



KINETIC
CONSULTANCY

EXPERT SURVEY REPORT:

BUILDING BLOCKS FOR THE FUTURE OF AIRPORT COMMERCE

JANUARY 2023

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INTRODUCTION

The future is flexible, and the best way to predict it is to keep an open mind and embrace opinions. That is why we annually invite experts from high traffic industries, predominantly airports, to share their vision on the direction of the market and which developments are ready to be implemented now, or in the very near term.

Kinetic Consultancy helps high traffic companies in creating their envisioned customer experience and aligning their business around that. In short, creating experiences, propelling businesses. This means we are not exclusively committed to any airport, retailer or brand, nor that we have a single product that is pushed in this publication. We are, however, committed to future proofing and optimising the airport non-aeronautical industry.

We do have a special focus for this report, just as we had with previous editions. The most recent were focused on commercial contracts of the future (2021) and the issues surrounding the COVID-19 pandemic (2020). This year we set our sights on the future of airport commerce.

Through a brief survey and in depth interviews we consulted industry experts from commercial operators, airports and brands, asking them for their opinions on the future of airport commerce. To keep the survey concise and the interviews manageable for participants, we narrowed the broad perspective of airport commerce down to four core topics: trends, categories, technological developments and performance indicators. These topics also function as a structure for the report.

With 40%+ of revenue for airports generated through non-aeronautical revenue it is fair to say that without strong consumer spending on products and services, flying wouldn't be as accessible as it is today. Consumer behaviour however is continuously shifting, and the past two years have shown some remarkable business dynamics.

Our sector was forced to rethink the fundamentals on which the business is built. The industry is looking forward and figuring out how to build back better. But to what? **Which building blocks shape the future of airport commerce?** We differentiate two types of blocks:



WHAT are the developments shaping the future of airport commerce and HOW can we implement or deal with these changes?

In general, the experts think **enhancing the customer experience is a crucial component of airport commerce in the future**. This enhancement will clearly build on top of what is already there – a strong retail and F&B offer. The strong belief is that there is a need to diversify sources of income and create room to innovate around customer experience themes.

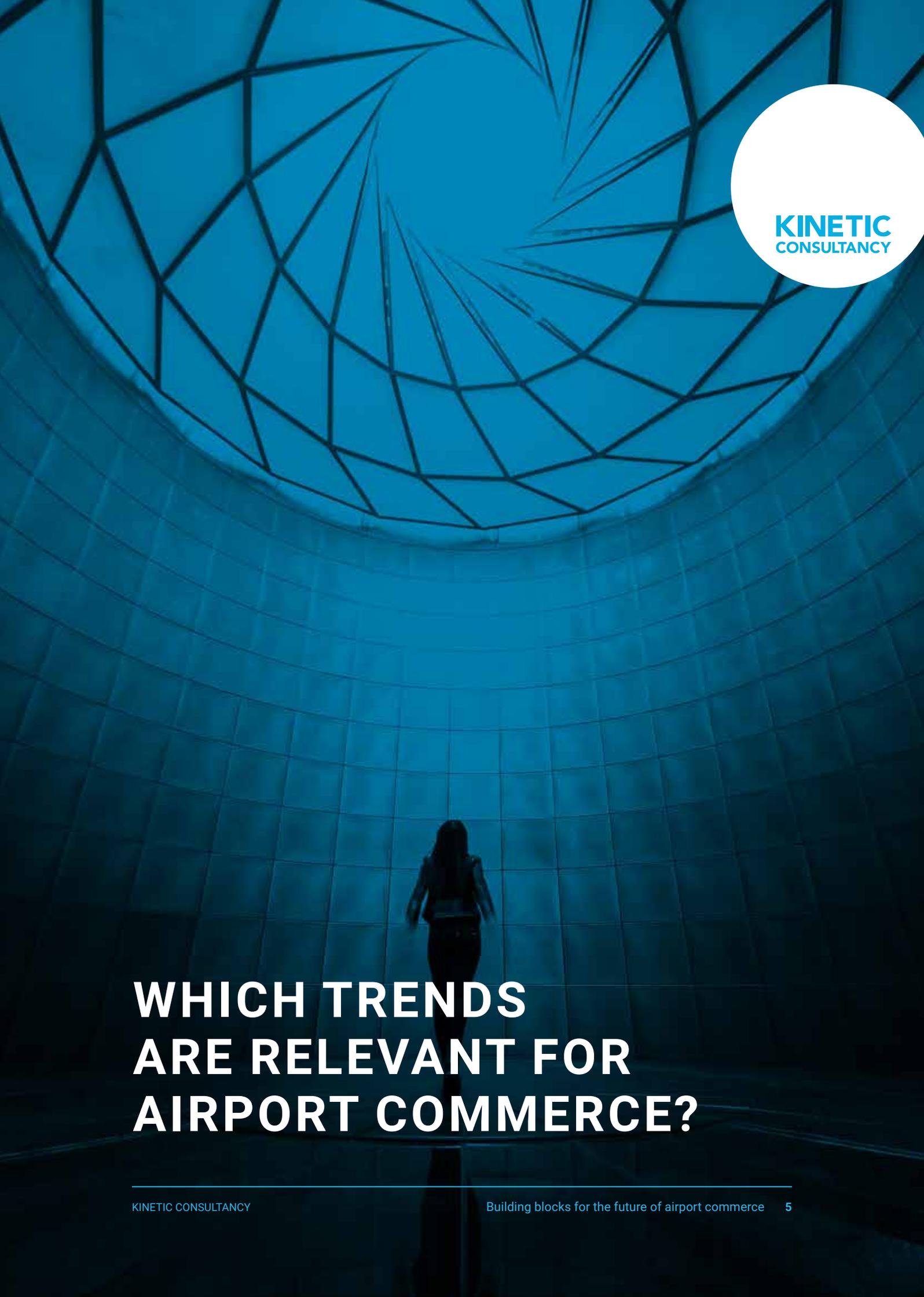
ACKNOWLEDGEMENTS

We were not able to create this report without the help of the many industry experts that undertook our survey and the media partners that helped spread the word about our initiative. A special thanks goes out to the experts representing brands, operators and airports that have shared their perspective on the future of airport commerce via interviews.

