

CAPA Summit

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Sydney Airport



KERRIE MATHER
MANAGING DIRECTOR AND
CHIEF EXECUTIVE OFFICER





Changes to our geopolitical environment, technology and business partnerships is creating growth potential



Macroeconomic factors

International political context and environment

Trade and bilateral agreements

Safety and security focus

Technology

Advances in aircraft technology

Automation of airport processes and operations

Customer control of journey experience

Open data improving efficiency, safety and security

Collaboration

New airline business models – LCCs, partnerships and codeshares

Customer driven investment requirements

Sustainability focus on long-term outcomes

Our increasingly diverse international market



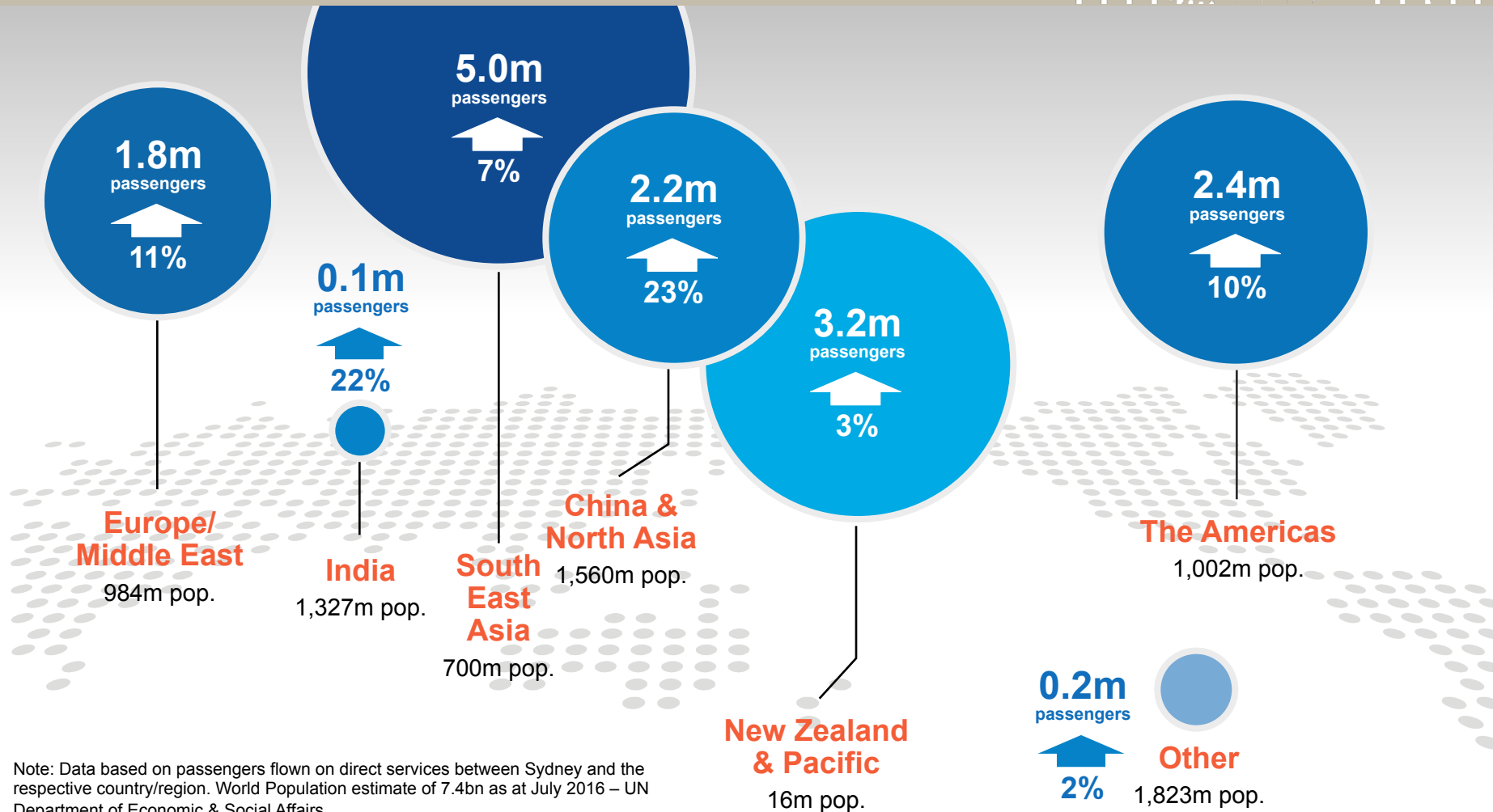
Sydney is a direct flight from 70% of the world's population



Our passenger profile is changing



Traditional markets remain important, with strong pan-Asian growth



Case study: China market strong and growing



Free trade and bilateral agreements supporting ongoing growth – creating new markets and opportunities for differentiation

