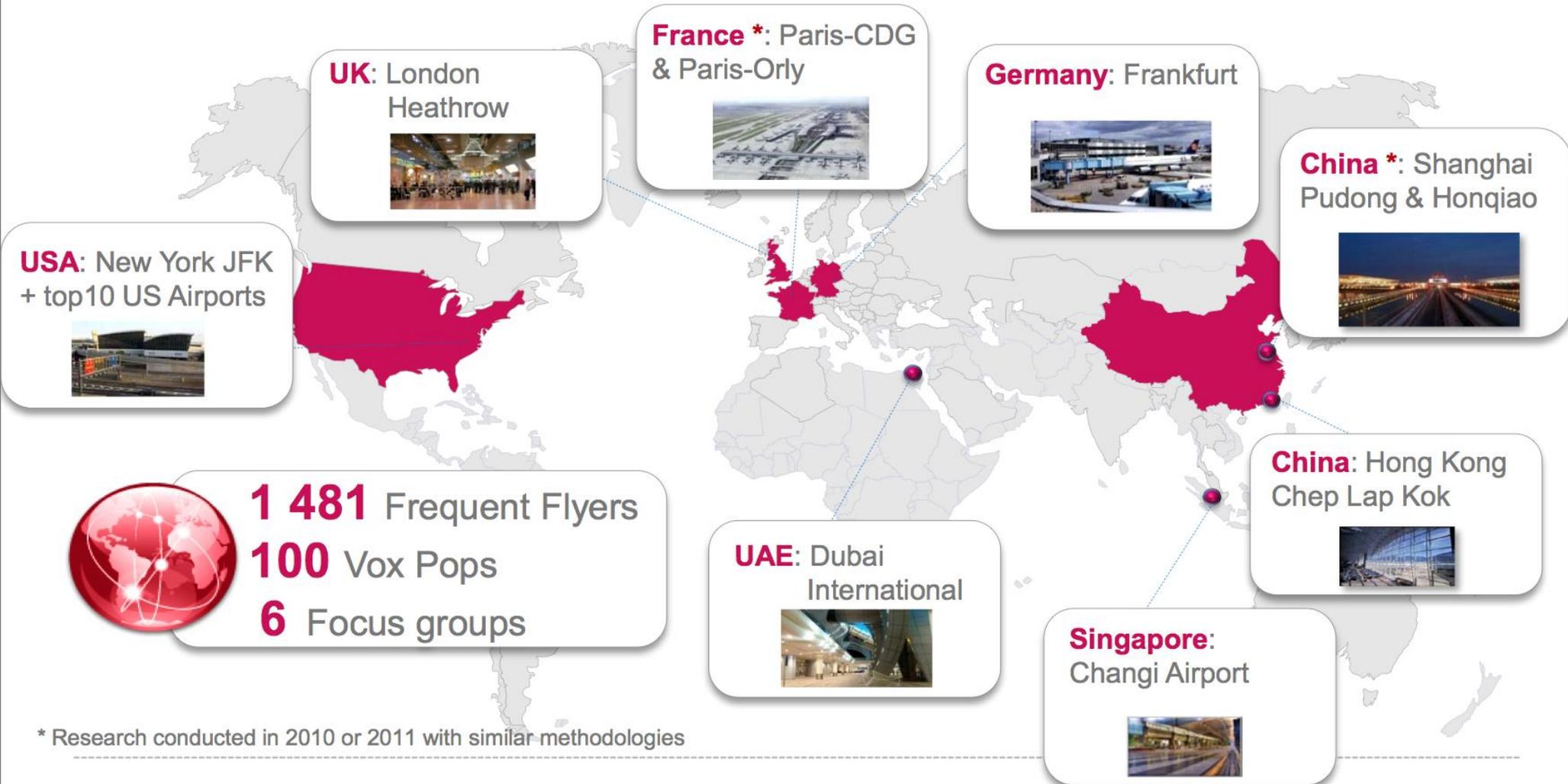


# *The Universal Brand Experience*

# Airport Stories World: frequent flyers on every continent



\* Research conducted in 2010 or 2011 with similar methodologies

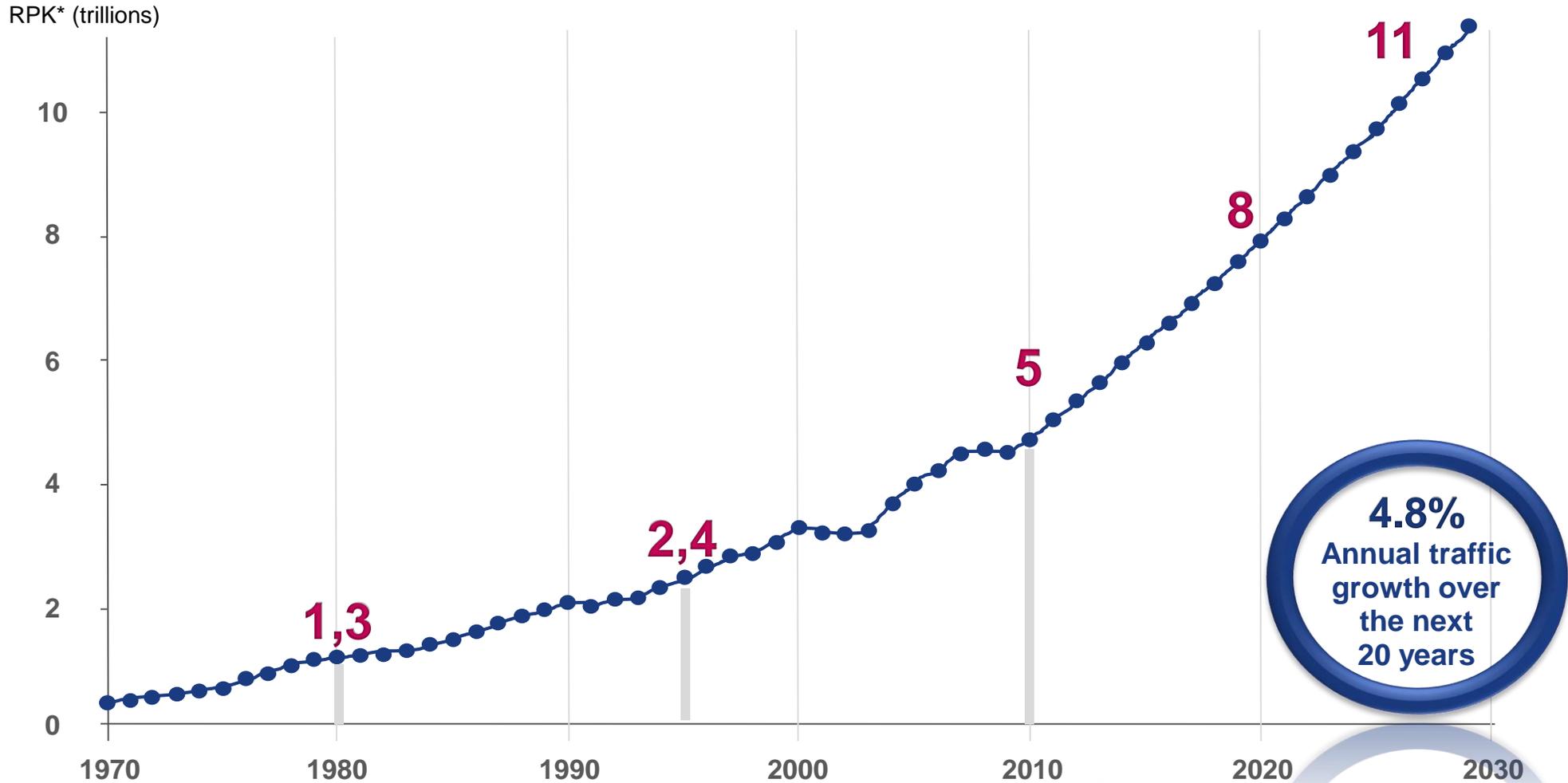
# Airportstories

## World

1

Airports, a growing global arena  
for brands

# Air traffic is expected to double in the next two decades



Sources : Airbus Global Market Forecast - December 2009 - ACI 2009 traffic forecast  
 \*: Revenue Passenger Kilometres

