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The human airport:

Why people, not
technology, are the
critical constraint in
aviation's next era

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Executive summary

The global airport industry is at an inflection point. For decades, competitive advantage has been built on physical assets – terminals, runways, gates – and the capital to build more of them. That logic still holds in part: the infrastructure backlog is real, and demand is rising. But PTE World Conference 2026 surfaced a more nuanced truth that reframes how airports should think about spending: the airports pulling ahead are not necessarily those with the biggest capital programs, but those that have built the human systems that enable capital to perform.

People form the often-overlooked core operating system of the airport: the workforce that delivers every passenger touchpoint, the leaders whose governance speed determines whether projects land on time, the frontline teams whose trust decides whether AI deployments succeed or stall, and the organizations that must learn to orchestrate outcomes across dozens of partners they do not control.

The dominant themes from PTE World Conference 2026 trace back to this core truth: airports must shift their thinking from asset operators to system orchestrators. The binding constraint on that shift — the input that is simultaneously scarcest, most consequential, and most under-leveraged — is human capital.

Across more than 50 sessions at the conference, four core interlocking themes emerged:

- (1) **The basis of competitiveness is shifting.** The airports gaining ground compete on process quality, coordination, governance speed, and adaptive design — not just on what they build. Section 1 of this paper makes the case that orchestration has overtaken ownership as the source of advantage, and that governance and decision-making speed are the most underleveraged capabilities in the industry.
- (2) **Human capital is the binding constraint.** Workforce availability, engagement, and empowerment set the ceiling for passenger experience, operational resilience, and every other form of transformation. This is not a labor shortage. It is a structural reordering of what matters most in airport performance, and the airports that have understood it are investing accordingly. Section 2 presents the evidence.
- (3) **Technology succeeds or fails by human engagement.** AI has arrived — over 70% of airports have it in production. Whether it delivers depends on data quality, process integrity, workforce trust, and governance clarity. These are human-system problems, not technology problems. Section 3 positions digital and AI investment inside the human-systems thesis rather than beside it.
- (4) **Passenger experience is the system output.** It cannot be designed, procured, or technology-enabled into existence independently. It is the result of everything that precedes it: workforce engagement, data ownership, commercial model design, and the cultural infrastructure that connects them. Section 4 makes this case.

Capital and human investment are not in competition; rather, they must be built together and sequenced intentionally. The airports that will lead in 2035 are building the organizational architecture — governance, culture, data flows, decision rights — alongside the physical one. That is the window open now.

1. From asset operator to system orchestrator — the shifting basis of airport competitiveness

For decades, airport competitiveness was largely a function of physical capacity: terminals, gates, runways, and the capital to expand them. That logic still holds, as the industry faces a \$2 trillion infrastructure requirement over the next 15 years, and US airports alone carry a backlog that has grown from \$80 billion to \$175 billion in a decade. But the conference surfaced a more nuanced truth that reframes how airports should think about spending: the airports pulling ahead are not necessarily those with the biggest capital programs, but those rethinking what they build, how they operate, and who they organize around. This means competing on orchestration over ownership, treating workforce as a strategic constraint rather than an operating variable, deploying technology on human terms, and designing passenger experience as a system output, not a standalone initiative.

The gap between what airports have built and what those assets can actually deliver is often larger than the gap between current capacity and projected demand. This is a fundamentally different capability from building and operating assets. It requires a clear, flexible governance framework and planning that can adapt to handle new challenges; coordination across a complex multi-stakeholder ecosystem; and the ability to optimize capacity of what already exists before committing to what comes next. Each of these is a human-system capability, not an engineering one.

1.1. Focused planning and decision-making lead to clarity in action

If there is one insight from the conference that the industry has not yet fully absorbed, it is this: the bottleneck in airport development is rarely engineering. It is usually governance.

