



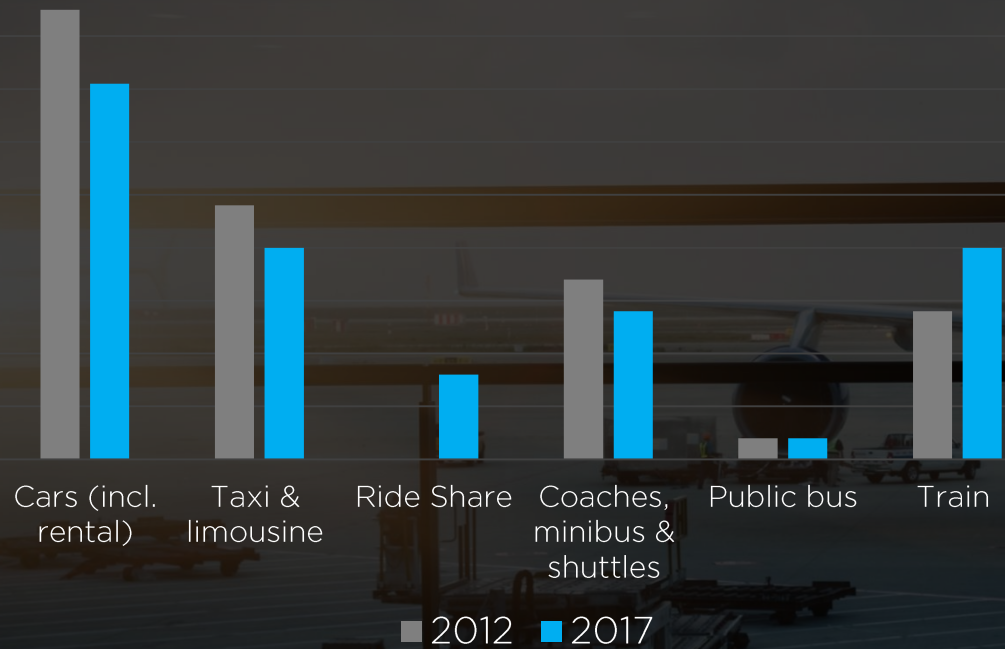
# LANDSIDE OPERATIONS & TRANSPORT

Craig Norton  
General Manager  
Landside Operations  
& Transport

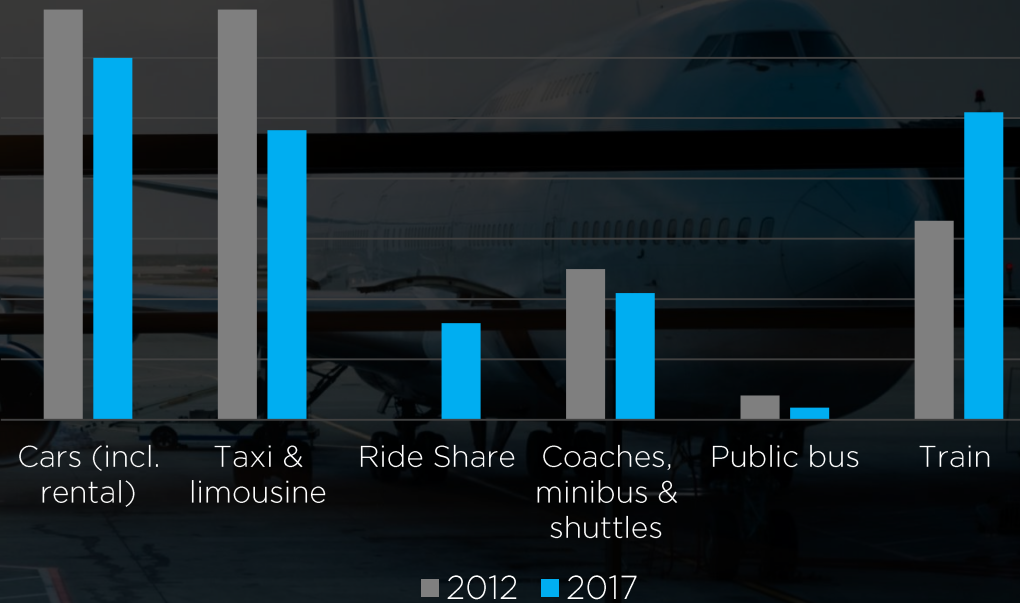
# THE EVOLUTION OF GETTING TO AND FROM THE AIRPORT

Since 2012 there has been a change in the way that passengers are choosing to access Sydney Airport

