

**The Trinity Forum  
31 October 2018  
Shanghai, China**

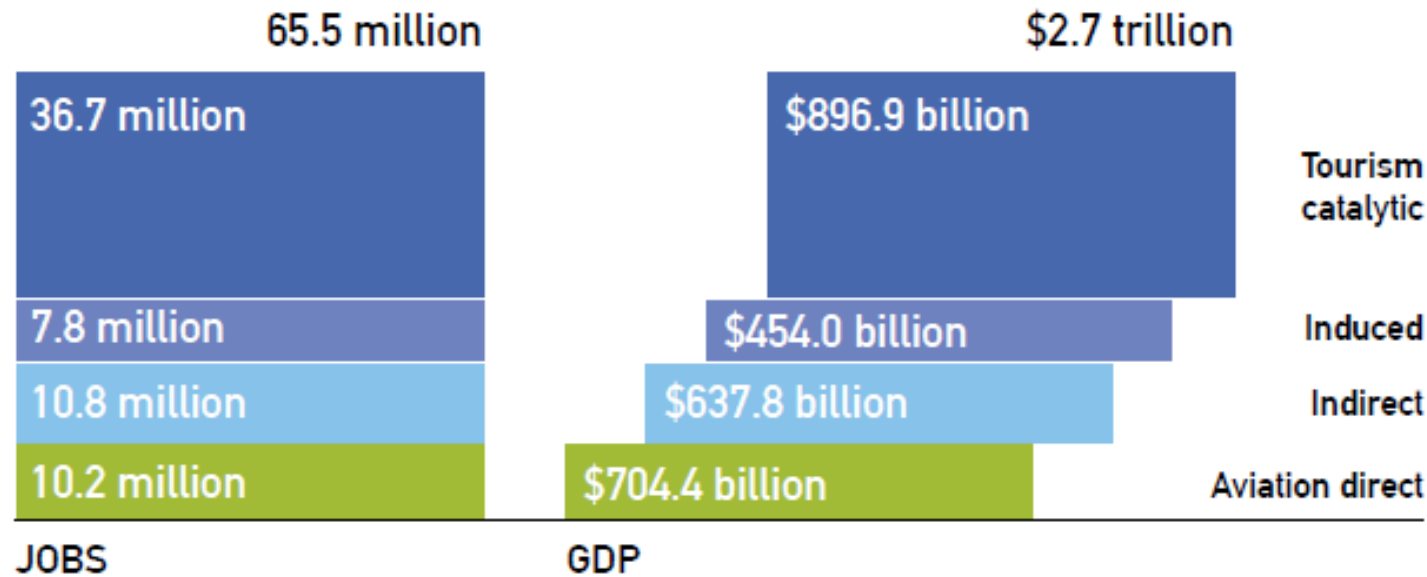
**Welcome and International Overview  
Angela Gittens, Director General, ACI World**



## Global benefits of Aviation: Supporting wider economic development

### Beyond the industry

Aviation's global employment and GDP impact<sup>2</sup>



### DIRECT JOBS

**525,000**

**Airport operators<sup>3</sup>**  
(operations, planning, engineering)

**5.6 million**

**Other on-airport<sup>4</sup>**  
(retail, car rental, government agencies such as customs and immigration, freight forwarders, some catering)

**2.7 million**

**Airlines<sup>5</sup>**  
(flight and cabin crews, executives, ground services, check-in, training and maintenance staff)

