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FUTURES STUDY

A Strategic Roadmap for the Next Generation of Airports

**AIRPORT
NEXT**



Prepared by AirportNEXT Solutions Inc.
In partnership with Airports Council International - North America



Dear Reader,

ACI-NA has partnered with AirportNEXT to develop a new thought-leadership piece for our industry: 2026 Futures Study - A Strategic Roadmap for the Next Generation of Airports.

This Futures Study identifies key trends affecting airports over the next 3 - 5 years, and potential strategies with case studies to address them.

It can be used on a stand-alone basis to support an airport's strategic planning and master planning work. It has also been designed to help airports address key focus areas identified by stakeholders in their AirportNEXT assessments.

The work is based on extensive feedback and validation from ACI members as well as comprehensive research and analysis by the AirportNEXT team. We extend our thanks to the many airports which participated in the outreach and to all those involved in bringing it to life.

This Study represents the second project in the long-term partnership between ACI-NA and AirportNEXT Solutions Inc. Along with our ongoing AirportNEXT Stakeholder Engagement program, our current plan is to reproduce the Futures Study every two years.

We hope you enjoy this Study and find it helpful in navigating the future.

A handwritten signature in dark blue ink, reading "Kevin M. Burke".

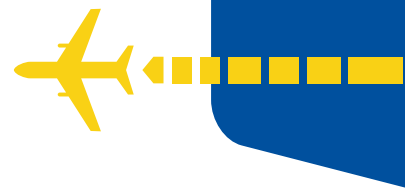
Kevin M. Burke
President and CEO
ACI-NA

A handwritten signature in dark blue ink, reading "Paul Ouimet".

Paul Ouimet
Chairman
AirportNEXT Solutions Inc.



Executive Summary



This Futures Study identifies key trends affecting airports over the next 3 - 5 years, and potential strategies with case studies to address them. The Study was conducted in two phases.

PHASE 1

Strategic radar mapping and AI-assisted research identified 55 trends that will impact airports over the next 3 - 5 years.

A survey was then sent out, with 320 airport executives ranking these trends.



PHASE 2

Potential strategies were discussed by airport CEOs during an interactive session at the 2026 ACI-NA CEO Forum.

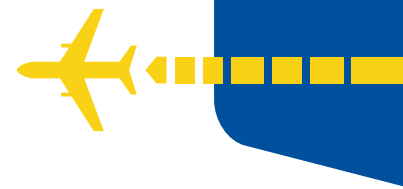
The project team, using AI-assisted research tools, further expanded on these strategies and developed case studies to support them. The strategies were then sent out to 32 AirportNEXT airports for final vetting and validation.

The strategies and case studies are organized into 12 variables using the AirportNEXT Stakeholder Engagement model.



Together these phases identify the aviation industry's most important trends, then translate them into 120 airport strategies and 72 case studies from 61 North American airports.

Top 25 Trends



320 airport executives responded to the survey, representing a diverse range of airports across the USA and Canada.

They evaluated 55 trends, on a scale of 0 to 5, based on how important each trend will be in the next 3 - 5 years. The top 25 trends are shown below.

	TREND	SCORE
1	Cybersecurity threats to operational technology systems demand continuous investment and training	4.63
2	A slowing economy reduces passenger demand, delays capital projects, and pressures airports to diversify revenue and control operating costs	4.18
3	Governments face monetary constraints to properly fund airport investments and support the aviation industry	4.13
4	Rising interest rates increase financing costs for airport capital projects	4.05
5	Skilled labor shortages persist in maintenance, security, and technical roles	4.01
6	5G and private wireless networks enhance connectivity for airside, ground operations and passengers	3.89
7	Smart energy systems optimize terminal heating, cooling and power consumption	3.85
8	Airport systems shift to cloud-based platforms for increased scalability and to manage cybersecurity risk	3.79
9	Accessibility and inclusion standards expand for passengers with disabilities	3.75
10	Expansion of biometrics and touchless processing across all aspects of the passenger journey	3.60
11	Artificial intelligence automates airport operations, from predictive maintenance to passenger flow management and experience	3.57
12	Global aging population changes passenger needs and service expectations	3.56
13	Advanced air traffic management systems integrate traditional and new airspace users (e.g. virtual towers, drones, eVTOLs)	3.56
14	Younger generations expect seamless digital travel and social responsibility from airports	3.55
15	Retail and food offerings shift toward local, sustainable, and experiential concepts	3.50
16	Air navigation modernization programs alter route structures and delay management	3.46
17	Volatile fuel prices drive cost management and airline network adjustments	3.44
18	Local community engagement becomes essential to maintain airport operating approvals	3.44
19	Global trade tensions and protectionism alter air routes and air cargo demand	3.43
20	Increased insurance costs and risk management complexity from extreme weather events	3.39
21	Air cargo growth continues from e-commerce and high-value goods logistics	3.38
22	Passengers expect personalized digital services that anticipate their needs, offering tailored flight updates, retail offers, and wayfinding	3.37
23	New revenue streams emerge from data monetization and digital services	3.31
24	Long-haul narrowbody aircraft create new point-to-point international routes	3.30
25	Upskilling programs expand as airports transition toward AI and digital solutions	3.30

Key Trends Takeaways

There were several general takeaways from the survey.

- Cybersecurity threats were considered to be the most important trend, by a significant margin, universally across all types of airports, management roles, and for both countries.
- Three of the top five trends were concerns over economic conditions: slowing economy, government funding challenges, and rising interest rates.
- There is significant concern about skilled labor shortages in maintenance, security, and technical roles.
- Four major themes emerged from a cluster analysis of the top 25 trends, shown below:

Major Themes

TOUGH BUSINESS CONDITIONS & ECONOMIC UNCERTAINTY

Concerns about several business and economic factors which will negatively impact airports.

Slowing economy	[2]
Government funding challenges	[3]
Rising interest rates	[4]
Skilled labor shortages	[5]
Volatile fuel prices	[17]
Global trade tensions	[19]

ADVANCED TECHNOLOGY INNOVATION AND ADOPTION

Significant opportunities to adopt new technologies to improve airport experience and productivity.

5G enhanced connectivity	[6]
Smart energy systems	[7]
Biometrics	[10]
Artificial intelligence	[11]
Advanced air traffic management	[13]
Seamless digital travel	[14]
Air navigation modernization	[16]
Personalized digital services	[22]
Data monetization	[23]

ACCELERATION IN RISK MANAGEMENT

Increased focus on cybersecurity threats and other risk factors impacting airports.

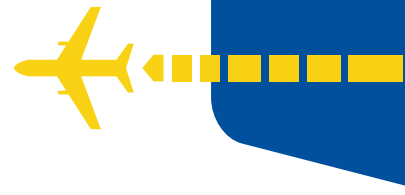
Cybersecurity threats	[1]
Robust cloud-based platforms	[8]
Extreme weather events	[20]

SHIFTING COMMUNITY EXPECTATIONS

Increasing significance of community values and expectations about airport facilities and services.

Accessibility standards	[9]
Global aging population	[12]
Retail and food options	[15]
Local community engagement	[18]

Trend Demographic Differences



There were many notable differences in rankings, among four distinct groups of airports and respondents.

AIRPORT SIZE:

- Larger airports apply higher importance to passenger experience using digital systems.
- Medium and large airports place very high importance on premium travel and lounge experiences.
- Small and medium sized airports believe they will be greatly affected by the tough economic conditions.
- Smaller airports view limited production of new small aircraft as a major threat.

USA VS. CANADA:

- Government funding constraints and skilled labor shortages are significant concerns in both countries, and an even greater concern in the USA.
- Limited production of small aircraft is a major issue for Canadian airports.
- Canada gives higher importance to international and geopolitical air service dynamics.
- Climate, ESG, and sustainability trends are ranked higher in Canada than in the USA.

MANAGEMENT ROLE:

- CEOs ranked the need for more local community engagement the highest of all management roles.
- Commercial Development respondents place greater importance on macro trends impacting revenue and market growth.
- Although AI in general was a highly important trend, there is significant variation across management on the need for AI upskilling programs.
- CEOs ranked three trends significantly higher than every other management group (limited production of new small aircraft, financial burden from health screening standards, and acceleration of dynamic aeronautical pricing models).

GENERAL & BUSINESS AVIATION:

- General & business aviation airports place much greater importance on local community engagement.
- General & business aviation airports give a higher ranking to risk from extreme weather events.
- Pressure to improve ground transportation offerings is of greater importance to general & business aviation airports.
- General & business aviation airports give a higher importance to their community and environmental concerns.

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FUTURES STUDY



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1. Introduction

Airports are operating in a time of dramatic change and uncertainty.

Technology is advancing at an alarming rate. Geopolitical tension is creating global chaos. Economic and financial conditions are facing strong headwinds. Shifting demographics and community values are creating new demands. Government ideology and policies are in a state of flux. All of these factors are creating both opportunities and challenges for airports around the world.

This Futures Study was developed to assist airports in preparing for the forces that will define the next generation of airport infrastructure and operations.

This report serves three purposes:

- Provide a data-driven ranking of the most important trends impacting the aviation industry over the next 3 - 5 years;
- Identify potential strategies airports can use to overcome and adapt to these trends; and
- Include case studies to provide real-world, practical examples of these strategies in action.

Work began on the Futures Study in late 2025 and took nine months to complete.

The Study can be used on a stand-alone basis to support an airport's strategic planning and master planning work. It has also been designed to help airports address key focus areas identified by stakeholders in their AirportNEXT assessments.



A Note from the Authors

Our project team wants to acknowledge several significant developments which have occurred since the survey was completed in January 2026.

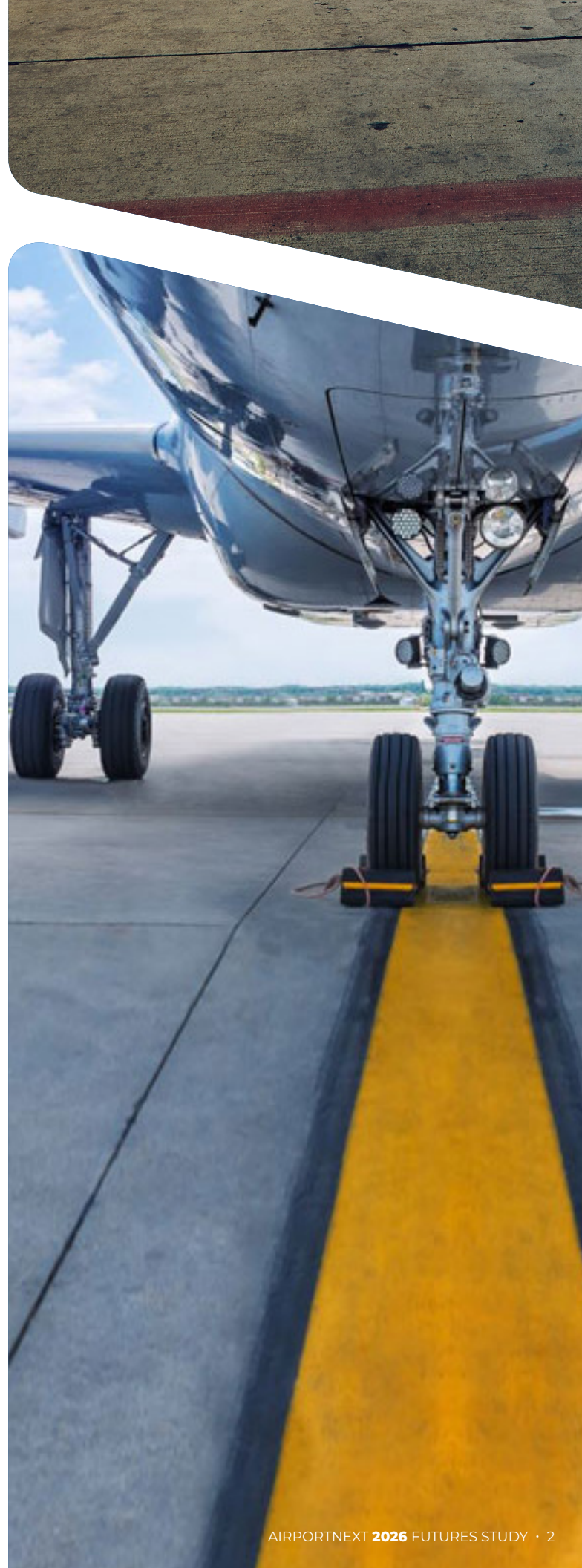
These include:

- War in Iran in February 2026 and escalating conflict in Eastern Europe and across the Middle East;
- Increased concern over global shipping, supply-chain security, and international trade policies;
- Uncertain and volatile conditions for fuel prices and availability.

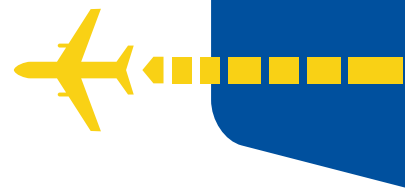
While these developments are significant, we believe that the takeaways from the survey remain relevant and valid.