Australia set to become the fourth most desirable destination for Chinese tourists

- 2016 air services agreement supporting growth
- CSLA predict continued strong growth in passenger numbers over next three years
- Chinese market consists of variety of passenger profiles:
 - Frequent independent travellers on established routes – often repeat visitors to Australia
 - Growing middle class driving demand for tour groups
- Natural attractions and quality food and wine experiences contribute to Australia's appeal

Frequent independent travellers

Beijing
Shanghai
Guangzhou

Growing middle class

Xi'an
Chongqing
Nanjing
Shenzhen
Fuzhou
Xiamen
Kunming
Wuhan
Changsha
Chengdu

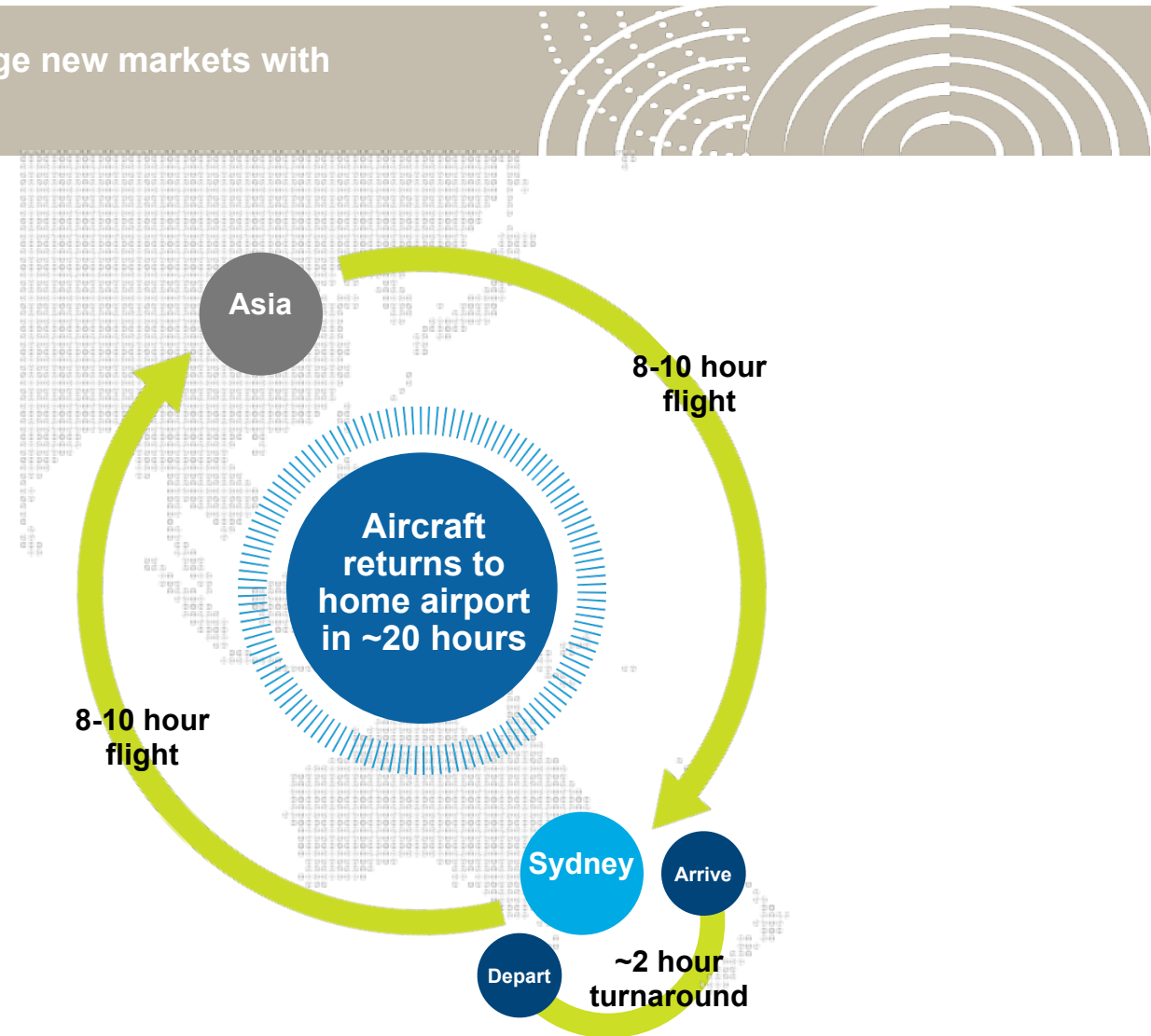
Next generation aircraft and new airline business models are changing aviation markets we serve