Almost every major expansion discussed at PTE was delayed not by design or construction but by regulatory alignment, political sequencing, or the absence of committed public investment in surface transport. Manchester Airport's leadership noted that the managing director of an airport spends a remarkable share of time focused on trains, because the rail connection that would unlock the next phase of growth is a government decision, not an airport one. At Heathrow Airport, third-runway expansion requires a motorway tunnel, four river relocations, and the filling of a 20-hectare lake. None of those are runway or terminal problems. The pattern recurs globally: Navi Mumbai Airport's terminal is open but its high-speed rail link is not; Poland's new hub has an architect and a concept but its rail connection timeline has already shifted by several years.

The fast-track greenfield panel drew a pointed conclusion: speed in airport development comes from governance quality, not construction pace. Noida International Airport cited decision-making autonomy, conferred by their Zurich Airport shareholder, as the single most decisive factor in holding schedule. To comply with timelines, all activities run in parallel: construction starts before design is complete. That is not recklessness. It is a governance model designed for the pace the industry now requires.

While external regulatory environments can be slow to change, the clarity and adaptability of internal governance is primarily within each airport's control. The airports that can move decisively are those that have invested in clear decision rights, escalation protocols, and the organizational confidence to act under uncertain and shifting conditions.

1.2. Optimizing capacity before building new

The governance argument gains force when set against the evidence of what existing assets can actually deliver. Stansted opened in 1991, designed for 7 million passengers. It now handles 30 million (with planning permission for 51 million) in the same building, on the same runway. Manchester has grown from 8 million to 32 million passengers per terminal, with a credible path to 60 million on existing infrastructure. Heathrow processes significantly more passengers per square meter than most European peers. Brussels is redesigning terminal assets to swing between configurations without construction.

These are not workarounds. They are evidence that the gap between what airports have built and what those assets can deliver is often larger than the gap between current capacity and projected demand. Decisive, accelerated capacity release, not perfection of design, has become the competitive variable.

If smart retrofits can unlock five to seven times a terminal's original design capacity, a new greenfield project must now demonstrate that it can accomplish what an optimization of existing assets could not. This is a higher bar to clear than the current industry standard before committing capital to new development.

1.3. Process quality and coordination as the key performance driver

The same orchestration logic applies to operations. Flow, coordination, and real-time decision-making, not capacity alone, define outcomes at the most constrained airports. At Heathrow, the operations team is fighting for three to five seconds per arriving aircraft. Across 240,000 annual arrivals, those seconds compound into meaningful capacity gains without a single new gate or runway.

The turnaround is where coordination matters most, and where more than 40% of all airline delay originates. Airlines, ground handlers, and airports each control a portion of that process under different contracts and incentive structures, posing a coordination challenge no single party can resolve alone and requiring tight partnership across them.

At Vancouver Airport, introducing a shared AI-powered turnaround camera gave all three parties simultaneous, neutral visibility into the same events. Vancouver is now targeting a 25% improvement in turnaround capacity without building anything new. What changed was the shared baseline for decision-making, not technology.

1.4. From “predict and provide” to “design and adapt”

The dominant model in airport master planning (forecast demand, design to meet it, build to spec) is under structural pressure. Nashville exceeded its long-term capacity plan twice in seven years. Tianfu Airport exceeded its design capacity by 38% within four years of opening.

The most sophisticated programs at PTE World Conference 2026 moved toward a design-and-adapt approach. Port Polska maintained optionality between 34 and 44 million passengers at opening with no change to the main building structure. Heathrow's planners are assigning expected end-of-life dates to every piece of infrastructure, explicitly planning for the removal of buildings designed today. Brussels is building assets that can swing between Schengen and non-Schengen use without construction. DFW's modular construction program makes the same argument in physical form. Terminal F was delivered in six modules over 14 nights, 35% faster than conventional construction. When requirements shifted mid-build, the program was able to absorb the change without pausing. The airports that build for a specific, fixed future will be wrong about that future. Those that build to absorb uncertainty are better positioned regardless of how demand evolves.

The shift from asset operator to system orchestrator demands capabilities that are fundamentally human: governance clarity, coordination across partners, adaptive judgment, and the organizational confidence to act under uncertainty. Section 2 argues that the single most constrained input in building those capabilities is the workforce itself.