The key trends impacted by these new developments were already ranked very high by respondents, shown by the theme cluster of Tough Business Conditions and Economic Uncertainty.

In light of these events, these scores would be higher. Scores in other areas are expected to remain relatively unchanged.



2. Methodology



PHASE 1

Trends

The first phase of the Futures Study focused on identifying and ranking key trends that will impact airports over the next 3 - 5 years.

Trend identification began with an environmental scan, structured around a strategic radar map organized into eight distinct categories, shown in Figure 1.

This was used as a framework for AI-assisted research tools to develop a comprehensive, initial list of trends, as well as perform bias reviews on the final selection. Three AI models were used in this Futures Study, carefully distributed over seven different jobs, described in Appendix B.

Lastly, the final selection and validation of the trends was done by the Futures Study Project Team, shown in Appendix D.



Figure 1: Strategic radar map of trend categories.

The Survey

The selected 55 trends were distributed as a survey to airport executives across North America. The survey respondents were asked to rate the importance of each trend on a Likert scale with the displayed options, and their numeric conversions.

Consolidating the results from this survey produces a comprehensive, industry-validated trends ranking that forms the backbone of this report.

Likert Scale

Not important	0
Slightly important.....	1.25
Moderately important	2.5
Important	3.75
Very important.....	5

Strategies and Case Studies

The second phase of the Futures Study focused on developing actionable strategies and real-world case studies to help airports respond to the trends identified in Phase 1.

Strategy development began at the 2026 ACI-NA CEO Forum in Bonita Springs, Florida. During a dedicated interactive session, airport executives were presented with four key takeaways from the highest-ranked 25 trends. Using facilitation software, they contributed 126 strategies and replies in response to the trends. This session provided the foundation for the strategies developed in this report.

Building on the CEO Forum input, the Futures Study Project Team further developed and refined the strategies through AI-assisted research and structured analysis.

The strategies were then organized into the 12 variables of the AirportNEXT Stakeholder Engagement model, and sent to 32 AirportNEXT airports for final review and validation. These airports are shown in Appendix A.

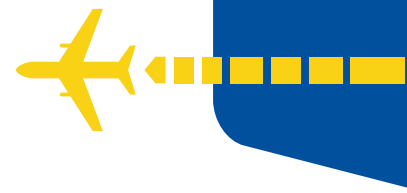
To complement the strategies, real-world case studies are included as practical examples of airports that have successfully implemented them.

The end result of Phase 2 is 120 strategies and 72 case studies from 61 North American airports, organized into the 12 AirportNEXT variables.



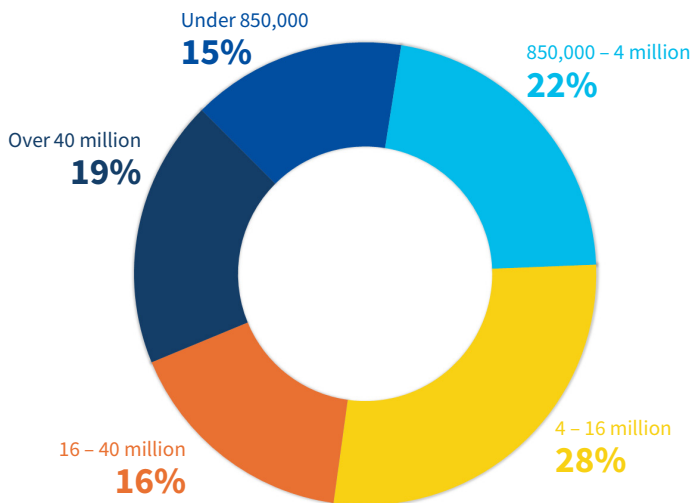
Figure 2: Mapping of the strategies and case studies into the 12 AirportNEXT Stakeholder Engagement Variables

3. Trend Results

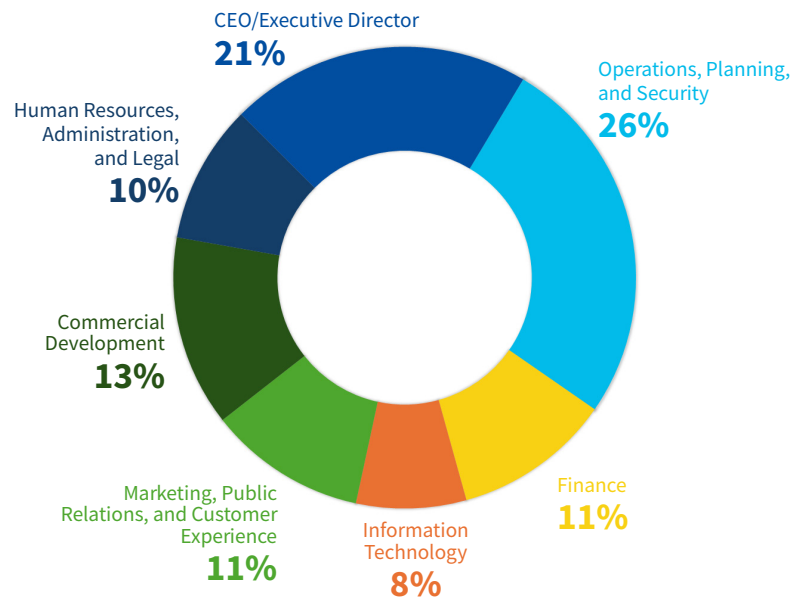


320 airport executives responded to the survey from a wide variety of management roles. They represent airports of different sizes, including general aviation, across the USA and Canada.

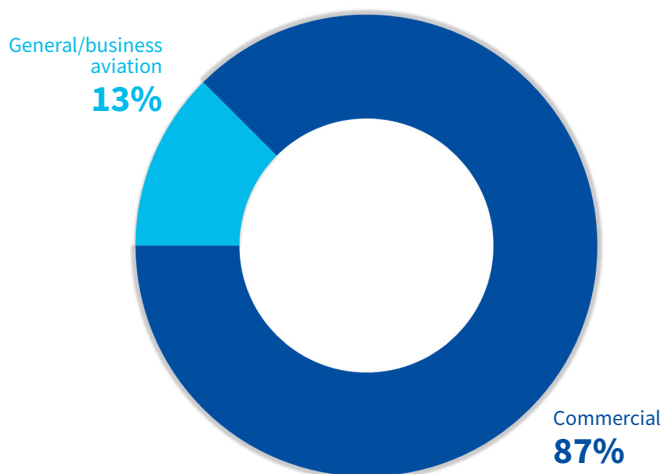
Airport Size (E/D PAX)



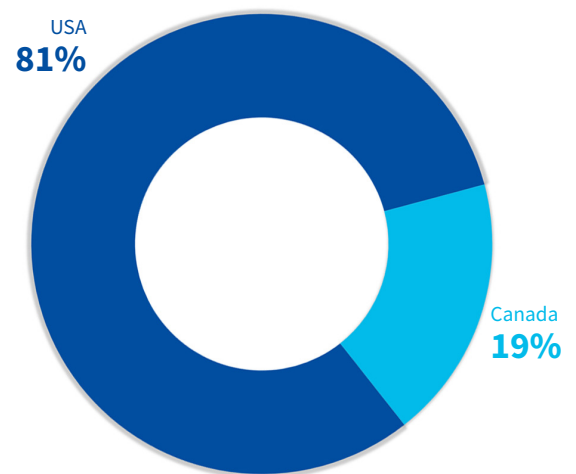
Executive Role



Primary Type of Operation



Airport Country



Overall Ranking

The overall ranking of all 55 trends is shown below, scored on a scale of 0 to 5, based on how important each trend will be in the next 3 - 5 years.

	TREND	SCORE
1	Cybersecurity threats to operational technology systems demand continuous investment and training	4.63
2	A slowing economy reduces passenger demand, delays capital projects, and pressures airports to diversify revenue and control operating costs	4.18
3	Governments face monetary constraints to properly fund airport investments and support the aviation industry	4.13
4	Rising interest rates increase financing costs for airport capital projects	4.05
5	Skilled labor shortages persist in maintenance, security, and technical roles	4.01
6	5G and private wireless networks enhance connectivity for airside, ground operations and passengers	3.89
7	Smart energy systems optimize terminal heating, cooling and power consumption	3.85
8	Airport systems shift to cloud-based platforms for increased scalability and to manage cybersecurity risk	3.79
9	Accessibility and inclusion standards expand for passengers with disabilities	3.75
10	Expansion of biometrics and touchless processing across all aspects of the passenger journey	3.60
11	Artificial intelligence automates airport operations, from predictive maintenance to passenger flow management and experience	3.57
12	Global aging population changes passenger needs and service expectations	3.56
13	Advanced air traffic management systems integrate traditional and new airspace users (e.g. virtual towers, drones, eVTOLs)	3.56
14	Younger generations expect seamless digital travel and social responsibility from airports	3.55
15	Retail and food offerings shift toward local, sustainable, and experiential concepts	3.50
16	Air navigation modernization programs alter route structures and delay management	3.46
17	Volatile fuel prices drive cost management and airline network adjustments	3.44
18	Local community engagement becomes essential to maintain airport operating approvals	3.44
19	Global trade tensions and protectionism alter air routes and air cargo demand	3.43
20	Increased insurance costs and risk management complexity from extreme weather events	3.39
21	Air cargo growth continues from e-commerce and high-value goods logistics	3.38
22	Passengers expect personalized digital services that anticipate their needs, offering tailored flight updates, retail offers, and wayfinding	3.37
23	New revenue streams emerge from data monetization and digital services	3.31
24	Long-haul narrowbody aircraft create new point-to-point international routes	3.30
25	Upskilling programs expand as airports transition toward AI and digital solutions	3.30
26	Premium travel and lounge experiences expand as airlines target high-yield customers	3.29
27	Smart terminal design incorporates modular, rapidly reconfigurable spaces	3.26
28	Dynamic wayfinding systems use sensors and digital signage to guide passengers through congestion	3.25

Overall Ranking

	TREND	SCORE
29	Cultural and local immersion becomes a differentiator in airport dining and design themes	3.19
30	Airline bankruptcies or mergers create volatility for airports	3.18
31	Limited production of new small aircraft constrains air service to smaller airports, reducing connectivity and increasing reliance on larger hubs	3.16
32	Slot constraints at major hubs accelerate growth at secondary and regional airports	3.15
33	Visa and border policies tighten in response to migration and security pressures, slowing international passenger traffic	3.15
34	Real-time language translation tools enhance accessibility for international travelers	3.14
35	Growing community pressure to improve multiple connected transportation options for passengers and workers (e.g. rail, bus, metro, rideshare)	3.09
36	Digital twins enable real-time monitoring and optimization of airport infrastructure performance	3.07
37	Robotics and sensor technologies improve operations and enhance passenger experience	3.05
38	Electric/hydrogen aircraft and ground equipment require new fueling, charging, and ground infrastructure	3.04
39	National security concerns and protectionism increase restrictions on foreign ownership and technology supply chains	3.01
40	Growing financial burden surrounding intensifying health screening standards, robust passenger bill of rights, and increased monetary penalties for irregular operations	2.98
41	Conflicts and political instability disrupt overflight routes	2.97
42	Noise and emissions concerns drive restrictions on airport growth and operations	2.93
43	Automation and robotics improve efficiencies and reduce airport staffing requirements	2.89
44	Dynamic aeronautical pricing models accelerate based on congestion, time of day, or sustainability metrics	2.88
45	Community expectations increase for airports to demonstrate climate action and environmental transparency	2.87
46	Passengers expect retail-street pricing at the airport	2.79
47	Airports adopt stronger environmental, social, and governance (ESG) reporting practices	2.74
48	Public-private partnerships reshape airport ownership and investment models	2.72
49	Diversity, equity, and inclusion initiatives remain central to airport workforce strategies	2.71
50	International climate agreements push airports toward net-zero targets	2.67
51	Pressure grows for airports to reduce single-use plastics and visible waste	2.59
52	Rapid growth in middle-class travelers from Asia and Africa reshapes global traffic patterns	2.45
53	Airport retail faces competition from e-commerce and pre-order delivery models	2.37
54	Green bonds, ESG-linked loans, and sustainability metrics shape airport financing and investor relations	2.36
55	Growth of autonomous airside vehicles for baggage handling and aircraft towing	2.28

General Takeaways

There were several general takeaways from the survey.

- Cybersecurity threats were considered to be the most important trend, by a significant margin, universally across all types of airports, management roles, and for both countries.
- Three of the top five trends were concerns over economic conditions: slowing economy, government funding challenges, and rising interest rates.
- There is significant concern about skilled labor shortages in maintenance, security, and technical roles.
- Four major themes emerged from a cluster analysis of the top 25 trends, shown below:

Major Themes

TOUGH BUSINESS CONDITIONS & ECONOMIC UNCERTAINTY

Concerns about several business and economic factors which will negatively impact airports.

