Challenges and Opportunities for Small & Emerging Airports in the 21st Century

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1. **Foreword**

While airports of every scale require a growth strategy which includes establishing aviation networks, staff training, and maintaining profitability in order to ensure sustained, progressive growth, cooperation from airport stakeholders is also indispensable in utilizing the airport to develop industry and the economy around it for the region. The same integrated growth strategy applies for small and emerging airports as well. In seeking efficient, highly profitable airport operations, collaboration with foreign investors and airport operators is an option to be considered, with one such trend being airport privatization.

Following on from the privatization of airports which began with Britain in the 1980s and Australia in the 1990s, the involvement of foreign investors or operators has become established operating practice at airports around the world. Various cases of airport privatization have also been seen in the Asia-Pacific region. In addition, the players seeking involvement in the operation of foreign airports have come to include not only airport operators but a range of pension funds and infrastructure companies and funds. This paper defines the role of small and emerging airports and, upon establishing their importance, discusses the profitability and areas of concern observed in these airports. Furthermore, it uses the examples of innovative initiatives by airports in the Asia-Pacific region to construct a target growth strategy for these airports.

Additionally, the paper investigates the opportunities and merits of collaboration with foreign investors and airport operators in the process of achieving sustained, progressive growth for small and emerging airports.

2. **Small and emerging airports in the 21st century**

With a diverse range of airports in existence, there are also various ways of measuring airport scale. This paper will treat “passenger traffic” as the key indicator and define a “small airport” as one handling less than 5 million passengers annually. “Emerging airports” with annual passenger traffic under 25 million are achieving significant growth in recent years in the Asia-Pacific region.

These passenger traffic indices were derived from Airport Service Quality (ASQ) surveys of airport service levels conducted by the ACI, which use the following 5 categories when releasing results of annual passenger traffic: 2-5 million, 5-15 million, 15-25 million, 25-40 million, and over 40 million passengers.

3. **The role of small and emerging airports**

The massive public infrastructure of an airport functions as the cornerstone of economic, industrial, and lifestyle activity of a country or region; it also serves as part of local revitalization efforts to stimulate
regional tourism and industry, consequently contributing to the economic development of the nation as a whole.

Even small airports are no longer necessarily designated as lifestyle infrastructure for isolated islands or remote areas, instead they are expected to be utilized for functions which deliver greater value for the regional economy.

In addition, the momentum of emerging airports, which are achieving significant progress around the world through expansion, improvement, and functional enhancements, provides vital support for the economic growth of nations.

3.1 **Cornerstone of a nation’s economy, industry, and lifestyle**

In some countries, being the sole international airport makes such airports a cornerstone of diplomatic relations as the gateway to a nation, even though they may be small in scale. Meanwhile, in some cities with multiple airports, small airports may play a supporting role to busier ones, with particular increases in usage by LCCs (Low Cost Carriers), which have achieved strong growth and presence in recent years. Even if they are small in size, such airports must meet global standards in airport operation and security measures, albeit on a compact scale.

For example, Mongolia’s Chinggis Khaan International Airport located in its capital of Ulaanbaatar is a small airport with annual traffic of approximately 1 million passengers, but being Mongolia’s sole international airport means it serves as the point of entry into the country. For landlocked Mongolia, despite its overland exchanges with neighboring Russia and China, Chinggis Khaan International Airport exists as the one and only point of contact by air, serving as a receptacle for the flow of people and goods via air routes which enable rapid, mass transportation from distant places.

3.2 **Playing a role in the revitalization of regional tourism and industry**

Serving as the main engine for revitalizing regional tourism and industry can be considered one of the roles expected of small and emerging airports.

As hubs of exchange, local airports play a major role in discovering regional tourism and business demand, enabling the development of rural economies and job creation, and diversifying an overconcentration of people and goods flowing only into capital and major cities.

While at roughly 378,000 km² Japan’s territory is certainly not large, this area contains some 97 airports. Although 8 of these 97 have annual traffic exceeding 10 million passengers, most of the remaining airports serve below 5 million and would be regarded as small, regional airports by global standards.¹

Through the Ministry of Land, Infrastructure, Transport and Tourism’s Japan Tourism Agency, Japan

¹ From Ministry of Land, Infrastructure, Transport and Tourism 2015 Record of Airport Management Conditions
is currently undertaking various initiatives aimed at becoming a tourism-oriented country, striving for the major economic ripple effect of tourism by generating demand from around the world, including rapidly-growing Asia. Essential in becoming a tourism-oriented country is enriching regional economies and creating vibrant local communities through each area’s unified efforts to develop unique tourist attractions and attract a broad spectrum of tourists. ²

One strategy is to effectively utilize regional airports to assist in revitalizing the local economy, which consequently contributes to the economic development of the nation as a whole.