**1.2 million**

**Civil aerospace<sup>6</sup>**  
(engineers and designers of civil aircraft, engines and components)

**233,000**

**Air navigation service providers<sup>7</sup>**  
(air traffic controllers, executives)

Source: Aviation benefits beyond the border Report, 2018

# Annual World Airport Traffic Dataset and Report 2018

Data from over 2,500 airports  
in more than 175 countries



## Annual World Airport Traffic Report 2018 EDITION



Data from over 2,500 airports  
in more than 175 countries



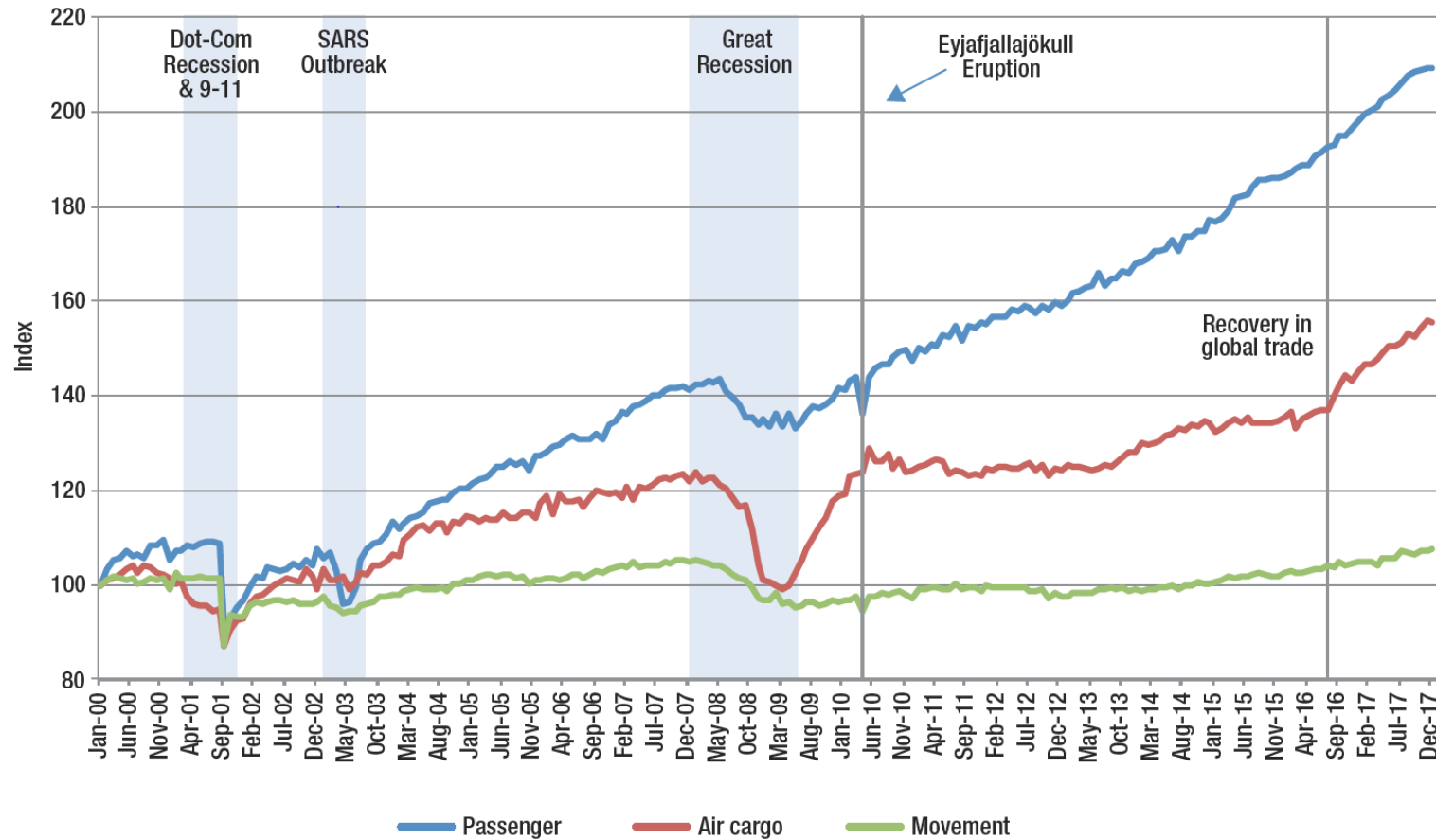
## Annual World Airport Traffic Dataset 2018 EDITION