### T1 CHANGES TO MODE SHARE 2012-2017



### T2/T3 CHANGES TO MODE SHARE 2012-2017

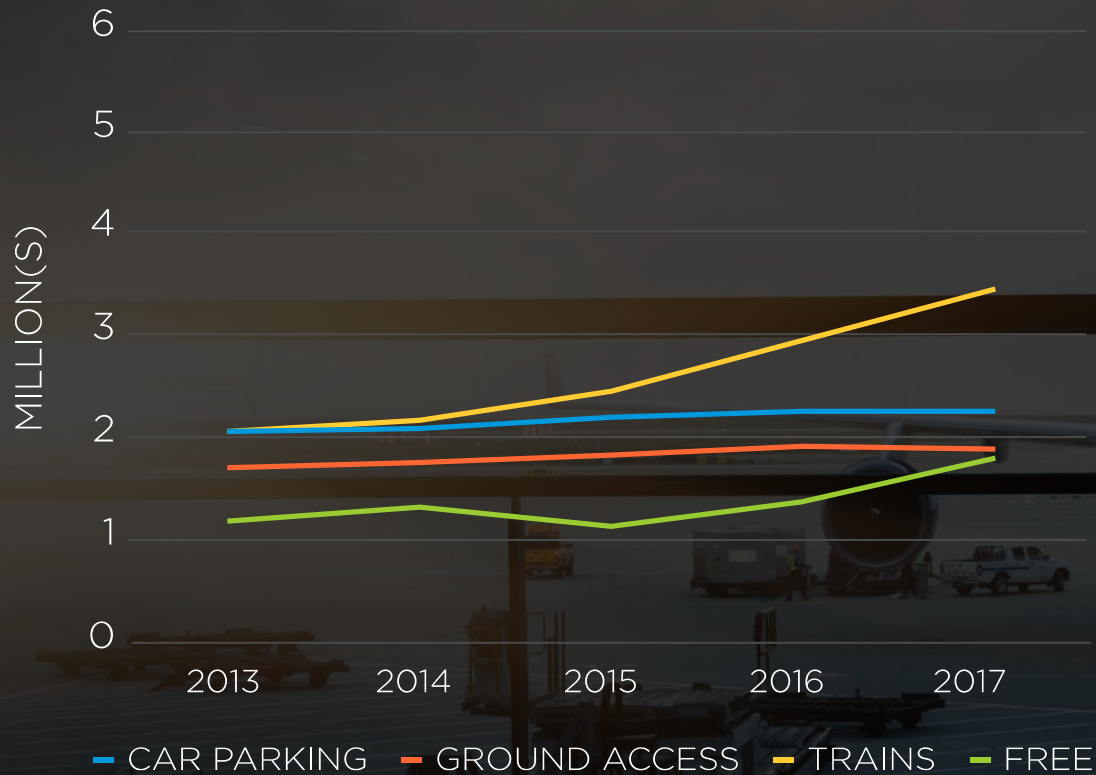




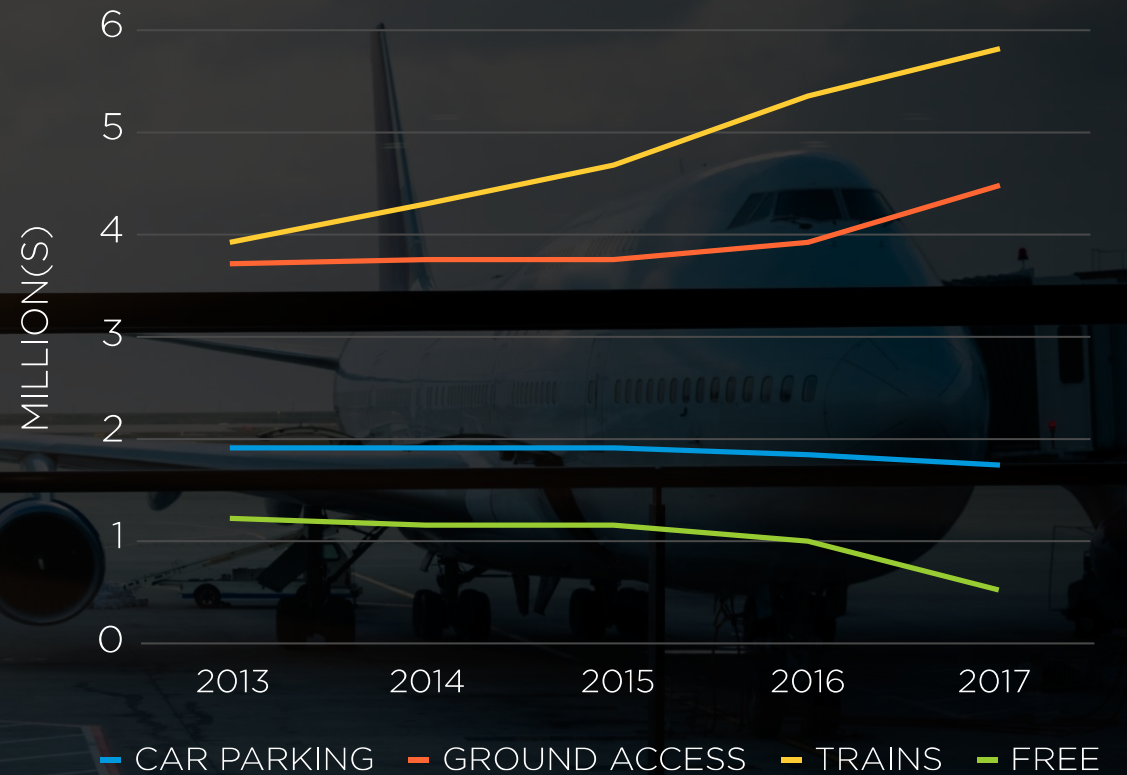
# THE EVOLUTION OF GETTING TO AND FROM THE AIRPORT