Their perspective is woven into the text, but occasionally highlighted through quotes. This report is the result of the expert survey and the interview results; therefore, it is not always the opinion of Kinetic Consultancy that is presented, nor do quoted professionals necessarily support other content in this report.

Participants in our survey and in the interviews are involved across many different aspects of the airport non-aeronautical industry but are very much skewed towards a European perspective. Over 80% of participants are related to the European airport business, with Asian and North American perspectives both standing at a little less than 10%.

The open-ended section of the questions was used extensively, contributing to a very broad range of perspectives which have been used in the compilation of this report. The quotes included in the report are from individual one-to-one interviews for which we are especially grateful.



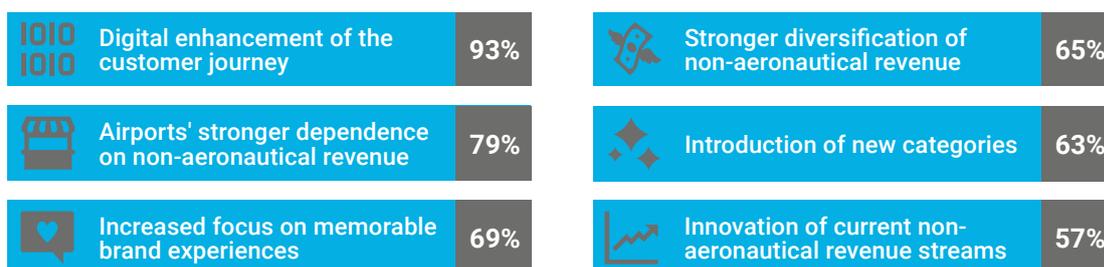
WHICH TRENDS ARE RELEVANT FOR AIRPORT COMMERCE?

WHICH TRENDS ARE RELEVANT FOR AIRPORT COMMERCE?

Trends in airport commerce impact non-aeronautical revenue in the short to medium term but have a more profound impact long term. Broad ongoing trends like the focus on sustainability or the privatisation of airports have an impact on the customer experience and the business model in general.

Through desk research and conversations with our partners and contacts, we've come across a subset of trends that are especially relevant for airport commerce. We have put six of

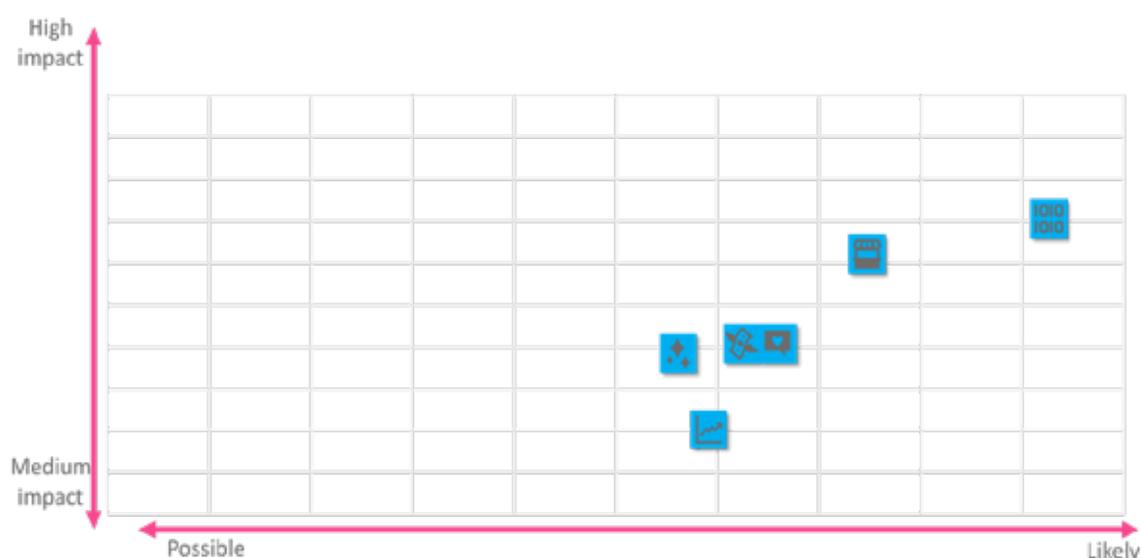
Figure 1: Likelihood of airport trend developing further*



* % of respondents that think it likely the trend will develop further

these to the test through our survey to quantify the relevance of the trend, in the eyes of our respondents. We asked the experts if these trends are likely or unlikely to develop further. All six of these trends were deemed likely to develop further. The percentage next to the trend shows how many of the total respondents deemed the trend likely to develop further (as opposed to possible or unlikely to develop further). Less than 1% thought each of these trends unlikely. This suggests a consentient perspective on the trends.

Figure 2: Priority matrix



Based on the average score of respondents thinking a trend is likely and impactful

However, a lot of these trends have been ongoing for some time and there is already some understanding of not only how likely these trends are but also how impactful these trends might be on the future of airport commerce. All trends were again on average deemed impactful, but some more than others.

When combined, these two questions of likeliness and impact create a priority matrix from fellow airport commerce experts (see chart on previous page). We see two most impactful trends. **The stronger dependence on non-aeronautical revenue and the digital enhancement of the customer journey standout.**

Respectively, 63% and 70% of respondents think these trends will have a high impact on non-aeronautical revenue.

“With different delivery models, the range of brands that can be sold through more temporary pop-up units, islands and white-boxes, for instance, can broaden beyond the current high-end luxury.”

FRASER BROWN, RETAIL & PROPERTY DIRECTOR HEATHROW AIRPORT

Even the relatively lowest rated (but still medium to high and likely) trends of the non-aeronautical revenue stream are envisioned to potentially have a positive impact. Currently, airports display many luxury brands that are appealing to many, but affordable to a small audience. As a result of the digitally enhanced customer journey that allows delivery, less of the very expensive space in airports is necessary to bring products to passengers. Through an online offer and delivery system or pick-up point, a broader range of retail brands can explore the opportunities of airports. This is also a prime example of how these trends are often related.