EXCEL VERSION

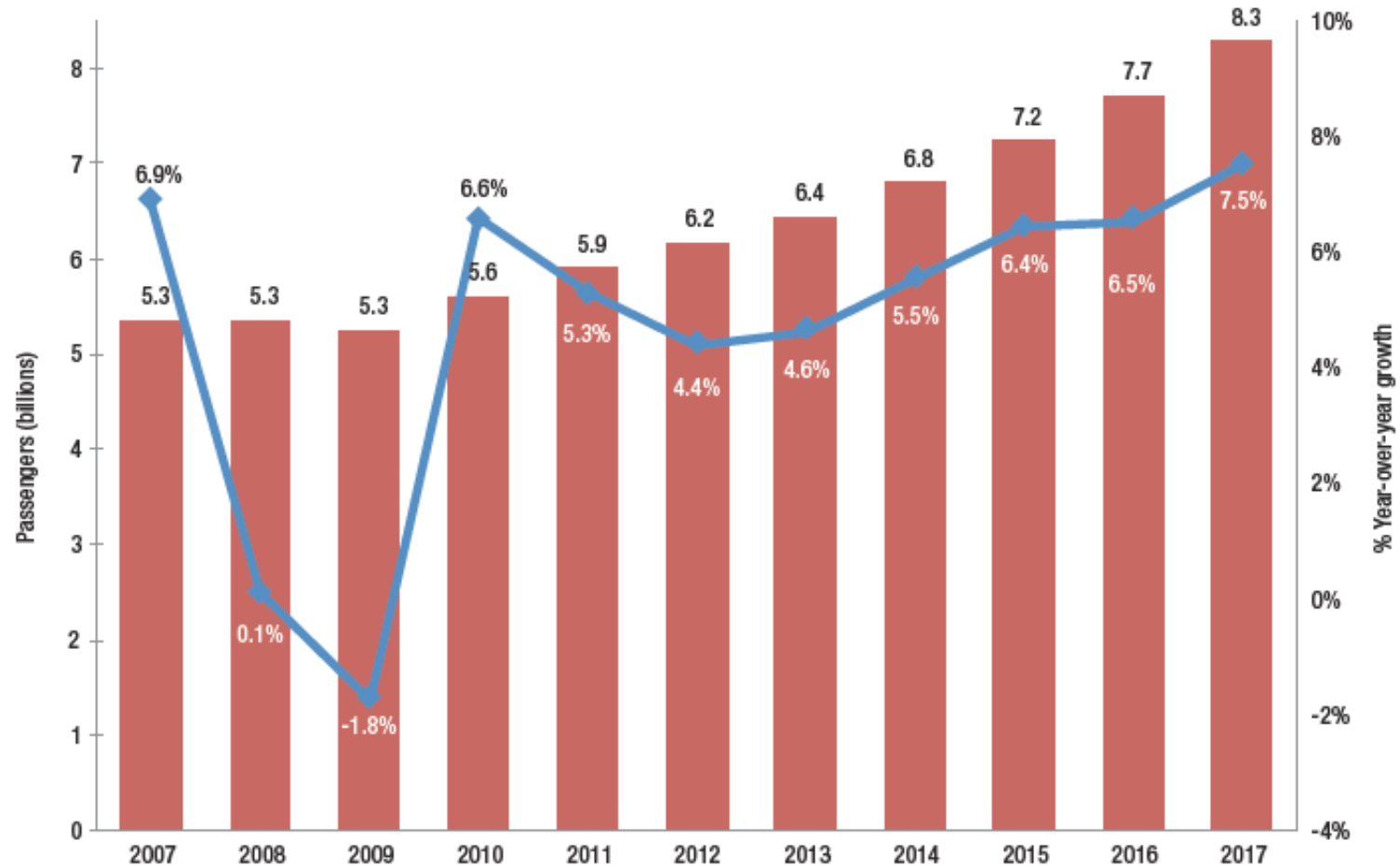
<https://store.aci.aero/products/>

## Total worldwide movements, passengers and air cargo evolution (2000–2017)



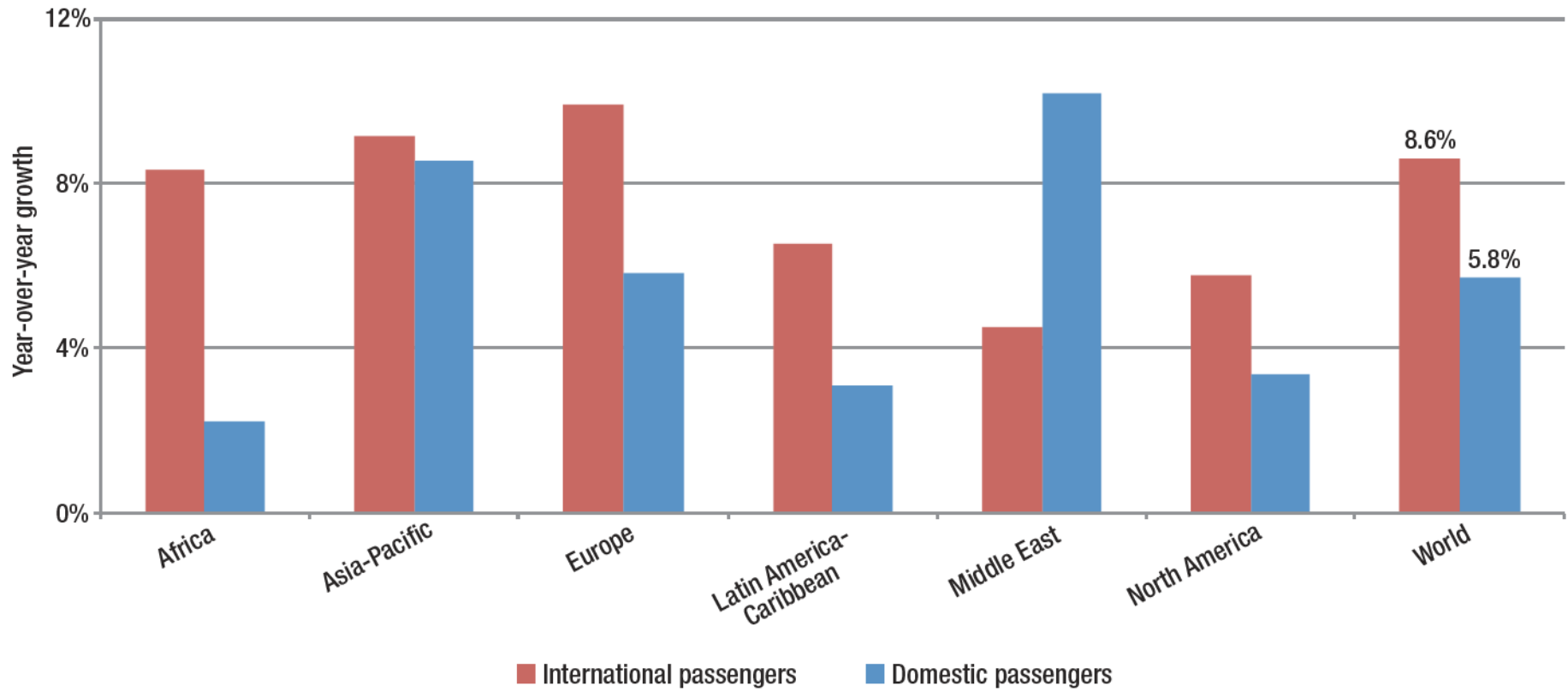
Source: ACI World Airport Traffic Database, 2018