**Global growth  
requiring  
higher  
investments  
in airport  
infrastructures  
around the world**



Dubai's newest  
airport  
**\$33 billion**



Bangalore terminal  
expansion  
**\$221 million**



Frankfurt Main  
new T3  
**€420 million**



Jeddah KAIA  
new terminal  
**\$2.4 billion**



Minneapolis  
expansion  
**\$2.4 billion**



## From Airports to Airport Cities

**1900-1960**

Shift from a means of transport for an elite to tourism for the masses

**Terminal  
Transit area**



**1960-1990**

Liberalisation: advent of charter flights and the creation of shopping malls

**Place for  
consuming  
& place for living**



**1990-2010**

Development of passenger services, airports become showcases for their countries  
**Airport Cities**



**2010-20..**

**To a remote & seamless airport experience**

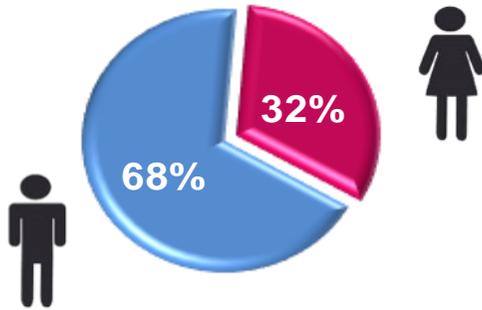


2

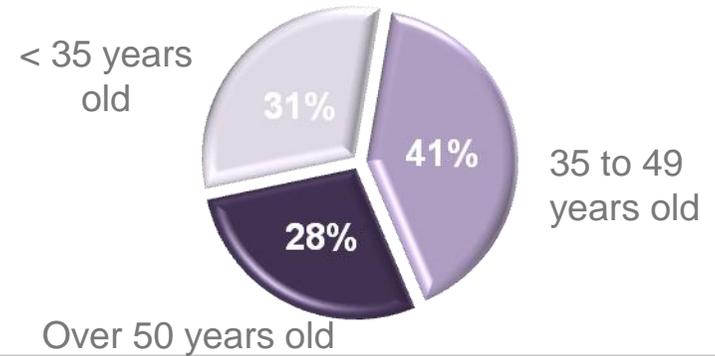
## The convergence of the international frequent flyer

# Convergent in demographics

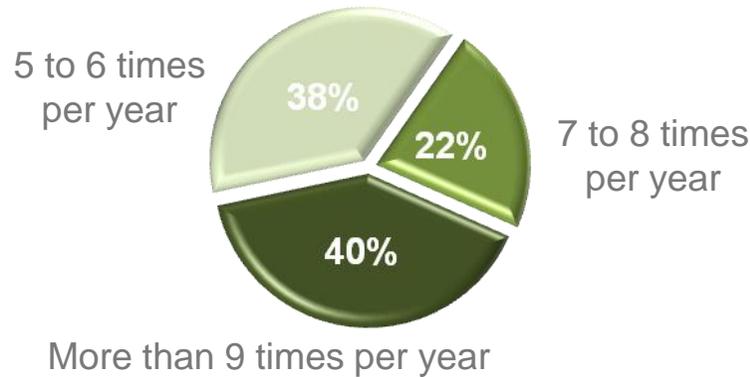
A growing proportion of women



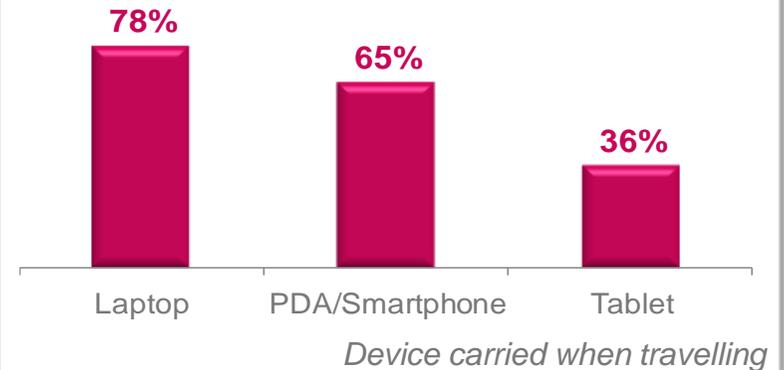
Well-balanced for age



40% travel more than 9 times a year



Early adopters of high-tech devices





Frequent flyers form **a high value, influential and cosmopolitan audience** for both brands and airports.