There is an increasing usage of the train to access the airport particularly in the Domestic precinct

## INTERNATIONAL VOLUMES



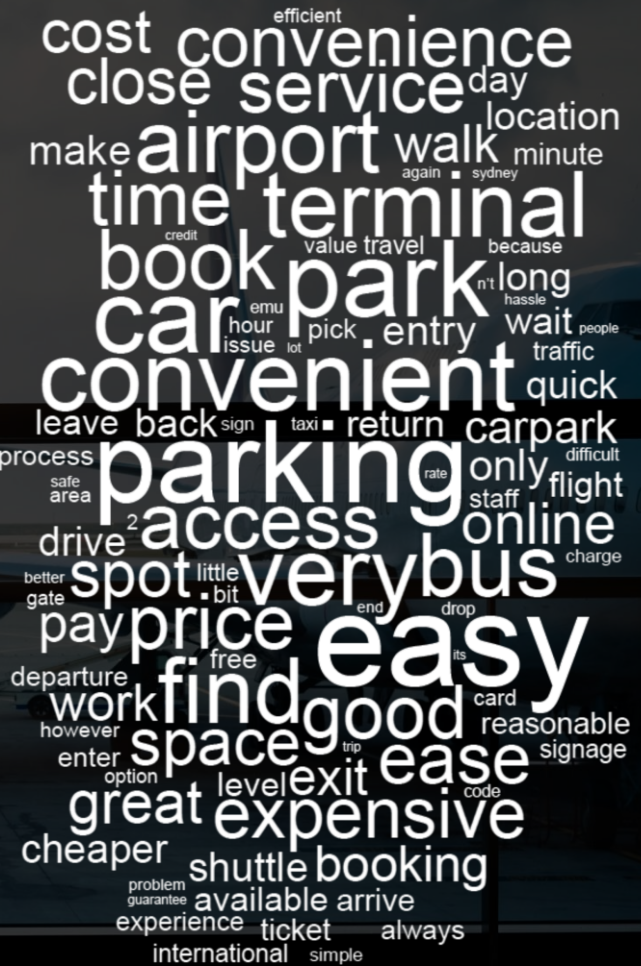
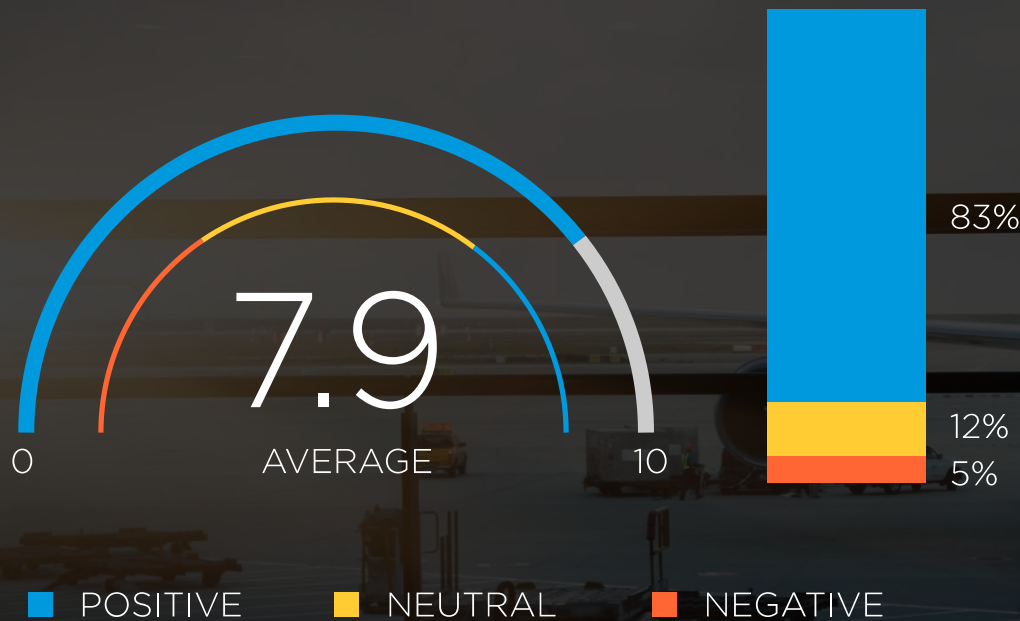
## DOMESTIC VOLUMES