2. The workforce imperative: Why human capital is now the binding constraint

Airports have long optimized around capital, technology, and airline relationships. An undeniable truth surfaced at the 2026 conference: the workforce, in its availability, engagement, and empowerment, now sets the ceiling for passenger experience quality, operational resilience, and the ability to execute any type of transformation, including AI deployment.

Workforce themes featured in almost half of PTE sessions, and that is no coincidence: it reflects an industry beginning to recognize the truth that the most constrained input in airport performance is people.

2.1. The workforce crisis is structural, not cyclical

Germany will lose 3 million workers from its employment market by 2030. Frankfurt Airport will lose 25% of its facility management staff to retirement within a decade. Hong Kong International Airport must grow its workforce from 70,000 to 100,000 over the same period in one of the world's most expensive labor markets. LAX was still 20% below pre-COVID workforce levels as recently as two years ago. At Haneda Airport, a checkpoint redesign pilot revealed a 50% staff attrition rate, and 80% of ramp employees have been in role for less than two years.

These are not temporary post-pandemic dislocations. They are structural demographic and economic pressures converging on an industry that has historically treated workforce as an operating variable rather than a strategic constraint. The implication is that airports need to rethink how they organize, equip, and empower their workforce, as the demographic math will not allow them to simply accumulate more people. The leading operators are responding on three fronts simultaneously: targeted automation to reduce reliance on labor for the most physically demanding tasks (Section 1.3), workforce empowerment that lifts productivity from the people already in role (Sections 2.2–2.4), and access reforms that widen the talent pool itself (Section 2.5).

2.2. Employee experience sets the ceiling for passenger experience

Passengers largely do not differentiate between who employees work for and where they work (at the airport). An agent wearing a ground handler's badge is, from the passenger perspective, an airport employee. That single insight has significant operational implications for airports that contract out the majority of their passenger-facing workforce.

Seattle-Tacoma International Airport manages 25,000 workers employed by 800 separate tenant companies. There is no shared email list, no common communication channel, no universal onboarding. When the airport suffered a cyberattack in 2024 that disabled every digital display, the app, and the website overnight, it was the human network that delivered. The crisis revealed how much the experience depends on people who technically work for someone else.

Pittsburgh International Airport's "We Got You" program began as a passenger disruption-response initiative and pivoted almost immediately when the team discovered the real problem: what began as a passenger project quickly shifted to focus on how to best provide services to airport staff thereby enabling them to put passengers first.



Barbados's Grantley Adams International Airport handled 2.4 million passengers with the same infrastructure it used for 2.3 million, with passenger experience and staff satisfaction both improving, and no new construction. Same infrastructure, same staff; what changed was a deliberate community-mindset program that trained 100% of airport staff, anchored in a simple key operating principle the CEO articulated: an increase in passenger volume does not have to, and should not, mean a decrease in customer experience. What unlocked the gain was first extending training and shared purpose to the contracted workforce across the full airport ecosystem, then equipping that workforce with the tools and authority to act on that established culture.

The same investment logic appears in different forms at airports of very different scale. Heathrow's "Team Heathrow" philosophy is built on the recognition that passengers experience the airport through every person they encounter, regardless of employer. Its "dipped in purple" campaign trained all staff working at the airport, including partners and contractors, in a shared service ethos, anchored by something as simple but deliberate as the "power of hello": a consistent, human greeting as the baseline of every passenger interaction. JFK T4's "T4 State of Mind" program pursues the same goal through operational empowerment, equipping frontline staff with real-time data and decision-making authority so that engagement is backed by the information needed to act on it.

2.3. Workforce ownership is the real technology deployment barrier

The most consistent finding from PTE World Conference 2026's technology sessions was about adoption, not about capability. Bottom-up problem identification consistently outperforms top-down technology deployment: AI and automation implementations succeed when the workforce trusts and owns them, and stall when they do not.

DFW's most successful digital product emerged from a competition inviting frontline teams to identify their own problems; the winning solution was developed jointly by field workers and service providers. The result was a 25% efficiency gain, and a workforce that had generated the answer rather than been handed one that was not explicitly connected to their experience. As the DFW team noted, when field staff own the solution, they tend to get things right the first time.

