



# THE SEAMLESS PASSENGER JOURNEY IN SMART AIRPORTS

New market intelligence report from Valour Consultancy and P.A.ID Strategies. Available now!

First, let's look at the current state of the market, across all core passenger touchpoints.

## FACTS & FIGURES

State of the market in 2020.

**233.5 million**  
Total annual revenues

**23.9%**  
Biometric penetration rate

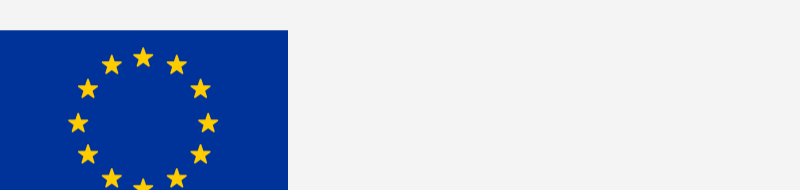
**50,531 units**  
Total smart touchpoint installed base

**6.8%**  
Annual installed base growth

**15.0%**  
Biometric adoption growth

**Year-on-Year**

The report uses a dual base year of 2019 and 2020. This highlights the impact of COVID-19 on the passenger touchpoints market, before presenting 10-year growth forecasts out to 2030.



Europe has consistently been an early-adopter of automation and self-service technologies.

## MID-TERM STATS

Projected development of the market by 2025.

**386.1 million**  
Total annual revenues

**40.1%**  
Biometric penetration rate

**72,285 units**  
Total smart touchpoint installed base

**8.3%**  
Annual installed base growth

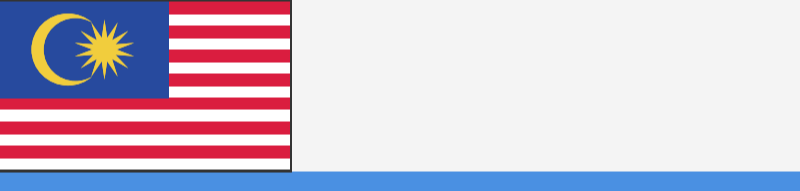
**22.6%**  
Biometric adoption growth

**Year-on-Year**

## BIOMETRIC PENETRATION

While already fully integrated into immigration kiosks and ABC eGates, biometric adoption in other touchpoints will rise rapidly over the next decade.

COVID-19 is proving to be a catalyst by accelerating this existing trend.



Self-bag drop at Kuala Lumpur International halved processing times to 30-40 seconds, reducing wait times and staff required.



EU-EES immigration kiosks at Keflavik International Airport cut processing times by 60% to 42-64 seconds per traveller.

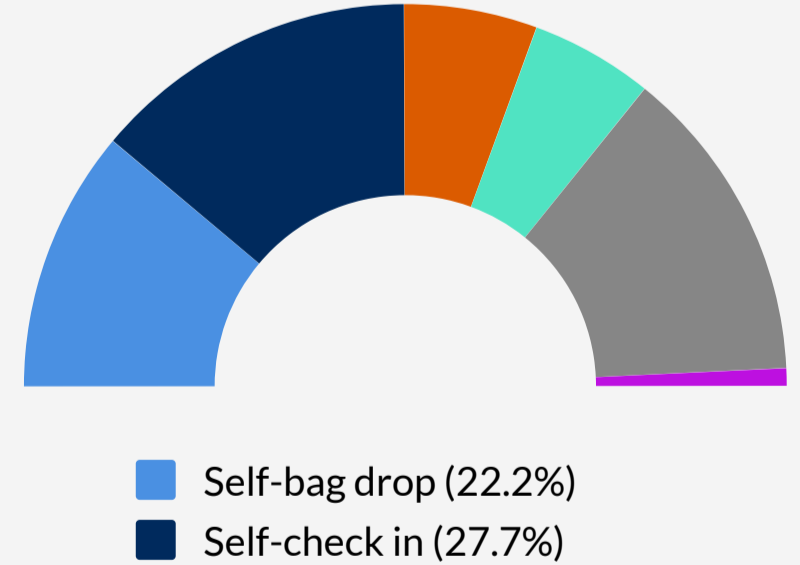
## MARKET VALUE PROJECTIONS

This graph shows each touchpoint's market share, in relation to total annual revenues.