**Affluent**

Their average **income** is at least 30% above the average of the local population

**Influential**

About **40%** of all air passengers travel on **business**

**Captive**

Passengers spend almost **3 hours** per trip in major international airports

# Convergent in brand experience



## *The Universal Brand Experience*

Created through **advertising**  
the **common language** of the International Frequent Flyers' airport experience



### Touchpoints to engage with



Emotions



Desires



Actions

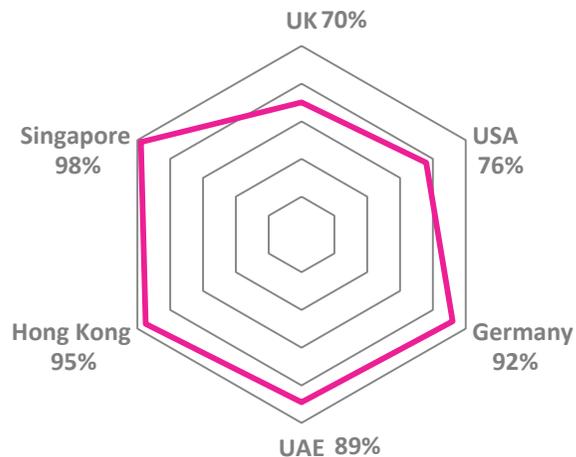
3