Slowing economy	[2]
Government funding challenges	[3]
Rising interest rates	[4]
Skilled labor shortages	[5]
Volatile fuel prices	[17]
Global trade tensions	[19]

ADVANCED TECHNOLOGY INNOVATION AND ADOPTION

Significant opportunities to adopt new technologies to improve airport experience and productivity.

5G enhanced connectivity	[6]
Smart energy systems	[7]
Biometrics	[10]
Artificial intelligence	[11]
Advanced air traffic management	[13]
Seamless digital travel	[14]
Air navigation modernization	[16]
Personalized digital services	[22]
Data monetization	[23]

ACCELERATION IN RISK MANAGEMENT

Increased focus on cybersecurity threats and other risk factors impacting airports.

Cybersecurity threats	[1]
Robust cloud-based platforms	[8]
Extreme weather events	[20]

SHIFTING COMMUNITY EXPECTATIONS

Increasing significance of community values and expectations about airport facilities and services.

Accessibility standards	[9]
Global aging population	[12]
Retail and food options	[15]
Local community engagement	[18]

Demographic Differences

There were many notable differences in rankings, among four distinct groups of airports and respondents.

Demographic: Airport Size (E/D PAX)

» Larger airports apply higher importance to passenger experience using digital systems

	TREND	UNDER 850K	850K – 4M	4M – 16M	16M – 40M	OVER 40M
6	5G and private wireless networks enhance connectivity for airside, ground operations and passengers	16	6	7	7	2
10	Expansion of biometrics and touchless processing across all aspects of the passenger journey	27	14	17	14	3
22	Passengers expect personalized digital services that anticipate their needs, offering tailored flight updates, retail offers, and wayfinding	48	16	20	27	11
25	Upskilling programs expand as airports transition toward AI and digital solutions	24	32	29	32	7
28	Dynamic wayfinding systems use sensors and digital signage to guide passengers through congestion	53	29	21	19	15

» Medium and large airports place very high importance on premium travel and lounge experiences

	TREND	UNDER 850K	850K – 4M	4M – 16M	16M – 40M	OVER 40M
26	Premium travel and lounge experiences expand as airlines target high-yield customers	50	37	13	10	8

» Small and medium sized airports believe they will be greatly affected by the tough economic conditions

	TREND	UNDER 850K	850K – 4M	4M – 16M	16M – 40M	OVER 40M
2	A slowing economy reduces passenger demand, delays capital projects, and pressures airports to diversify revenue and control operating costs	2	2	2	3	22
3	Governments face monetary constraints to properly fund airport investments and support the aviation industry	1	3	3	5	24
4	Rising interest rates increase financing costs for airport capital projects	6	4	5	2	13
20	Increased insurance costs and risk management complexity from extreme weather events	7	11	30	26	43

» Smaller airports view limited production of new small aircraft as a major threat

	TREND	UNDER 850K	850K – 4M	4M – 16M	16M – 40M	OVER 40M
31	Limited production of new small aircraft	4	10	36	52	54

Demographic: USA vs. Canada

- » Government funding constraints and skilled labor shortages are significant concerns in both countries, and an even greater concern in the USA

	TREND	USA	CANADA
3	Governments face monetary constraints to properly fund airport investments and support the aviation industry	2	11
5	Skilled labor shortages persist in maintenance, security, and technical roles	4	14

- » Limited production of small aircraft is a major issue for Canadian airports

	TREND	USA	CANADA
31	Limited production of new small aircraft constrains air service to smaller airports, reducing connectivity and increasing reliance on larger hubs	40	3

- » Canada gives higher importance to international and geopolitical air service dynamics

	TREND	USA	CANADA
19	Global trade tensions and protectionism alter air routes and air cargo demand	24	7
24	Long-haul narrowbody aircraft create new point-to-point international routes	29	9
41	Conflicts and political instability disrupt overflight routes	42	36

- » Climate, ESG, and sustainability trends are ranked higher in Canada than in the USA

	TREND	USA	CANADA
45	Community expectations increase for airports to demonstrate climate action and environmental transparency	46	38
47	Airports adopt stronger environmental, social, and governance (ESG) reporting practices	49	30
50	International climate agreements push airports toward net-zero targets	51	20



Demographic: Management Role

- » CEOs ranked the need for more local community engagement the highest of all management roles

TREND		CEO/Executive Director	Commercial Development	Finance	Human Resources, Administration, and Legal	Information Technology	Marketing, Public Relations, and Customer Experience	Operations, Planning, and Security
18	Local community engagement becomes essential to maintain airport operating approvals	13	35	20	40	21	16	20

- » Commercial Development respondents place greater importance on macro trends impacting revenue and market growth

TREND		CEO/Executive Director	Commercial Development	Finance	Human Resources, Administration, and Legal	Information Technology	Marketing, Public Relations, and Customer Experience	Operations, Planning, and Security
19	Global trade tensions and protectionism alter air routes and air cargo demand	15	5	36	17	37	15	22
21	Air cargo growth continues from e-commerce and high-value goods logistics	35	6	14	18	24	31	16
30	Airline bankruptcies or mergers create volatility for airports	26	22	26	44	46	39	28
33	Visa and border policies tighten in response to migration and security pressures, slowing international passenger traffic	36	18	45	31	36	29	23

- » Although AI in general was a highly important trend, there is significant variation across management on the need for AI upskilling programs

TREND		CEO/Executive Director	Commercial Development	Finance	Human Resources, Administration, and Legal	Information Technology	Marketing, Public Relations, and Customer Experience	Operations, Planning, and Security
11	Artificial intelligence automates airport operations, from predictive maintenance to passenger flow management and experience	16	9	18	22	8	23	14
25	Upskilling programs expand as airports transition toward AI and digital solutions	22	34	16	13	20	33	35

- » CEOs ranked three trends significantly higher than every other management group

TREND		CEO/Executive Director	Commercial Development	Finance	Human Resources, Administration, and Legal	Information Technology	Marketing, Public Relations, and Customer Experience	Operations, Planning, and Security
31	Limited production of new small aircraft constrains air service to smaller airports, reducing connectivity and increasing reliance on larger hubs	11	40	27	30	43	22	50
40	Growing financial burden surrounding intensifying health screening standards, robust passenger bill of rights, and increased monetary penalties for irregular operations	29	43	39	46	44	43	42
44	Dynamic aeronautical pricing models accelerate based on congestion, time of day, or sustainability metrics	34	45	46	42	49	40	43

Demographic: General & Business Aviation

» General & business aviation airports place much greater importance on local community engagement

TREND	RANK
18 Local community engagement becomes essential to maintain airport operating approvals	4

» General & business aviation airports give a higher ranking to risk from extreme weather events

TREND	RANK
20 Increased insurance costs and risk management complexity from extreme weather events	7

» Pressure to improve ground transportation offerings is of greater importance to general & business aviation airports

TREND	RANK
35 Growing community pressure to improve multiple connected transportation options for passengers and workers (e.g. rail, bus, metro, rideshare)	14

» General & business aviation airports give a higher importance to their community and environmental concerns

TREND	RANK
42 Noise and emissions concerns drive restrictions on airport growth and operations	9
45 Community expectations increase for airports to demonstrate climate action and environmental transparency	8
47 Airports adopt stronger environmental, social, and governance (ESG) reporting practices	16
51 Pressure grows for airports to reduce single-use plastics and visible waste	29



4. Strategies

Airports can adopt a wide variety of strategies to address these trends. Some can be implemented in the short term while others will take longer.

The project team used the AirportNEXT Stakeholder Engagement model to organize all of the trends, strategies, and case studies into 12 applicable variables. The model, shown below, consists of six variables covering airport infrastructure & facilities and six variables covering the airport's alignment with key stakeholders.

INFRASTRUCTURE & FACILITIES VARIABLES



TERMINAL



TRANSPORTATION
ACCESS



COMMERCIAL
SERVICES



SECURITY



BORDER



TECHNOLOGY

STAKEHOLDER ALIGNMENT VARIABLES



AIRLINES



GOVERNMENT
RELATIONS



WORKFORCE
& CULTURE



COMMUNITY
SUPPORT



SUSTAINABILITY



ECONOMIC DEVELOPMENT
& TOURISM

The next page identifies the six key trends, and their overall ranking, for each of the 12 variables. The following pages identify potential strategies that airports should consider. Some airports have already implemented them. Others are considering them.

How to use this section:

- There is one page of strategies and case studies for each variable. Each page begins with a definition of the variable, and a high-level, key takeaway from the trends survey results.
- Potential strategies are listed in order of ease and speed of implementation, and organized into two classes: short-term (0 – 24 months) and medium-term (2 – 5 years).
- Case studies are lettered, such that strategies show which case study(ies) they apply to.
- Each case study's IATA airport code links to an external source and reference.

Trends by Variable



Six key trends, and their overall ranking, for each of the 12 AirportNEXT variables.

TERMINAL

Accessibility standards	[9]
Biometrics	[10]
Modular terminal design	[27]
Dynamic wayfinding	[28]
Digital twins	[36]
Robotics and sensor technologies	[37]

TRANSPORTATION ACCESS

Government funding challenges	[3]
Accessibility standards	[9]
Dynamic wayfinding	[28]
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Slowing economy	[2]
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Air cargo growth	[21]
Community pressure to improve transportation	[35]
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Terminal is defined by the quality and efficiency of the end-to-end passenger journey through the airport facility.

Terminals must modernize into smarter environments to meet rising passenger expectations, with technology playing a central role in delivering faster, more seamless experiences.

SHORT-TERM (0 – 24 months)

1. Implement baggage and check-in scorecards tracking first-bag, last-bag, and queue times, reviewed monthly with airlines, handlers, and airport teams. (B)
2. Conduct an accessibility walkthrough with a disability advisory group to prioritize quick terminal improvements and service fixes. (C)
3. Pilot self-service bag drop and common-use kiosks with resident airlines, including staffed assistance and measured check-in throughput. (C)
4. Upgrade adverse-weather playbooks with pre-agreed activation triggers for gate use, de-icing sequencing, passenger communication, and recovery. (D)
5. Approve a funded terminal refresh program covering power outlets, bottle-fill stations, quiet seating zones, and visible local-identity improvements. (C)

MEDIUM-TERM (2 – 5 years)

6. Deploy dynamic, real-time wayfinding with walk times and gate-change alerts, plus multilingual support across the terminal journey. (E)
7. Roll out common-use and swing gates with modular holdroom layouts that adapt to changing airline and passenger demand. (E)
8. Use digital twins and simulation tools to optimize gates, taxi times, passenger flow, and construction sequencing before major capital work. (A)
9. Modernize baggage systems with individual bag tracking and ramp-to-belt coordination to reduce delivery times and mishandling. (B, F)
10. Establish formal governance and reporting structures with milestone tracking, stress and accountability metrics, and public progress updates to keep multi-year terminal redevelopment programs on schedule without disrupting daily operations. (B)

AIRPORTNEXT MODEL FACTORS

- Check-in process and baggage drop-off
- Baggage-delivery times
- Signage and flight information displays
- Walk times
- Facilities for travelers with disabilities
- Passenger seating areas
- Environment's sense of place
- Making connections
- Taxiing time

CASE STUDIES

- YLV 2026** - Kelowna International modeled its largest-ever terminal expansion before building it, using a digital construction twin, advanced fire modeling, and a life-cycle assessment of building materials to de-risk a prefabricated mass-timber waffle roof. Factory-cut panels arrived with all mechanical and electrical openings in place, cutting site traffic by an estimated 90 percent.
- BUF 2024** - Buffalo Niagara International has pursued a phased terminal modernization: it renovated its passenger greeting and baggage-claim areas in its first major terminal overhaul in years, then drew on roughly \$19 million in federal Airport Terminal Program grants to modernize the terminal's heating and cooling systems, replace passenger boarding bridges, and rebuild the terminal access roadway as passenger volumes climbed back past pre-pandemic levels.
- LGA 2022** - LaGuardia's terminal rebuild emphasized accessibility, color-coded wayfinding, family and quiet spaces, and visible passenger-comfort upgrades. Four check-in islands shared by its resident airlines pair staffed counters with self-service kiosks and a central bag drop, showing how quick-win experience improvements can be embedded within a larger redevelopment program.
- DEN 2025** - Denver International keeps one of North America's busiest airports running through severe winter weather with 500 trained personnel and 209 pieces of airside equipment to clear six runways, 300 lane miles of roads, and 30 acres of parking. A dedicated "snowman" stationed in the FAA control tower serves as the single point of coordination between the airport and controllers and has helped earn DEN the 2024–2025 Balchen/Post Award for outstanding snow and ice removal operations.
- MCI 2023** - Kansas City opened a single modern terminal with clearer passenger flow, expanded holdrooms, stronger local design cues, and more adaptable gate and queuing areas, replacing fragmented legacy facilities with a more flexible operating model.
- SLC 2026** - Salt Lake City International's new baggage-handling system, delivered as part of its \$5.1 billion terminal redevelopment, uses nine miles of conveyor belts and 100% RFID bag tracking on Delta flights to move checked bags from counter to aircraft in 30 minutes on average.