Self-check in and immigration kiosks will lose market share, with self-bag drop seeing the greatest improvement in relative value.

## AGGREGATED BIOMETRIC SHARE

The wheel below shows the value of each touchpoint across the 10-year forecast period, as a proportion of total biometric revenues.



One staff member can typically supervise five stations equipped with automation.

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**2030**

**2020**

**2025**

**2030**

**2030**

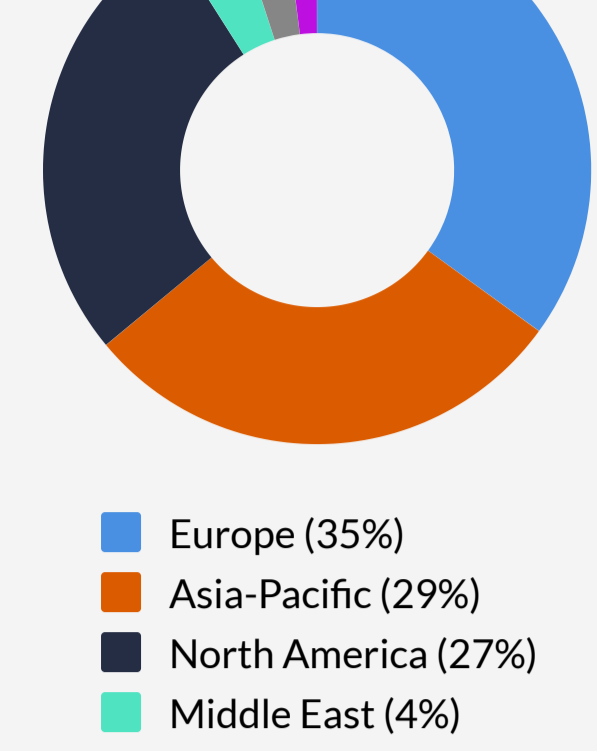
## Forecasts

## Regions

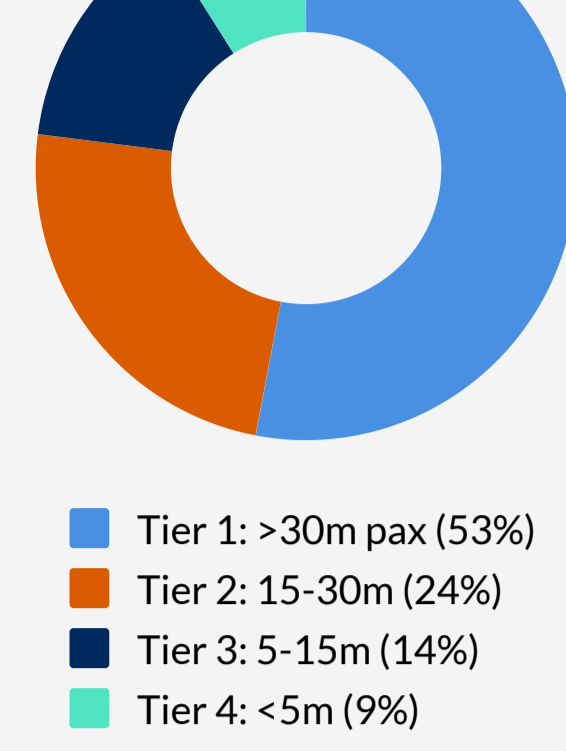
## Touchpoints

## ANNUAL TOUCHPOINT INSTALLATIONS IN 2020

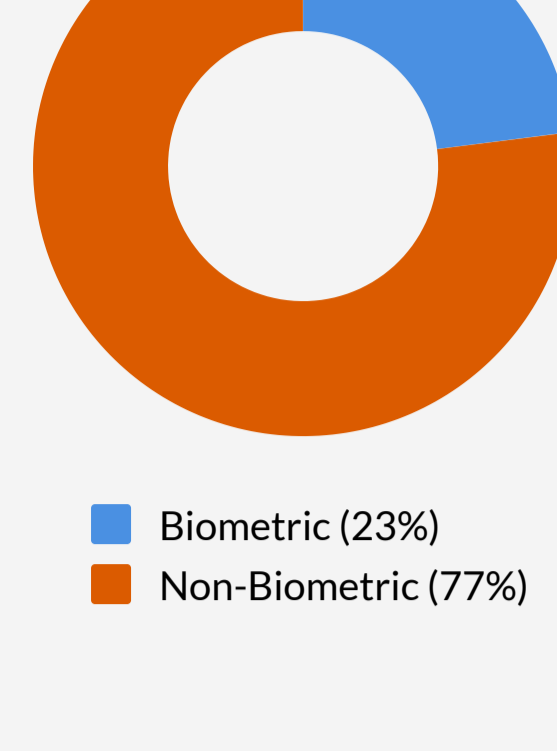
by region



by airport size



by type



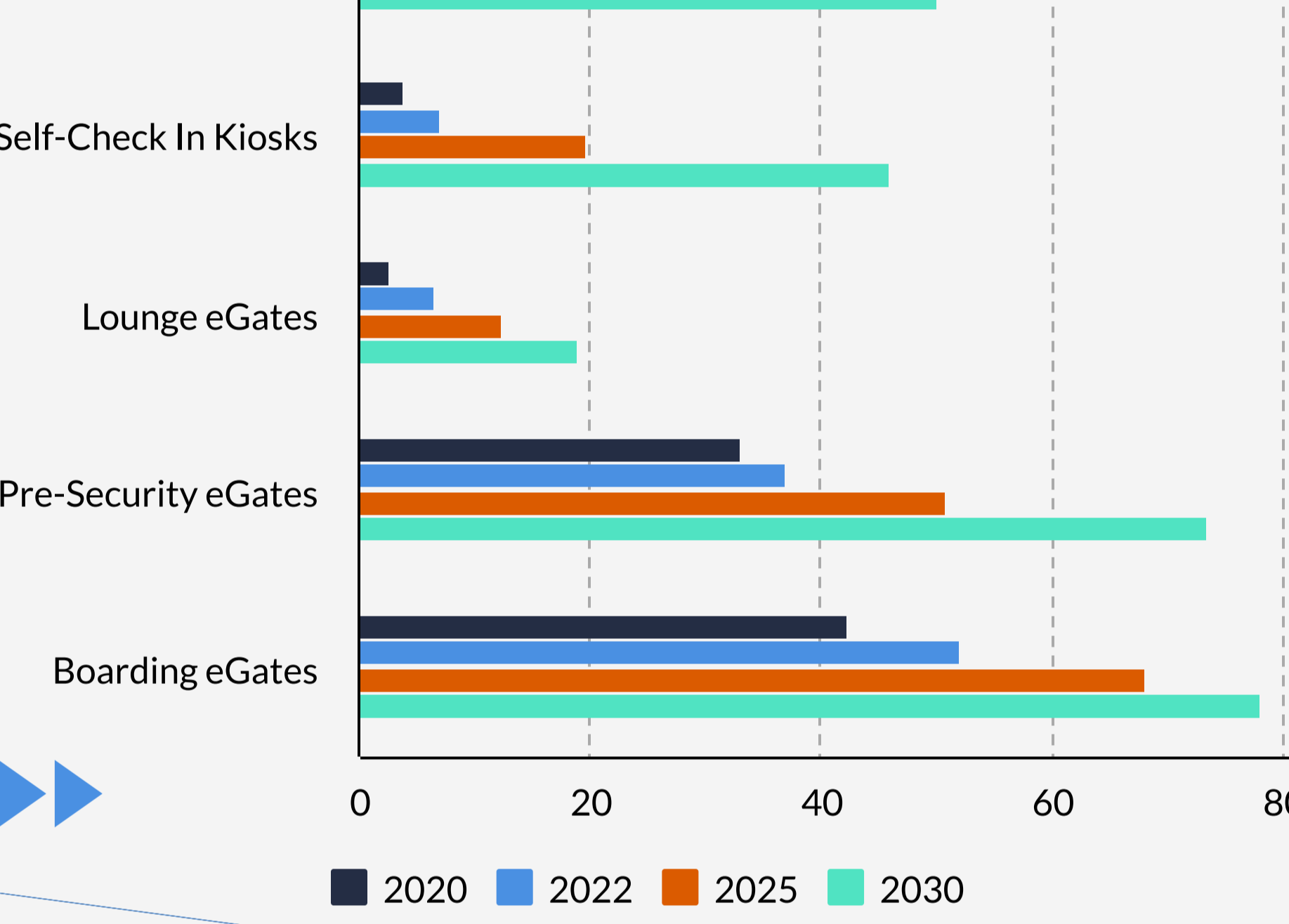
## SMART TOUCHPOINT - MARKET PENETRATION