Opportunities for airports to work with airlines to leverage new markets with improvements in aircraft technology

Daily Asian flights can be served by a single aircraft

- Delivers significant competitive advantage compared to Asia to Europe or North America
- 8-10 hour sector is also ideal length for long haul, low-cost airlines
 - Scoot (SYD was the first global destination)
 - Cebu Pacific (SYD was the first Australian destination)
 - Jetstar
 - AirAsia X

















Technology strategy



Our technology strategy is aligned to business objectives and customer requirements



KEY BUSINESS OBJECTIVES	TECHNOLOGY THEMES
 Customer centric	RESILIENT, 24X7 CORE TECHNOLOGY OPERATIONS 
 Productivity & efficiency	FLEXIBLE & RESPONSIVE WORK PLACE 
 Enterprise decisions	PEOPLE-CENTRIC DIGITAL EXPERIENCES 
 Growth	CUSTOMER ENGAGEMENT & INTIMACY 
 Sustainable & responsible	DATA-DRIVEN DECISION MAKING 
 Agile & coordinated	CONNECTED AIRPORT ECOSYSTEM 
 Operational resilience	TRANSFORMED TECHNOLOGY OPERATING MODEL 



We are adapting to meet the customer's needs, and improve their experience through technology



Getting to
the airport

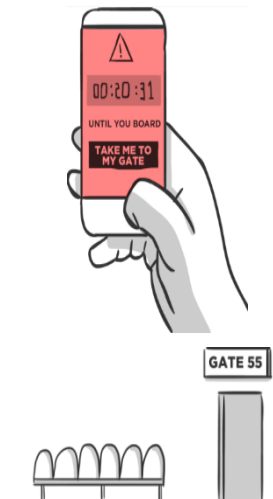
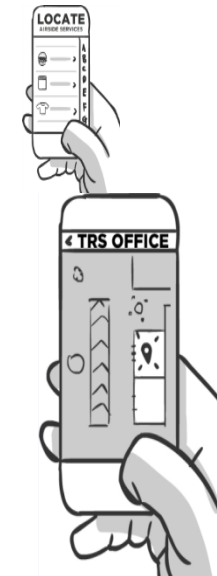
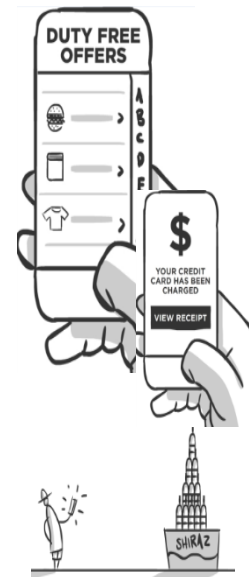
Check-in and
baggage

Security and
immigration

Retail
experience

Wayfinding

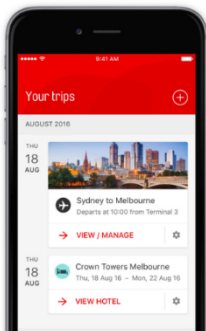
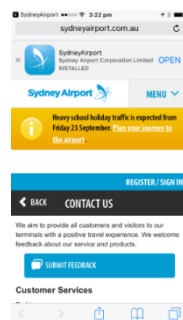
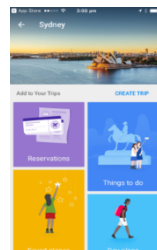
Aircraft
departure



Putting customers in charge of their airport experience

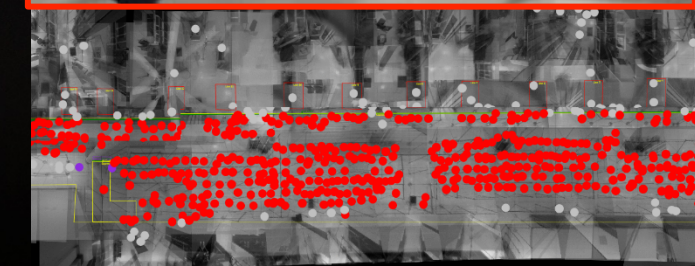
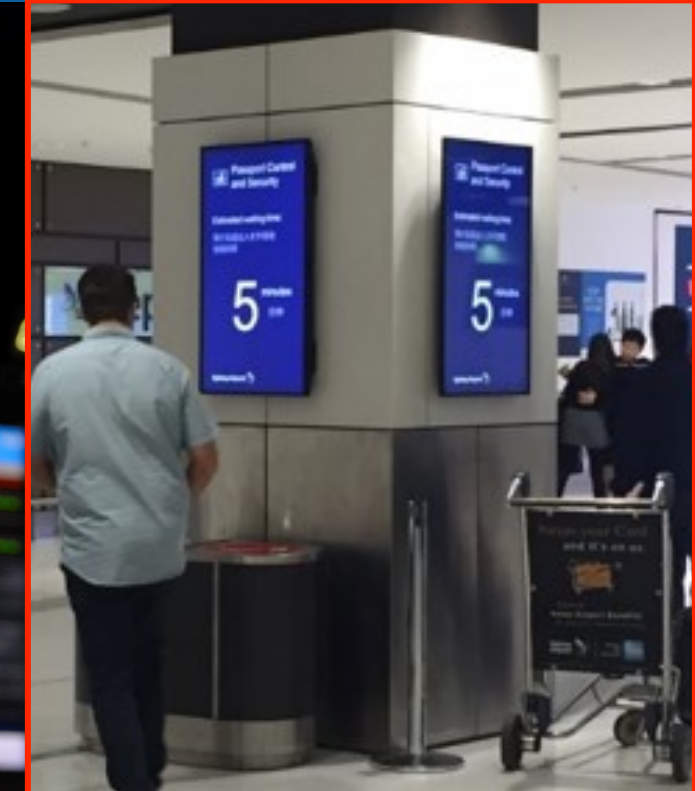