## 2017 total passenger traffic volume and increase from 2016



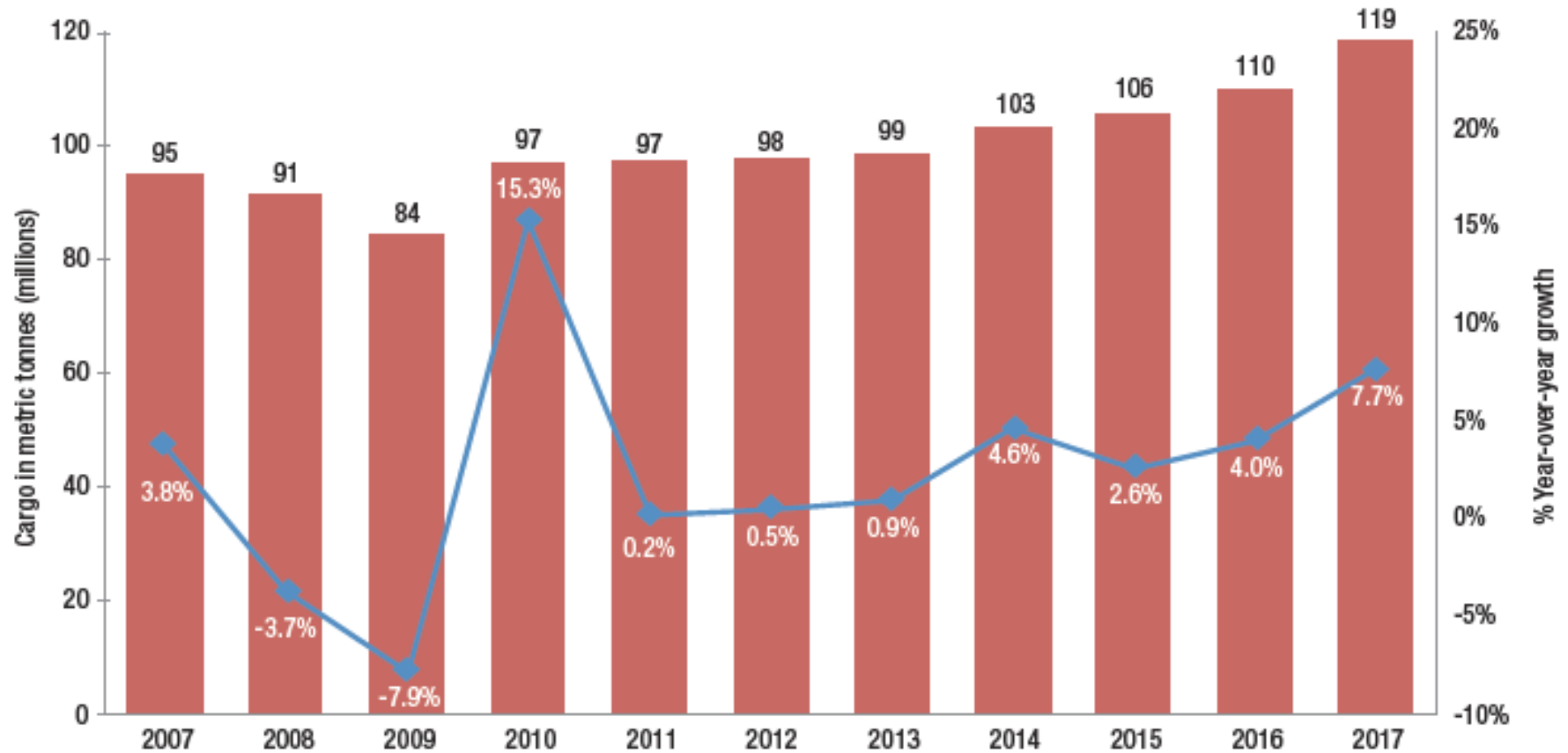
Source: ACI World Airport Traffic Database, 2018

## Growth in international and domestic passenger traffic by region (2017/2016)



Source: ACI World Airport Traffic Database, 2018

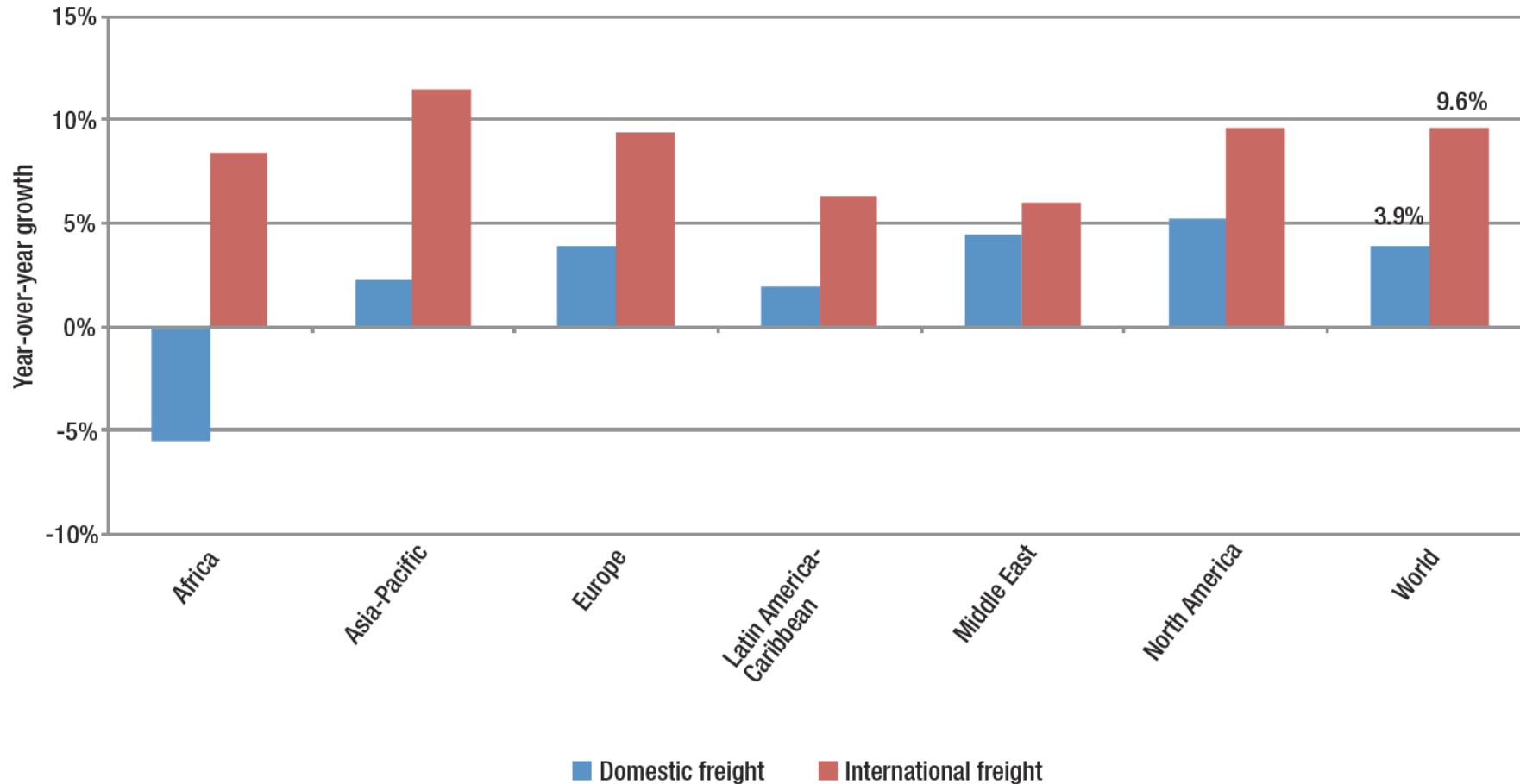
## 2017 total air freight traffic and increase from 2016