This table shows projected integration of smart technologies into the existing installed base of passenger touchpoints, encompassing manual/agent counters, desks, and so on.

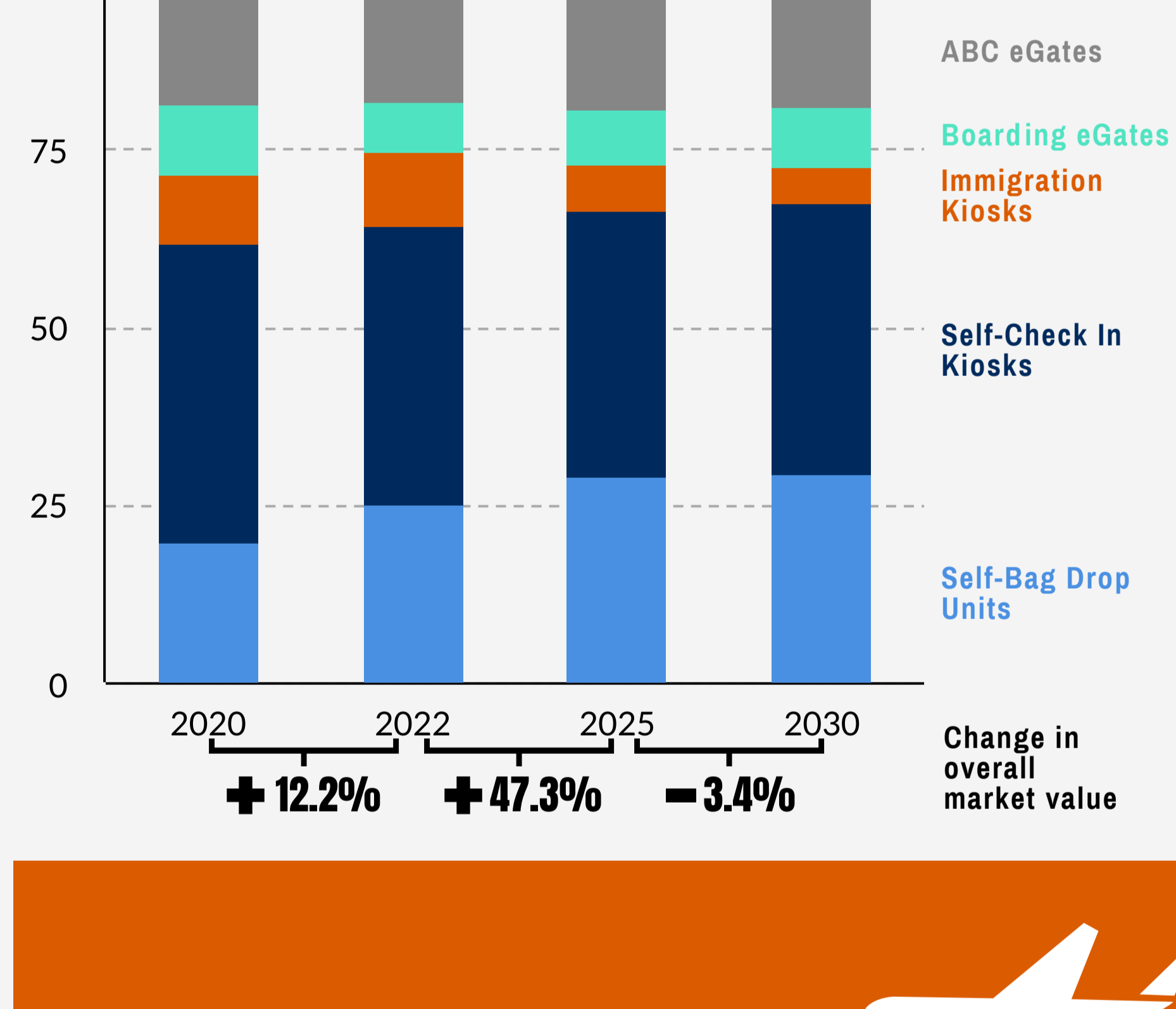
	BASELINE 2020	TWO-YEAR '22	FIVE-YEAR '25	TEN-YEAR '30
<b>Self-bag drop</b> As a % of total baggage units	2.6%	+1.0%	+2.3%	+3.0%
<b>Passenger kiosks</b> Self-check in and immigration	13.9%	+1.5%	+2.0%	+1.0%
<b>eGates</b> Pre-sec, boarding, lounge, ABC	7.1%	+0.4%	+0.5%	+0.7%
<b>Overall Penetration</b> All passenger touchpoints	15.5%	+2.2%	+6.0%	+9.9%