Fraport's AI leadership identified a structural barrier that applies across the industry: aviation is not accustomed to the pace of change that AI deployment demands. The very loyalty that makes aviation operationally stable makes it digitally cautious. Airports with winning AI strategies have recognized this early and invested accordingly, including in change management, building internal champions, and giving frontline teams genuine ownership of the tools they are being asked to trust and adopt.

2.4. The CEO priority reorder: Employees before airlines

During the BCG-hosted CEO panel at PTE World Conference described an emerging archetype: the airport CEO as "mayor of the airport," whose starting point is the wellbeing of their constituents, beginning with employees. LAX's three-year transformation illustrates what this looks like in practice. Importantly, it did not begin with a terminal redesign or technology deployment, but with a step-change rebuild of HR systems, performance management infrastructure, and employee recognition, setting the institutional foundation to unlock sustainable competitive advantage from the frontline workforce. Milan's SEA Aeroporti di Milano offered a parallel observation: HR directors are, in effect, becoming marketing directors for employees. Attracting talent to shift-based roles at airports far from city centers requires the same strategic thinking as attracting passengers.



2.5. Removing barriers to workforce participation

The availability of talent is often assumed to be the binding human capital constraint. The real binding constraints, however, are the structural and access barriers that prevent people who would otherwise work at the airport from doing so. The airports successfully recruiting, retaining, and developing talent are reframing the frequently-cited “talent problem,” treating workforce access as a capital investment and HR as regional economic infrastructure rather than an internal cost to be managed. In practice, that means addressing the practical barriers that prevent people from showing up, not just the incentives to do so.

Cincinnati/Northern Kentucky International Airport, for example, discovered that workers living 15 minutes from the airport faced two-hour bus commutes routing through downtown. The airport partnered with the regional transit authority, Amazon, and DHL to reroute bus service directly. It also piloted Kentucky’s childcare subsidy program and established two aviation mechanics schools on campus.

Heathrow’s workforce leadership named a question the industry rarely asks: who in this environment has to work harder to stay safe, and who is silently adapting, masking, or compensating? Inclusive workforce design (removing environmental and process barriers) was presented not as an equity initiative but as an operational risk management one.

Munich Airport’s Operations Specialist program is built around a deliberate “generalist before specialist” philosophy: the 26-module, 4-month curriculum is designed to break the “cognitive tunnel” of the specialist focused exclusively on their component of the overall airport system. The goal is cross-department relationships and shared language that become the cultural infrastructure for resilient operations.

If workforce is the binding constraint, every technology investment is then also a workforce investment: an investment in trust, adoption, data literacy, and governance, determining whether humans or machines make the call. Section 3 positions AI and digital transformation inside this frame.

3. Technology succeeds or fails on human terms

Artificial Intelligence (AI) has arrived: over 70% of airports now have AI projects in production. Whether it delivers depends on four factors that are not primarily technological: alignment on the problem it is meant to solve, the quality of data inputs, the trust of the workforce it is meant to serve, and the governance frameworks that determine the roles of machines and humans. Technology investment is in fact a human-systems problem, and the airports treating it as such are the ones extracting real value.

3.1. Start with the problem, not the platform

The most consistent pushback across PTE World Conference 2026's technology sessions was directed not at AI capability but at the framing around it. The airports deriving real value began with a defined operational problem and worked backward to the technology solution, rather than the reverse ("tech for tech's sake" or "solutions searching for problems"). The corollary was stated plainly at the conference: deploying AI against a poor process merely amplifies that poor process, rather than fixing it.

DFW operationalized this sequencing deliberately: define the product (the solution that answers a specific operational question) before selecting the technology. Build jointly with the people who will use the output. The technology is the last decision, not the first.

The airports generating real value from AI investments are the ones that resolved direction, process and data issues first and treated governance as a prerequisite, not an afterthought.