4. Profitability and areas of concern in small and emerging airports

4.1 Airport business revenue structure

The revenue structure of the airport business is divided between user fee and charges for the primary facilities required for the aircraft to operate (runways, aprons, etc.) and revenue from the use of other facilities and from services (passenger and cargo terminal buildings, car-parking, retail, restaurants etc.). Revenue generated mainly through facilities and services related to aircraft operation, as in the former, is considered aeronautical revenue, while the latter facilities and services generate non-aeronautical revenue.

Summary of revenue structure in the airport business

<table>
<thead>
<tr>
<th>Aeronautical revenue</th>
<th>Non-aeronautical revenue</th>
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</thead>
<tbody>
<tr>
<td>Landing charges</td>
<td>Tenant management income</td>
</tr>
<tr>
<td>Parking charges</td>
<td>Revenue from merchandise, food and beverage, duty free and other tenants</td>
</tr>
<tr>
<td>Passenger service facility charges (PSFC)</td>
<td>Rental fees for facilities within passenger terminals</td>
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<tr>
<td>Passenger security service charges (PSSC)</td>
<td>Office, counter and other facility usage charges</td>
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<tr>
<td>Passenger boarding charges</td>
<td>Cargo terminal usage charges</td>
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<tr>
<td>Ground handling service charges</td>
<td>Airport lounge management revenue</td>
</tr>
<tr>
<td>Fuel facility charges</td>
<td>VIP &amp; CIP lounge charges</td>
</tr>
<tr>
<td>BHS usage charges</td>
<td>Utility usage charges</td>
</tr>
<tr>
<td>Visual and radio aeronautical facility usage charges</td>
<td>Electricity, water, heating and other common service charges</td>
</tr>
<tr>
<td>Air traffic control charges</td>
<td>Revenue from business operations around the airport</td>
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</table>

The above is a general revenue structure, and additional components exist. Also, methods for setting charges vary by airport.

4.2 Profitability and areas of concern in small and emerging airports

Foremost for small airports is the expansion of aviation networks in order to increase the number of

² From Ministry of Land, Infrastructure, Transport and Tourism, Japan Tourism Agency website
airlines using their facilities. Doing so will lead to increase revenues related to aircraft operations (aeronautical revenue). Meanwhile, becoming an attractive choice for airlines is not simply about investment in facilities, but may often require incentives or other strategies. Needless to say, adequate maintenance and management of primary airport facilities are necessary to avoid impacting on the safe operation of aircraft. In some cases, government support may also be necessary.

Non-aeronautical revenue supplements aeronautical revenues, which is dependent on the number of flights and play an important factor for airport management. It is no longer an incremental revenue level issue. Even if profits from aeronautical revenue are small or, in some cases, in the red, airports can still achieve stable overall profitability by increasing non-aeronautical revenue from passenger terminals and other facilities.

Airports of restricted in its size and capital, require strategies for maximizing revenue gains from their limited facilities.

In the following section of this paper, I would like to exhibit examples of airports with progressive approaches focusing on the expansion of aviation networks, staff training, and strategies for increasing non-aeronautical revenue, and examine how small and emerging airports can ensure self-sustainability and continued growth.

5. Growth strategies for small and emerging airports

In order for airports to grow by “increasing passenger numbers”, it is necessary to actively attract airline routes and improve the frequency with which the airport is utilized. Along with greater aviation demand, airports are expected to provide not only good terminal facilities and equipment, but also improved quality in soft aspects such as service and staff training. An approach focused on both hard and soft aspects can be expected to expand non-aeronautical as well as aeronautical revenues.

5.1 Attracting airline routes and passengers

5.1.1 Airlines and their passengers and cargo are airport’s key customers

It is vital for airports to strive towards creating a convenient facility for its existing and prospective client airlines.

Just like airports, airlines are also becoming more diverse, with fierce competition being waged by Full Service Airlines (FSAs) while at the same time the prominence of LCCs has become universally recognized for short and medium range and even long range.