# THE EVOLUTION OF THE CAR PARK EXPERIENCE

People who use our car parks have a positive experience 83% of the time

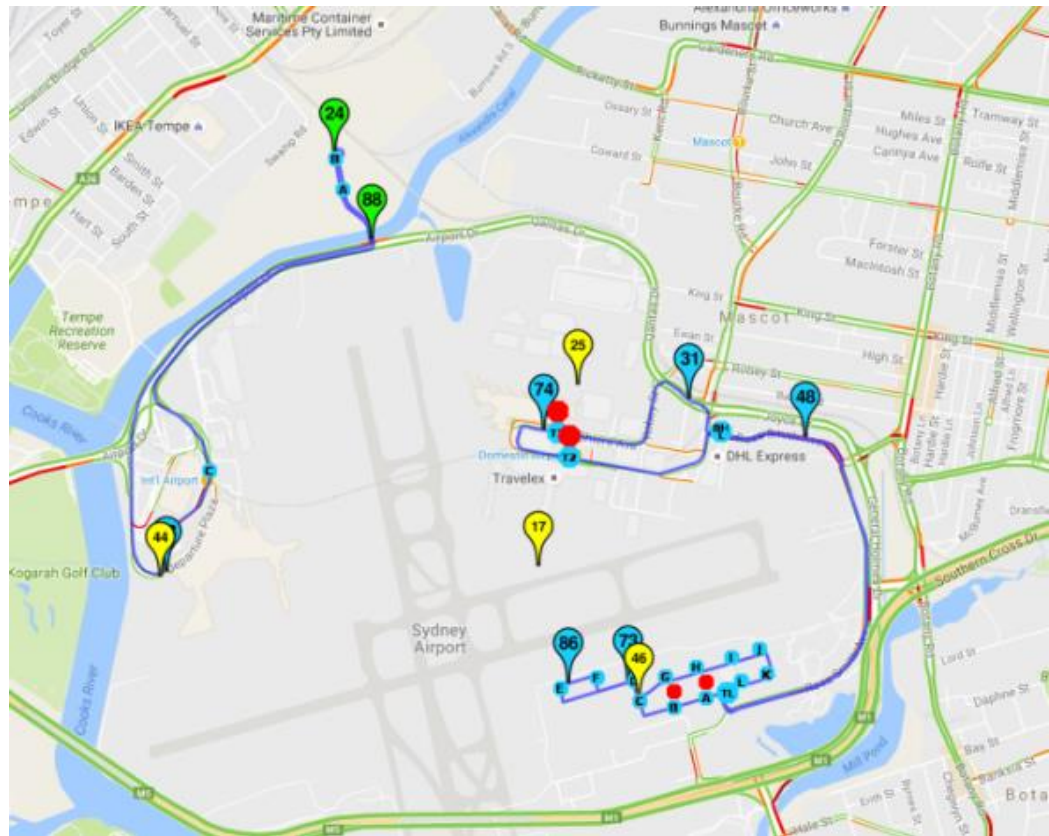
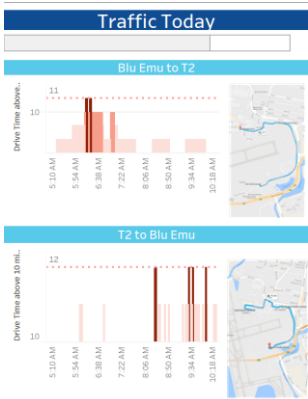
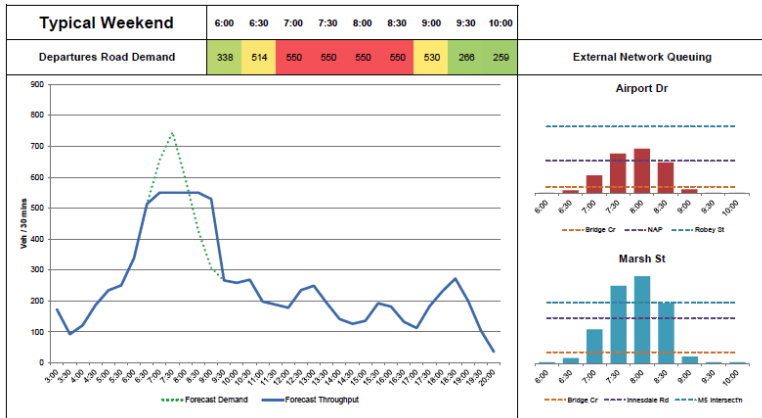
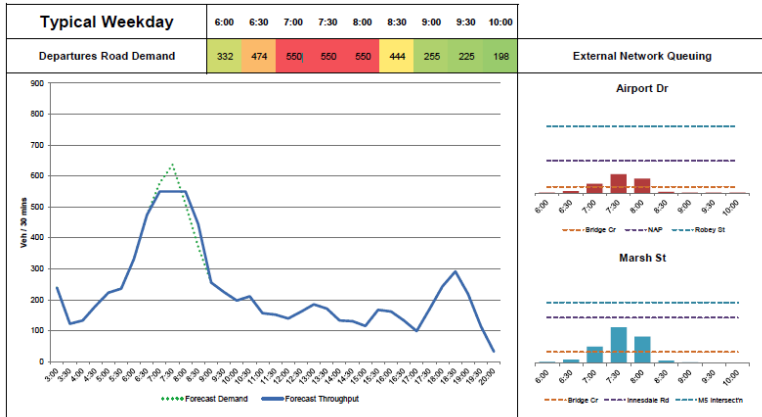
## 2018 POST TRIP SURVEY - ALL CAR PARKS