3.2. Data quality, not AI capability, is the real bottleneck

The airports with the strongest AI outcomes are clear on a prerequisite that does not feature prominently in most technology roadmaps: the quality and trustworthiness of the underlying data. Across multiple sessions at the conference, the same finding surfaced: sophisticated platforms and well-resourced teams running up against the limits of the information feeding them. This reflects the genuine complexity of managing data across large, multi-stakeholder operational environments — and it is the constraint that determines whether AI investments deliver or disappoint.

Copenhagen Airport's experience illustrates the challenge honestly: the airport reached an all-time passenger high, scaled its data team to 30 people including seven internal data engineers, and migrated to a new open-source data intelligence platform. In that process, it discovered that approximately 200 windsocks were registered in its database that did not exist in the field. AI trained on that data would have produced incorrect predictions.

Almost 50% of airports surveyed in the ACI study identified data integration as their primary transformation opportunity, yet investment in data governance ranks near the bottom of AI spending priorities. There is a consistent pattern here: heavy investment in models and underinvestment in the data those models consume.



3.3. Integration, trust, and the distribution of intelligence

Across the conference's technology sessions, three connected truths stood out: first, data must be integrated across the ecosystem; second, such integration depends on trust among the parties in the ecosystem; and third, that trust is only worth building if the resulting intelligence makes it into the hands of those who can act on it.

On integration: Most of the value in an airport's digital systems comes from integrating and providing access to data sources, rather than the direct output of the system. The shift from isolated pilots to unified operational platforms (such as digital twins, integrated airport operations databases, and total airside orchestration) was a dominant theme in the conference's technology and operations sessions. But the value of integration only materializes if the parties holding the data are willing to share it, which is where the next constraint comes in.

On trust: Integration across the airport ecosystem requires data sharing between parties with different commercial interests. The passenger journey is fragmented across operators and channels — airline, airport, ground handler, retailer, border agency — and connecting across those players requires trust, which requires each party to see clear value in participating. Passengers, likewise, tend to share their own data only when they see clear value from doing so. Building the trust architecture that makes sharing viable is as much a commercial and governance challenge as a technical one.

Historically, it has been airlines, not airports, who primarily own the direct relationship with passengers: it is the airline who holds the booking, loyalty program, and communication channels. Airports have largely inherited whoever walks through the door. That asymmetry is not new, but its commercial consequences are becoming harder to ignore as personalization and direct digital engagement become baseline expectations and material financial drivers, especially of non-aeronautical revenue. Airports must actively develop the capability to know and engage their passengers directly; most are still in the early stages of building this muscle.

On distribution: The critical "last mile" in data's journey to value is distribution: getting the right insight to the right person, at the right time. Birmingham Airport built what its team described as an "airport brain" — rich data modelling, forecasting, and real-time operational insight — but almost none of it was accessible to the people who needed it. The chatbot BABS was created not as a digital product but as a distribution mechanism for intelligence that already existed. On a single snow day, thousands of passengers used it, saving hundreds of hours of staff time. Zurich Airport approached a similar challenge from the ground up: 17 QR code locations, 45,000+ scans, 85% self-service resolution. Intelligence distribution does not require sophistication. It requires deliberate design around where people are and what they need in that moment.

Aeroporti di Roma's approach is instructive: the airport gave all ground handlers and major airlines free access to its A-CDM platform, creating shared situational awareness. This resulting shared situational awareness, rather than the technology itself, was the competitive advantage. After one week of the AI-generated TOBT trial, ground handlers stopped manually overriding the AI system's predictions. Trust followed transparency.

Empowering frontline staff with real-time operational data is simultaneously a workforce engagement intervention and a passenger experience one. The two investments are the same decision; workforce and passenger experience goals are not parallel, but sequential. If technology succeeds on human terms, then its highest-value application is not operational efficiency alone; it is the passenger experience that operational efficiency, workforce empowerment, and governance collectively produce. Section 4 examines what delivering that experience actually requires.

4. Passenger experience and what it requires

Passenger experience has been a conference theme for a decade, and PTE World Conference 2026 offered a more grounded view of what delivering it actually requires. The answer is not better technology, terminals, or service training, though each of those help. The answer is that passenger experience is the output of everything that precedes it in this paper: workforce empowerment, governance, and culture that connect them. It cannot be bolted on; it must be built in.

