinetic lines in the original version and the TIACA acronym, with the final A drawn as the wing of an airplane. The colour scheme has been adapted from the original, introducing a stronger shade of blue.

“We are entering an exciting new season for the Association, building on our experiences and accomplishments with a new value proposition and fresh initiatives from more training to stronger global networking,” said Sebastiaan Scholte, TIACA Chairman and Chief Executive Officer of Jan de Rijk Logistics. “Our new brand identity stays true to our roots, whilst highlighting our new, forward-thinking mission.”

The new logo appears on TIACA’s redesigned websites, launched at www.tiaca.org and www.tiacaevent.org. The sites have been designed to showcase TIACA initiatives, as well as to offer a hub for members to connect and access information and updates from the Association. The websites include social media feeds, as well as job postings, and up-to-date schedules for TIACA events.

“As we continue to grow TIACA globally and develop new offerings, it is important to have a clear shop window to showcase the Association and a user-friendly portal for members to connect,” said Steven Polmans, TIACA Vice Chairman and Head of Cargo and Logistics, Brussels Airport Company.

TIACA will be rolling out the new look with members in the lead up to the Air Cargo Forum (ACF), which takes place in Toronto from 16 to
“We are looking forward to providing the ideal backdrop for business development and new growth opportunities for our members in October.”

18 October 2018. The forum will bring together thousands of air cargo decision makers from across the globe to network, grow their businesses and learn about the latest trends from industry thought leaders.

The 2018 ACF takes place alongside the inaugural Multimodal Americas event and the Canadian International Freight Forwarders Association’s 70th anniversary conference, bringing together leading logistics companies from across the global supply chain.

“The ACF will include input from a wide range of industry experts who will be addressing and discussing themes affecting us all in the air freight supply chain,” said Vladimir Zubkov, TIACA Secretary General. “We are looking forward to providing the ideal backdrop for business development and new growth opportunities for our members in October.”

For more information on the Air Cargo Forum, or to register, visit www.tiacaevent.org, or contact Warren Jones, TIACA Executive Director, at wjones@tiaca.org or call +1 (786) 265 7011.
Photo Gallery

Aerodrome Safeguarding, 07-09 May 2018, Brussels, Belgium
Accommodating Passengers with Disabilities (APD) Workshop, 14-16 May 2018, San Francisco, USA

ACI/ICAO User Charges*, 14-18 May 2018, Montreal, Canada

Developing a Customer Service Culture at Airports*, 14-18 May 2018, Diass, Senegal
Formation sur la sécurité Aéroportuaire, 14-25 May 2018, Bangui, Republique Centrafricaine

ACI-ICAO Aerodrome Certification*, 21-25 May 2018, Bangkok, Thailand
Training calendar

Safety:

**GSN 2 – Airside Safety & Operations**
3—7 September 2018  Munich, Germany

**GSN 5 - Advanced Safety Management Systems**
16—20 September 2018  Abu Dhabi, UAE

**Aeronautical Studies & Risk Analysis**
17—21 September 2018  Riga, Latvia

**ACI-ICAO Aerodrome Certification***
17—21 September 2018  Port of Spain, Trinidad

**GSN 1 – Safety Management Systems**
15—19 October 2018  Kuala Lumpur, Malaysia

Customer Experience:

**Passengers with Reduced Mobility Workshop**
17—19 September 2018  Kuala Lumpur, Malaysia

**Developing a Customer Service Culture at Airports***
1—5 October 2018  Bucharest, Romania

**Managing Service Quality at Airports**
8—10 October 2018  Montego Bay, Jamaica

Security:

**Quality Management in Airport Security**
10—14 September 2018  Bucharest, Romania

**ACI-ICAO Management of Airport Security***
22—26 October 2018  Athens, Greece

**Quality Management in Airport Security**
22—26 October 2018  Johannesburg, South Africa

Economics:

**ACI-ICAO User Charges***
10—14 September 2018  Port of Spain, Trinidad

**Airport Business Development and Planning**
30 September—2 October 2018  Abu Dhabi, UAE

**Introduction to Airport Economics**
30 September—2 October 2018  Abu Dhabi, UAE

**Airport Air Service Development**
2—4 October 2018  Abu Dhabi, UAE

**Airport Revenue Generation***
7—11 October 2018  Abu Dhabi, UAE
Environment:

Airport Environmental Management*
17—21 September 2018  Panama City, Panama

Online Airport Environmental Management*
1 October—9 November 2018  Montreal, QC, Canada

Leadership and Management:

Airport Executive Leadership Programme (AELP)*
12—17 August 2018  Cincinnati, USA

Airport Human Resources Management*
23—27 September 2018  Abu Dhabi, UAE

Airport Communications & Public Relations*
14—18 October 2018  Abu Dhabi, UAE

Operational & Technical:

Airport Collaborative Decision Making (A-CDM)
12—16 August 2018  Abu Dhabi, UAE

*Can be taken as an elective for the Airport Management Professional Accreditation Programme (AMPAP)

For additional information please contact us at training@aci.aero
ACI Events calendar
September 2018–November 2018

**ACI Customer Excellence Global Summit**
10—13 September 2018  Halifax, NS, Canada

**ACI-NA Annual Conference & Exhibition**
30 September—2 October 2018  Nashville, TN

**The Trinity Forum**
31 October—1 November 2018  Shanghai, China

**2018 ACI-LAC Annual Assembly Conference & Exhibition**
12—14 November 2018  Miami, FL

**ACI EUROPE / ACI Asia-Pacific Airport Exchange**
27—29 November 2018  Oslo, Norway

For a full listing of ACI events, please visit [www.aci.aero/events](http://www.aci.aero/events).
THE TRINITY FORUM 2018
THE GLOBAL AIRPORT COMMERCIAL REVENUES CONFERENCE
31 October – 1 November 2018 • Shanghai, China

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For more information please email Sarah@MoodieDavittReport.com
Key events and courses

Highlighted events and training
August 2018–November 2018

ACI-NA ANNUAL CONFERENCE & EXHIBITION
30 September—2 October 2018
Nashville, TN

ACI-LAC ANNUAL ASSEMBLY & CONFERENCE
12—14 November 2018
Miami, FL

ACI EUROPE / ACI ASIA-PACIFIC AIRPORT EXCHANGE
27—29 November 2018
Oslo, Norway

AIRPORT HUMAN RESOURCES MANAGEMENT*
15—19 October 2018
San Francisco, USA

ACI/ICAO USER CHARGES*
10—14 September 2018
Port of Spain, Trinidad and Tobago

*This course can be taken as an elective for the Airport Management Professional Accreditation Programme.

For additional information please contact us at training@aci.aero
AERONAUTICAL STUDIES AND RISK ANALYSIS
17—21 September 2018
Riga, Latvia

QUALITY MANAGEMENT IN AIRPORT SECURITY
22—26 October 2018
Johannesburg, South Africa

ACI-ICAO AERODROME CERTIFICATION*
06—10 August 2018
Incheon, South Korea

THE TRINITY FORUM
31 October—1 November 2018
Shanghai, China
GE Capital Aviation Services (GECAS) is a world leader in aviation leasing and financing. With 50 years of experience, GECAS offers a wide range of aircraft types including narrow-bodies, wide-bodies, regional jets, turboprops, freighters and helicopters, plus multiple financing products and services including operating leases, purchase/leasebacks, secured debt financing, capital markets, engine leasing, and airframe parts management.

TCR is the world’s leading provider of GSE Solutions & GSE Services. More than 20 years’ experience in the GSE sector. TCR is present in 19 countries, 120+ airports with 80 on-airport workshops supported by 900+ technicians and technical experts globally.
CDM Smith provides lasting and integrated solutions in water, environment, transportation, energy and facilities to public and private clients worldwide. As a full-service consulting, engineering, construction and operations firm, we deliver exceptional client service, quality results and enduring value across the entire project life-cycle.

The Secure Worker Access Consortium (SWAC) is a unique cooperative program that delivers comprehensive personnel assurance technologies and services to risk managers. SWAC unites the efforts of public agencies, private corporations, labor groups, and contractors, assuring that all members comply with security and safety requirements.