# MANAGING TRAFFIC FLOWS AT SYDNEY AIRPORT

The Landside Operations Centre has a range of forecast and real-time information that it uses to inform decisions on the ground



## COMMUNICATING WITH OUR CUSTOMERS

Once informed of the traffic situation, Sydney Airport has a number of tools at its disposal to deal with the situation and communicate with our customer



Over flow drop off zone


## Tools available to manage peak congestion

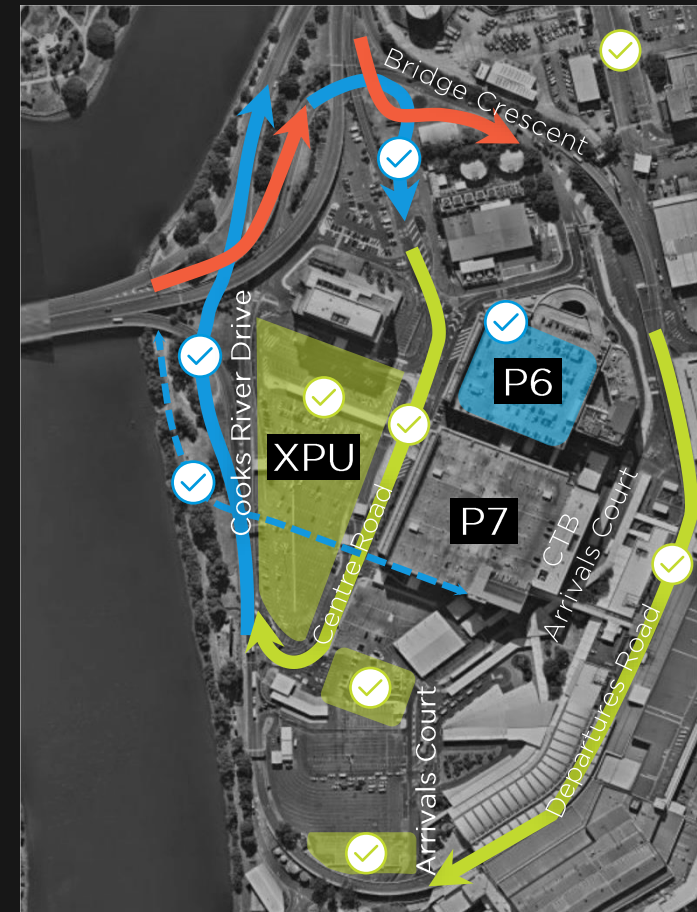
1. Over flow drop off zone
2. Active kerbside management
3. Re-direction via dynamic signage



# 2013-2018 T1 GROUND TRANSPORT PLAN

The planned T1 road works promised in the 2033 MasterPlan will be delivered 6 months ahead of schedule

<b>STAGE 1</b>	Widen Departures Road kerbside lane and extend kerb by 120m	Completed
	Reconfigure Link Road/Airport Drive intersection	Completed
	Dedicated bus drop-off zone at southern end of Departures Road	Completed
	Distribute and increase entry/exit gates to each parking zone	Completed
	New city bound exit gate from Express Pick-up	Completed
	Relocate and improve Express Pick-up facility	Completed
	New free flowing Centre Road	Completed
<b>STAGE 2</b>	Expand and improve taxi holding bay	Completed
	New exit from Marsh Street to Centre Road	Completed
	New footbridge and cycling way, removing at grade crossing on Cooks River Drive	Completed
	New dedicated exit road for Departures Road and Arrivals Court to Airport Drive	Completed
<b>STAGE 3</b>	Removal of traffic signals on Cooks River Drive	Completed
	New flyover exit ramp from Airport Drive to Arrivals Court	Jun-18
	Widen Bridge Crescent to allow two entry lanes from Marsh Street	Jun-18
	Widening Marsh Street and improved turning lanes	Operational