Whether FSA or LCC, airlines are what brings passengers and cargo to an airport, and building relationships with these main customers is indispensable.
5.1.2 FSA and Airline Alliances

Many FSAs are members of airline alliances, with major aviation networks formed around airlines belonging to the same alliance. Airports need to establish an environment which facilitates smooth operation for major airlines and airline alliances. This is handled in a variety of ways by host airports, with France’s Charles de Gaulle Airport having approximately half of its services comprised of SKYTEAM flights while Japan’s Narita International Airport has maintained routes relatively balanced among three alliances – STAR ALLIANCE, oneworld, and SKYTEAM respectively with “under one roof” concept to facilitate flight connections among alliance member airlines.

5.1.3 Attracting LCCs

The arrival and establishment of an LCC operating model has made air travel more accessible to travelers which previously had little opportunity or no interest to make use of the air transport service. For small and emerging airports, there are major benefits in actively attracting LCCs to expand flight network to new destinations or increase frequencies to existing destinations. LCCs achieve affordable air fares through frequent quick turn-around flight services and cost-cutting. Some destination airports also create an attractive environment for LCCs by providing facilities reasonably in expensive charges for the airlines and flight incentives to serve the airport.

5.1.4 Marketing analysis and developing travel demand to and from your airport and region.

The creation of travel opportunities for your own airport is also important in attracting new routes and passengers and cargo.

Airports should consider a network strategy for both outbound and inbound market demand creation based on analysis of potential untapped markets in surrounding areas.

Particularly from the perspective of stimulating inbound tourism, it is difficult for airports alone to generate demand. Airports need to collaborate with national and regional governments, travel agencies, airlines, and other relevant parties to create attractive destinations and as a transit point.

5.2 Staff training

Alongside growth strategy through efforts for increasing aviation traffic demand, it is equally important to develop staff who actually operate them.

In order to support continued growth, airports need to cultivate in their staff administrative abilities and a consciousness for passenger convenience. Particularly when attending passengers from overseas, staff are also required to have good foreign language ability.

There are variety of facilities travelers use at airports, and so are the staff passengers are assisted by. Both the passengers and staff background are diverse. While improving the quality of hard aspects such as facilities and equipment is important, it is even more essential for airports to provide comprehensive
training for the staff that operate them and serves the passengers.

5.3 Retail Business strategies

In order to attract airlines and passengers, achieve sustained growth, airports must aim to increase non-aeronautical revenue.

Airport is a massive infrastructure establishments and further, airports are highly public facilities. Airports must aim to ensure self-sustainability by maximizing the output with their available resources and increase non-aeronautical revenues in order to recoup construction costs, cover the maintenance and operation costs required of a safety-focused facility, and invest in further equipment and personnel to increase attractiveness.

5.4 Examples of successful airports in the Asia-Pacific region

5.4.1 The case of Australia’s Gold Coast Airport

In Australia, all of the 22 nationally-owned airports were privatized following revisions to the Airports Act. Gold Coast Airport was privatized in 1998 and is currently being operated by Queensland Airports Limited (QAL). Despite being located some 100 km from Brisbane Airport, whose annual passenger traffic exceeds 20 million, the small-scale Gold Coast Airport has achieved remarkable growth, ranking fifth in Australia in terms of passenger traffic.
(1) Attracting airlines

Following privatization, Gold Coast Airport actively sought to attract more LCCs, expanding its network from 3 airlines with 3 routes in 2000 to 9 airlines with 20 routes by 2016. In their efforts to attract LCCs, Gold Coast Airport collaborates with local governments to market itself to airlines and strategically increase tourists, achieving more than three-fold growth in passenger traffic from approximately 1.9 million at the time of privatization to over 5.8 million as of 2015.

The airport’s management includes members with airline experience, which appears to enable them to create policies with an understanding of the needs of airlines. They have invested in new facilities, including the establishment of an LCC terminal, extension of runways, and separate taxiways, as well as a lounge to meet airline requests. Meanwhile, the airport has adopted inexpensive facilities and charges, including landing and user charges, to accommodate LCC operations, with aircrafts able to park adjacent to the passenger terminal without waiting for boarding bridges.