Source: ACI World Airport Traffic Database, 2018

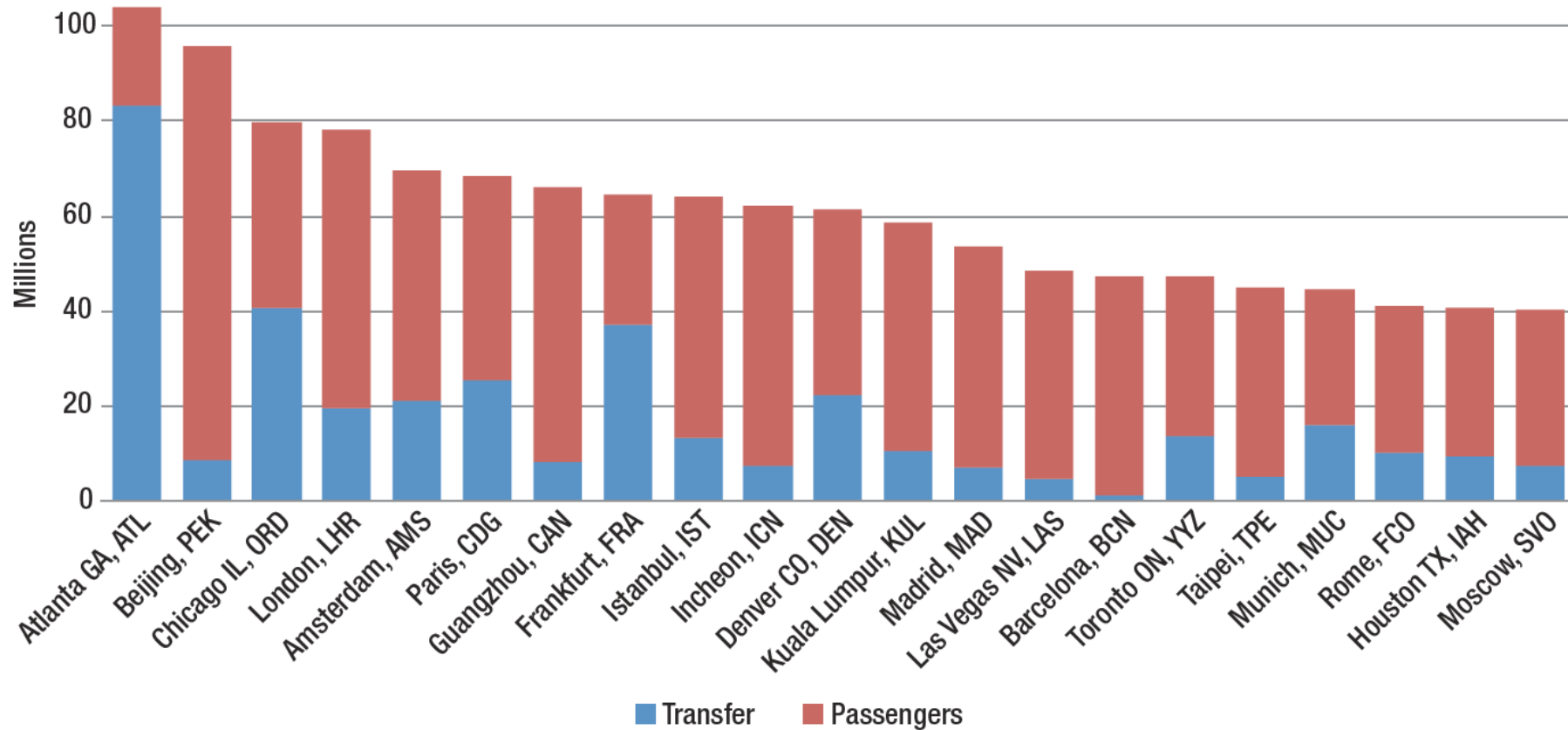


## Growth in international and domestic air Freight traffic by region (2017/2016)





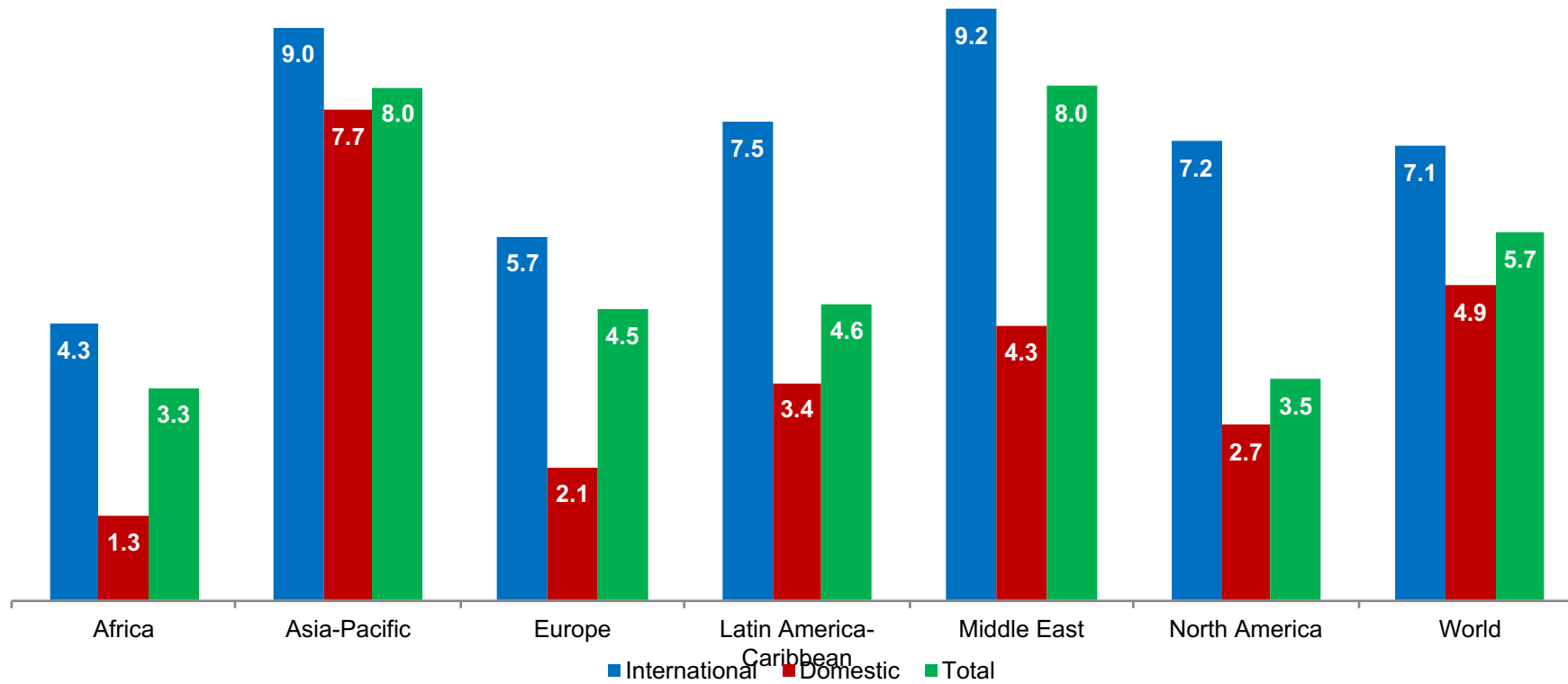
## Transfer passenger as proportion of total passenger traffic for major hubs (2017)



\* Transfer passengers based on estimates provided by airports

Source: ACI World Airport Traffic Database, 2018

## Medium-term passenger forecast CAGR (2016-2021)

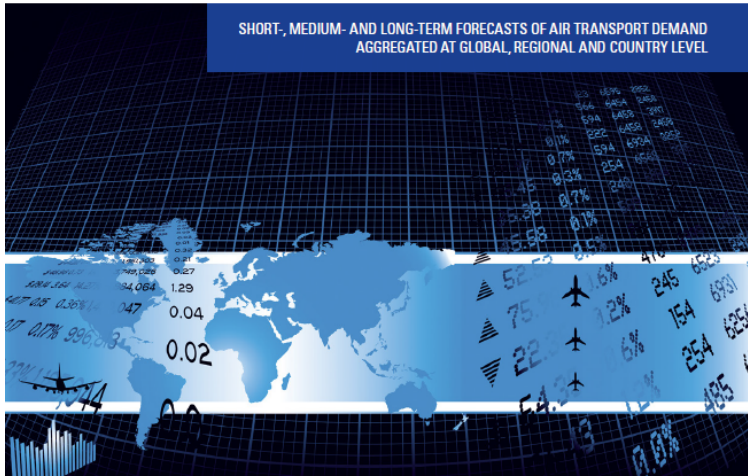


# ACI Annual World Traffic Forecasts 2018-2040

Data from over 100 countries across the globe



## ACI World Airport Traffic Forecasts (WATF) 2018–2040



EXCEL FORMAT

- Covers the 2018 to 2040 period, using 2017 as reference year
- Features traffic volumes, growth rates, market shares and contribution to growth for:
  - Total passengers, broken down into international and domestic
  - Total air cargo
  - Total aircraft movements
- Presented at global, regional and national levels with over 110 countries
- Includes analyses, summary tables, predicted rankings, various charts/graphs and the full dataset of forecasts