4.1. The data ownership gap

The data ownership gap faced by airports is not a technology problem, but an architecture one. Airports see more people than almost any other commercial environment, yet know very little about most of those passengers. This gap is the structural result of a fragmented ecosystem in which the airport is the host but rarely owns the passenger data.

The takeaway is that airports should not wait for the ecosystem to fix this architecture for them, but accept and act on their role in ecosystem coordination. Ecosystem-wide data sharing has been an industry conversation for over a decade with slow progress, and the airports gaining ground have stopped treating it as a prerequisite. Instead, leading airports have now begun building direct passenger relationships from their own first-party data.

Paris CDG's loyalty and pre-booking platform connects pre-arrival, in-airport, and lounge behavior into a single CRM. Brussels Airport's digital travel companion generates journey-specific notifications that achieved a 4.7 out of 5 satisfaction score. Minneapolis-St. Paul Airport moved from mass broadcast to persona-based marketing by building a unified passenger CRM from scratch. The common thread across these airports is that rather than waiting for the ecosystem to grant them passenger data, they built the direct passenger relationship and data conduct themselves, one touchpoint at a time, treating the CRM as core infrastructure to meet downstream passenger satisfaction, strategic, and financial goals.

4.2. Commercial models under pressure

The traditional airport retail model of fixed-term concession agreements, brand-led category management, and minimum annual guarantees was designed for a world of stable brand hierarchies and predictable consumer behavior. Yet brand lifecycles are shortening faster than 10-year investment contracts can accommodate. As Lagardère's leadership noted at the 2026 conference, the structural problem is that funding capital commitments requires brands to expect 10-year relevance, yet this timeframe is longer than most brand cycles last now.

Bogota El Dorado International Airport built an in-house platform for local and emerging brands (Paraiso Local) that generated \$8.7 million in sales in its first year, activated 42 commercial spaces simultaneously, hosted nearly 150 brands, and lifted average ticket spend from a \$3.50 domestic baseline more than 10x to \$37.60. Pittsburgh doubled concessions revenue in three years by moving from a developer-led model to an owner model. Vienna Airport requires international operators to carry local Viennese brands, some with histories of up to 200 years, rather than generic duty-free ranges.

The shared finding across these illustrative examples is that original and regional products are growing spend per passenger more than generic duty-free products can. The airports gaining commercial ground are those that have moved from leasing space to curating locally-grounded experiences.



4.3. Sense of place as competitive strategy

The airports generating the strongest commercial and reputational results are treating their terminals as editorial platforms. Examples abounded at the conference: Portland's terminal used 3.7 million board feet of locally sourced timber, replaced 670 columns with 34 mega-columns, and runs all 23 restaurants at street pricing with local vendors. JFK Terminal 1 commissioned 10 short films from Queens and Brooklyn filmmakers. LAX has themed each terminal around a distinct Los Angeles neighborhood story and given staff a shared narrative identity to draw on rather than a generic service standard.

Paris CDG's commercial team described the structural mechanism behind an over-1,000% uplift in category sales relative to baseline from a single brand activation: three seasonal storytelling cycles per year, pre-trip digital activation, coordinated in-airport physical experience, and lounge integration, with the entire ecosystem aligned around a single narrative theme. The commercial logic is straightforward: only 17% of passengers visit the fragrance aisle, and only half of those buy. The 83% who do not are not reachable through product placement alone, but they might be reached through effective storytelling.

Passenger experience is not an output or a function the airport performs, but the result of everything the airport is and does: The workforce that delivers every touchpoint (Section 2), the data and intelligence systems that inform it (Section 3), the governance that enables decisions at the speed passengers expect (Section 1). These components are upstream from and define the passenger experience. The airports that treat passenger experience as a standalone initiative, separate from these components, will consistently underperform those that treat it as a core integrated system output.