% changes are shown in relation to previous forecast interval.

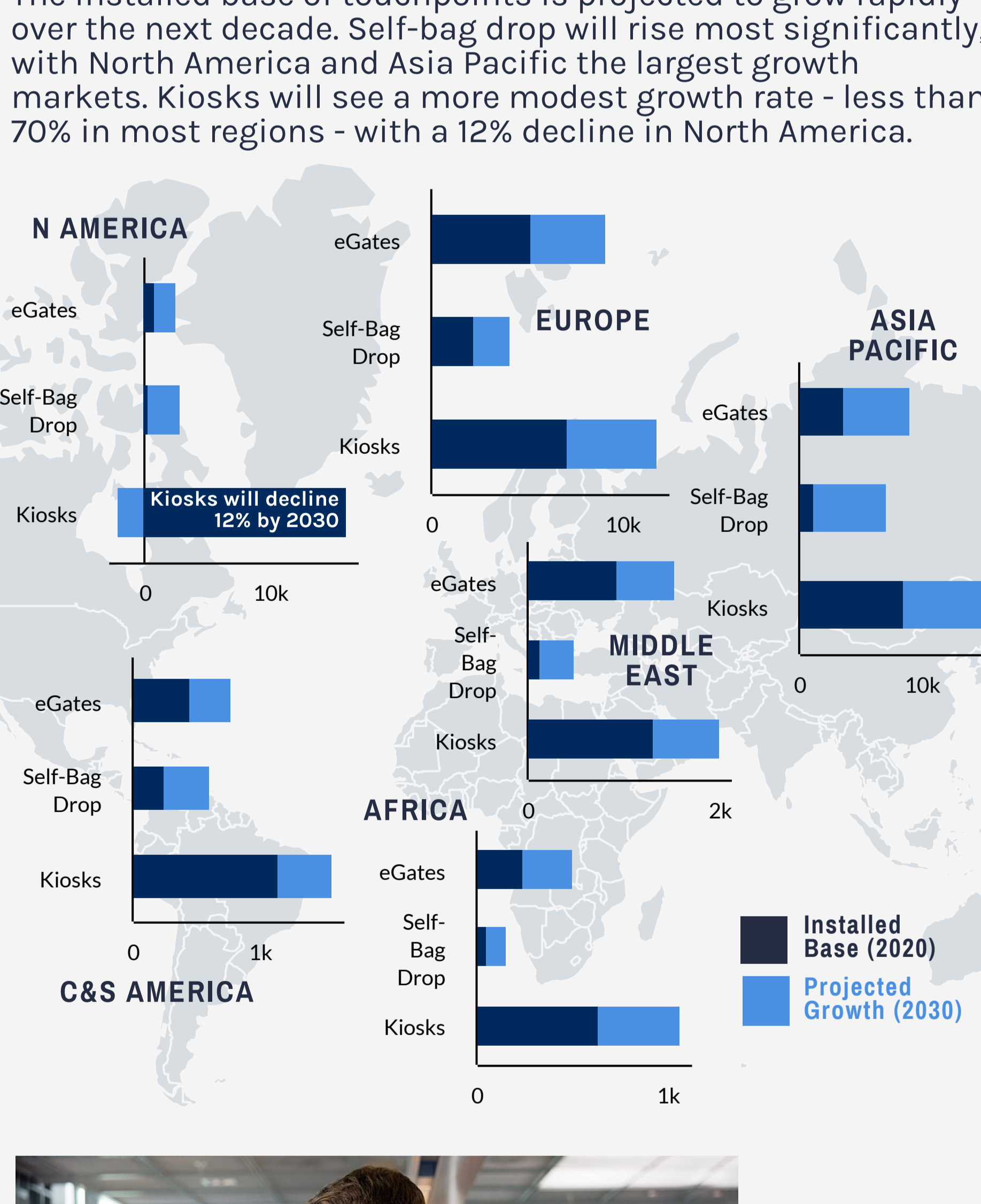
- Self-check in kiosks at Vancouver Airport increased pax processing rates by 250% and reduced staff costs by 30%.
- Seamless biometric journeys at Istanbul Airport achieved a 30% reduction in boarding times and increased customer satisfaction.
- At two US airports, Spirit Airlines' new biometric bag drops cut average processing times by 30% to 70 seconds per flyer.
- Using seamless facial recognition, >400 pax can board an Airbus A380 at Beijing Capital International Airport in less than 20 minutes.



eGates were found to deliver performance improvements of between 30% and 250% over traditional manual processes.



The revised base of touchpoints is projected to grow rapidly over the next decade. Self-bag drop will rise most significantly, with North America and Asia Pacific the largest growth markets. Kiosks will see a more modest growth rate - less than 70% in most regions - with a 12% decline in North America.



**4-fold rise in biometrically-enabled touchpoints**

Given the industry efforts to modernise airport processes and the advent of digital identity, we can only see biometric inclusion in touchpoints increasing. In addition to the rapid increase in attach rates outlined from 2020-25, we predict the biometric installed base of all touchpoints will almost double again between 2025-2030 as more airports strive to offer seamless journeys.

## LEARN MORE

Valour Consultancy and P.A.ID Strategies have combined their expertise on the evolution of seamless passenger journeys within smart airports.

It focusses on the passenger experience and interactions of travellers as they pass through touchpoints, including check-in, bag drop, pre-security, lounges, immigration, boarding gates, customs and border control.

The report provides a timely insight into the current market status and future direction. It reviews the impact of COVID-19 on investment decisions in each region and outlines how the adoption of smart touchpoints can aid recovery and improve operational efficiency.

**>40** 1-2-1 interviews

**224** charts

**171** pages



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