HOW TO BUILD ON TRENDS

Knowing the trends and their drivers is about prioritising attention. Envisioning the future through the lens of a specific trend can help generate and evaluate new business ideas. It can help airport commercial professionals to set goals and plan budgets for the medium and long term.

Looking at trends can help to prioritise an organisation’s attention. Trends point towards a possible future for which you can plan. Not a plan to make that specific future reality, but a plan in which you are prepared for a future of that nature.

In the example of digitisation of the customer experience, it is still unclear how that digitisation will take place. Each visitor could have an airport app, or through facial recognition, signage and advertising could be personalised or maybe some third-party hardware could be driving the airport communication. At this point, we might have a preferred future but no real answer as to which will be the case. But we can plan for a future where the customer journey is digitally enhanced.

A seamless end to end passenger experience is only possible through collaboration between the involved stakeholders.

DIMITRI XOURAFAS, COMMERCIAL DIRECTOR NIEUPORT AVIATION

All these different scenarios point towards a future where in-company silos and separated stakeholders across the customer experience will make it much harder to digitally enhance the entire customer journey. The same goes for the trend of the stronger dependence on non-aeronautical revenue, more and deeper collaboration between stakeholders is necessary. Therefore, incorporating extra development time and budget for other internal company teams to tweak and enhance the project from their perspective and inviting them to do so can future proof your project.

Having the most important trends and their drivers in mind can also help in the short-term, adding bits and pieces to existing workflows. What are you currently doing to integrate perspectives from across the internal organisation into your new brand activation project? Can for instance your digital advertising partner support you in evaluating a brand's point of sale campaign?



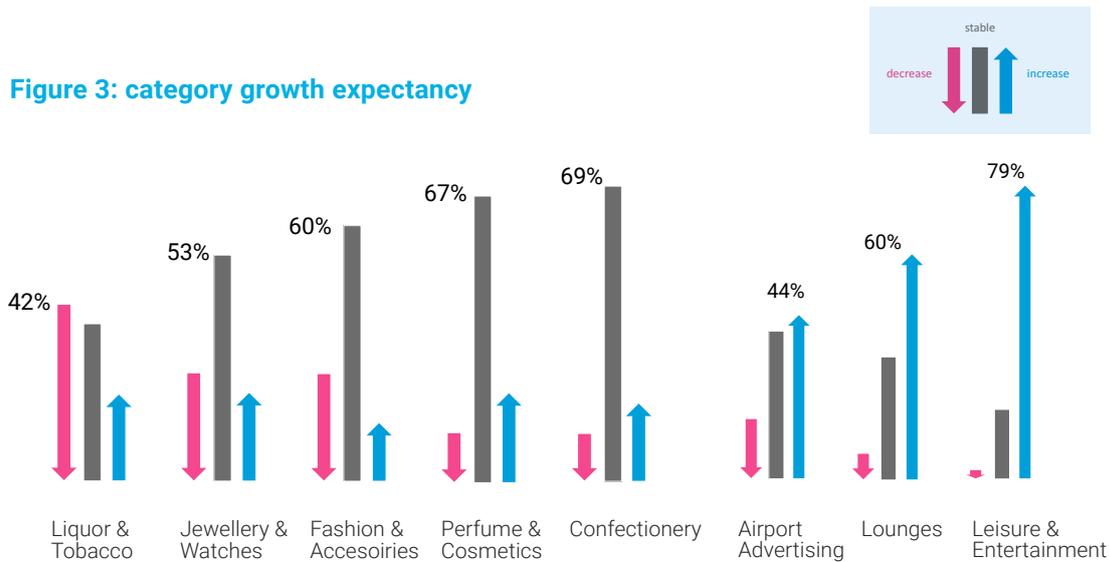
**WHAT ARE THE MAIN
CATEGORY DYNAMICS?**

WHAT ARE THE MAIN CATEGORY DYNAMICS?

The airport industry has a business model that has been tested and tried for decades. We've asked experts which retail categories they think will grow, stay stable, or decline in the coming five years in terms of their share of total revenue. An overall stable share of revenue is expected from core duty free categories. Only for the biggest category, liquor and tobacco, experts can potentially see a decrease in the total share of turnover.

Some other categories are expected to grow much faster, as we see in the figure below, which is based on the opinion of our respondents.

Figure 3: category growth expectancy



In a global survey undertaken by m1nd-set and TRBusiness of people that bought in duty free stores in the past two years, over 80% bought liquor or tobacco. This illustrates that core duty free categories are at a point at which it is so optimised that most growth has to come from increasing passenger numbers.

It is a strong fundament on which to grow new business and, as seen in the previous chapter, innovation within existing revenue streams is likely to continue but might not be as impactful as the introduction of new categories.

More than 40% of our expert respondents think the liquor and tobacco category will decline in total revenue share. If we are looking at future growth it appears prudent to look more towards the relatively uncharted territory of leisure and entertainment, lounges and (digital) airport advertising. It is noteworthy that in the interviews most experts see the growth in other categories as an additional revenue stream as opposed to replacing revenues from existing core categories.

While we, for efficiency reasons, decided to exclude F&B from the survey and interviews it did come up frequently in open-ended answers. Especially as a category where many airports are exploring opportunities related to digital enhancement, for instance pre-ordering or delivery at the gate.



Over the years, the **food offer at airports has been increasing in quality and share of revenue and is expected to grow further**. Spurred on by increasing quality and new (digital) points of sale. However, it is also a labour-intensive category and staffing is for many airports an increasing challenge. Different service levels require different staffing, it is therefore interesting to see how this category's development will play out.

HOW TO INNOVATE WITH NEW AND CORE CATEGORIES

Most airports struggle with space (square metre) allocation, especially during peak season. The growth categories are, however, totally different in their use of space than more traditional retail categories. Lounges are often situated in less suitable areas for retail and airport advertising competes for attention not square metres.