In addition, plans exist to install ILS in the future, with even greater efforts expected in order to attract airlines. As a result of actively pursuing LCCs businesses, more than 90% of Gold Coast Airport passengers comprised of LCC users; however, with the ratio of FSA passengers having risen to roughly 1/3 of the total since 2013, the airport’s future growth is worth observing.

(2) Strategies for improving non-aeronautical revenue

To supplement slow growth in aeronautic revenue resulting from the setting of moderate charges and fees to attract LCCs, Gold Coast Airport has adopted strategies to increase non-aeronautical revenue.

To date, the airport has repeatedly undertaken expansion and alteration of the passenger terminal to improve customer convenience. One unique point is the ability for non-passengers to enter shops and restaurants in the restricted areas of the passenger terminal provided they have cleared the security check as any other departing passengers. International and domestic passengers, as well as those coming to see them off, can use restaurants and shops beyond the security checkpoint. Food courts and other facilities near the departure gate can be used right up until departure time for the passengers and well-wishers. The layout is such that international departure passengers would pass through the duty free shopping area after immigration, employing a flow plan which utilizes a “Walk Through Concept” to stimulate customer desire to do some shopping. Other strategies for gaining non-aeronautical revenue are visible throughout, including the introduction of a sales revenue based commission system for tenant charges.

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3 From the Queens Airports Limited (QAL) Annual Report 2014-2015
4 From materials presented by QAL at the ACI Asia-Pacific Regional Assembly, Conference and Exhibition (April 2016, Gold Coast, Australia)
In addition, the airport has also expanded the volume of its parking areas, with fees set according to distance from the passenger terminal and convenience of facilities.

Attracting airlines as discussed in (1), facility investment and the abovementioned strategies for improving non-aeronautical revenue have proved successful, with a rising trend in profitability even after the establishment of a new LCC terminal in 2010.

(5.4.2) The case of Vietnam’s Noi Bai International Airport

(1) Staff training collaboration between airport operators

With the rapid increase in passenger traffic demand, the number of passengers handled at Noi Bai
International Airport (11.34 million in 2012) greatly exceeded the terminal’s design capacity (6 million annually). Following this, a second terminal building was built exclusively for international flight handling, opening in December 2014. Passenger numbers have continued to rise after the terminal’s opening (in 2015, passenger traffic exceeded 13 million), and the airport continues to grow as the main gateway to Vietnam’s capital, Hanoi.

Narita International Airport provided support in commissioning Terminal 2 from the construction phase, transferring expertise related to planning, facility maintenance and management in order to ensure safe airport operation with a high level of service for Noi Bai International Airport.

An “order-made” staff training was organized in Japan by Narita International Airport familiar with the operating conditions and understanding circumstances of Noi Bai International Airport, enabling participants to gain expertise for specific applications - truly a “training of airport operators, by airport operators, for airport operators”.

With the brand new international terminal and facilities, Noi Bai International Airport received much praise for its improved operation efficiency and service levels, including being chosen as the “WORLD’S MOST IMPROVED AIRPORT” in the SKYTRAX 2016 WORLD AIRPORT AWARDS.

Facility inspection, operation and maintenance on-site training

Management training for senior leaders

(2) Combination of multiple infrastructure projects

In addition to the Terminal 2 building project, Noi Bai International Airport was simultaneously carrying out two other projects – the construction of access roads and bridge. These projects reduced traffic congestion and time required for access between the airport and the city.

While both construction projects were financed by yen loans from Japan, collaboration with the Vietnamese government enabled the project to bring greater value by not only improving the airport’s functions but also its connectivity with the city.

Combined with the training aforementioned in (1), the cooperation of both Vietnamese and Japanese governments and private sectors, including airport operators, on both the hardware facility and soft
aspects of services and personnel development can be deemed as reasons of this success.

Projects carried out alongside the building of Noi Bai International Airport Terminal 2
(Left: Nhat Tan bridge  Right: Vo Nguyen Giap road)

5.4.3 The case of Japan’s New Chitose Airport

While New Chitose Airport’s basic facilities are government-managed, its passenger terminals are operated by Hokkaido Airport Terminal Co., Ltd. As the gateway to Sapporo in Hokkaido, Japan, the airport’s 20 million annual passengers give it the fifth largest passenger traffic in the country after Haneda, Narita, Kansai, and Fukuoka. With the success of LCCs and tourism to Japan last year (FY2015), New Chitose Airport recorded its highest ever passenger numbers for domestic and international routes alike.