5. What the leading airports are doing differently

Across more than 50 sessions, hundreds of speakers, and airports at every stage of maturity, PTE World Conference 2026 surfaced a consistent set of interrelated strategic moves that set the leading airports apart. No single airport exemplifies all five, and they are not parallel options to be selected from a menu. Taken together, and in the right sequence, they form a coherent picture of what it means to compete on orchestration, people, and process, rather than on capital alone.

1: Govern for the Pace of Change

Governance must come first because every other move depends on clear decision rights. The pace of AI deployment, regulatory evolution, and operational complexity has outrun the institutional frameworks designed to manage them. Clear decision rights are the prerequisite for unlocking the power of the workforce, deploying agentic AI, managing multi-stakeholder coordination, and moving capital at the speed the market demands.

The diagnostic question: Can we name, for every AI system in production, the accountable party when it acts, not just when it advises? Do we have a decision-rights framework that distinguishes between machine-advise and machine-act, with defined escalation protocols?

The 90-day decision: Establish and internally publish a decision-rights register for all AI systems currently in production or planned for deployment in the next 12 months. For each, define the boundary between advising and acting, name the accountable executive, and document the escalation path.

The cost of inaction: An agentic system that acts without a defined accountability framework is an unmanaged liability. The first serious incident at an airport without clear AI decision rights will set the industry's regulatory response, and the airports that shaped the framework in advance will operate under rules they helped write, while those that did not will operate under rules written for them.

2: Elevate Workforce to a Capital Investment

Workforce investment comes second because governance clarity is what makes it survive a leadership transition: with clear decision rights established, the airport can name an executive workforce lead and equip them with the budget authority and accountability to protect the workforce investments that are critical to unlock the following moves. Technology adoption stalls without workforce trust. Passenger experience cannot exceed the engagement level of the people delivering it. Each subsequent move on this list depends on beginning with an enabled workforce supported by clear, adaptive governance.

The diagnostic question: Who in the organization owns workforce strategy as a capital allocation question, not an HR program? Is there a named executive accountable for workforce as a strategic constraint, with budget authority and a say in capital planning?

The 90-day decision: Appoint a workforce-strategy owner at the C-suite or equivalent level, with a mandate that spans direct employees, contracted partners, and the broader airport ecosystem. Conduct an audit of workforce barriers (e.g., transportation, scheduling, onboarding) to identify the highest-impact barriers that can be addressed in 12 months.

The cost of inaction: Airports without a named workforce-as-capital owner are losing 18–24 months on every major transformation, because each program independently discovers the same workforce constraints and independently builds workarounds. The cost compounds beyond schedule slippage, as each delayed program erodes workforce trust in the next one, making subsequent transformations harder to deliver.



3: Deploy Technology in Service of the Employee First

Technology investment comes third because its effectiveness depends on the workforce (Move 1) and governance (Move 2) that surround it. Staff improvising with personal devices to answer passenger questions cannot be fixed with a better passenger app; the technology infrastructure that serves employees is the prerequisite for the technology infrastructure that serves passengers.

The diagnostic question: What percentage of our frontline workforce, including contracted partners, has real-time access to the operational data they need to do their job effectively? When we deploy a new system, is the employee interface designed first, or added after the passenger-facing version?

The 90-day decision: Audit the information environment of the three largest contracted workforce groups at the airport. Identify what operational data they need and do not have, and what systems they are currently improvising around. Commit to closing the top three gaps within six months.

The cost of inaction: Passenger-facing technology investments made without first solving the employee information problem will underperform their business case. The compounding effect is a widening gap between what the airport's systems can do and what its workforce can deliver, which erodes passenger experience, staff satisfaction, and the credibility of the technology investment itself.

4: Build Ecosystem Data-Sharing as a Strategic Advantage

Data-sharing is fourth because it requires the trust infrastructure (workforce, governance) and the technology sequencing (employee-first) established in the preceding moves. Without those foundations, data-sharing agreements collapse under commercial tension and operational mistrust.

The diagnostic question: For our three most operationally critical multi-stakeholder processes, do all parties have access to the same real-time data? If not, what is the commercial, legal, or cultural barrier, and is it real or inherited?

