



Aviation Strategy Forum

24th & 25th March 2020

Research Report

Total Delegate Group: 175



This report is based on survey findings of the delegates for the Aviation Strategy Forum on the 24th and 25th March 2020, comprising of 175 chief officers, VPs and directors from major international airports and airlines.

To deepen our insights, we interviewed the highest decision makers in face-to-face and telephone interviews to discuss trends and issues being tackled in their organisations.

SOME OF THE COMPANIES REPRESENTED





32

Chief Officers
& VPs

34

Directors

71

Heads of
Department

38

Senior
Management

MAIN FINDINGS OF THE REPORT



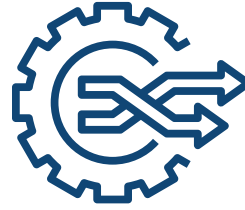
AI & AUTOMATION

Artificial intelligence is transforming how major international airlines and airports manage the passenger journey from kerbside to airside. Baggage handling is being streamlined through new automated processes, machine learning is enabling passenger identities and potential threats to be detected more effectively and there is a drive for more advanced passenger self-service technologies.



DATA & ANALYTICS

Aviation leaders are urgently investing in more advanced data analytics software and processes that drive real-time data-driven actions to optimize operational performance, reduce wait time and forecast passenger flow. Major airlines and airports produce an abundance of data from many touchpoints and it is imperative for this to be more effectively utilised.



DIGITAL CHANGE

A concerted effort is being made to migrate from legacy infrastructure and utilise cloud systems. Infrastructure developments are enabling workforces to become more mobile, and with increased adoption of loyalty-driven customer applications and specialized mobile aviation applications, airline enterprises and passengers are using mobile technology to not just simplify the travel experience, but also make it more rewarding.



PASSENGER EXPERIENCE

Major airports and airlines are leading digital programmes and plans to improve the experience of both external and internal customers. Passenger expectations about real-time flight information, ease of check-in procedures and connectivity while in the terminal as well as in the air have never been greater. As such, this is a key issue at the core of strategic plans.

The key issues being tackled by the Director of Customer at TUI:

- Driving new ancillary revenue streams
- Use of data analytics
- Being agile in a complex corporate environment

The challenges being prioritised by the Director of Operational Excellence at Manchester Airport Group

- Connecting the end-to-end airport journey with better use of data
- Enhancing the passenger experience
- Cost efficiencies and automation

COMBINED SPENDING POWER OF GROUP

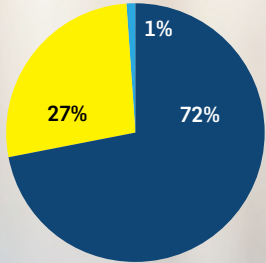
£4.6 Billion



BUDGET RESPONSIBILITY PER PERSON

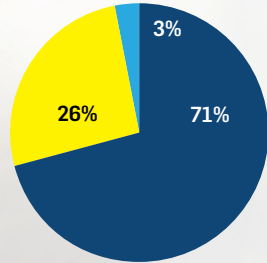
SPEND MAPPING

ARTIFICIAL INTELLIGENCE



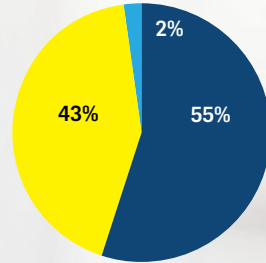
● Increase ● Stay the same
● Decrease

INTEGRATION OF NEW APPLICATIONS INTO LEGACY/EXISTING TECHNOLOGY



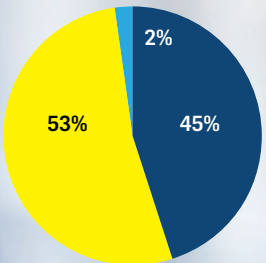
● Increase ● Stay the same
● Decrease

ASSET MANAGEMENT SOLUTIONS & AUTOMATION



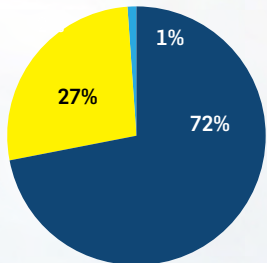
● Increase ● Stay the same
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ENTERPRISE MOBILITY