## 2018 Key Performance Indicators



**GLOBAL  
INDUSTRY  
REVENUES**

**\$161.3**  
billion

\*in US\$



**GLOBAL  
AERONAUTICAL  
REVENUES**  
per passenger

**\$10.15**



**GLOBAL  
NON-AERONAUTICAL  
REVENUES**  
per passenger

**\$7.12**

**TOTAL COST** per passenger **\$13.55**



## Distribution of global airport revenues (2016)

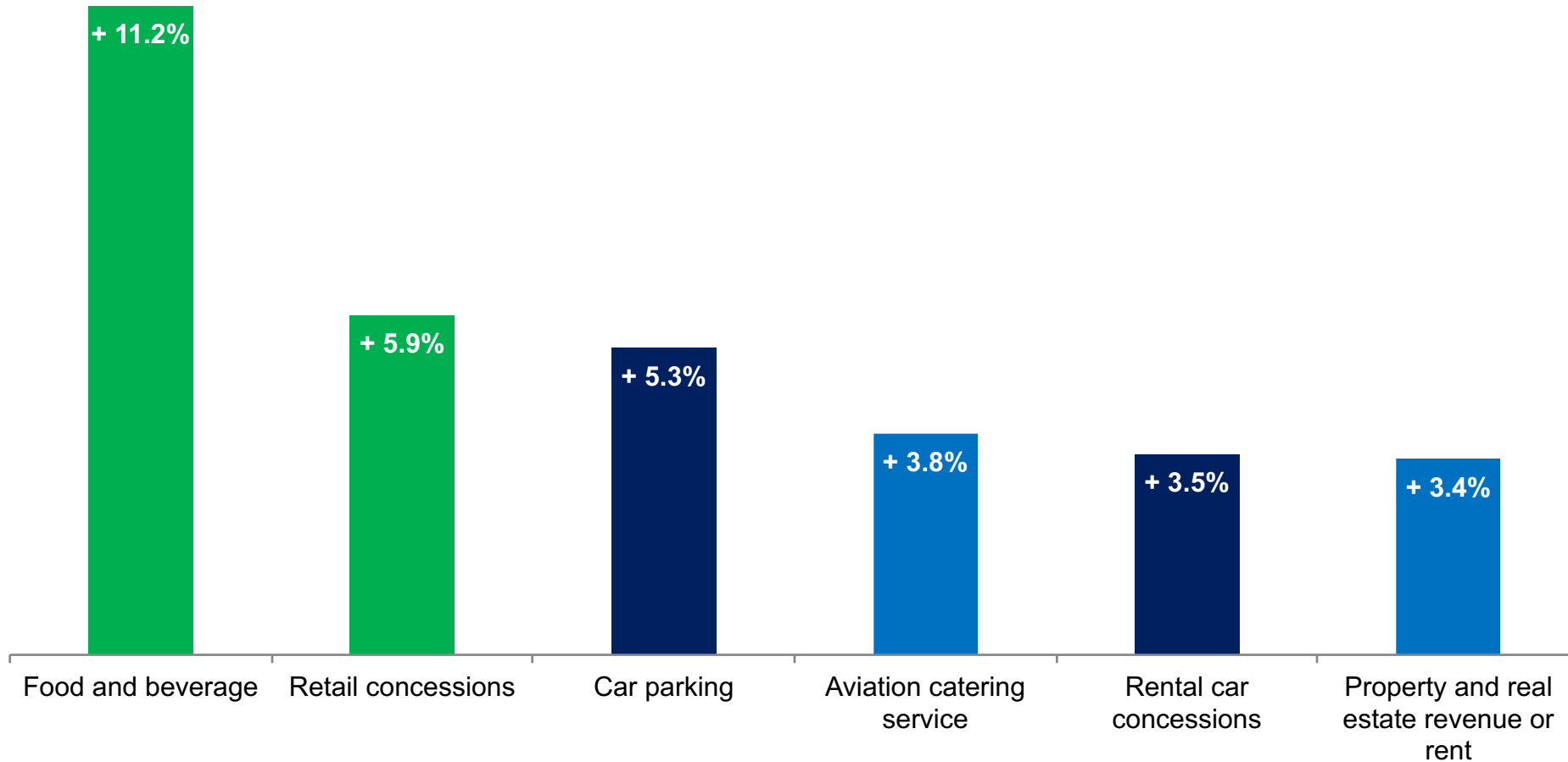
	Total revenue	2016/2015 % change	Aeronautical revenue	2016/2015 % change	Non-aeronautical revenue	2016/2015 % change	Non-operating revenue	2016/2015 % change
<b>Africa</b>	3,500	12.6%	2,400	11.1%	900	7.0%	200	78.1%
<b>Asia-Pacific</b>	50,200	9.3%	25,200	9.3%	22,100	6.9%	2,900	61.8%
<b>Europe</b>	54,300	3.1%	32,500	3.6%	20,700	3.6%	1,100	-22.9%
<b>Latin America-Caribbean</b>	9,700	-2.6%	6,100	8.7%	3,300	-20.3%	300	53.1%
<b>Middle East</b>	13,400	9.2%	6,700	10.1%	6,500	7.7%	200	20.7%
<b>North America</b>	30,200	7.1%	16,400	4.5%	10,800	5.0%	3,000	38.6%
<b>World</b>	<b>161,300</b>	<b>5.8%</b>	<b>89,300</b>	<b>5.9%</b>	<b>64,300</b>	<b>3.6%</b>	<b>7,700</b>	<b>25.5%</b>

Source: 2018 ACI Airport Economics Report

## Distribution of non-aeronautical revenue by region (% of total non-aeronautical revenue, 2016)

	Retail concessions	Food and beverage	Car parking	Rental car concessions	Advertising	Fuel and oil	Aviation catering service	Utility recharges	Property and real estate revenue or rent	Other non-aeronautical revenue
<b>Africa</b>	32.8%	2.1%	12.5%	5.5%	4.1%	3.2%	0.4%	5.7%	7.1%	26.5%
<b>Asia-Pacific</b>	41.6%	3.2%	7.5%	0.8%	3.8%	1.6%	0.6%	3.6%	22.6%	14.7%
<b>Europe</b>	34.4%	4.4%	15.9%	2.0%	2.1%	1.2%	0.1%	5.3%	17.9%	16.7%
<b>Latin America-Caribbean</b>	31.2%	6.5%	9.2%	3.0%	4.3%	3.9%	0.6%	1.1%	12.7%	27.5%
<b>Middle East</b>	56.0%	4.9%	9.1%	0.9%	2.2%	4.0%	1.1%	3.4%	10.9%	7.6%
<b>North America</b>	8.4%	7.6%	40.8%	17.4%	0.5%	2.7%	0.0%	0.0%	6.1%	16.4%
<b>World</b>	28.8%	5.1%	20.5%	6.3%	2.2%	2.0%	0.3%	3.0%	15.0%	16.7%

## Year-over-year % change in selected non-aeronautical revenues (2016/2015)





## Airport Service Quality (ASQ) ratings (2017/2016)

	2016 Out of 5	2017 Out of 5	YTD 2018
<b>Restaurant/eating facilities</b>	3.84	3.90	3.92
Value for Money of restaurant/eating facilities	3.35	3.43	3.45
<b>Shopping facilities</b>	3.78	3.84	3.88
Value for Money of shopping facilities	3.38	3.46	3.49