Transportation Access is defined by the availability and quality of public and personal transportation to and from the airport.

Governments are struggling to meet community pressure to improve transportation access to and from airports, largely from funding challenges.

SHORT-TERM (0 – 24 months)

1. Clarify curbside rules, lane assignments, dwell-time limits, and enforcement for private vehicles, taxis, buses, and rideshare. (C)
2. Optimize parking products, pricing, and occupancy management using cross-silo data and simpler customer communication. (C, F)
3. Create a coordinated operating forum with transit agencies, taxi operators, and rideshare providers, reviewing shared performance data. (A, B)
4. Grow non-aeronautical revenue from ground access with per-trip rideshare/TNC fees, dynamic and reserved/premium parking, and curb-management pricing. (B)
5. Build out EV charging infrastructure for rideshare, for-hire, and taxi fleets at staging and cell phone lots. (E)

MEDIUM-TERM (2 – 5 years)

6. Expand digital parking reservations, real-time space availability, and app-based pickup coordination across ground transportation modes. (F)
7. Introduce smarter curb allocation with dynamic rules by time of day, demand, or vehicle type, using dwell-time and throughput data. (B, C)
8. Adopt a multimodal ground access plan with mode-share targets covering transit, parking, active mobility, and employee commuting. (A, D)
9. Secure service commitments with local transit partners for more frequent, reliable, and airport-oriented routes. (A, D)
10. Deliver major access infrastructure projects such as transit integration, consolidated rental car or parking facilities, or full curbside reconfiguration. (D, F)

AIRPORTNEXT MODEL FACTORS

- Taxi and bus pick-up/drop-off areas
- Personal pick-up/drop-off areas
- Rideshare pick-up/drop-off areas
- Rideshare services
- Short-term parking
- Long-term parking
- Parking rates
- Cell phone waiting lot
- Public transportation
- Public transportation pricing
- Taxi service
- Roadway signage

CASE STUDIES

- LAX 2025** - Los Angeles International runs its own public bus network, FlyAway, where nonstop coaches connect every LAX terminal to downtown and the San Fernando Valley, seven days a week at a flat \$12.75 fare, with Wi-Fi, baggage storage, and a clean-fuel fleet. In 2024 the service carried more than 1.8 million passengers and cut personal driving by roughly 29.5 million vehicle-miles.
- BOS 2025** - Boston Logan reset the economics of its curb: when it reintroduced rideshare pickup, it paired the convenience with an \$11 round-trip fee on app-based rides, turning growing rideshare volume into a recurring ground transportation revenue stream.
- YUL 2023** - Montréal-Trudeau redistributed terminal congestion by opening alternative express drop-off zones at its parking sectors with free shuttle service, expanding a free CellParc waiting lot, and adjusting parking rates for short stays, cutting peak-hour curbside traffic by up to 700 vehicles per hour.
- PHX 2022** - Phoenix Sky Harbor completed the final stage of its PHX Sky Train, linking the terminals, a new 24th Street station, and a consolidated Rental Car Center all to Valley Metro light rail, eliminating rental car shuttle buses entirely and cutting Sky Harbor Boulevard traffic.
- EWB 2025** - Newark Liberty partnered with ZAPP to open an eight-port EV fast-charging hub at its cell phone lot, strategically located to serve the growing number of for-hire and rideshare drivers electrifying their vehicles, reducing wait times and lot congestion while supporting the shift away from fossil fuels.
- RNO 2025** - Reno-Tahoe International manages tight curb and parking capacity with data and demand tools, rolling out real-time, stoplight-style parking availability, a garage reservation system, and thousands of \$5 rideshare vouchers to nudge local travelers out of their cars during peak periods. In parallel, a \$299 million privately financed Ground Transportation Center, delivered through a public-private partnership at no cost to local taxpayers and opening in 2028, will consolidate rental cars, taxis, shuttles, and rideshare under one roof while freeing roughly 600 parking spaces near the terminal.



Commercial Services is defined by the quality, variety, and value of food, beverage, retail, and other passenger-facing services throughout the airport.

Rising passenger expectations for personalized and locally authentic experiences are colliding with economic headwinds that constrain what can realistically be offered, requiring a more deliberate and targeted commercial strategy.

SHORT-TERM (0 – 24 months)

1. Audit concession mix, hours, pricing, and service gaps across pre- and post-security journeys, benchmarked on sales per enplanement. (B, D)
2. Add high-demand convenience services first, including family spaces, pet relief, translation, and accessible amenities. (C)
3. Adopt transparent value-pricing guidelines, with a defined comparison basket and periodic audits, to narrow the perception gap between airport and street pricing. (B)
4. Convert underused or vacant terminal space into recurring revenue by competitively leasing experiential retail, short-term or pop-up concepts, and premium lounges, with operators funding build-out where possible. (E)
5. Competitively bid the airport advertising program and shift toward digital out-of-home (DOOH) and programmatic formats to grow non-aeronautical media revenue. (F)

MEDIUM-TERM (2 – 5 years)

6. Restructure concession agreements with percentage-rent tiers and service-quality clauses tied to audited scores, by daypart and location. (D)
7. Build a curated local-brand program that turns food, retail, and design into a regional differentiator. (D)
8. Expand premium lounge and hospitality offerings where yield, dwell time, and passenger mix support investment. (E)
9. Introduce a single airport-wide pre-order, delivery, and digital retail platform, with tenant participation written into new leases. (A)
10. Execute a full commercial master plan linking concessions, passenger flow, revenue growth by zone, and customer experience. (B, E)

AIRPORTNEXT MODEL FACTORS

- Food & beverage facilities pre-security
- Food & beverage facilities post-security
- Retail facilities & services
- Airport pricing
- Departure lounges
- Information services
- Accessibility services
- Convenience services
- Other services

CASE STUDIES

- PHL 2020** - Philadelphia International became the first U.S. airport to launch a fully integrated mobile ordering and gate-delivery platform, letting passengers and employees order from any participating restaurant or retailer through the Grab app and have their order delivered directly to their gate or workspace.
- PIT 2025** - Pittsburgh International's longstanding street-pricing policy and data-driven local and national brand mix, supported by its Fraport USA concessions partnership and 20 new or refreshed concessions in 2025, have helped it consistently rank among North America's highest airports for per-passenger concessions spending.
- EWK 2025** - Newark Liberty's Terminal A opened the first dual-sensory-room program in the U.S. for neurodivergent travelers, developed with the Anderson Center for Autism and paired with a dedicated TSA Cares screening lane, alongside pet relief areas, family suites, and accessible restrooms.
- BOI 2025** - Boise competitively re-bid its entire food, beverage, and retail program, awarding 10-year agreements and requiring operators to fund the build-out. The result leans deliberately local, with a Treefort Music Fest-branded outpost, rotating live musicians, Flying M Coffee, The STIL, Telaya Wine Co., and retail spaces themed on the Capital City Public Market, the Boise Depot, and the Sawtooth Mountains, paired with mobile and QR code ordering, self-order kiosks, and digital wallet payments.
- LAS 2025** - Harry Reid International turned prime post-security space into recurring non-aeronautical income by competitively leasing the space to premium card-issuer lounges, Capital One and Chase Sapphire, as well as an American Express "Sidecar" lounge. The deals involve operators funding the full build-out, with the airport collecting rent plus a share of revenue.
- MSY 2019** - Louis Armstrong New Orleans International awarded Clear Channel Airports a seven-year media contract timed to its new \$1 billion terminal, which added a digital-forward network of LED video walls aimed at growing non-airline revenue.



Security is defined by the reliability and efficiency of security screening processes at the airport.

The technologies underpinning modern security screening are evolving quickly, requiring constant investment from governments and airports to remain effective.

AIRPORTNEXT MODEL FACTORS

- Getting through
- Wait times
- Staffing
- Priority screening options
- Innovative security processes

SHORT-TERM (0 – 24 months)

1. Launch a weekly security performance review using wait-time targets, staffing, throughput, and lane-availability dashboards. (A, B)
2. Rework lane schedules around data-driven peak waves, built from flight schedules and historical throughput, rather than static daily staffing assumptions. (A, B)
3. Create a formal escalation protocol with screening agencies specifying trigger thresholds, notification times, and named decision-makers. (C)
4. Conduct quarterly checkpoint walkthroughs with security partners to identify quick operational fixes and recurring bottlenecks. (A)
5. Standardize cybersecurity drills, access controls, and phishing training for all staff and critical airport partners. (D, E)

MEDIUM-TERM (2 – 5 years)

6. Negotiate stronger service-level agreements specifying wait-time percentiles, minimum lane counts by hour, and joint reporting. (C)
7. Build a multi-year business case for next-generation screening and biometric identity, covering throughput gains, space requirements, and federal cost-share. (F)
8. Segment operational technology from enterprise networks, with offline backups and tested recovery-time objectives for critical systems to mitigate cybersecurity risk. (E)
9. Integrate checkpoint data, incident reporting, and passenger-flow analytics into a single security decision dashboard. (A, B, D)
10. Invest in checkpoint redesigns sized for automated screening lanes, with divestiture depth, accessible lanes, and space for future technology. (D, F)

CASE STUDIES

- SEA 2021** - Seattle-Tacoma scaled SEA Spot Saver and public checkpoint wait-time tools through FlySEA, giving operations teams a stronger dashboard for peak-wave staffing, queue communication, and checkpoint performance management rather than relying on static daily assumptions.
- DFW 2019** - Dallas Fort Worth deployed Xovis 3D tracking sensors across all 15 TSA checkpoints, measuring passenger flow from line entry through screening and pushing live wait-time data to the airport's app and digital signage, giving operations teams continuous, sensor-driven visibility into staffing and lane performance.
- MCI 2026** - Kansas City International is one of roughly 20 U.S. airports in TSA's Screening Partnership Program, using a private contractor under federal oversight to manage checkpoint staffing. The model delivered sub-three-minute lines and operational resilience during the 2026 federal shutdown, while TSA-staffed airports elsewhere saw waits exceeding two hours.
- YEG 2024** - Edmonton International used its Integrated Operations Centre, predictive analysis tools, and cybersecurity exercises to combine incident reporting, passenger-flow awareness, and operational resilience into a more unified security decision model. This is further reinforced at the checkpoint by CATSA's new CT X-ray screening technology, which lets passengers keep liquids and electronics in their bags, improving screening efficiency and speed.
- YHZ 2024** - Halifax Stanfield strengthened cyber readiness by delivering cybersecurity-awareness and incident-response training to senior leadership and the board, reinforcing access discipline, recovery planning, and executive oversight of airport risk.
- SFO 2024** - San Francisco International completed the final phase of its \$2.5 billion Harvey Milk Terminal 1, opening a new security checkpoint with Automated Screening Lanes that move passengers and bags 30% faster using single-tray screening, along with automated exit lanes and a post-security walkway connecting all terminals, combined with support for biometric identity options such as CLEAR across all checkpoints.



Border is defined by the reliability and efficiency of customs and immigration processes at the airport.

Border processing is under pressure from multiple directions at once: tightening policies, escalating screening requirements, and geopolitical uncertainty, making investment in efficient, technology-enabled processing more urgent than ever.

SHORT-TERM (0 – 24 months)

1. Publish a shared daily forecast of inbound arrival banks and at-risk connections with border agencies. (E)
2. Improve bilingual signage, queue communication, and staff wayfinding support for arriving international passengers. (B)
3. Introduce dedicated lanes and escort protocols for short connections, accessibility needs, and family or group travel. (A, D)
4. Pilot digital tools that give passengers real-time customs wait times and connection guidance. (A, B, D)
5. Create a joint irregular-operations playbook with border agencies specifying notification triggers, callout procedures, and holdroom options. (B)

MEDIUM-TERM (2 – 5 years)

6. Reconfigure inbound processing to a bags-first flow with a single customs checkpoint, improving queue separation and surge handling. (C)
7. Build the cabling, power, and data infrastructure for biometrics, digital declarations, and touchless processing. (A, D, F)
8. Pursue preclearance, trusted-traveler, or bilateral government facilitation opportunities where traffic volumes justify the effort. (E)
9. Negotiate booth-opening triggers and maximum wait-time standards with border agencies, tied to forecast arrival banks. (E)
10. Align air-service development with border-processing capacity of booths, kiosks, and baggage hall, so new international growth remains operationally sustainable. (E, F)

AIRPORTNEXT MODEL FACTORS

- Getting through
- Wait times
- Staffing
- Priority screening options
- Innovative border processes
- Connections for international flights

CASE STUDIES

- JFK 2026** - The New Terminal One at JFK launched Enhanced Passenger Processing (EPP) with U.S. Customs and Border Protection, using iProov real-time facial biometrics to clear eligible U.S. citizens, including families and travelers using wheelchairs, without enrollment, fees, or kiosks.
- YUL 2022** - Montréal-Trudeau paired CBSA's Advance Declaration with bilingual arrivals wayfinding and clearer communication, cutting time at primary inspection kiosks by roughly a third and easing arrivals surges.
- SAN 2018** - San Diego International opened a new 130,000-square-foot, three-level Federal Inspection Services facility designed "inside out" from the passenger's perspective, featuring a "bags first" flow where travelers collect checked luggage before a single customs checkpoint. Mobile passport control and Global Entry let eligible travelers clear while they wait for bags, cutting typical customs processing to roughly 10–20 minutes.
- YVR 2017** - Vancouver International, through its in-house Innovative Travel Solutions unit, developed the BorderXpress Primary Inspection Kiosks, letting arriving travelers scan documents, complete a paperless declaration, and verify identity by facial recognition. The self-service model moves passengers through CBSA processing up to 50% faster while officers handle up to four times as many travelers per hour, and YVR has exported the technology to dozens of airports and seaports worldwide.
- YTZ 2026** - Billy Bishop Toronto City Airport opened a new U.S. CBP Preclearance facility, backed by a \$30 million Government of Canada investment, giving CBP and the Department of Homeland Security a forward-planning model for staffing and capacity ahead of projected growth from roughly 300,000 to 1 million precleared travelers annually within a decade.
- PHL 2023** - Philadelphia International expanded biometric boarding across 25 international gates in partnership with CBP using SITA's Smart Path platform powered by the NEC i:Delight digital identity management platform, providing long-term readiness for touchless cross-border processing and closer alignment between international air service ambitions and border facilitation tools.