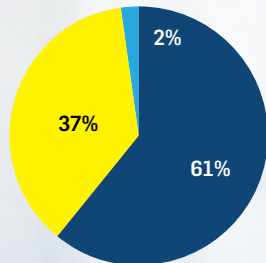
● Increase ● Stay the same
● Decrease

BIG DATA AND ASSOCIATED ANALYTICS



● Increase ● Stay the same
● Decrease

MACHINE LEARNING

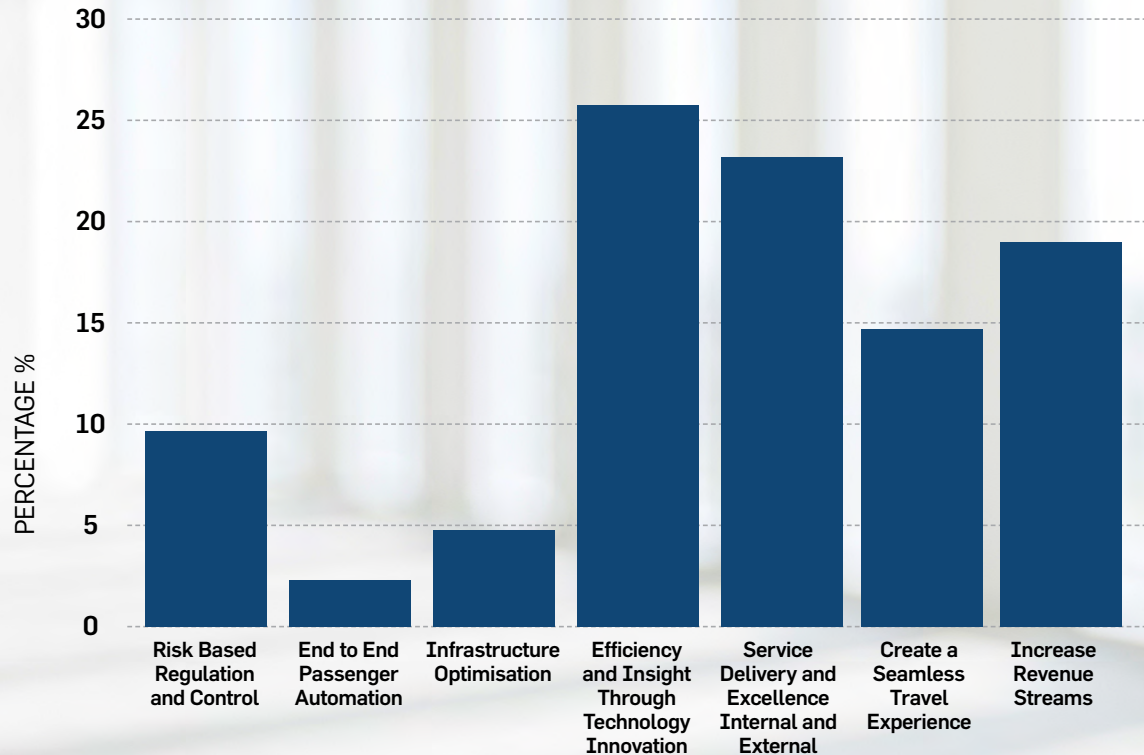


● Increase ● Stay the same
● Decrease

Artificial intelligence and automation are very much at the forefront of our group's budget plans, with these technologies being incorporated to streamline their repair operations and implement a predictive maintenance strategy.

There are also significant investment plans towards data analytics to better plan maintenance schedules for aircraft and improve passenger experience.

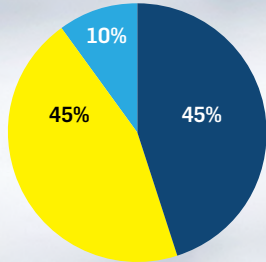
TOP STRATEGIC PRIORITY



It's clear that there is a wide range of issues being prioritised by airlines and airports, with a general theme showing that there is a drive to efficiently improve passenger experience and business revenue through adoption of new technologies and processes.