# 2013-2018 T1 GROUND TRANSPORT PLAN

Significant positive results off the back  
of our ground transport works

↑ 37%

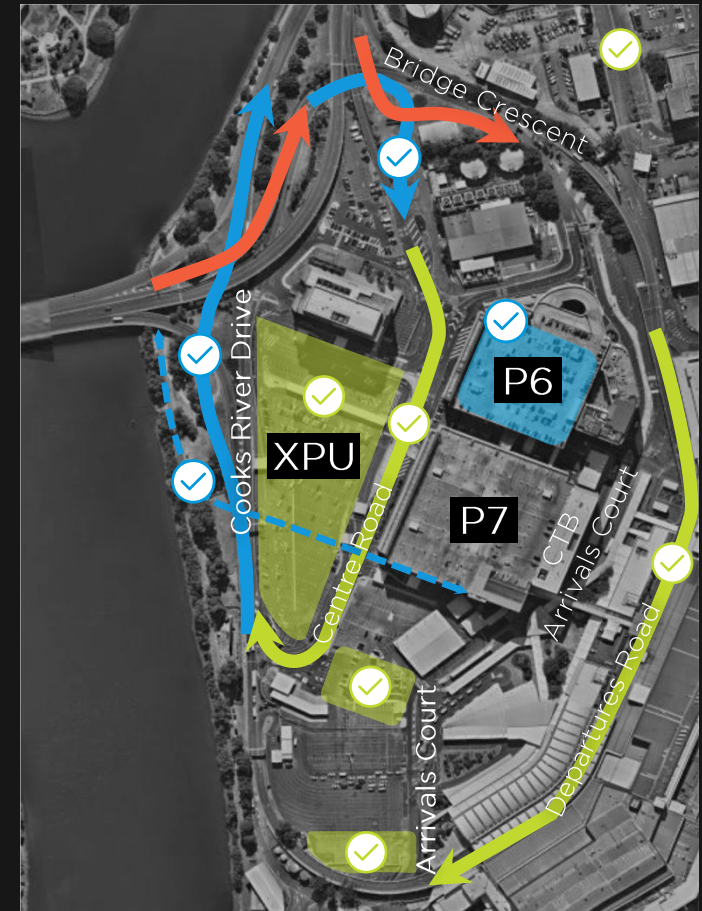
T1 TERMINAL  
KERBSIDE  
DROP-OFF  
CAPACITY