Technology is defined by the quality and breadth of digital infrastructure and passenger-facing services available throughout the airport journey.

Realizing the full potential of emerging technologies requires more than adoption; it demands a coherent strategy for data governance, cybersecurity, and workforce readiness that keeps pace with rapid innovation.

SHORT-TERM (0 – 24 months)

1. Fix core passenger basics first by improving Wi-Fi reliability, charging access, and digital flight information. (E)
2. Approve a single enterprise digital roadmap with named executive owners, stage-gate funding decisions, and an annual reprioritization cycle. (F)
3. Standardize data governance, cybersecurity policies, and vendor requirements, including contractual security terms for third-party systems. (A)
4. Pilot two or three AI use cases with measurable ROI and stop-or-scale criteria, such as queue prediction using lidar, maintenance alerts, or customer service automation. (C)
5. Migrate priority systems to cloud-ready architectures with strong integration, defined recovery-time objectives, and tested failover for critical operational systems. (B, F)

MEDIUM-TERM (2 – 5 years)

6. Build out 5G and private wireless connectivity using a neutral-host or carrier-leased model that improves coverage while turning connectivity into a recurring revenue stream. (D)
7. Build a unified passenger digital platform on a single identity and API layer, linking flight, wayfinding, concessions, parking, and accessibility data. (E)
8. Introduce paperless, mobile-first workflows with electronic signature and approval routing across operations, maintenance, and inspections. (A)
9. Deploy digital twin capabilities built on a common asset and spatial data model, for asset management, passenger flow, and scenario planning. (B)
10. Consolidate fragmented systems onto interoperable platforms with fewer manual handoffs and duplicate datasets. (B, F)

AIRPORTNEXT MODEL FACTORS

- Wi-Fi services
- Device charging
- Paperless
- Flight information through a website or app
- Digital information for passengers
- Digital services for passengers

CASE STUDIES

- MSP 2025** - The Metropolitan Airports Commission, which operates Minneapolis-Saint Paul International, built robust IT resilience through cybersecurity-awareness training, redundant infrastructure (including three active-active connections from separate internet service providers), critical-system backups, and regular disaster-recovery exercises, reflecting a low risk tolerance for any technology disruption to airport operations.
- SFO 2026** - San Francisco International advanced an Airport Integrated Operations Center digital twin environment that connects its Geographic Information System, Building Information Modeling, and live operational data, helping teams simulate passenger flow, coordinate projects, and reduce fragmented datasets.
- GRR 2022** - Gerald R. Ford International runs FLITE (the Ford Launchpad for Innovative Technologies and Entrepreneurship), one of the first airport-based programs in the U.S. to give startups grant funding and live-environment pilot testing. Focus areas include automation and data analytics, letting the airport validate emerging tools, from AI assistants to autonomous robots, before committing to full deployment.
- PIT 2026** - Pittsburgh International completed a campus-wide 5G neutral-host Distributed Antenna System with American Tower, delivering high-speed wireless coverage across its new terminal, legacy concourses, back-of-house areas, and operational zones. The model lets multiple carriers share one managed infrastructure, turning connectivity into a non-aeronautical revenue stream: American Tower pays the airport authority roughly \$6 million over a 10-year contract.
- DTW 2022** - DTW hosted Delta's Parallel Reality trial testing multilingual, personalized wayfinding that changes by traveler, demonstrating how airports can use advanced digital tools to improve passenger guidance without overhauling every physical sign first.
- MWAA 2020** - The Metropolitan Washington Airports Authority, through its in-house team MWAA Labs, migrated a large share of on-premises systems to cloud-hosted solutions, consolidating fragmented websites and siloed applications across Reagan National and Dulles International, and built mobile apps for facilities inspection and maintenance. It also sells what it builds: Dallas Fort Worth contracted MWAA's veriScan, the tablet-based biometric boarding system developed for its gates, making IT a revenue contributor.



Airlines is defined by the availability, capacity, and affordability of passenger and cargo air service available to/from the airport.

Economic headwinds and supply-side constraints are creating an unpredictable air service environment, while structural shifts in aircraft technology and cargo demand are adding strategic opportunities and threats for airports.

SHORT-TERM (0 – 24 months)

1. Hold structured annual route development meetings with airlines, tourism leaders, and economic development partners. (E)
2. Build route scorecards showing load factor, yield, and profitability estimates by market, with defined support actions and review cadence. (D)
3. Prioritize defend-grow-replace actions for at-risk routes, emerging opportunities, and underserved markets. (D, E)
4. Strengthen retention plans for incumbent airlines, including renewal timing, cost-per-enplanement positioning, and station-cost support, before pursuing new carriers. (A)
5. Build a cargo growth task force focused on facility use, shipper demand, and import-export bottlenecks. (F)

MEDIUM-TERM (2 – 5 years)

6. Pursue airline diversification with a target maximum share for any single carrier, reducing exposure to merger, retreat, or bankruptcy. (B)
7. Position the airport for long-haul narrowbody, secondary-hub spillover, or niche international growth, backed by catchment and connectivity analysis. (A)
8. Prepare to integrate new airspace users: drones and uncrewed traffic now, with advanced air mobility and eVTOLs to follow. (C, E)
9. Expand cargo handling, warehousing, and international processing capacity where committed tenant demand supports investment. (F)
10. Build a shared route development fund with tourism, business, and government partners, with defined contribution shares and a route-selection process. (B, F)

AIRPORTNEXT MODEL FACTORS

- Domestic air service
- International air service
- Affordable air service options
- Air cargo facilities & services
- International air cargo facilities & services
- Runway, taxiway, and apron capacity

CASE STUDIES

- BDL 2023** - Bradley International and the Connecticut Airport Authority, with state backing, secured and retained Aer Lingus's nonstop Dublin service, the airport's only direct link to Europe, operated by a long-range A321neo narrowbody and backed by a risk-sharing, multi-year commitment agreement.
- STL 2024** - St. Louis Lambert International rebuilt connecting traffic after losing its longtime hub carrier, working through a replacement anchor and a mix of roughly 20 airlines. Where TWA once carried three-quarters of boardings, the top carrier now sits just under two-thirds, showing a case of reducing exposure to any single carrier's retreat or collapse.
- YEG 2024** - Edmonton International, already the first Canadian airport to integrate commercial drone logistics into its operations, expanded its scheduled cargo-drone program in a second phase and, working with NAV Canada and Transport Canada, launched the first drone program in Canada to safely cross a runway glide path. The airport runs uncrewed flights to the same safety and operational standards as crewed aircraft, with detect-and-avoid procedures and holds for traffic on approach.
- RDU 2024** - Raleigh-Durham landed Lufthansa nonstop service to Frankfurt in June 2024, a route roughly a decade in the making and projected to add \$3.3 billion to North Carolina over 25 years. The win reflected sustained, scorecard-driven route development: patient multi-year carrier cultivation, and demand cases built with local business and economic development partners.
- MCO 2025** - Orlando International is positioning itself as a proving ground for electric air taxis, using its 11,000-plus-acre campus to prepare for eVTOL and advanced air mobility operations. After a 2024 GOAA-led tabletop exercise, MCO became the second U.S. airport to complete a multi-day, human-in-the-loop FAA airspace-integration simulation, in which Orlando controllers tested notional eVTOL routes and procedures meant to fold air taxis into a busy large hub without disrupting legacy traffic.
- CVG 2024** - Cincinnati/Northern Kentucky, home to both Amazon Air's primary U.S. hub and DHL Express's Global Superhub, opened the first facility at its Global Logistics Park, an 80,000-square-foot building with direct airside access and 18 truck docks, courting forwarders and MRO operators to build cargo demand beyond those two anchor tenants.



Government Relations is defined by the level of support and collaboration airports receive from federal, state/provincial, and local governments.

Funding challenges and ideological differences are making relationships with all levels of government more complex and urgently required than ever before, requiring airports to be active and strategic partners in policy discussions.

SHORT-TERM (0 – 24 months)

1. Develop a concise government-relations agenda with a few priorities, clear asks, and supporting local data. (E, F)
2. Prepare ready-to-use briefing materials showing the airport's economic value, needs, and public benefits. (E)
3. Schedule recurring briefings with federal, state/provincial, and local officials rather than only meeting during crises. (D, F)
4. Build a grant and advocacy calendar tied to budget cycles, legislation, and agency funding windows. (D)
5. Protect the airport's airspace and operational influence zones from encroachment, with land use compatibility planning, height and overlay zoning, and enabling state or local legislation with surrounding jurisdictions. (C)

MEDIUM-TERM (2 – 5 years)

6. Form a regional coalition of chambers, employers, and tourism partners advocating jointly for airport access and investment. (B, F)
7. Establish a formal annual government-relations review to assess policy wins, funding progress, agency relationships, and priority files for the next 24 months. (F)
8. Involve agency reviewers and funding partners at concept stage through pre-application meetings and joint scoping, reducing later delays. (B, D)
9. Advance enabling policy changes that support faster project delivery, technology adoption, and airport flexibility. (A)
10. Convert recurring grant and advocacy wins into a documented multi-year funding pipeline that pairs each major capital project with a specific government funding source and public progress reporting. (B, E)

AIRPORTNEXT MODEL FACTORS

- Federal Government support
- State/Provincial Government support
- Local Government support
- All levels of government work together

CASE STUDIES

- PAE 2019** - Snohomish County advanced a pioneering public-private model at Paine Field, granting Propeller Airports a long-term lease to privately finance, build, and operate the passenger terminal, securing the necessary FAA approvals and delivering commercial service in 2019 without the county funding terminal construction.
- YWG 2026** - Winnipeg Richardson secured a combined \$32 million package, including \$15 million federal and provincial, to make 127 acres of direct-runway-access trade lands development-ready, the federal share coordinated through a multi-department forum and tied to a Manitoba trade alliance, an example of early, structured intergovernmental coordination on a major project.
- SGF 2024** - Springfield-Branson National Airport's Land Use Compatibility Plan pairs an airport overlay zone with surrounding local zoning to protect its operational influence area, applying height limits and steering residential and other noise-sensitive development away from approach corridors so incompatible growth does not constrain current or future airport operations.
- AUS 2026** - Austin-Bergstrom has turned sustained federal engagement into a grant pipeline for its \$5 billion Journey With AUS expansion program: more than \$14 million in 2024, \$50 million in 2025, and a record \$90 million for fiscal 2026, pushing FAA Airport Terminals Program awards past \$195 million without local taxpayer dollars, as capacity expands toward 30 million passengers.
- SAT 2025** - San Antonio International won a \$13.3 million FAA Airport Infrastructure Grant for Phase 4 of its \$2.5 billion Elevate/SAT terminal program, the latest in a repeatable federal pipeline (following \$20 million in FY2024 terminal and infrastructure grants), with city leaders and the airport pairing each award with congressional outreach and a consistent economic impact case: a projected \$2.8 billion regional impact and roughly 16,000 jobs.
- YOW 2022** - Ottawa International turned sustained multi-level government relationships into outcomes beyond any single project, resulting in federal support through Transport Canada's Airport Critical Infrastructure Program and Airport Relief Fund that have funded roughly \$4 million for taxiway rehabilitation and \$5.6 million in pandemic relief. A further example is the \$6.4 million grant toward a light-rail station linking the terminal directly to downtown Ottawa, highlighting the authority's coalition-style advocacy.



Workforce & Culture is defined by the airport's ability to attract, develop, and inspire a skilled, inclusive, and collaborative workforce.