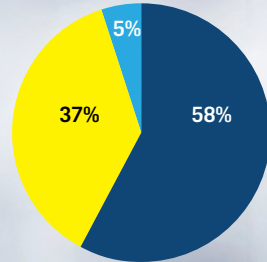
LOW, MEDIUM AND HIGH PRIORITY AREAS

AUTOMATED BAGGAGE DROP SOLUTIONS



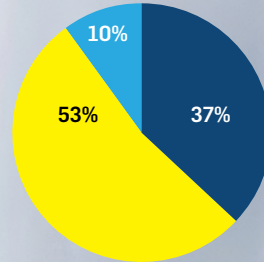
High Medium Low

PASSENGER SELF-SERVICE SOLUTIONS



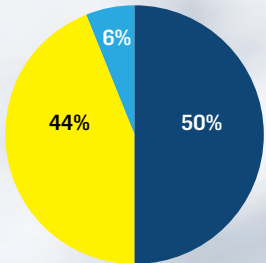
High Medium Low

AI AND PREDICTIVE ANALYTICS



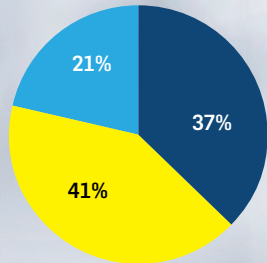
High Medium Low

IMPROVED CYBER SECURITY



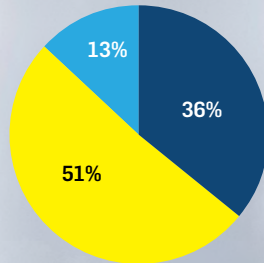
High Medium Low

ONBOARD CONNECTIVITY



High Medium Low

ASSISTED DECISION-MAKING TECHNOLOGY



High Medium Low

Many of the high priority issues being tackled by the group surround the AI technologies which are being incorporated to improve passenger flow and experience. Besides this, there is also a push for stronger defences against cyber threats which could compromise reputation or even critical avionic systems.

CURRENT OR FUTURE STRATEGIC PRIORITIES

● Current ● Future

Using Behavioral Science to Isolate Threats and Enhance Security



Technologies to Focus Attention on Safety and Risks



Technologies to Help Improve and Understand Passenger Behaviour



Advancing Automation Across Key Internal and Passenger Facing Areas

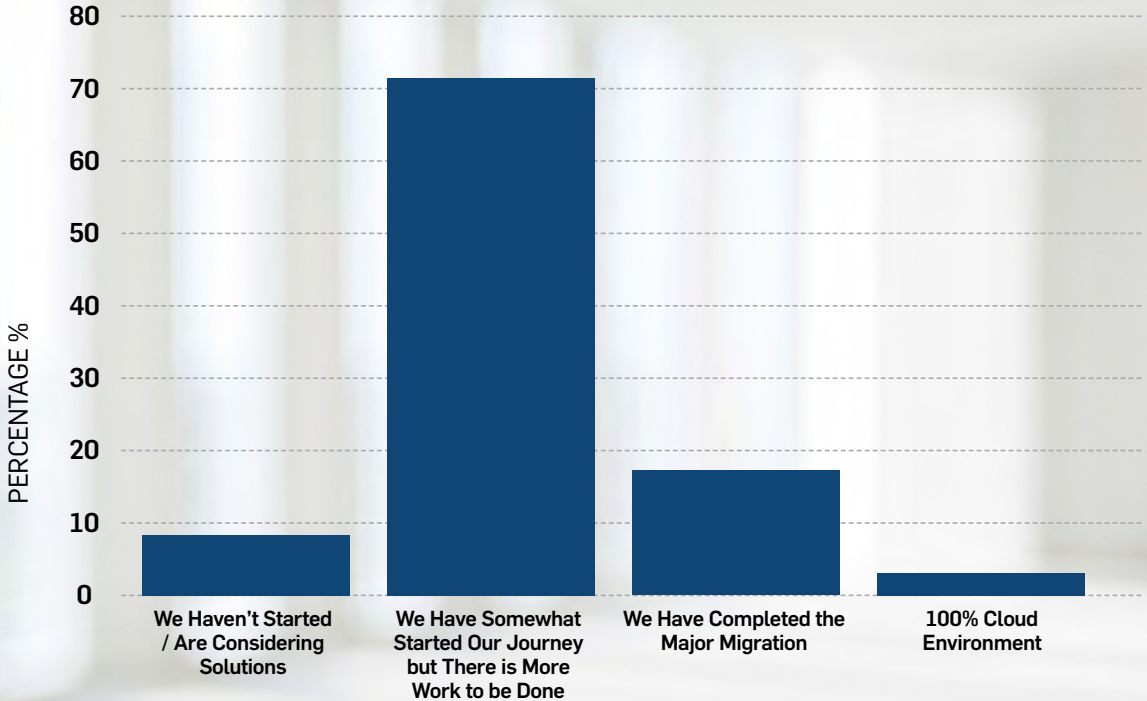


Encouragement of Better (Real Time) Data Sharing Between Airline and Airport and Wider Organisations