↑ 19%

T1 ADDITIONAL  
DROP-OFF  
THROUGHPUT IN  
OVERFLOW

↓ 18%

T1 VEHICLES AT  
DEPARTURES  
RAMP PINCH  
POINT

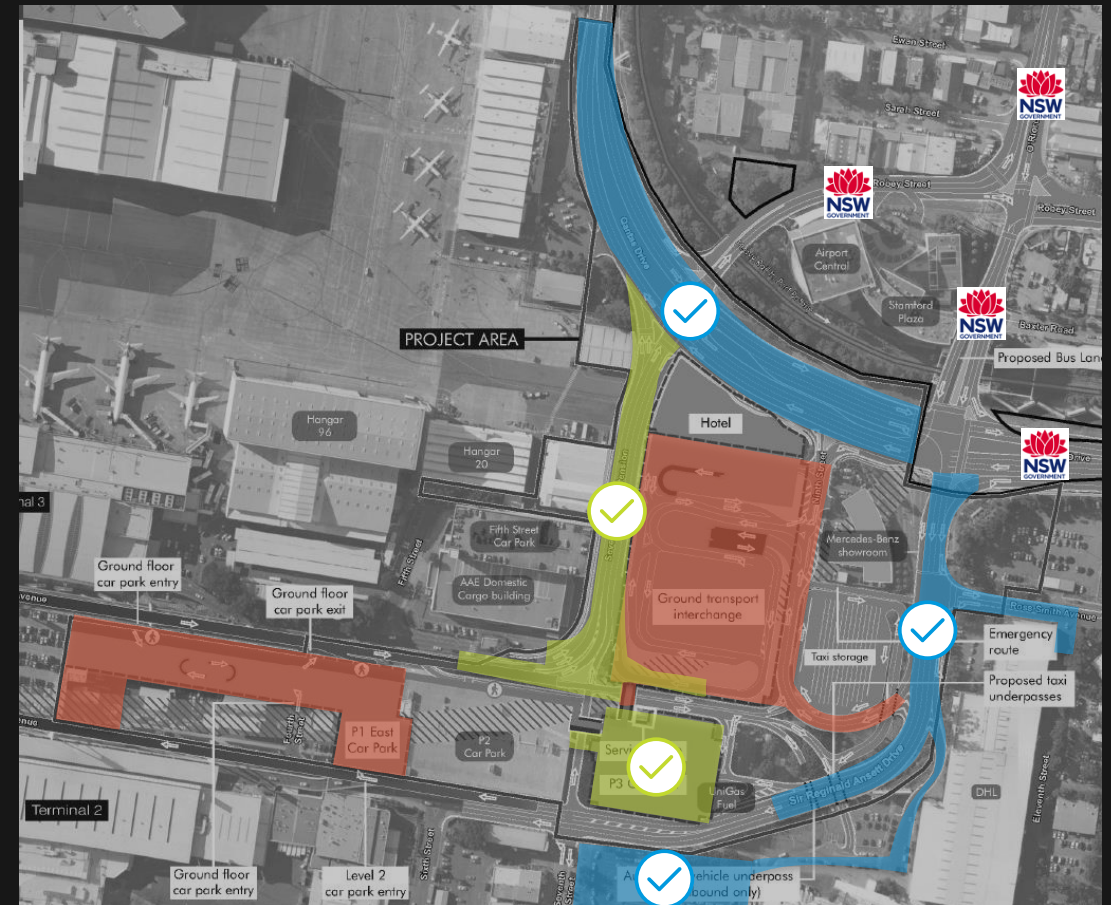




# 2013-2018 T2/T3 GROUND TRANSPORT PLAN

The planned T2/T3 road works promised in the 2033 MasterPlan were delivered 15 months ahead of schedule

<b>STAGE 1</b>	Demolishing hangars and extending Seventh Street through the Jetbase to create a new one way five lane exit from the precinct	Completed
	Expansion of the P3 car park to accommodate lost parking during construction of P1 East	Completed
<b>STAGE 2</b>	Reconfiguring Sir Reginald Ansett Drive to a five lane one way entry to the precinct	Completed
	Improvements to taxi holding area and operations	Completed
	Widening Qantas Drive between Robey and O’Riordan Streets to three lanes in each and associated turning lanes. This design would also integrate with the proposed NSW Government’s off airport works.	Completed
<b>STAGE 3</b>	Redevelopment of P1 East (in the horseshoe) to accommodate a pedestrian corridor from terminals to the transport interchange. This includes a new Ground Transport Interchange (GTI) that would provide bus/coach drop-off/pick-up services for commercial and public buses and coaches, including double decker buses.	Operational Date TBA



# 2013-2018 T2/T3 GROUND TRANSPORT PLAN

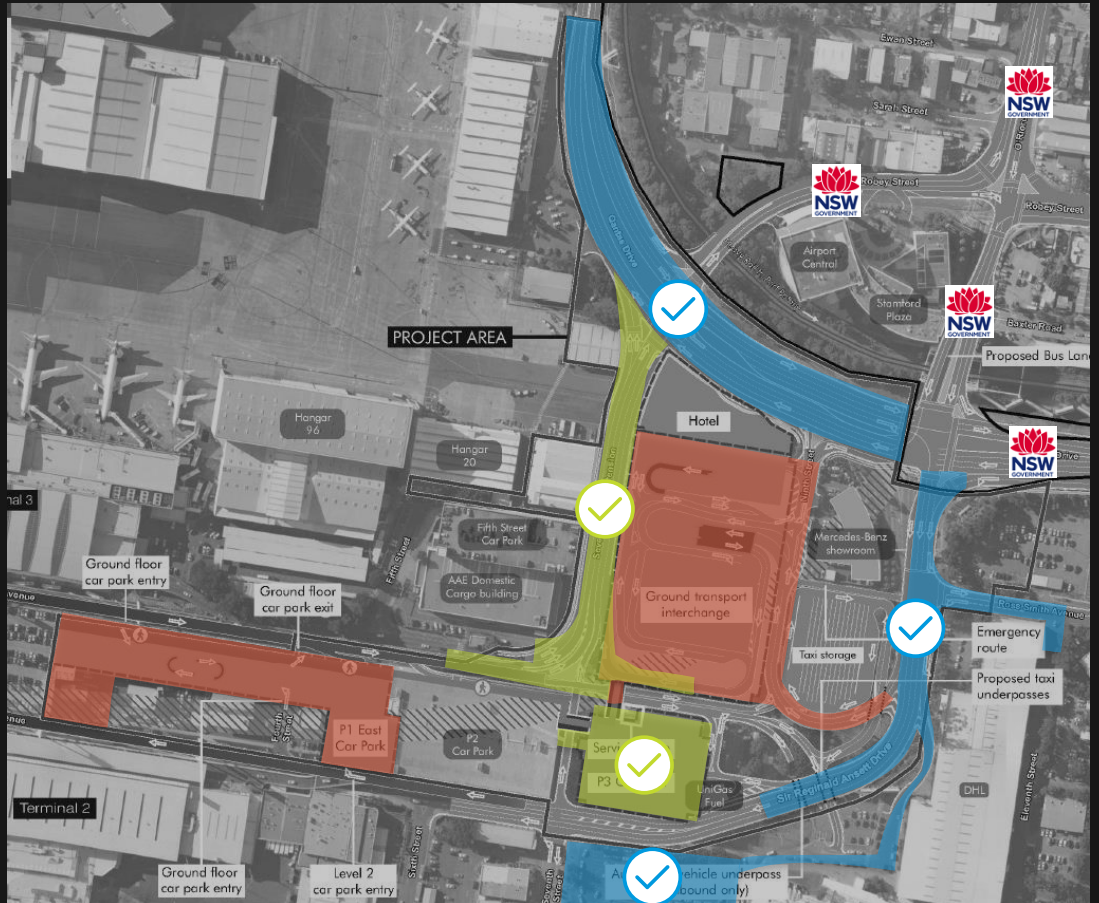
Significant positive results off the back  
of our Ground Transport works