The workforce of the future will look fundamentally different, shaped by AI and automation, requiring investment in both people and technology to remain effective.

SHORT-TERM (0 – 24 months)

1. Complete a workforce gap assessment covering frontline service, technical roles, leadership depth, and partner staffing. (A, C)
2. Set clear airport-wide service standards and make every department jointly accountable for passenger outcomes. (E, F)
3. Establish a joint workforce council with airlines, contractors, and unions to address shared staffing gaps, service standards, and retention. (C)
4. Expand disability, customer service, and irregular-operations training for all staff and tenant-facing partners. (E, F)
5. Introduce faster recruiting, onboarding, and retention tools for hard-to-fill operational and technical roles. (D)

MEDIUM-TERM (2 – 5 years)

6. Build partnerships with colleges, trade schools, and community organizations that include paid internships, tuition support, and interview pathways. (B, C, D)
7. Establish succession plans for critical executive, operational, and technical roles, with annual Board review. (A, B)
8. Adopt a multi-year talent strategy with market pay benchmarking, shift flexibility, wellbeing, leadership development, and career pathways. (A, B, E)
9. Redesign work processes so automation absorbs repetitive tasks while reskilling employees into higher-value roles. (D)
10. Create an airport academy delivering certification pathways in cybersecurity, maintenance, digital systems, and leadership. (D)

AIRPORTNEXT MODEL FACTORS

- Number of service employees
- Number of certified technical workers
- Fair hiring & pay equality
- Assist passengers with disabilities
- Deliver exceptional experience
- Provide efficient, cost-effective services
- Fiscally responsible and transparent

CASE STUDIES

- MWAA 2026** - The Metropolitan Washington Airports Authority uses a Succession Optimization and Advancement Readiness (SOAR) program to map employees' skills and career stages for Reagan National and Dulles International, allowing it to pinpoint skill gaps, build succession plans, and flag retention risks early, with succession coverage now reaching 91 percent of key positions.
- RIC 2024** - Richmond International earned ACI-NA's Excellence in Human Resources recognition for its workforce programs: team coaching to accelerate professional development, partnerships with higher education institutions to build a pipeline of future aviation leaders, and structured employee workshops to strengthen communication and growth.
- IND 2020** - Indianapolis International built a talent pipeline through EmployIndy's Modern Apprenticeship Program for high school students, 12-week paid college internships, and up to \$5,000 a year in tuition support for employees pursuing further credentials.
- BNA 2025** - Nashville International runs a Maintenance Apprenticeship Program, paying apprentices a full salary and covering tuition and books while they train toward licensed trades, starting with electricians and expanding into HVAC, plumbing, carpentry, and equipment operation, targeting hard-to-fill roles where maintenance demands are rising faster than the labor pool.
- GSP 2024** - Greenville-Spartanburg International built its workforce around "the GSP way," a shared set of core values emphasizing diversity, open communication, teamwork, and mutual support across every department. That culture earned GSP five ACI Airport Service Quality awards, plus induction into ACI World's Director General's Roll of Excellence.
- YFC 2025** - Fredericton International formalized accessibility through partner-delivered programs rather than one-off fixes. The Hidden Disabilities Sunflower Program lets travelers discreetly signal they need extra time or support, without altering screening, while the Corps of Commissioners provides curb-to-counter assistance. YFC also became New Brunswick's first airport to deploy GoodMaps, offering turn-by-turn terminal navigation in 18 languages with audio, text, and step-free routing.



Community Support is defined by how well the airport engages with, communicates to, and earns the trust and goodwill of its surrounding communities.

As community expectations continue to evolve, the social license to operate and grow will increasingly depend on how authentically and responsibly airports engage with the people around them.

SHORT-TERM (0 – 24 months)

1. Publish a community engagement calendar with fixed forum dates, issue updates, and project-specific outreach by neighborhood. (B)
2. Improve plain-language communication on airport operations, noise, construction, and the airport's regional value. (E)
3. Track community sentiment regularly, then establish a rapid-response process for neighborhood concerns, complaints, and recurring misinformation. (A)
4. Increase visible community benefit activities through local partnerships, education support, and airport-hosted events. (A, D)
5. Engage general aviation users, tenants, and community groups at concept stage, before design decisions are fixed. (C, F)

MEDIUM-TERM (2 – 5 years)

6. Build enduring advisory structures for residents, businesses, and aviation users, with defined membership, meeting cadence, and a formal path into airport decisions. (A, D)
7. Adopt a community trust compact with measurable commitments and annual public reporting on noise, emissions, communication, and local benefits. (B, E)
8. Co-create long-term land use and mobility priorities with municipalities and community institutions. (B)
9. Set local hiring, apprenticeship, and procurement goals as percentage targets in contract terms for major airport projects. (C, D)
10. Integrate community benefit commitments into major capital programs as budgeted line items, with public reporting. (B, E)

AIRPORTNEXT MODEL FACTORS

- Operates 24 hours per day, every day of the year
- Minimizes noise impacts on neighbors
- Value is understood
- Brand is well regarded
- Gives back to the community
- Promotes region's community values
- Communicates to the community
- Partner in promoting regional development

CASE STUDIES

- CLT 2026** - Charlotte Douglas International pairs visible community benefit work, using its annual Runway 5K that has raised more than \$300,000 for over 30 need-based college scholarships, with an Airport Neighborhood Committee that gives residents a standing forum to raise operational and noise concerns.
- MSP 2026** - The Metropolitan Airports Commission gave aircraft noise its own standing governance body, the Noise Oversight Committee, which balances community and aviation industry representatives and recommends noise policy to the Commission. Open data backs the forum: a 39-tower monitoring network, interactive flight-tracking and noise reports the public can replay, and quarterly resident listening sessions.
- ATL 2025** - Hartsfield-Jackson Atlanta launched its FAA-approved Concessions Small Business Program, Gateway to Growth. The 11-week academy equips local entrepreneurs to navigate airport operations and bidding for concession opportunities, extending Atlanta's long economic inclusion tradition to give small and minority-owned businesses a pathway into airport commerce.
- YYZ 2025** - Toronto Pearson made its largest Nest Fund community investment through the Propeller Project, a \$780,000 contribution supporting ten Indigenous-led organizations in building capacity and advancing reconciliation, guided by the airport's Indigenous Relations Action Plan.
- BOS 2026** - Boston Logan continued four decades of public environmental reporting through its annual Environmental Data Reports and five-year Environmental Status and Planning Reports filed under the Massachusetts Environmental Policy Act, covering noise, air quality, ground access, construction impacts, and passenger activity, with public consultation sessions with each filing.
- YXE 2023** - Saskatoon International partnered with the Saskatoon Police Service and the #NotInMyCity campaign after recognizing that traffickers move victims through transportation corridors. Every airport employee now trains to identify signs of exploitation and get help without putting the victim at risk, extending detection beyond police to frontline staff.



Sustainability is defined by the airport's commitment to environmental, social, and economic responsibility, as well as its transparency in communicating progress to the public.

Sustainability is now being embedded into every aspect of operations, planning, and investment, rather than treated as a separate initiative.

SHORT-TERM (0 – 24 months)

1. Publish a sustainability plan with baseline year, interim targets, named accountabilities, and annual reporting commitments. (C)
2. Implement low-cost efficiency actions first, including lighting, HVAC tuning, waste sorting, and procurement changes. (A)
3. Reduce visible waste through single-use plastic policies, concession standards, and passenger-facing recycling improvements. (C)
4. Add climate risk and resilience criteria to capital planning, insurance review, and operational preparedness, with a documented vulnerability assessment. (B)
5. Develop on-site renewable energy and storage, such as solar arrays and microgrids, to cut emissions, manage costs, qualify for federal grants, and improve resilience. (A)

MEDIUM-TERM (2 – 5 years)

6. Use ESG reporting and sustainable finance tools including green bonds, sustainability-linked debt, and grant stacking, to fund priority projects. (B, C)
7. Build a phased low-carbon energy and alternative-fuels readiness plan covering grid capacity, SAF support, charging, and emerging aircraft needs. (E)
8. Deploy smart energy systems that optimize heating, cooling, and power use, with fault detection and measured annual savings. (D, F)
9. Phase in fleet, ground support, and landside electrification where infrastructure and operations allow. (E)
10. Deliver a long-term net-zero and resilience program integrated into master planning, capital investment, and stakeholder reporting. (D, F)

AIRPORTNEXT MODEL FACTORS

- Environmental sustainability
- Social sustainability
- Economic sustainability
- Reducing carbon footprint
- Balance with growth
- Communicates sustainability goals and achievements to the public

CASE STUDIES

- A) **CHA 2019** - Chattanooga Metropolitan became the first U.S. airport to run entirely on on-site solar: a \$10 million, 2.6-megawatt solar farm with battery-microgrid storage (about 90% funded by an FAA Voluntary Airport Low Emission grant) that covers all of its electricity needs and effectively eliminated its utility bill, alongside LED retrofits and LEED-certified facilities.
- B) **OAK 2025** - Oakland San Francisco Bay built a community-first framework for securing sustainability and climate-resilience funding, proactively developing partnerships rather than chasing grants, and extended its grant capacity to community-based organizations running their own environmental projects, achieving the ACI-NA 2025 Innovative/Special Projects Environmental Award.
- C) **YQB 2025** - Québec City Jean Lesage developed its 2025–2030 strategic plan with more than 30 regional socioeconomic stakeholders, then made sustainability one of six corporate objectives. It commits to a governance framework measuring environmental, social, and economic performance and to carbon neutrality for airport-authority-managed operations by 2040.
- D) **SDF 2023** - Louisville Muhammad Ali International shifted its terminal HVAC from gas to electric with the largest geothermal system at any U.S. airport: 648 wells drilled 500 feet deep and 82 heat pumps serving a 412,766-square-foot terminal, with a building management system flagging equipment faults to staff, supported by a \$10.6 million FAA grant. The airport sees an 80% cut in carbon emissions, 40% less energy use, and \$400,000 in annual savings.
- E) **YVR 2025** - Vancouver International, carbon neutral since 2020 and the first Canadian airport at Level 4+ Airport Carbon Accreditation, accelerated its net-zero target from 2050 to 2030. It is building Canada's largest geo-exchange system and has signed agreements with every other BC airport toward a net-zero aviation region.
- F) **LIT 2026** - Bill and Hillary Clinton National is decarbonizing its utility backbone before its visible terminal work. A \$117 million Central Utility Plant, replacing infrastructure original to 1972, pairs a 760-well geothermal field with new mechanical and electrical capacity to cut on-site greenhouse gas emissions by 85 to 95 percent. It completes in 2028, unlocking a \$300 million arrivals hall.



Economic Development & Tourism is defined by the airport's role as a catalyst for regional economic growth, job creation, and tourism promotion in partnership with local stakeholders.

Delivering on the economic development mandate requires closer collaboration with business, tourism, and community partners than ever before.

SHORT-TERM (0 – 24 months)

1. Establish a shared route, visitor, and trade opportunity forum for local hotels, attractions, and business groups. (A, B)
2. Convene quarterly planning sessions with tourism, business, and economic development leaders. (B, F)
3. Commission a current third-party economic impact study and translate it into audience-specific cases that anchor concrete investment, route, or funding asks. (D, E)
4. Target off-peak demand with joint incentives and co-funded marketing that improve year-round utilization and visitor spending. (F)
5. Identify airport-adjacent development opportunities and secure land control or option agreements for logistics, hospitality, and commercial growth. (C, D)

MEDIUM-TERM (2 – 5 years)

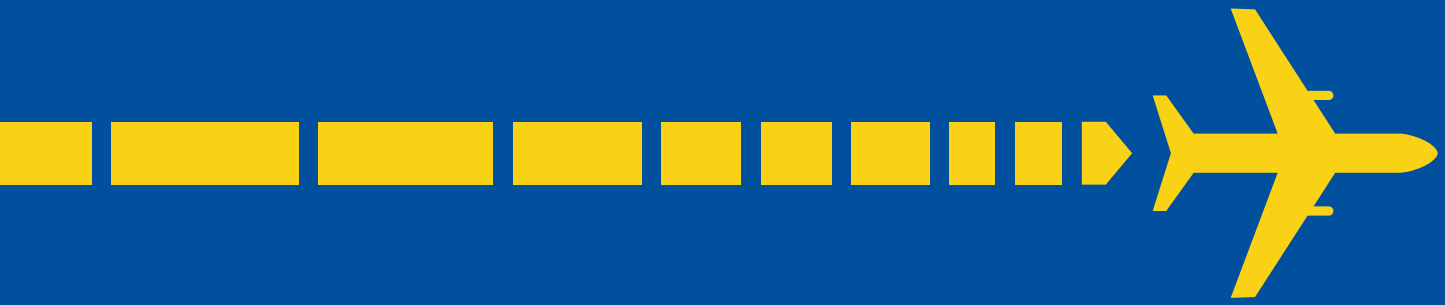
6. Build sector-based route strategies using origin-and-destination data by industry for tourism, headquarters attraction, exports, and business travel. (A, F)
7. Coordinate with local partners on destination development that strengthens year-round demand, not only peak seasons. (B)
8. Expand cargo and logistics positioning with airside-access land and cold-chain-ready facilities for e-commerce and advanced manufacturing. (D, E)
9. Ground-lease developable airport land with business parks, logistics, and commercial sites, under long-term, fair-market-value leases that build durable, direct airport revenue while keeping the underlying land in the airport's hands. (C, E)
10. Secure the airport a statutory seat in regional economic development and land-use planning so airport growth and capacity are written into the region's long-term strategy and major site selection decisions. (A, C)