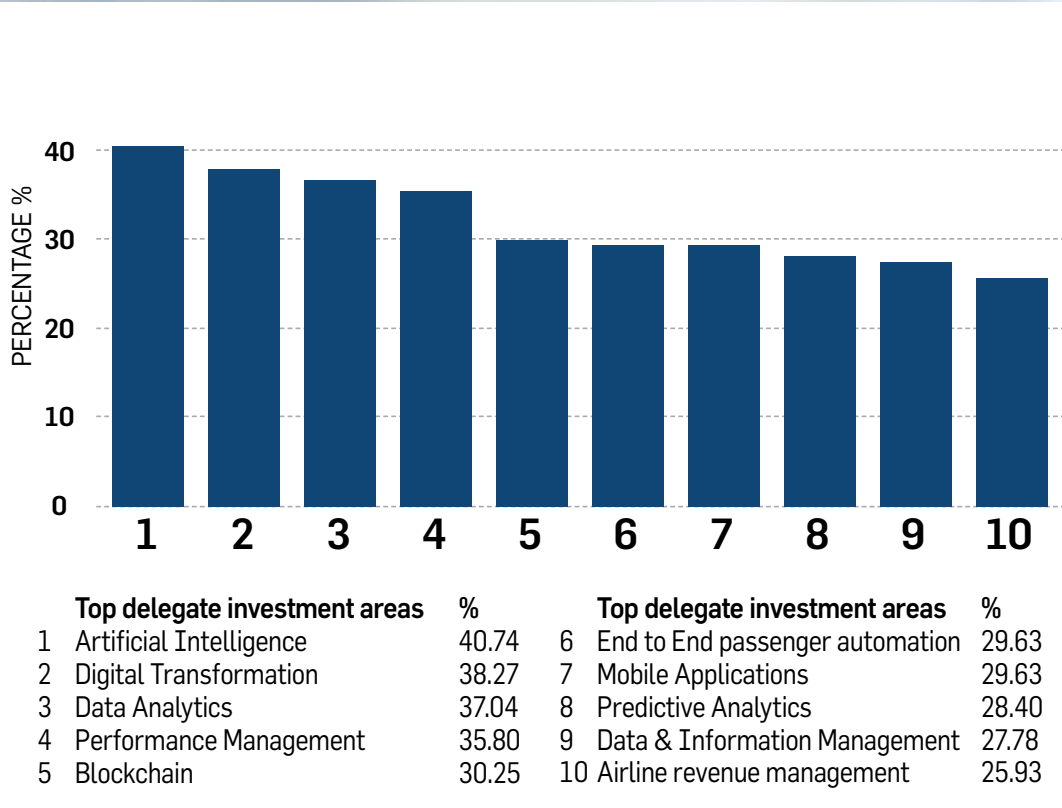
More than any other noted priority, the aviation leaders surveyed stressed that adoption and implementation of technologies that support the safety and wellbeing of passengers is a significant issue that needs to be tackled as a current priority.

HOW ADVANCED IS YOUR ORGANISATION WITH CLOUD MIGRATION



To facilitate the wider digital strategies of major international airports and airlines, legacy infrastructures are being migrated to the cloud. Despite this urgency, most of the group specified that there is still a significant amount of work that needs to be done in this cloud migration journey.

DELEGATE INVESTMENT AREAS



The aviation leaders surveyed highlighted AI as the technology area they are investing most heavily in, with applications in baggage screening, identification of passengers, maintenance prediction and to improve the passenger experience.

STRATEGY FORUMS



Live Events

FORUM IQ



Analytics & Research

FORUM LINK



Collaboration App

All our Strategy Forums combine industry leading searchable analytics through Forum IQ - our delegate discovery platform. Key client investment data is blended with enhanced networking capability via our Forum Link app for everyone to intelligently connect through multi-channel exchanges during our live Strategy Forums.

Deep understanding and clever tech connecting smart people in smooth interactions. Goodbye static conferences, hello evolution.

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