Therefore, it is clear these categories could be added to an existing airport layout. However, the expectation is that these **new building blocks of enhancing the customer experience don't just get added on top, they will be interwoven through existing categories**. High street retail has shown a trend of blending categories alongside the existing retail set up. These include incorporating leisure, F&B and more specialised forms of retail.

"Food & beverage is still growing and can even be broadened on both sides of the market, from luxury fine-dining experiences to the convenience of having food brought to you wherever you are."

KIM GRAY, SENIOR VICE PRESIDENT, COMMERCIAL STRATEGY AT UNIBAIL-RODAMCO-WESTFIELD

Tastings and trials, immersive brand experiences spanning leisure and shopping, gaming lounges and brand activations have different ways of generating value for airport, operator, brand and of course the passenger.



Some of the **new categories' business models are still in the exploratory phase**. With such innovations it is sometimes unclear what the added value for customers and brands or direct turnover might be long term. Also, in practice when operators are divided between retail, F&B and leisure, blending these categories can bring operational challenges.

Exploring these new business models is potentially a path to failure but also the only way to innovate. Setting innovative projects in a way where failing becomes a valuable lesson and succeeding is scalable is the way to move forward, but this is only possible in a broader innovation portfolio.

An innovation portfolio could be seen as a management tool for innovation. It separates three levels of innovation: improvements, additions, and disruptions. Classify your projects, investments, or ideas into each of these categories to see if you are focusing on the right type of innovations.

Shorter term trial-contracts between airports and retailers/
concessionaire can improve the innovation for new categories such as
experiential or gaming”

GRAEME STEWART, CEO ENVIRO-POINT / BUSINESS DEVELOPMENT DIRECTOR LUGGAGE-POINT

No airport is alike, what is 'disruptive' in one airport can be tested and tried in another. Disruptive innovations are much harder to implement than 'improvement' innovations. Disruptive innovations impact layout, design, customer experience, offer, business model and processes all at the same time. Whereas improvement innovations only have one of these changes and are therefore much less complex.

Figure 4: Innovation portfolio distribution



For example:

New package or payment system within existing products or addition of new SKUs within same category

For example:

New product categories
New types of experiences

For example:

New business models
New marketing strategy
New partnerships

Focusing all your attention on disruptions can block more direct benefits, whereas too much focus on improvements can hurt your profitability in the long run. As a rule of thumb, we often look for a 70-20-10 (see figure 4) distribution, but exact numbers are dependent upon local business dynamics.

“We have recently introduced a new F&B model at our landside food court, whereby the airport invested in the outlet fit-out and inventory, extending shorter term contracts, so we can easily trial different concepts and stay ahead of food trends”

**KRISTINA BORG CARDONA, EXPERIENCE DESIGN AND COMMERCIAL DEVELOPMENT
MANAGER AT MALTA INTERNATIONAL AIRPORT PLC**



**WHAT COULD DIGITAL
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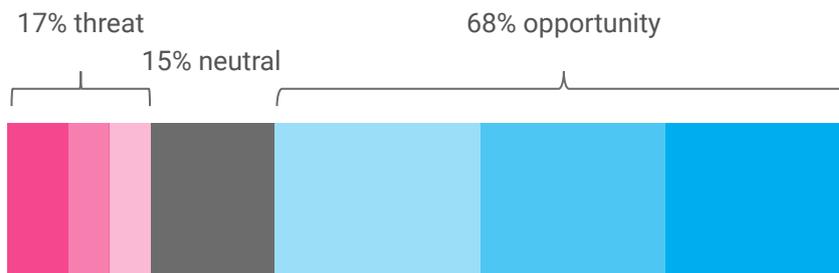
E-commerce is often the first digitisation trend that comes to mind when thinking about airport commerce. It has been around for over two decades, but it has proven a hard nut to crack. The potential of e-commerce transcends shopping. A stronger developed e-commerce offer is primarily interesting when combining all kinds of services into one, digitally enhanced, super convenient customer journey.

“Cross selling a parking space with a fast track and lounge access. It is something that is discussed a lot but still needs good implementation”

PHILIPP AHRENS, SENIOR VICE PRESIDENT CENTER MANAGEMENT VIENNA INTERNATIONAL AIRPORT

We've asked experts if e-commerce is a threat or more an opportunity. The vote was decisive, however far from unanimous. We've asked respondents to rate e-commerce as a threat or an opportunity on a 7-point scale with 4 being a neutral middle. 68% of respondents found e-commerce to be more the opportunity side of the scale.

Figure 5: E-commerce, a threat or an opportunity



In discussing this finding in some of our one-to-one interviews, an interesting perspective emerges – the perspective of the growing democratisation of technology. In the early days of e-commerce big investments had to be made to set up an e-commerce platform for your airport. Back then also customers were still exploring e-commerce. Nowadays there are off-the-shelf e-commerce platforms and customers are much more adept in combining e-commerce with a physical offer.

For airports the parking offer is often digitalised well, but in other categories, e-commerce is still in a more testing and planning phase. It might be wise to browse through older business plans to see if these can be implemented in this new reality where there is a greater adoption among customers and lower costs of implementation.

HOW TO LEVERAGE E-COMMERCE

To make the most of e-commerce in the airport environment, most respondents look at **'phygital' retail**. Many will be familiar with this now popular term, which as the name suggests means the combination of physical and digital retail. Even if you don't have a strategy for phygital retail, your customer does.

Exploring alternatives, comparing prices and checking reviews, all happens simultaneously when browsing through a store. With the addition of e-commerce it pays off to think of what you are adding. Dynata reported¹ two major drawbacks listed by e-commerce buyers – not being able to touch the product (46%) and not being sure about the quality (42%). Making sure your physical retail can take care of these aspects while bringing forward benefits of e-commerce at the same time is a logical way forward.



The value of endless aisles, pre-ordering, enhanced shopping experience and personalised offers all have different benefits and fit in different ways across the various categories. One primary challenge to overcome is to get the right offer in front of the right passenger. Through which channels will your digitally-enhanced retail get in front of the right customer?

