

Talon

AVIATION INSIGHTS AND DEVELOPMENTS

Q4 2015

TALON'S QUARTERLY REVIEW OF
THE INTERNATIONAL AVIATION
MARKET

FOR A LANDSCAPE OF POSSIBILITIES



The Talon logo is displayed in a blue, italicized serif font within a white rectangular box. The background of the entire slide is a blurred photograph of a person's legs and feet walking on a light-colored path, with a blue-tinted overlay.

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NEWS & DEVELOPMENTS

FOR A LANDSCAPE OF POSSIBILITIES

JCDECAUX EXTENDS PRESENCE IN 41 AIRPORTS WITH CEMUSA ACQUISITION

The logo for JCDecaux, featuring the company name in a bold, blue, sans-serif font. The letters 'J', 'C', and 'D' are significantly larger than the other letters, creating a distinctive visual identity.The logo for CEMUSA, consisting of a stylized blue 'C' icon followed by the word 'CEMUSA' in a bold, blue, sans-serif font.

JCDecaux has completed the acquisition of CEMUSA (Corporación Europea de Mobiliario Urbano) via its subsidiary JCDecaux Europe Holding.

CEMUSA is an outdoor advertising subsidiary of the Fomento de Construcciones y Contratas (FCC) group with operations in Spain, the US, Brazil and Italy. Its Portugal operations were not part of the acquisition scope.

The acquisition adds more than 43,000 advertising panels in transport and street furniture to JCDecaux's portfolio, with the company saying its presence in 41 airports - including in Madrid and Barcelona - would either be extended or reinforced.

JCDecaux has reported first half 2015 revenues of €1,460 million, and its 2014 revenue was €2,813 million.

The logo for Talon, featuring the word 'Talon' in a stylized, multi-colored font with a gradient effect.

FOR A LANDSCAPE OF POSSIBILITIES

WILDSTONE AIRPORTS ISSUES ADVERTISING OPPORTUNITY FOR HEATHROW BUSES



Wildstone Airports, in partnership with Omniserv and Heathrow, has issued a new media advertising opportunity for buses serving the UK hub, under the banner Heathrow Connections.

The opportunity is available on 26 new buses that provide access to 8.5 million passengers transferring flights at Heathrow. They are onboard for an average 13 minutes.

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OOH!MEDIA LAUNCHES DIGITAL ADVERTISING NETWORK ACROSS AUSTRALIA'S AIRPORTS



A new digital advertising network at baggage carousels across Sydney, Melbourne, Brisbane and Perth airports has been launched by oOh!media.

The airport advertising provider said the network, Collect & Connect TV, offers the reach of 44 screens capable of full motion animation and audio content. It will provide the flexibility to run high definition 15 to 60 second TVC spots in standard, widescreen or modified format, equipped with sound capabilities, according to oOh!media.

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JCDECAUX RESEARCH SHOWS JUST HOW MUCH TRAVELLERS INTERACT WITH ADVERTS



92% of regular business flyers would interact with an airport advert, according to the latest in JCDecaux Airport's Business Traveller research series.

The third instalment in the series, BT3, has just launched and brings together insights from more than 500 business travellers into their rapidly changing lifestyles, focusing on their profile, relationship with technology and opinions on airport advertising.



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FOR A LANDSCAPE OF POSSIBILITIES

LOWER OIL PRICES, ECONOMIC GROWTH AND PASSENGER DEMAND BUOY AIRLINE PROFITS



The International Air Transport Association (IATA) has revealed its airline industry outlook for 2016, which forecasts an average net profit margin of 5.1% and total net profits for airlines of US\$36.3 billion.

IATA also announced a revision to its airline industry outlook for 2015 upwards to a net profit of US\$33 billion (4.6% net profit margin) from US\$29.3 billion forecast in June.



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TECHNOLOGY & SERVICES

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INFLIGHT RETAIL TO BE TRANSFORMED BY 2025, SAYS CROSS-INDUSTRY REPORT



Increased engagement opportunities, self-service ordering, and retail partnerships are among the predicted trends in a cross-industry report that looks at how the narrowbody inflight passenger experience might be revolutionised by 2025.

Personalised retail offers are expected to be one part of a wider “digital personal assistant” service available on passengers’ mobile devices throughout the end-to-end journey, according to Future Travel Experience’s (FTE) ‘Onboard 2025 Think Tank’ report.

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ONBOARD RETAIL SYSTEMS LIMIT ANCILLARY REVENUES, SAYS NOVO IVC



According to a study by Novo IVC, two thirds of the airline industry's onboard point of sale systems are restricting airlines' capacity to drive ancillary revenue, and one third lack the ability to offer promotions to passengers.

The study, which asked senior managers of the world's major airlines about future onboard retail trends, uncovered that nearly one third will be updating electronic point of sale (EPOS) systems in the next 12 months and 10% within the next three years.

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ETIHAD PARTNERS WITH COGNIZANT TO DELIVER PERSONALISED GUEST EXPERIENCE



Etihad Airways has announced a three-year partnership with information technology, consulting and business process outsourcing services provider Cognizant, which aims to drive digital transformation across the airline and its equity partners.

The multi-million dollar deal will see Cognizant help Etihad Airways define its digital strategy and reimagine the guest experience along a traveller's journey.

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SYDNEY AIRPORT ENHANCES CONSUMER EXPERIENCE WITH NEW DIGITAL PLATFORM



Sydney Airport has partnered with leading location service provider Discovery Technology to improve its digital platform. The move, said the airport, is designed to deliver an enhanced airport experience for passengers, visitors and staff.