AIRPORTNEXT MODEL FACTORS

- Works closely with local economic development agencies
- Works closely with local tourism agencies
- Support of local business leaders
- Contribution to overall economic impact of region
- Impact on attracting new jobs and businesses

CASE STUDIES

- CMH 2025** - The Columbus Regional Airport Authority frames its airports as “vital economic engines,” expanding to a record 53 nonstop destinations to serve central Ohio’s fast-growing business base, anchored by major investments like Intel and Honda, positioning air connectivity as central to the region’s economic development strategy.
- YYJ 2024** - Victoria International anchors its growth in regional economic strategy rather than raw passenger counts, generating roughly \$880 million in economic output and about 4,700 jobs for Vancouver Island, with a goal of reaching \$1.1 billion in annual impact. As a member of the South Island Prosperity Partnership, the airport aligns air service development with regional competitiveness, using origin-and-destination data to pursue nonstop routes that serve tourism, conferences, and business travel.
- BOI 2025** - Boise Airport turned airport-owned land into a recurring, direct revenue stream, ground-leasing parcels for a commercial and industrial business park under long-term master-developer agreements that keep the land in the airport’s hands while income compounds as parcels are built out. The program generated \$4.3 million in industrial land-lease revenue in FY2025, with substantial room to grow against its longer-term build-out plan.
- YQM 2024** - Greater Moncton Roméo LeBlanc International has tied airport performance to wider logistics and commercial potential, illustrating how regional airports can build a case for adjacent development and cargo-oriented opportunity.
- MEM 2025** - Memphis International, home to the FedEx World Hub and North America’s busiest cargo operation, anchors “America’s Aerotropolis”: a 2025 economic impact study found it supports 67,550 jobs and \$10.7 billion in output in Tennessee, up 45% since 2019, figures airport leaders use to align business and elected stakeholders behind future projects.
- TRI 2025** - Carter County built a replicable model for visitor-economic growth, anchored at Tri-Cities Airport. BRIDGE Regional, an economic development nonprofit focused on air service, put up a \$2 million minimum revenue guarantee that landed new Breeze Airways flights and prompted American and United to add competing Chicago service, pushing fares down.



Appendix

A. AirportNEXT Airports

Thank you to the AirportNEXT Airports for their support of the AirportNEXT Stakeholder Engagement Program, and providing final review and validation of the Futures Study strategies.

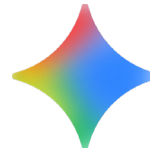
Boise
Charles M. Schulz-Sonoma County
Charlottetown
Cleveland Hopkins International
Clinton National
Dallas Love Field
Deer Lake Regional
Edmonton International
Fort McMurray International
Fredericton International
Gander International
Greenville-Spartanburg International
Halifax Stanfield International
Harrisburg International
Kamloops
Kelowna International
Milwaukee Mitchell International
Minneapolis-Saint Paul International
Montréal-Trudeau International
Ottawa International
Palm Springs International
Philadelphia International
Prince George
Quad Cities International
Québec City Jean Lesage International
Raleigh-Durham International
Regina International
Region of Waterloo International
San Francisco International
St. John's International
Vancouver International
Victoria International



B. AI-Assisted Research



AI tools were used to support research synthesis, drafting, and quality review. All final interpretations, selections, and edits were conducted and validated by the Futures Study Project Team.

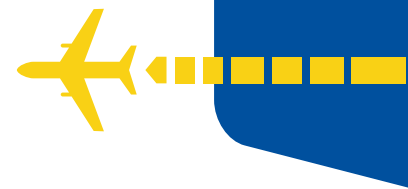


	ChatGPT 5.2 Extended Thinking	Gemini 3.0 Pro	Claude Opus 4.6
Trend development	Primary	Secondary	
Trend survey bias review			Primary
Strategy development	Primary	Secondary	
Strategy feasibility review			Primary
Case study development	Primary	Primary	
Case study verification			Primary
Report writing		Secondary	Primary



C. Trends Survey Results by Demographic

Demographic: Airport Size (E/D PAX)



	TREND	UNDER 850K	850K – 4M	4M – 16M	16M – 40M	OVER 40M
1	Cybersecurity threats to operational technology systems demand continuous investment and training	3	1	1	1	1
2	A slowing economy reduces passenger demand, delays capital projects, and pressures airports to diversify revenue and control operating costs	2	2	2	3	22
3	Governments face monetary constraints to properly fund airport investments and support the aviation industry	1	3	3	5	24
4	Rising interest rates increase financing costs for airport capital projects	6	4	5	2	13
5	Skilled labor shortages persist in maintenance, security, and technical roles	9	8	4	6	4
6	5G and private wireless networks enhance connectivity for airside, ground operations and passengers	16	6	7	7	2
7	Smart energy systems optimize terminal heating, cooling and power consumption	5	7	6	20	14
8	Airport systems shift to cloud-based platforms for increased scalability and to manage cybersecurity risk	8	5	10	22	6
9	Accessibility and inclusion standards expand for passengers with disabilities	19	9	9	4	9
10	Expansion of biometrics and touchless processing across all aspects of the passenger journey	27	14	17	14	3
11	Artificial intelligence automates airport operations, from predictive maintenance to passenger flow management and experience	22	12	23	9	12
12	Global aging population changes passenger needs and service expectations	15	18	16	11	17
13	Advanced air traffic management systems integrate traditional and new airspace users (e.g. virtual towers, drones, eVTOLs)	13	19	22	8	18
14	Younger generations expect seamless digital travel and social responsibility from airports	12	28	14	15	5
15	Retail and food offerings shift toward local, sustainable, and experiential concepts	36	15	8	13	26
16	Air navigation modernization programs alter route structures and delay management	11	22	19	33	28
17	Volatile fuel prices drive cost management and airline network adjustments	17	13	11	21	41
18	Local community engagement becomes essential to maintain airport operating approvals	10	23	26	18	27
19	Global trade tensions and protectionism alter air routes and air cargo demand	23	24	18	12	31
20	Increased insurance costs and risk management complexity from extreme weather events	7	11	30	26	43
21	Air cargo growth continues from e-commerce and high-value goods logistics	40	27	15	23	10

Demographic: Airport Size (E/D PAX)

	TREND	UNDER 850K	850K – 4M	4M – 16M	16M – 40M	OVER 40M
22	Passengers expect personalized digital services that anticipate their needs, offering tailored flight updates, retail offers, and wayfinding	48	16	20	27	11
23	New revenue streams emerge from data monetization and digital services	18	21	25	37	33
24	Long-haul narrowbody aircraft create new point-to-point international routes	45	30	12	25	20
25	Upskilling programs expand as airports transition toward AI and digital solutions	24	32	29	32	7
26	Premium travel and lounge experiences expand as airlines target high-yield customers	50	37	13	10	8
27	Smart terminal design incorporates modular, rapidly reconfigurable spaces	28	26	28	29	30
28	Dynamic wayfinding systems use sensors and digital signage to guide passengers through congestion	53	29	21	19	15
29	Cultural and local immersion becomes a differentiator in airport dining and design themes	38	20	33	30	35
30	Airline bankruptcies or mergers create volatility for airports	20	33	24	28	50
31	Limited production of new small aircraft constrains air service to smaller airports, reducing connectivity and increasing reliance on larger hubs	4	10	36	52	54
32	Slot constraints at major hubs accelerate growth at secondary and regional airports	26	17	32	48	38
33	Visa and border policies tighten in response to migration and security pressures, slowing international passenger traffic	43	39	31	17	25
34	Real-time language translation tools enhance accessibility for international travelers	41	34	27	35	23
35	Growing community pressure to improve multiple connected transportation options for passengers and workers (e.g. rail, bus, metro, rideshare)	33	40	41	24	21
36	Digital twins enable real-time monitoring and optimization of airport infrastructure performance	46	35	42	16	29
37	Robotics and sensor technologies improve operations and enhance passenger experience	37	41	34	42	16
38	Electric/hydrogen aircraft and ground equipment require new fueling, charging, and ground infrastructure	14	46	39	39	37
39	National security concerns and protectionism increase restrictions on foreign ownership and technology supply chains	31	42	35	36	39
40	Growing financial burden surrounding intensifying health screening standards, robust passenger bill of rights, and increased monetary penalties for irregular operations	21	25	43	44	48
41	Conflicts and political instability disrupt overflight routes	39	38	37	31	40
42	Noise and emissions concerns drive restrictions on airport growth and operations	25	45	44	40	34
43	Automation and robotics improve efficiencies and reduce airport staffing requirements	32	43	38	50	32
44	Dynamic aeronautical pricing models accelerate based on congestion, time of day, or sustainability metrics	44	36	45	34	44

Demographic: Airport Size (E/D PAX)

	TREND	UNDER 850K	850K – 4M	4M – 16M	16M – 40M	OVER 40M
45	Community expectations increase for airports to demonstrate climate action and environmental transparency	29	48	47	38	36
46	Passengers expect retail-street pricing at the airport	54	31	40	41	52
47	Airports adopt stronger environmental, social, and governance (ESG) reporting practices	35	50	46	47	46
48	Public-private partnerships reshape airport ownership and investment models	30	47	48	46	49
49	Diversity, equity, and inclusion initiatives remain central to airport workforce strategies	42	44	50	45	45
50	International climate agreements push airports toward net-zero targets	34	51	49	51	42
51	Pressure grows for airports to reduce single-use plastics and visible waste	47	49	53	49	47
52	Rapid growth in middle-class travelers from Asia and Africa reshapes global traffic patterns	51	55	54	43	19
53	Airport retail faces competition from e-commerce and pre-order delivery models	55	52	51	55	51
54	Green bonds, ESG-linked loans, and sustainability metrics shape airport financing and investor relations	49	53	52	53	55
55	Growth of autonomous airside vehicles for baggage handling and aircraft towing	52	54	55	54	53

Demographic: USA vs. Canada

	TREND	USA	CANADA
1	Cybersecurity threats to operational technology systems demand continuous investment and training	1	1
2	A slowing economy reduces passenger demand, delays capital projects, and pressures airports to diversify revenue and control operating costs	3	2
3	Governments face monetary constraints to properly fund airport investments and support the aviation industry	2	11
4	Rising interest rates increase financing costs for airport capital projects	5	5
5	Skilled labor shortages persist in maintenance, security, and technical roles	4	14
6	5G and private wireless networks enhance connectivity for airside, ground operations and passengers	6	8
7	Smart energy systems optimize terminal heating, cooling and power consumption	8	6
8	Airport systems shift to cloud-based platforms for increased scalability and to manage cybersecurity risk	7	13
9	Accessibility and inclusion standards expand for passengers with disabilities	9	10
10	Expansion of biometrics and touchless processing across all aspects of the passenger journey	16	4
11	Artificial intelligence automates airport operations, from predictive maintenance to passenger flow management and experience	13	12
12	Global aging population changes passenger needs and service expectations	10	19
13	Advanced air traffic management systems integrate traditional and new airspace users (e.g. virtual towers, drones, eVTOLs)	11	17
14	Younger generations expect seamless digital travel and social responsibility from airports	12	15
15	Retail and food offerings shift toward local, sustainable, and experiential concepts	14	22
16	Air navigation modernization programs alter route structures and delay management	15	25
17	Volatile fuel prices drive cost management and airline network adjustments	20	18
18	Local community engagement becomes essential to maintain airport operating approvals	17	28
19	Global trade tensions and protectionism alter air routes and air cargo demand	24	7
20	Increased insurance costs and risk management complexity from extreme weather events	19	31
21	Air cargo growth continues from e-commerce and high-value goods logistics	22	23
22	Passengers expect personalized digital services that anticipate their needs, offering tailored flight updates, retail offers, and wayfinding	21	32
23	New revenue streams emerge from data monetization and digital services	23	40
24	Long-haul narrowbody aircraft create new point-to-point international routes	29	9
25	Upskilling programs expand as airports transition toward AI and digital solutions	26	26
26	Premium travel and lounge experiences expand as airlines target high-yield customers	18	49
27	Smart terminal design incorporates modular, rapidly reconfigurable spaces	27	24
28	Dynamic wayfinding systems use sensors and digital signage to guide passengers through congestion	25	44