Passengers might already have multiple digital interfaces on their phones competing for attention during their travels. Think of airline and airport apps, McDonalds or Starbucks loyalty programmes, the e-commerce platforms of retailers and other digital experiences. Airlines, airports, and other stakeholders such as retailers and brands have a crucial part to play in the passenger experience. Great opportunities lie in cooperation – experts think **sharing data among airport stakeholders will significantly improve revenue in the future**.

¹ <https://www.dynata.com/resources/dynata-global-trends-report/>

Figure 6: Which digitisation trend do you see influencing the future non-aeronautical revenue the most? [Data sharing and analysis across airport stakeholders]



“Everyone wants more data, but sharing data should serve the purpose of learning more about our users or driving engagement, not just collecting data because we think we need it. Many airports already have extensive passenger information from pre-booked parking reservations for example, that would be a good place to start leveraging the existing data”

SAMMY PATEL, VICE PRESIDENT OF COMMERCIAL FOR VANTAGE AIRPORT GROUP

In 2020 and continuing through 2021, worldwide airline check-in through a mobile app has exceeded the use of physical check-in desks. If this continues, as it surely will, airlines will lead not only before travel and during flight on passenger data. Passengers are now also getting accustomed to checking the airline’s app for gate information or F&B options during their stay at the airport.

The cooperation between airline, airport, retailer and brand should be intensified to bring the entire customer experience to the next level. The challenge is to find which benefits each stakeholder can bring to the table.

“Cooperation between stakeholders is maybe not on top of everyone’s priorities list but if we don’t do it, someone else will, like platforms such as booking.com”.

ARTURS SAVELJEVS, CCO RIGA INTERNATIONAL AIRPORT



WHAT WILL HAPPEN WITH EMERGING TECHNOLOGIES?

WHAT WILL HAPPEN WITH EMERGING TECHNOLOGIES?

In ten years' time, will we finally walk around with AR-glasses that continuously help our customer journey throughout the airport? The idea has been out there for more than a decade. Although no one AR, VR or XR application has covered the entire customer journey to our knowledge yet, elements of digital enhancement of the customer journey through augmented reality have certainly emerged at different touchpoints.

Figure 7: Which digitisation trend do you see influencing the future non-aeronautical revenue the most? [Virtual, augmented or mixed realities (metaverse)]

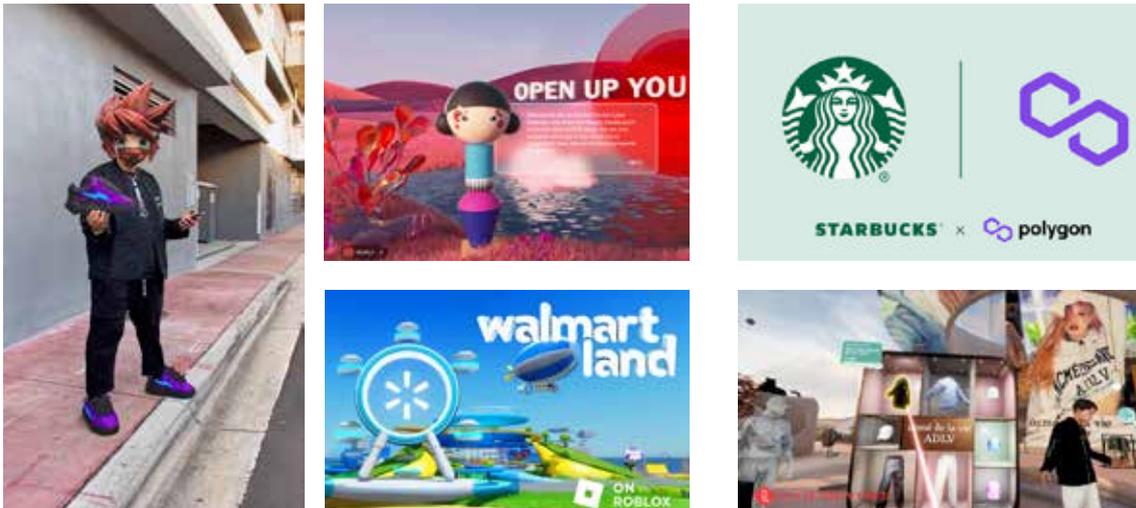


Figure 8: Which digitisation trend do you see influencing the future non-aeronautical revenue the most? [blockchain and smart contracts]



Virtual worlds and the metaverse, or smart contracts and blockchain have established themselves as looming future scenarios for digital development, but they are not quite here yet, as can be seen in the charts generated by our survey above. Will they ever fully manifest or will again only some elements transfer into the airport context and if so, will these be impactful for airports? The experts seem undecided. **Most respondents think the metaverse and blockchain will only have a little influence on the future of non-aeronautical revenue.**

Interestingly both trends are already being adopted by brands traditionally found at airports. Releasing virtual clothing, testing NFTs and transforming themselves into virtual lifestyle brands, for example. Gucci debuted its Gucci Garden experience on Roblox in 2021, allowing users to purchase avatars and Gucci clothing items, while Balenciaga debuted skins and outfits on Epic Games' Fortnite. Burberry, Ralph Lauren and Louis Vuitton are among the other luxury brands experimenting with virtual goods and NFTs through gaming collaborations.



And it's not just the luxury clothing brands that explore the opportunities. McDonald's, Starbucks and airport retailers such as Lotte and DFS are exploring what role these trends will play in their digital strategies.

“Not many people truly understand what The Metaverse is, we should start by taking a step back and truly understand what people want from it instead of just making a gimmick which is neither relevant, or required by the consumer.”