Open data is getting our information to customers via their preferred channel





Technology is helping us work together more effectively on safety and security issues





Our new airline agreements set the agenda for investment to meet airline customer and passenger needs





New facilities and products addressing changes in passenger mix





Autonomous vehicles, modal choice and new public transport options to meet future demand



TRAINS

Two train stations, with services every six minutes in peak times



TAXIS AND RIDE SHARING

New pick-up zones to cater for a wider range of transport options



ACTIVE TRANSPORT

New pedestrian and cycle paths to access our terminals



BUSES

Planned ground access improvements to cater for more buses



MORE PARKING

More car parking spaces across eight car parks

Airport infrastructure must flexibly respond to customer demand and advances in technology





Working with tourism and industry partners to drive visitor economy

Sydney and NSW's visitor economy is a competitive advantage for the local aviation industry

32%

of Australia's GDP

.....

41%

of Australia's leading 500 companies

600

Multinationals

.....

31%

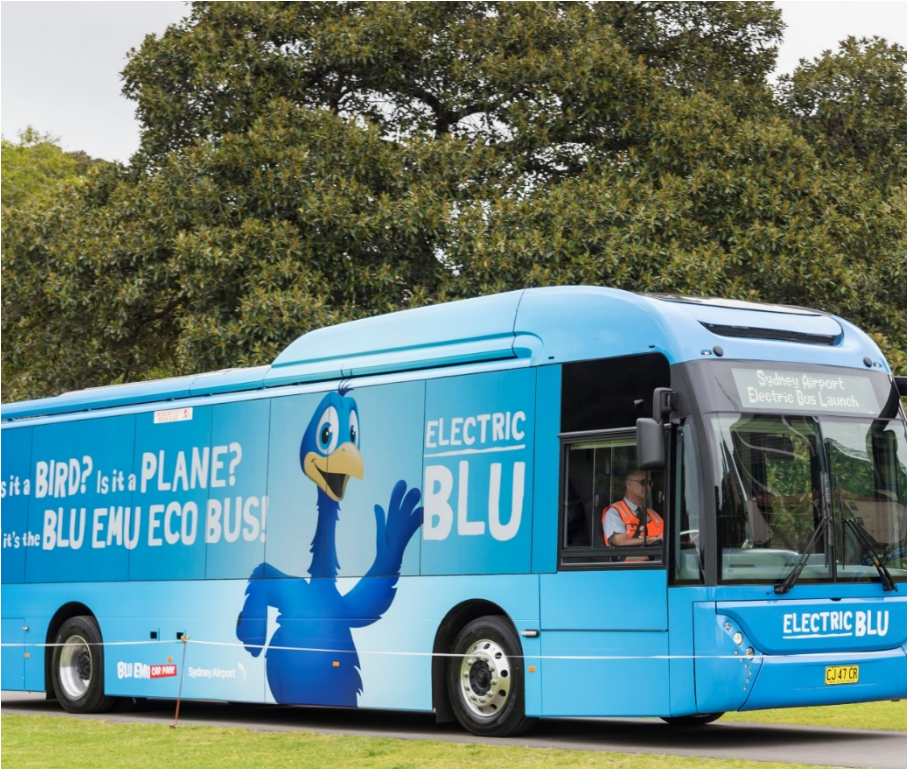
of Australia's 24.5 million population in the catchment

Our tourism partners





Working together with our communities to support our sustainable growth



INTEGRITY
AND OPENNESS



SAFETY
AND SECURITY



EXCELLENCE



TEAMWORK



CREATIVITY
AND FLEXIBILITY



SUSTAINABILITY



Being a good neighbour vital to our people and our future growth



**Thank you
for your attention**