## Does passenger satisfaction increase airport non-aeronautical revenue?



Does passenger satisfaction increase

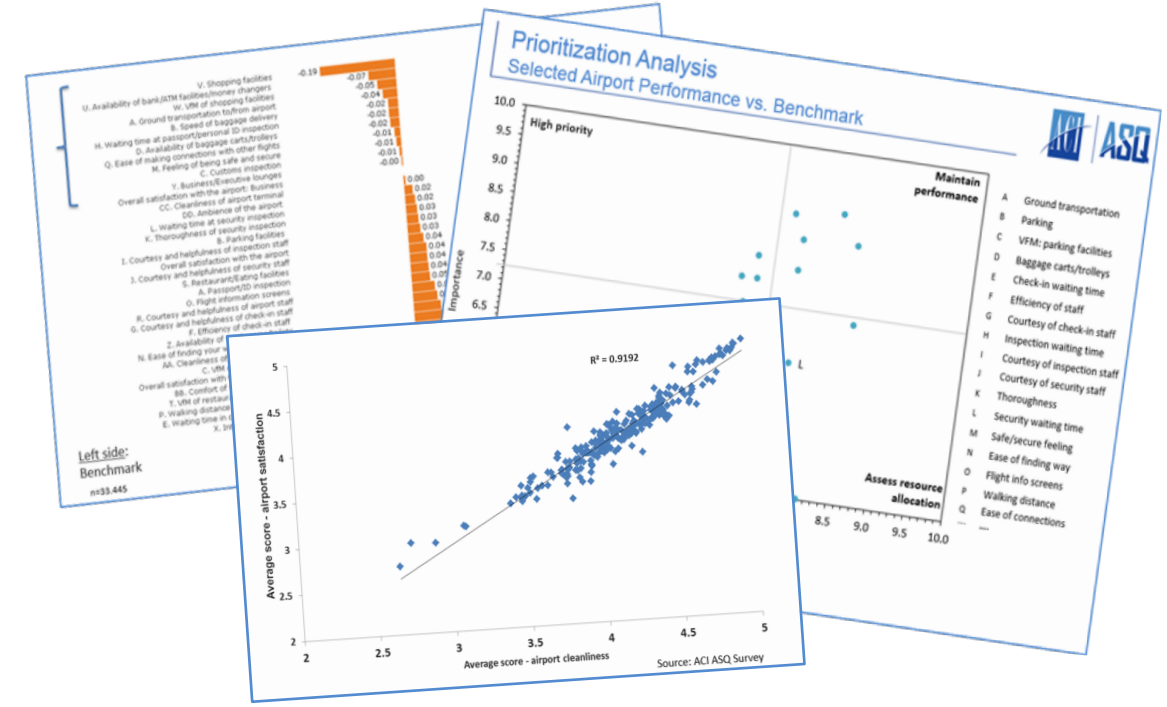
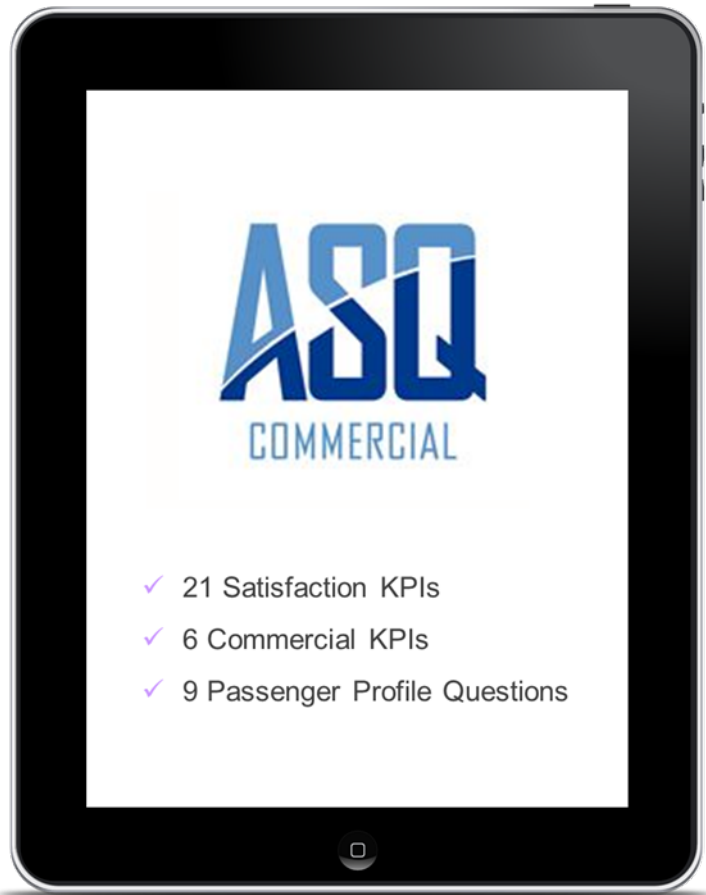
Airport non-aeronautical revenues?

A comprehensive assessment

### Research report



# The ASQ Commercial Survey



## ASQ Commercial Survey: Detailed insights



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Why passengers choose to spend or not in commercial areas?

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•Which passenger groups use retail, food and beverage, and paid services options the most?

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•What airports should do to improve the retail, food and beverage and services experience?

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•What airports need to do to improve its non-aeronautical revenues?

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**Duty/Tax-Free Shops**  
(do not charge taxes - not limited to duty-free concessions)



**Non-Duty-Free Shops**  
(shops where taxes are chargeable)



**Restaurant/eating facilities**  
(bars, coffee shops, quick serve and casual restaurants)



**Paid Services**  
(services that are not offered by the airport)

## ASQ Commercial Survey: Transforming the business



### The ASQ Commercial Survey lets you:

- Maximize your airport's revenue generating potential.
- Make your airport a great destination for passengers—even before they begin their flights.
- Get ahead of the customer-service curve by being proactive, not reactive.
- Make your airport stand out from the crowd—be an airport where service isn't just a slogan.
- Attract new aviation business to your airport—and boost your non-aeronautical revenue at the same time.
- Transform your commercial decision-making



## Conclusion





The  
**voice**  
of the  
**world's**  
**airports**