GRAEME STEWART, CEO ENVIRO-POINT / RETAIL DIRECTOR LUGGAGE-POINT

Figure 9: Age distribution of gamers in the UK, 2021*

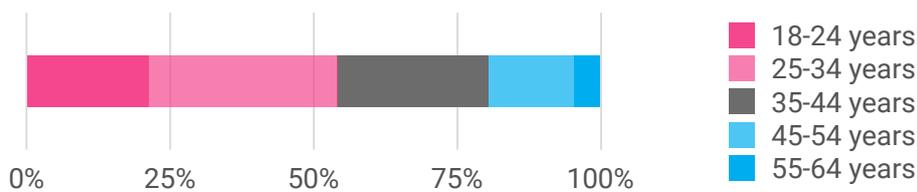
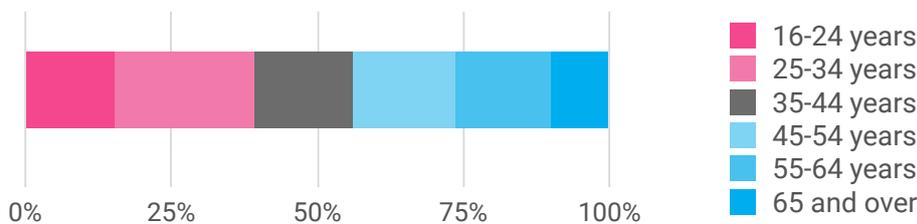


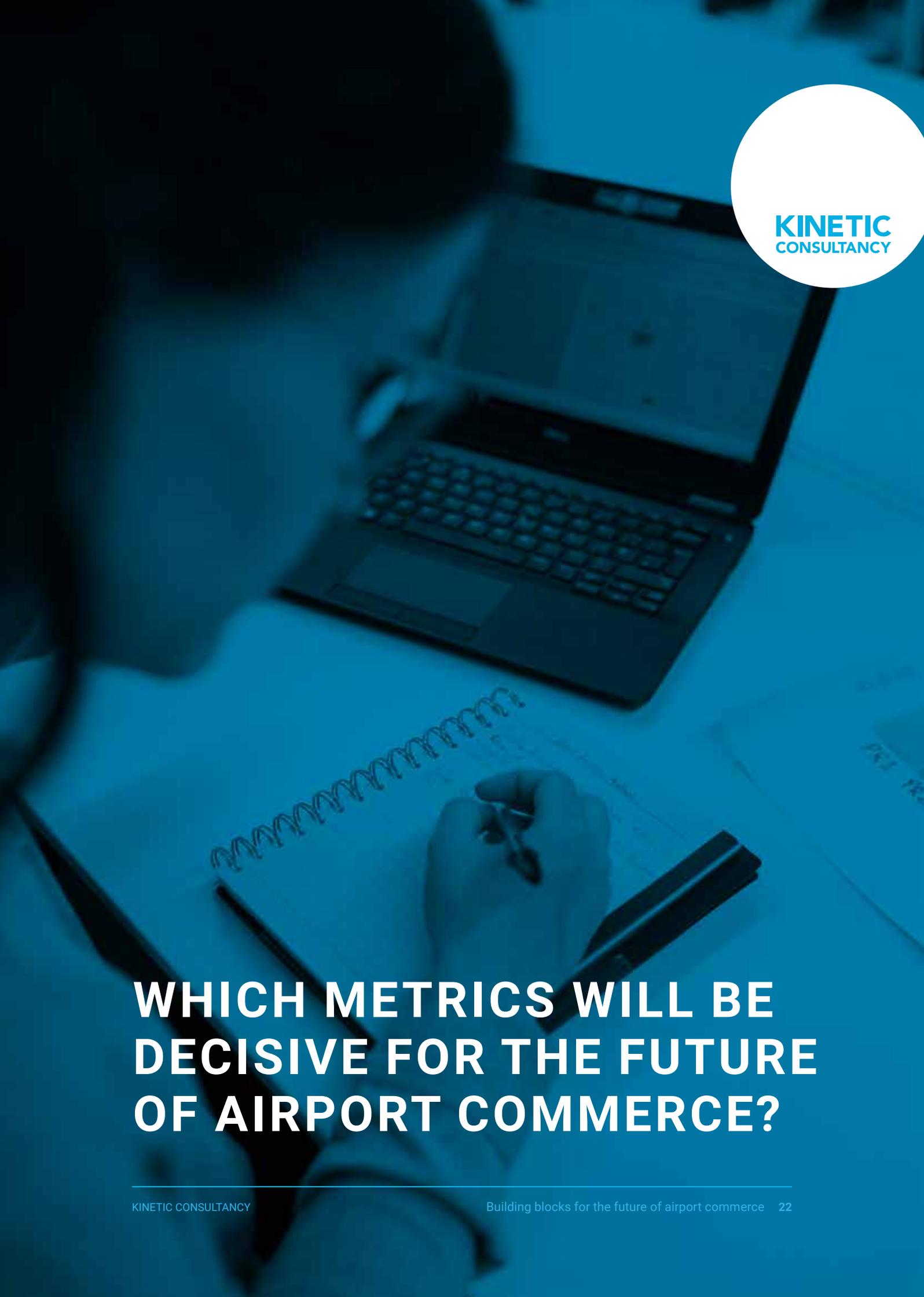
Figure 10: Age distribution of air passengers in the UK, 2019**



* Statista, Media and Advertising outlook 2020

** Civil Aviation Authority (UK); GOV.UK 2019

Even if as an airport, commercial operator or brand you don't feel the need for a virtual presence, there is a good chance that your audience is virtually present somewhere else, while dwelling at your location. 75% of people play video games, half of which do so on their smartphones, and with an age distribution that is getting more and more akin to the age distribution of people flying. Gaming is, and will increasingly be, part of waiting around an airport, whether you facilitate it or not.



WHICH METRICS WILL BE DECISIVE FOR THE FUTURE OF AIRPORT COMMERCE?

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Almost every aspect of airport operations has been digitalised and airports generate a massive amount of data from internal processes alone. If the sharing of data can be arranged, there will be a bigger challenge in processing the data in meaningful ways.