(1) Hokkaido’s popularity and attracting airlines

Supported with abundant tourism resources and winter sports, Hokkaido’s popularity has spread wide overseas, with rising numbers of tourists many from Asian and Oceania countries. Last year, 2015 saw a record number of 2.26 million passengers from overseas, roughly three-fold increase over ten years.

Popularity among foreign visitors is also visible with an accelerating increase in inbound tourists, comprising roughly 90% of passengers on the international flights at New Chitose when comparing with Japanese nationals traveling abroad from the same airport.

Air routes from New Chitose to the six other airports in Hokkaido region (as of 1 September 2016) have also expanded, with each airports within 60 minutes flight time. Aside from air routes, the train and bus network is also extensive. In fact, New Chitose Airport was the first in Japan to introduce Jet and Rail intermodal transport, which directly connects the passenger terminals to a train line.

Utilizing the above mentioned strengths, New Chitose Airport has formed a council for promoting internationalization together with chambers of commerce, tourism organizations, and airlines to market

5 From Ministry of Land, Infrastructure, Transport and Tourism 2015 Record of Airport Management Conditions
overseas (Singapore, Malaysia, Indonesia), leading to the addition of foreign LCCs such as Scoot and Air Asia X.

Trend in international passenger numbers at New Chitose Airport (past 10 years)

Trends in departing Japanese nationals and arriving foreign visitors at New Chitose Airport (past 10 years)

(2) Developing a unique airport concept and attractive retail facilities
Hokkaido Airport Terminal Co., Ltd., which operates the New Chitose Airport passenger terminals, has sought to create a more pleasant and enjoyable airport experience for tourists and nearby residents through various initiatives which are “firsts” in Japan.

In order to achieve this, they have adopted “Hokkaido Showroom” and “Entertainment Airport” as concepts for the passenger terminals.

The “Hokkaido Showroom” is a retail facility with a “uniquely-Hokkaido” collection of local produce and goods, including Hokkaido’s specialty, seafood products and a great variety of souvenirs. It is a facility designed to utilize passengers’ wait time at the airport, with even many Japanese tourists equally unable to resist spending time and money buying various souvenirs.

Meanwhile, the development of Japan’s first “Entertainment Airport” includes facilities to visit with popular animation characters, the country’s first airport cinema, and the first genuine hot spring bathing facility in domestic airports; such entertainment facilities make New Chitose a destination for local tourist and as well as for visitors from overseas. Another first for a Japanese airport is the Royce’s “Chocolate World” closely resembles the popular Lindt Chocolate Museum in Cologne, Germany, with chocolate-themed displays and the open facility for visitors to gaze through the glass into an actual chocolate factory.

Despite being located along the access way connecting the domestic terminal and the international terminal, these facilities are frequently visited by domestic departing passengers as well.

(3) Keeping up with expanding aviation demand

Keeping up with the increasing passengers, New Chitose Airport has pursued to improve passenger convenience to remain as an attractive airport to travel through and also to visit, which includes the construction of a new international terminal building and renewal of their domestic terminal.

The airport employs advanced barrier-free concepts in order to be accessible to diverse needs of passengers, with information displayed in Russian as well as Japanese, English, Chinese, and Korean.

Given the large proportion of foreign tourists at New Chitose airport, a new tourist information center opened in the international terminal on 12 October 2016 to assist growing needs for more detail information by many foreign visitors. Tourist information center staff can provide assistance in English, Chinese, and Korean, with a wealth of sightseeing pamphlets also available in those three languages. Information can also be obtained in Thai, Vietnamese, Spanish, and Portuguese by using the tablet PC units. Visiting passengers can obtain information about sightseeing or accommodation facilities any day of the year.

6. Opportunities and merits of collaboration with foreign investors and airport operators

The utilization of private enterprise’s marketing knowledge and experience, business associates network and personnel development increases the potential of the growth strategy for small and emerging
airports discussed in detail above, including attracting new air service routes, passengers and cargo traffic, training staff, and raising non-aeronautical revenue.

Beginning with the UK airports in the 1980s, the industry has seen airport privatization spread around the world. With this trend and growing needs, the participation of foreign investors and operators in the airport management has become increasingly competitive.