The airport advertising arena:  
engaging with travellers

# A place of strong loyalties

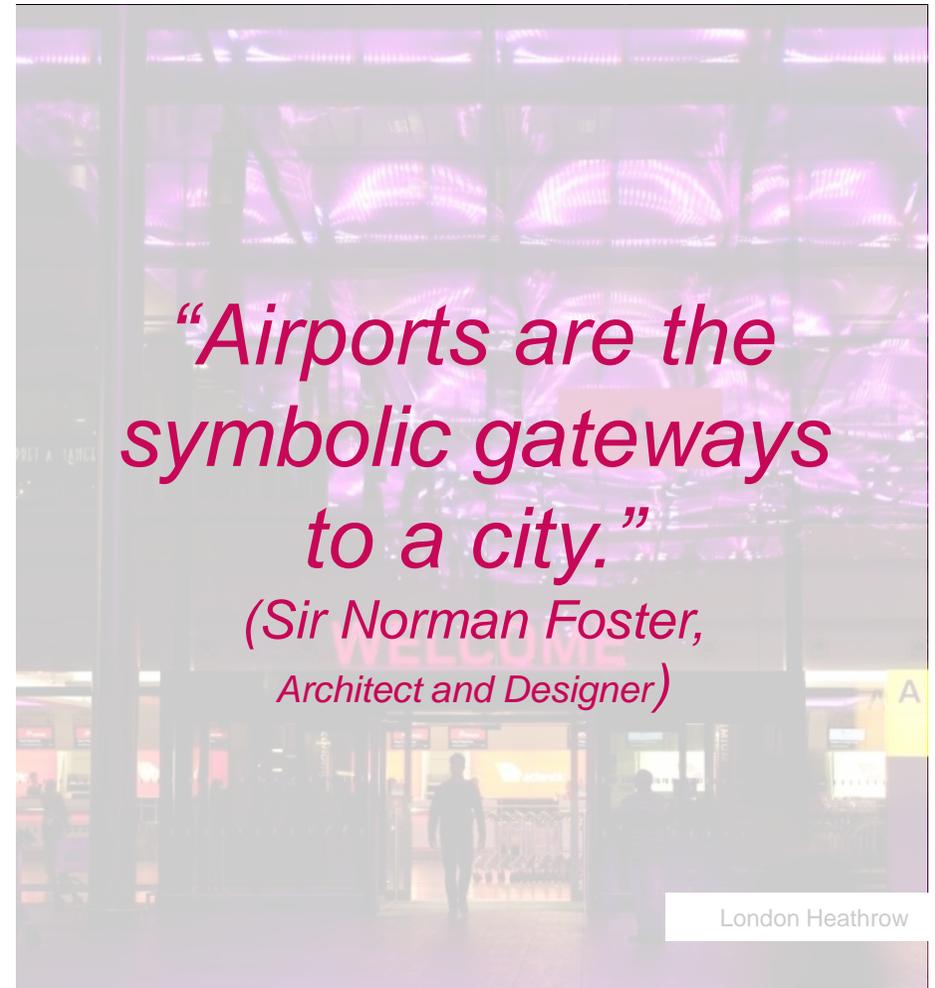
# 86%

International airports are a showcase of the country



*“Airports are the symbolic gateways to a city.”*

*(Sir Norman Foster, Architect and Designer)*



London Heathrow

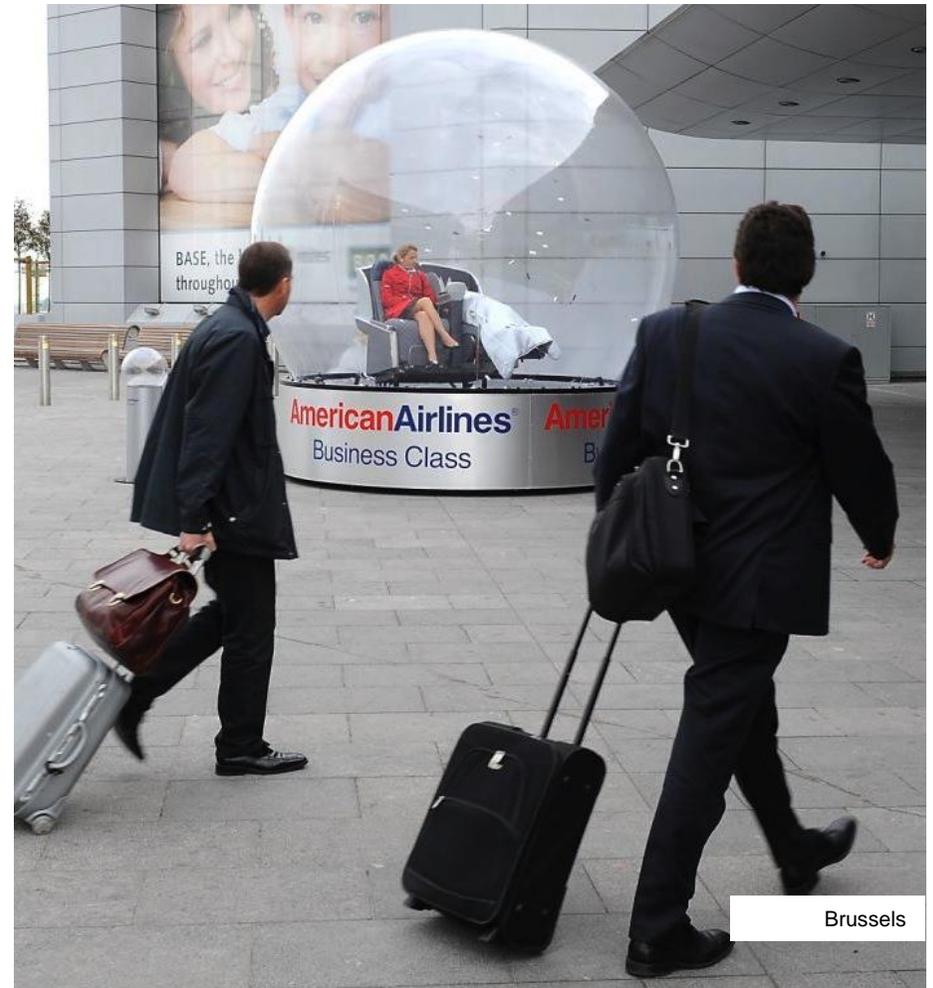
# 85%

International Frequent Flyers  
enjoy airport advertising

“ Without ads the airport would  
be stark & boring ”

(F, USA)

(F, USA)



# 67%

expect to see international brands

**“ You feel it is a powerful brand ”**

(M, UAE)