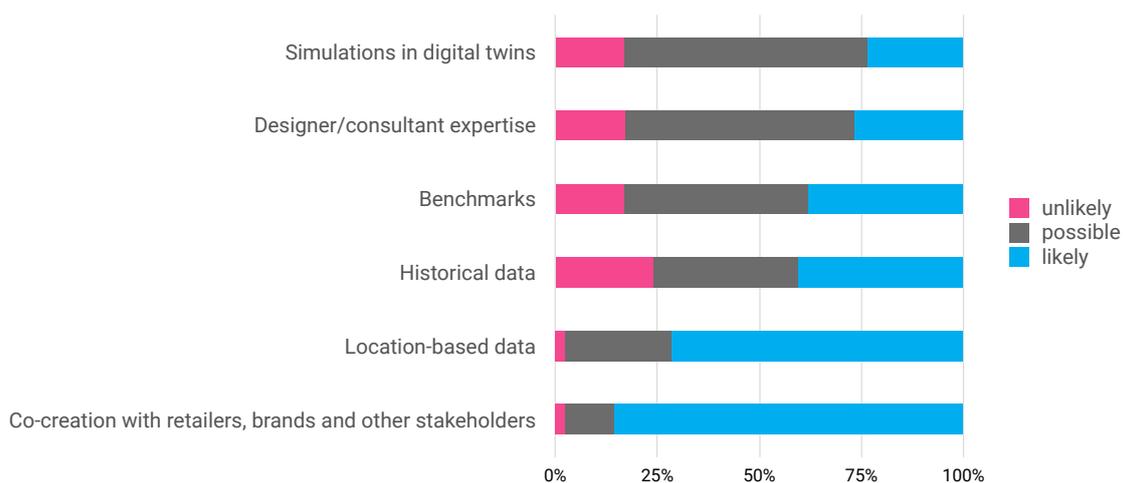
Technological enhancement of the customer journey will inevitably increase the level of objective data within an airport. These data sources are great for things like keeping stock, personnel planning, and as an overall KPI. In our survey over 86% of respondents state that spend or revenue per passenger is their most important performance metric. But more subjective data stemming from mystery shoppers, emotion ratings, and experience sampling is often necessary to get true meaning and opportunities for improvement.

For example, a long dwell time in your store is often considered a good thing. But if passengers take a long time actively searching for one specific item, they have lost valuable free roaming time in your store where their minds could have been open to impulse purchasing.

We should consider relating sales outside of the airport to in-airport experiences for retail brands that have a unique experience inside of the airport through a store or exhibition stand.

JÉRÔME LEPAGE, MARKETING & BUSINESS DEVELOPMENT DIRECTOR - TRANSPORT DIVISION AT JCDECAUX

Figure 11: What metrics will be relevant for the future of airport commerce



Most metrics to evaluate success and plan for the future of non-aeronautical revenue consist of a combination of passenger numbers, sales, and space (square metres). With an increased focus on experience, additional digital layers, shifting categories and/or shopping behaviour, these metrics might start to lose their descriptive and predictive value. Therefore, we've asked our respondents to evaluate other potentially relevant metrics.

The most decisive ones for the future of airport commerce are measures related to location and to co-creation (creating products and experience with other stakeholders, including the passengers themselves). The combination of these two tells a story of where the future direction of airport commerce is going – setting a live stage for stakeholders to perform.

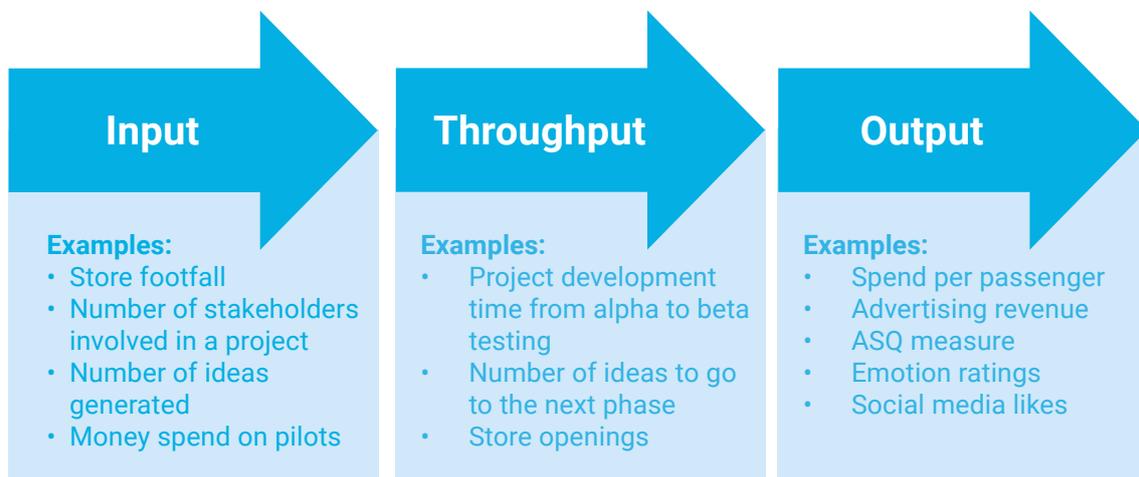
Over 80% of experts think a measure of co-creation will be decisive in the future of airport commerce and in excess of 70% think location-based data is likely to be decisive (see graph above).

While a lot of value is given to partnerships and trying new commercial relationships, not many measures currently keep track of how co-creation is tried, set up, or performed. It might be interesting to see how we value partnerships, experiments and the resulting network that grows from it.