### 6.1 Forms of airport operation and privatization

Privatization of a publicly managed airport can take the form of a complete transfer of ownership, as in a trade sale or stock listing, or a concession, in which the airport’s long-term operation is transferred while ownership remains with the public body. There are also cases employing the BOT (Build-Operate-Transfer) method, where private funds are used to build and operate an airport for a fixed period, after which ownership is returned to the public body.

While highly-profitable airports can be sold off through a stock offering or trade sale, those with low profitability may seek improvements over a fixed period by entrusting airport operation to the private sector through a management contract. Concessions are an often-used method because, by retaining ownership, the public body is able to participate in the airport’s management; however, the relevant government office’s role varies depending on whether or not the airport is financially self-sustainable. In some cases, airports with low profitability may require government assistance, such as guaranteed minimum revenue for a fixed period or free/inexpensive leases of land or buildings.

All of these forms carry potential and opportunity of transferring the airport management to the hands of private sector from the public body, as well as the ability to utilize private enterprise and global airports’ operation expertise. An approach which retains ownership has the additional benefit of allowing the government and public body to participate in the management of an airport. This requires contract schemes demarcating the scope of roles, payment relationships, and other aspects to suit each airport’s circumstances.

Referring back to the examples of innovative initiatives outlined in 5.4, Gold Coast Airport achieved rapid growth following privatization. Meanwhile, Noi Bai International Airport is an example of success through integrated government projects and cooperation with foreign airport operators in staff training and the transfer of expertise. Similarly, a particular feature of the New Chitose Airport’s case is the development of retail facilities and management style of the passenger terminal by Hokkaido Airport Terminal Co., Ltd.

### 6.2 Sustainable airport development through public and private sectors partnership.

While the abovementioned collaboration with international investors and operators is one effective measure in airport growth strategy, sustainable airport development is not achievable through the capital and expertise of these foreign parties alone.
The cooperation of governments, local authorities, airlines, and other airport stakeholders is indispensable in developing the relevant legal system, scheme formation, easing of regulations, ensuring freedom in price setting and other operations for private organizations, and creating tourism demand.

It is important to integrate cooperative relationships with airport stakeholders into a growth strategy which utilizes the private capital and expertise of foreign investors and airport operators.

If it was to be represented as a fish, as in the diagram shown in 5.2, an airport’s prospects, growth, and competitiveness depend on the strength of its body, which is formed by the potential of both hard and soft aspects for improving service level and airport functions. Strategies for expanding non-aeronautical revenue and airline networks are the driving force and nutrients which facilitate an airport’s growth. In addition to the government’s fulfillment of its role, this also requires the formulation of management schemes which guarantee the airport a certain degree of freedom, as well as an environment of tourism and business demand creation and promotion.

The sustainable development of a competitive airport

7. Conclusion
With the continued increase of small and emerging airports, many in developing countries, competition between airports has also intensified. These airports may have various roles, acting as a country’s gateway and cornerstone of economic development, or helping to stimulate local industry; in all cases, an airport cannot achieve sustainable growth and establish its position through the efforts of airport
operators alone.

To effectively implement key strategies for sustained growth, including attracting passengers and airline networks, staff training, and increasing non-aeronautical revenue, small and emerging airports have the option of employing the capital and expertise of foreign investors and airport operators.

At the same time, the cooperation of governments and local authorities in relaxing regulations and promoting tourism is also vital.

In Japan, the government is spearheading promotion to increase inbound tourism, aiming for even greater results ahead of the 2020 Tokyo Olympic and Paralympic Games. Given this, a future rise in airport privatization through concessions seems likely, with a new trend in the effective utilization of small regional airports, which make up the majority of Japan’s 97 airports. While certain local authorities, and airlines, are already active in promoting tourism, with some airports recording increasing foreign visitors, such cases speak of a need to utilize private sector capital and expertise in airport marketing and the operation of commercial facilities.

Looking globally, airport privatization continues to become established as the new trend, with the utilization of private sector expertise coming to be regarded as an effective approach. Even small-sized airports can aim for high quality.

The “No Country Left Behind” principle, which became a theme at the recent 39th ICAO Assembly and ICAO World Aviation Forum, can be also be taken as “No Airport Left Behind”.

I anticipate that inter-airport collaboration and competition will aid the development of individual airports, with the further emergence of interesting airport concepts, regardless of size, particularly in the ACI Asia-Pacific region; I hope this essay serves as a point of reference in that regard.