New York JFK

# 91%

agree brands benefit from advertising in airports

## Top perceptions

Appropriate for airports

Visually appealing Makes airports more attractive

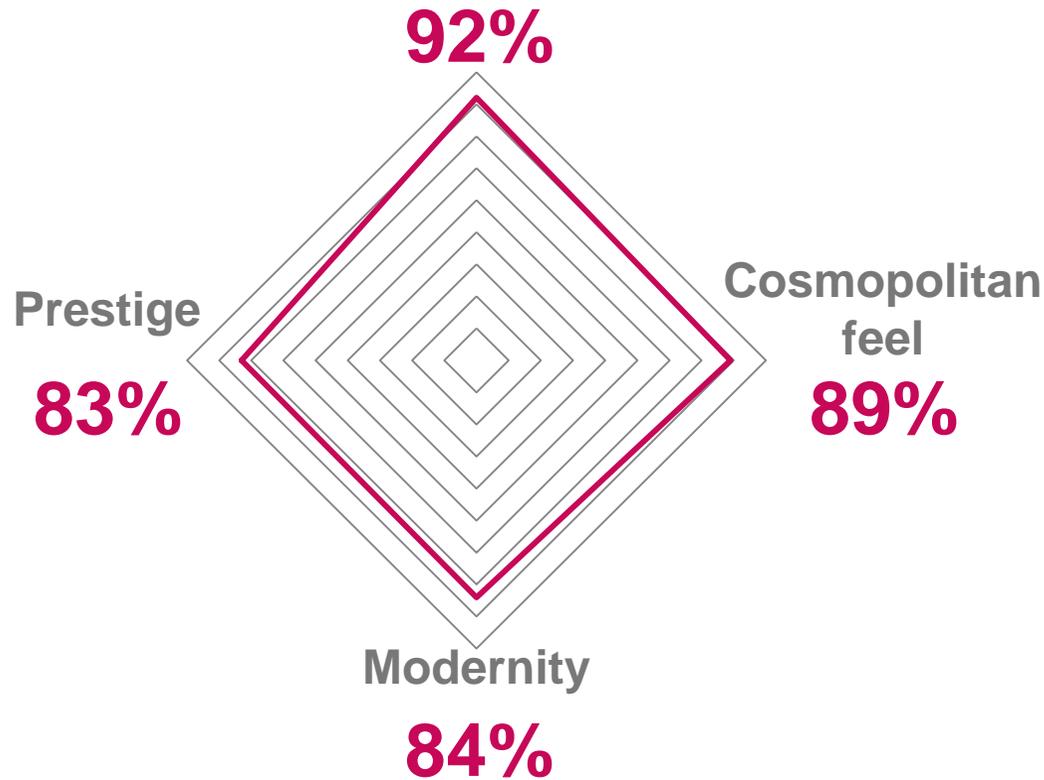
Well integrated with the airport environment

Well designed



 Airport advertising increases brands' ...

International status



Shanghai

**84%** Helps brands **increase sales**

*“ You couldn ’ t buy it in the airport but afterwards I had a look at the new Jaguar ” M, UK*

**“ With a cleverly chartered advertising route through the airport, travelers are welcomed by the Clarins ad and escorted all the way through to the point of sale. Definitely a great success ”**

Damien Tonneau, Clarins  
Travel Retail Regional Director Asia Pacific

TRAVEL RETAIL REGIONAL DIRECTOR ASIA PACIFIC  
DAMIEN TONNEAU, CLARINS



# Airportstories

## World



The airport advertising arena:  
going further

## Digital Impact & Intimate



*“Airport advertising will catch your attention because a lot of times they're interactive now with the screens” (USA, F, 45)*

## Experiential Elevate & Entertain



*“They are telling us to come and discover. They are raising curiosity about the brand.” (UAE, M)*

## Sponsored Services Function & Fun



*“We are in a hurry at the airport. So if at that time we get some sort of service it will create a lasting impression.” (UAE, M)*