Demographic: USA vs. Canada

	TREND	USA	CANADA
29	Cultural and local immersion becomes a differentiator in airport dining and design themes	30	29
30	Airline bankruptcies or mergers create volatility for airports	28	43
31	Limited production of new small aircraft constrains air service to smaller airports, reducing connectivity and increasing reliance on larger hubs	40	3
32	Slot constraints at major hubs accelerate growth at secondary and regional airports	33	21
33	Visa and border policies tighten in response to migration and security pressures, slowing international passenger traffic	31	33
34	Real-time language translation tools enhance accessibility for international travelers	32	34
35	Growing community pressure to improve multiple connected transportation options for passengers and workers (e.g. rail, bus, metro, rideshare)	35	27
36	Digital twins enable real-time monitoring and optimization of airport infrastructure performance	36	35
37	Robotics and sensor technologies improve operations and enhance passenger experience	34	37
38	Electric/hydrogen aircraft and ground equipment require new fueling, charging, and ground infrastructure	37	39
39	National security concerns and protectionism increase restrictions on foreign ownership and technology supply chains	39	41
40	Growing financial burden surrounding intensifying health screening standards, robust passenger bill of rights, and increased monetary penalties for irregular operations	45	16
41	Conflicts and political instability disrupt overflight routes	42	36
42	Noise and emissions concerns drive restrictions on airport growth and operations	41	45
43	Automation and robotics improve efficiencies and reduce airport staffing requirements	43	48
44	Dynamic aeronautical pricing models accelerate based on congestion, time of day, or sustainability metrics	38	52
45	Community expectations increase for airports to demonstrate climate action and environmental transparency	46	38
46	Passengers expect retail-street pricing at the airport	44	51
47	Airports adopt stronger environmental, social, and governance (ESG) reporting practices	49	30
48	Public-private partnerships reshape airport ownership and investment models	47	46
49	Diversity, equity, and inclusion initiatives remain central to airport workforce strategies	48	42
50	International climate agreements push airports toward net-zero targets	51	20
51	Pressure grows for airports to reduce single-use plastics and visible waste	50	47
52	Rapid growth in middle-class travelers from Asia and Africa reshapes global traffic patterns	52	50
53	Airport retail faces competition from e-commerce and pre-order delivery models	53	55
54	Green bonds, ESG-linked loans, and sustainability metrics shape airport financing and investor relations	54	53
55	Growth of autonomous airside vehicles for baggage handling and aircraft towing	55	54

Demographic: Management Role

TREND		CEO/Executive Director	Commercial Development	Finance	Human Resources, Administration, and Legal	Information Technology	Marketing, Public Relations, and Customer Experience	Operations, Planning, and Security
1	Cybersecurity threats to operational technology systems demand continuous investment and training	2	1	1	1	1	1	1
2	A slowing economy reduces passenger demand, delays capital projects, and pressures airports to diversify revenue and control operating costs	1	2	4	3	2	7	4
3	Governments face monetary constraints to properly fund airport investments and support the aviation industry	3	3	2	9	3	5	3
4	Rising interest rates increase financing costs for airport capital projects	4	4	7	7	4	8	5
5	Skilled labor shortages persist in maintenance, security, and technical roles	7	13	5	2	6	3	2
6	5G and private wireless networks enhance connectivity for airside, ground operations and passengers	6	10	8	8	7	2	7
7	Smart energy systems optimize terminal heating, cooling and power consumption	5	24	6	6	14	9	6
8	Airport systems shift to cloud-based platforms for increased scalability and to manage cybersecurity risk	8	7	3	5	12	4	15
9	Accessibility and inclusion standards expand for passengers with disabilities	12	8	9	10	5	13	13
10	Expansion of biometrics and touchless processing across all aspects of the passenger journey	14	12	11	20	13	19	10
11	Artificial intelligence automates airport operations, from predictive maintenance to passenger flow management and experience	16	9	18	22	8	23	14
12	Global aging population changes passenger needs and service expectations	9	30	13	11	28	17	11
13	Advanced air traffic management systems integrate traditional and new airspace users (e.g. virtual towers, drones, eVTOLs)	18	14	21	4	35	26	9
14	Younger generations expect seamless digital travel and social responsibility from airports	19	27	19	28	9	12	8
15	Retail and food offerings shift toward local, sustainable, and experiential concepts	24	11	10	32	15	25	12
16	Air navigation modernization programs alter route structures and delay management	10	20	15	29	22	6	36
17	Volatile fuel prices drive cost management and airline network adjustments	20	32	22	12	16	18	17
18	Local community engagement becomes essential to maintain airport operating approvals	13	35	20	40	21	16	20
19	Global trade tensions and protectionism alter air routes and air cargo demand	15	5	36	17	37	15	22
20	Increased insurance costs and risk management complexity from extreme weather events	17	36	12	23	23	21	19
21	Air cargo growth continues from e-commerce and high-value goods logistics	35	6	14	18	24	31	16
22	Passengers expect personalized digital services that anticipate their needs, offering tailored flight updates, retail offers, and wayfinding	21	23	25	16	11	20	37
23	New revenue streams emerge from data monetization and digital services	23	29	17	34	17	14	30
24	Long-haul narrowbody aircraft create new point-to-point international routes	32	21	33	19	18	10	26
25	Upskilling programs expand as airports transition toward AI and digital solutions	22	34	16	13	20	33	35

Demographic: Management Role

TREND		CEO/Executive Director	Commercial Development	Finance	Human Resources, Administration, and Legal	Information Technology	Marketing, Public Relations, and Customer Experience	Operations, Planning, and Security
26	Premium travel and lounge experiences expand as airlines target high-yield customers	39	16	30	25	25	24	18
27	Smart terminal design incorporates modular, rapidly reconfigurable spaces	25	28	32	21	30	28	25
28	Dynamic wayfinding systems use sensors and digital signage to guide passengers through congestion	37	26	29	27	10	34	27
29	Cultural and local immersion becomes a differentiator in airport dining and design themes	31	19	24	14	38	37	39
30	Airline bankruptcies or mergers create volatility for airports	26	22	26	44	46	39	28
31	Limited production of new small aircraft constrains air service to smaller airports, reducing connectivity and increasing reliance on larger hubs	11	40	27	30	43	22	50
32	Slot constraints at major hubs accelerate growth at secondary and regional airports	27	38	23	35	32	30	31
33	Visa and border policies tighten in response to migration and security pressures, slowing international passenger traffic	36	18	45	31	36	29	23
34	Real-time language translation tools enhance accessibility for international travelers	38	25	38	33	29	42	29
35	Growing community pressure to improve multiple connected transportation options for passengers and workers (e.g. rail, bus, metro, rideshare)	41	37	40	45	39	11	21
36	Digital twins enable real-time monitoring and optimization of airport infrastructure performance	43	17	31	38	27	41	40
37	Robotics and sensor technologies improve operations and enhance passenger experience	30	31	48	15	31	35	44
38	Electric/hydrogen aircraft and ground equipment require new fueling, charging, and ground infrastructure	28	42	50	24	53	27	33
39	National security concerns and protectionism increase restrictions on foreign ownership and technology supply chains	40	33	37	43	42	38	41
40	Growing financial burden surrounding intensifying health screening standards, robust passenger bill of rights, and increased monetary penalties for irregular operations	29	43	39	46	44	43	42
41	Conflicts and political instability disrupt overflight routes	46	15	41	26	26	32	47
42	Noise and emissions concerns drive restrictions on airport growth and operations	42	46	35	50	40	46	24
43	Automation and robotics improve efficiencies and reduce airport staffing requirements	33	41	34	54	19	51	46
44	Dynamic aeronautical pricing models accelerate based on congestion, time of day, or sustainability metrics	34	45	46	42	49	40	43
45	Community expectations increase for airports to demonstrate climate action and environmental transparency	44	47	49	49	34	36	32
46	Passengers expect retail-street pricing at the airport	48	52	28	37	50	45	45
47	Airports adopt stronger environmental, social, and governance (ESG) reporting practices	52	48	42	41	41	53	38
48	Public-private partnerships reshape airport ownership and investment models	45	39	54	39	33	49	48

Demographic: Management Role

TREND		CEO/Executive Director	Commercial Development	Finance	Human Resources, Administration, and Legal	Information Technology	Marketing, Public Relations, and Customer Experience	Operations, Planning, and Security
49	Diversity, equity, and inclusion initiatives remain central to airport workforce strategies	53	44	47	36	45	47	51
50	International climate agreements push airports toward net-zero targets	47	49	51	51	52	48	34
51	Pressure grows for airports to reduce single-use plastics and visible waste	49	50	43	47	47	50	53
52	Rapid growth in middle-class travelers from Asia and Africa reshapes global traffic patterns	50	51	52	55	48	54	52
53	Airport retail faces competition from e-commerce and pre-order delivery models	54	53	44	53	54	44	55
54	Green bonds, ESG-linked loans, and sustainability metrics shape airport financing and investor relations	55	55	55	52	51	52	49
55	Growth of autonomous airside vehicles for baggage handling and aircraft towing	51	54	53	48	55	55	54

Demographic: General & Business Aviation

TREND		RANK
1	Cybersecurity threats to operational technology systems demand continuous investment and training	1
2	A slowing economy reduces passenger demand, delays capital projects, and pressures airports to diversify revenue and control operating costs	2
3	Governments face monetary constraints to properly fund airport investments and support the aviation industry	3
4	Rising interest rates increase financing costs for airport capital projects	27
5	Skilled labor shortages persist in maintenance, security, and technical roles	10
6	5G and private wireless networks enhance connectivity for airside, ground operations and passengers	6
7	Smart energy systems optimize terminal heating, cooling and power consumption	11
8	Airport systems shift to cloud-based platforms for increased scalability and to manage cybersecurity risk	5
9	Accessibility and inclusion standards expand for passengers with disabilities	13
10	Expansion of biometrics and touchless processing across all aspects of the passenger journey	20
11	Artificial intelligence automates airport operations, from predictive maintenance to passenger flow management and experience	23
12	Global aging population changes passenger needs and service expectations	21
13	Advanced air traffic management systems integrate traditional and new airspace users (e.g. virtual towers, drones, eVTOLs)	15
14	Younger generations expect seamless digital travel and social responsibility from airports	12
15	Retail and food offerings shift toward local, sustainable, and experiential concepts	36
16	Air navigation modernization programs alter route structures and delay management	18
17	Volatile fuel prices drive cost management and airline network adjustments	28
18	Local community engagement becomes essential to maintain airport operating approvals	4
19	Global trade tensions and protectionism alter air routes and air cargo demand	32
20	Increased insurance costs and risk management complexity from extreme weather events	7
21	Air cargo growth continues from e-commerce and high-value goods logistics	50
22	Passengers expect personalized digital services that anticipate their needs, offering tailored flight updates, retail offers, and wayfinding	48
23	New revenue streams emerge from data monetization and digital services	17
24	Long-haul narrowbody aircraft create new point-to-point international routes	51
25	Upskilling programs expand as airports transition toward AI and digital solutions	19
26	Premium travel and lounge experiences expand as airlines target high-yield customers	52
27	Smart terminal design incorporates modular, rapidly reconfigurable spaces	26
28	Dynamic wayfinding systems use sensors and digital signage to guide passengers through congestion	37
29	Cultural and local immersion becomes a differentiator in airport dining and design themes	39

Demographic: General & Business Aviation

TREND		RANK
30	Airline bankruptcies or mergers create volatility for airports	44
31	Limited production of new small aircraft constrains air service to smaller airports, reducing connectivity and increasing reliance on larger hubs	24
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54	Green bonds, ESG-linked loans, and sustainability metrics shape airport financing and investor relations	46
55	Growth of autonomous airside vehicles for baggage handling and aircraft towing	55

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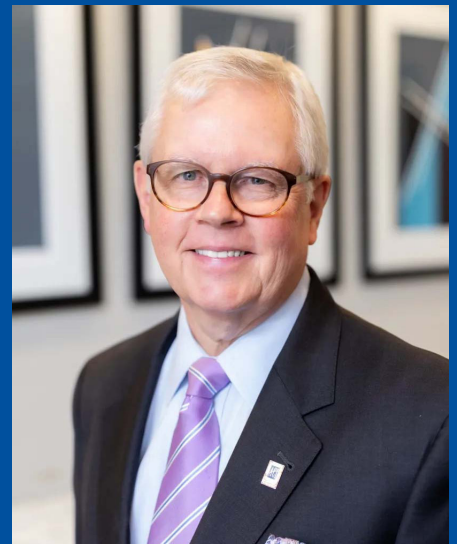
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Acknowledgement

This first edition is dedicated to Kevin M. Burke in recognition of his more than a decade of leadership at ACI-NA. Since 2014, Kevin has strengthened the association as the leading voice for U.S. and Canadian airports, deepened its advocacy presence in both Washington and Ottawa, and guided the industry through the pandemic by helping secure \$20 billion in federal relief. As he concludes his tenure in 2026, we are deeply grateful for his instrumental role in the creation and development of AirportNEXT, and for a career devoted to airports and the communities they serve.





A Strategic Roadmap

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