HOW TO OPTIMISE AND SELECT METRICS

The goal of airport commerce is driving sales, attention or creating engaging experiences for passengers. Sales are often easily measured, the other two much harder. Location and co-creation metrics are different from spend per passenger in numerous ways, and both specifically in a very important way. They are more seen as input metrics, whereas spend per passenger is an output metric. The difference is clear in the example of a walkthrough duty free store. Up to a certain point there is a relation between footfall and sales, but it is not the footfall that should be the ultimate measure. **Input metrics can be a heuristic, a short cut substitute, for the actual intended outcome metric. Throughput metrics help you evaluate the process of getting the intended outcome.**

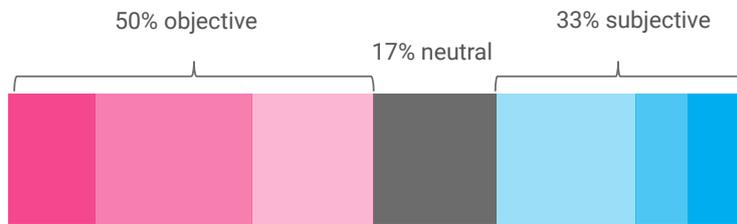
Figure 12: Examples of different metric types



Focusing on footfall or location-based data can be a great heuristic for how many people have watched an advertisement or interacted with an art installation for instance. It is important however to combine this relatively objective data of ‘time spent in front of an art installation’ with more subjective data of enjoyment of the interaction with the art installation or, for example, mentions on social media.

For each development stage, metrics can be more objective or more subjective. We asked experts to rate the relevance of objective or subjective metrics for the future of airport commerce on a 7-point scale. The result skews a lot more towards more objective measures, as we see in the chart below.

Figure 13: Are subjective or objective measures more relevant?



Topics such as co-creation might seem more subjective, but **objectifying co-creation can increase the likelihood of an organisation prioritising collaboration** between stakeholders. It is then again important to not see co-creation as an output metric or you will be stuck in meetings all day. The goal is to enhance the customer experience through a co-creative process; therefore, we look at it as a throughput metric. Examples of throughput metrics for co-creation could be how many co-creative workshops have been completed, or the ratio of development stages in which partners, end users, suppliers or other stakeholders are included.



MAKING THE FUTURE TANGIBLE

MAKING THE FUTURE TANGIBLE

Thinking about the future is often abstract. To help industry experts look at the future in a different way, we asked them some unusual questions. These questions can help to see the future in a different way and, as a consequence, reframe daily challenges. For instance, we asked people which famous historical or present day person they would want on their team to shape the future of airport commerce.



Easy as it might be to freely envision the ideal team member, reflecting on the qualities this legendary team member has can set a goal to cultivate these characteristics in your own organisation.

"Airports often think about personas and customer journeys, but not enough about the emotional drivers and the behavioural responses of passengers during their travelling experience. Drawing on other place makers - imagine an airport designed by Disney theme parks...where every touchpoint is carefully curated, branded and wrapped around making memories! That would be an amazing airport to go to."

**KRISTINA BORG CARDONA, EXPERIENCE DESIGN AND COMMERCIAL DEVELOPMENT
MANAGER AT MALTA INTERNATIONAL AIRPORT PLC**

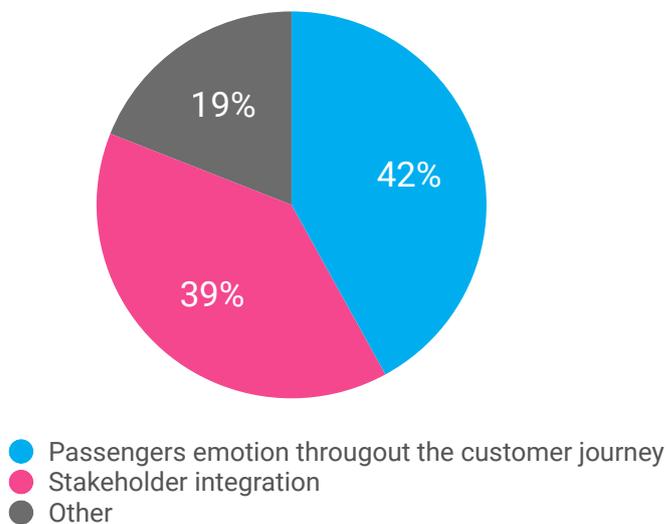
We introduced ten examples and allowed for respondents' own options to be entered. Of the options we supplied, Mr. Walt Disney was selected most often to be part of the team to develop the future of airport commerce. Aspects that were valued of what Walt could theoretically bring to the table, but also other ideal team members, were described as innovation and disruption and having a clear vision for the future.

Figure 14: What would be valued in a team member



Another such question was a utopian scenario of focusing a ‘dream-team’s’ attention on one challenge to improve non-aeronautical revenue. We asked what challenge that would be, and we see the result in the graph below.

Figure 15: What challenge to focus on?



The 'passenger's emotion throughout the customer journey' was identified as the number one topic. The second most chosen option was to focus the dream team's attention on the integration of stakeholders, such as airport, airlines, brands and retailers. Combined, we could say that the future focus should be on bringing the organisation and its stakeholders together to focus on the customer.

A satisfied customer is the best business strategy of all

MICHAEL LEBOEUF

BRINGING THE ORGANISATION AND ITS STAKEHOLDERS TOGETHER AROUND THE CUSTOMER

The idea that the organisation will need to come together around the customer is a core learning from the research on the future of airport commerce. In this future, growth categories will be added, maybe even interwoven, with existing categories. For example, the separate approach to retail and F&B might become more integrated into a tasting retail experience, or leisure and advertising might entangle more strongly into an immersive brand experience. All of this being supported by a digitally enhanced customer journey.

Most of these elements of airport commerce have traditionally been separated through different teams and or companies, resulting in a future where these collaborations will be much more co-creative.

These developments point towards an increasing complexity behind the scenes to make a smooth experience for the customer. Therefore, it will not be the best product or service that is flourishing in the future of airport commerce, but the organisation that is able to connect the complexity behind the scenes and to select the right elements for a streamlined experience for the passenger and a profitable shared business for the airport commerce network of companies.

Continually improving the customer experience is an essential ingredient of the future of airport commerce. Especially since the airport environment is an environment where customers wield growing power.

CREATING EXPERIENCES, PROPELLING BUSINESS

CONTACT

For questions regarding this report or any other information request please feel free to reach out to our head of research, Juriaan van Waalwijk Juriaan@kineticconsultancy.nl or managing director Martijn Steur Martijn@kineticconsultancy.nl

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The graphs and data described are based on the opinions of valued experts but might not be representative of the whole

community.

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