for more powerful **brand engagement**

Impact

# 65%

Changes make digital stand out

Intimate

# 83%

Want more interactive screens



Frankfurt



London Heathrow

Elevate

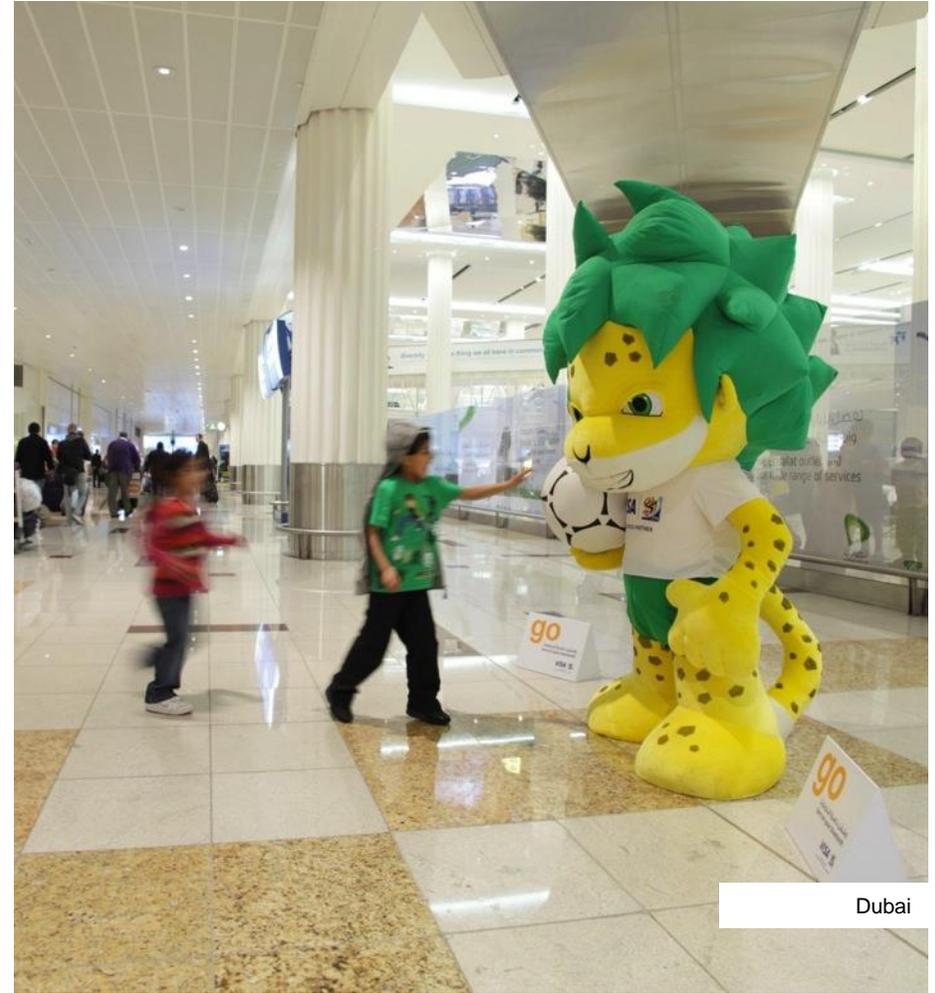
82%

Want more activities, services & distractions

Entertain

75%

Enjoy looking at exhibits



Dubai

# Sponsored services: function & fun

Function

77%

Free Wi-Fi access

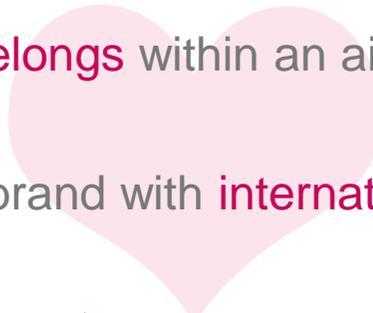
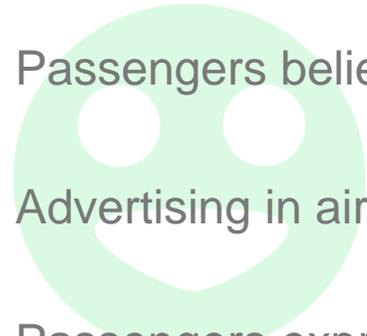
Fun

51%

TV (News, sport, weather, etc)



- ✈️ Airport advertising is the only medium forecast to **double** its audience within the next 20 years
- ✈️ The airport arena creates a **positive pre-disposition** toward brand communications
- ✈️ Passengers believe **advertising belongs** within an airport
- ✈️ Advertising in airports bestows a brand with **international status, prestige and power**
- ✈️ Passengers express a desire for **greater engagement** with airport advertising
- ✈️ Airport advertising is the only medium able to deliver a powerful and memorable **universal brand experience** across the globe



*The Airport Advertising Arena*  
creating  
*The Universal Brand Experience*  
for  
*Global Brand Acceleration*