Travellers can access a faster, free Wi-Fi service at T1 and T2, as well as engaging and targeted content via a 'walled garden' – including an extensive selection of information such as news; retail, food and dining offers; competitions; and the latest flight details via mobile devices.

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BEACONS OF HOPE: PERSONALISING THE PASSENGER EXPERIENCE

SITA



Today's passengers demand more control over their airport journey and this is shaping how airports will interact with them in future, writes SITA Vice President Airports Matthys Serfontein.

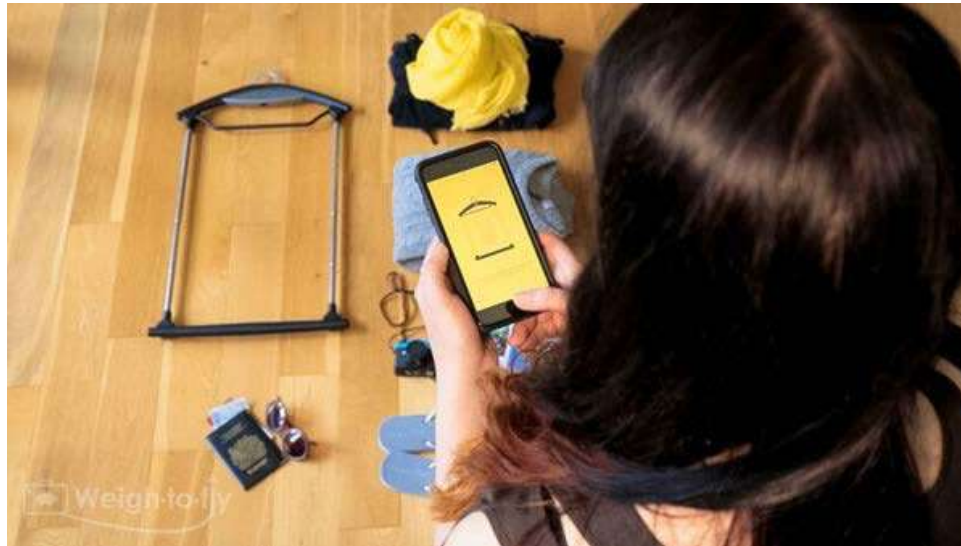
The modern passenger wants to spend as little time getting from the kerb to the gate. They want to eliminate the stress of check-in, immigration and security and have more time to enjoy the services, lounges and retail that await them. They are also demanding personalised airport information be put at their fingertips.

For airports, providing a personalised journey means giving passengers the information they want at the right time. Airports must allow passengers to choose the most relevant information.

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KICKSTARTER CAMPAIGN SUPPORTS THE LAUNCH OF NEW SMART LUGGAGE SCALE



Kickstarter, the global crowdfunding platform, is behind of the launch of a new Smart luggage scale.

The brainchild of softwear electronic engineer Jamie Cruickshank, Weigh-to-Fly is an extendable luggage scale designed to help travellers avoid excess baggage charges. The new device is listed as a Kickstarter project which aims to raise £50,000. The retail price of Weigh-to-Fly is expected to be £69.99.



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CAMPAIGNS

FOR A LANDSCAPE OF POSSIBILITIES

LYST TARGETS FASHION BLOGGERS WITH NYC CAMPAIGN



To coincide with UK event led activity, Talon and M2M planned a campaign focusing on the coolest areas of New York City to create a stand out campaign targeting the fashion industry and bloggers. Wildposting was utilised to create cut through in edgy areas where traditional methods of OOH are sparse, with target addresses covered and re-posted each week throughout the campaign. This was paired with a huge stand out billboard on Lafayette x Bond Street and a hand painted wall mural on West Houston x West Broadway. Painters flew in from Portland to re-create the eye catching creative directly onto the wall which kept the site in keeping with the local architecture.

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COTY BRINGS HIGH-PROFILE CK2 DIGITAL CAMPAIGN TO LONDON GATWICK



Coty, in partnership with Airport Media, is executing a high-profile ad campaign at London Gatwick to promote new CK2 fragrance.

The advertising campaign, said to be the biggest travel retail campaign in Gatwick's history, aims to raise awareness and drive sales by using eye-catching digital sites that dominate the departing passenger experience. Airport Media's large format HD digital screens and digital 6-sheet network can be seen across Gatwick's North and South terminals.

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EYE AIRPORTS HELPS ADVERTISER PULL OFF FESTIVE SURPRISE AT BRISTOL AIRPORT



Luxury handbags, shoes and China homeware were among the surprise Christmas gifts given to travellers at Bristol Airport as part of a festive campaign.

The airport teamed up with Clarks Village retail outlet and airport advertising company Eye Airports to launch the 'Random Acts of Christmas Kindness' campaign. Christmas parcels were mixed in with luggage on the Clarks Village branded baggage carousel to surprise passengers arriving on an easyJet flight from Keflavik in Iceland.

BURBERRY SCARF BAR CONCEPT AND ADVERTISING PROVE A HONG KONG HIT



British luxury brand Burberry has unveiled a new design concept for its Scarf Bar in association with Hong Kong International Airport and JCDecaux Transport.

The Scarf Bar pop-up store is sited in the East Hall where it will remain operational until 11 January, 2016.



Burberry launched the Scarf Bar concept in September, offering the opportunity to personally monogram purchases of the brand's iconic scarf.

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