The 90-day decision: Select one multi-stakeholder process (e.g., turnaround, baggage, or disruption management) and offer all parties free, real-time access to the airport's operational data for that process. Set a 90-day measurement window for the impact on coordination quality and dispute resolution.

The cost of inaction: Airports that do not build shared data environments will find their most capable partners (airlines, ground handlers, and technology vendors) building their own, creating parallel data ecosystems that the airport does not control and may not even see. The airport's role as ecosystem orchestrator relies on being the party that creates shared visibility (not hoarding information).

5: Own the Passenger Relationship Directly

Delivering the passenger relationship depends on each of the preceding moves. An airport that owns its passenger data but lacks the workforce to act on it, the governance to move quickly, or the ecosystem alignment to deliver a consistent experience will find that data ownership alone changes nothing.

The diagnostic question: Do we have a first-party passenger database (not borrowed from partners such as airlines, concessionaires, or credit card companies) that we can use to personalize, communicate, and build loyalty? If not, what is our 12-month plan to build it?

The 90-day decision: Define the minimum viable passenger CRM: data, sources, and connected touchpoints. Assign ownership to a single executive. Set a launch target for a first-party digital engagement channel (e.g., loyalty program, pre-arrival communication, or journey companion) within 12 months.

The cost of inaction: Every year without a direct passenger relationship is a year of loyalty data, commercial insight, and behavioral understanding flowing to airlines and credit card companies instead. The gap compounds. The airports that started building three years ago are now personalizing at scale. Those that have not started will find the cost of entry rising and the competitive distance widening with each passing year.

Summary: The moves leading airports are making

MOVE	DIAGNOSTIC QUESTION	90-DAY DECISION	COST OF INACTION
1. Govern for the pace of change	Can we name who is accountable when each AI system acts?	Establish a decision-rights register for all AI systems; define advise vs. act boundaries	First serious AI incident sets regulatory terms you didn't shape
2. Elevate workforce to a capital investment	Who owns workforce strategy as a capital allocation question?	Appoint C-suite workforce-strategy owner; audit and address top 3 barriers	18–24 months lost on every major transformation
3. Deploy tech for the employee first	What % of frontline staff have real-time access to the data they need?	Audit information gaps for 3 largest contracted workforce groups; close top 3 within 6 months	Widening gap between system capability and workforce delivery
4. Build ecosystem data-sharing	Do all parties in critical processes see the same real-time data?	Open one process's data to all stakeholders for free; measure impact over 90 days	Partners build parallel ecosystems the airport doesn't control
5. Own the passenger relationship	Do we have a first-party passenger database we control?	Define minimum viable CRM; assign ownership; launch first digital channel within 12 months	Loyalty data compounds, but for airlines and credit card companies, not for airports

Conclusion: The airport of 2035 is a human system

The leading airports in the coming decade will be defined not by what they build, but by how they operate. The most critical determinant of operational performance is the human systems underpinning and connecting the assets: the workforce, governance, processes, and culture.

The consistent finding across PTE World Conference 2026 is that the performance gap between leading and lagging airports is not primarily a capital gap. It is a gap in human systems: in governance speed, workforce capability, decision rights architecture, and the organizational culture that connects them. The airports that outperform do so because they have built the institutional architecture that makes capital, technology, and infrastructure actually deliver. Those that underperform have often invested just as heavily — in buildings, systems, and programs — without building the requisite organizational foundation.

The shift from asset operator to system orchestrator is not a future state; it is already underway, and it is widening the distance between airports that have made the transition and those still competing on what they build rather than how they operate. The five moves outlined here are not aspirational, but specific, sequenced, and urgent. The first, elevating workforce to a capital investment, unlocks the rest that follow.

The industry has spent decades optimizing the terminal; the next frontier is optimizing the organization that runs it. The airports that will lead in 2035 are those building the organizational architecture — the people, culture, data flows, and decision rights — that determines whether those assets perform. The airports that understand this are already measuring the results. The ones that don't are still counting ribbon cuttings.