↑ 50%

T2/T3 PM PEAK  
OUTBOUND  
CAPACITY

↓ 9%

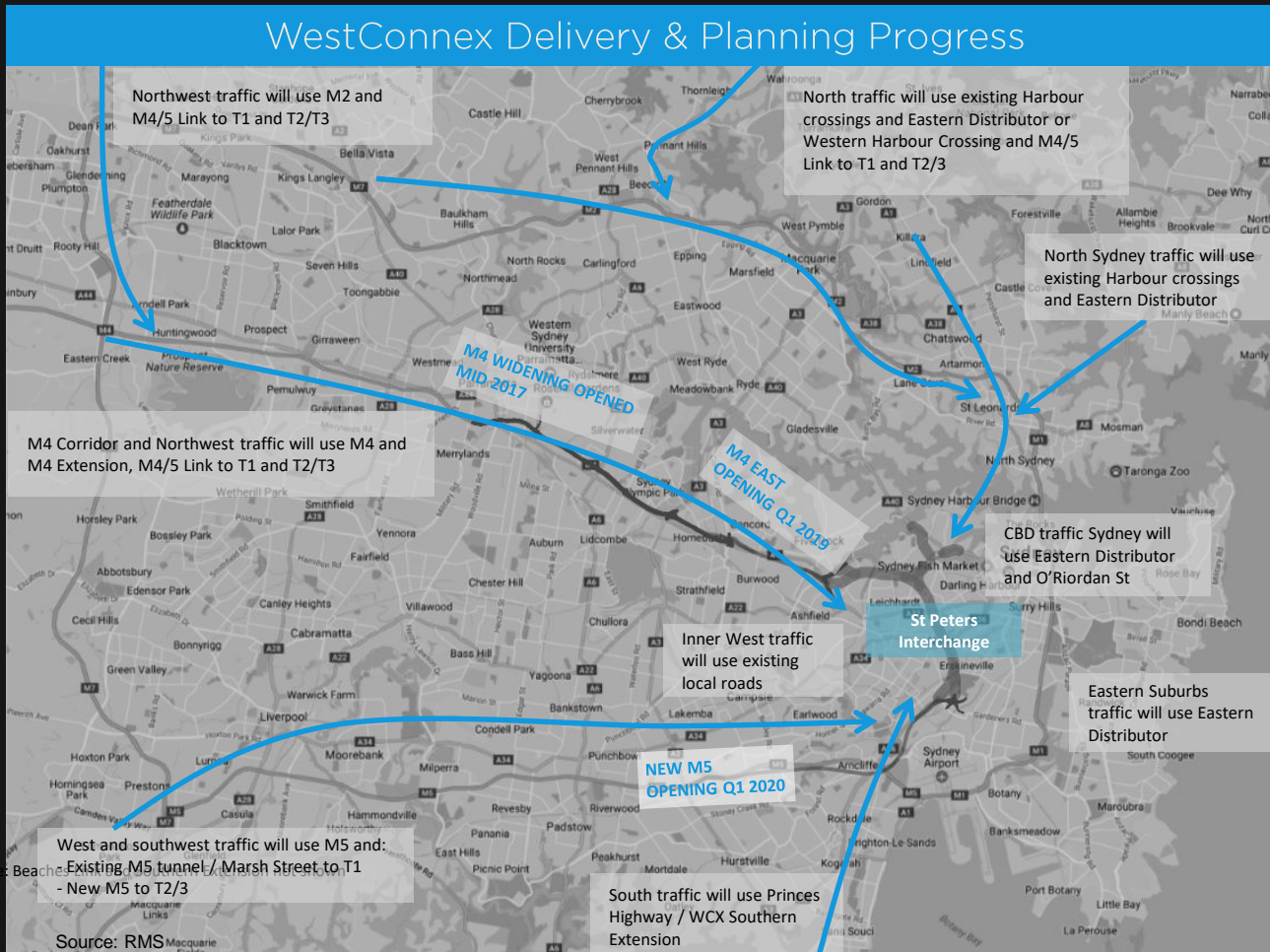
T2/T3 TRAVEL  
TIMES (AM & PM)





# FUTURE CONNECTIVITY WESTCONNEX

WestConnex provides a Motorway network that connects Metropolitan Sydney to St Peters Interchange



Sydney Airport principal connections to the existing Motorways are M5 (West & Southwest) and Eastern Distributor (East & North)

WestConnex Staging:

- 2017 Q3 M4 Widening Opened
- 2019 Q1 M4 East
- 2020 Q1 New M5
- 2023 Q1 M4-M5 Link
- 2022 Q3 Sydney Gateway

Proposed Sydney Gateway will connect St Peters Interchange with Sydney Airport and onto port Botany

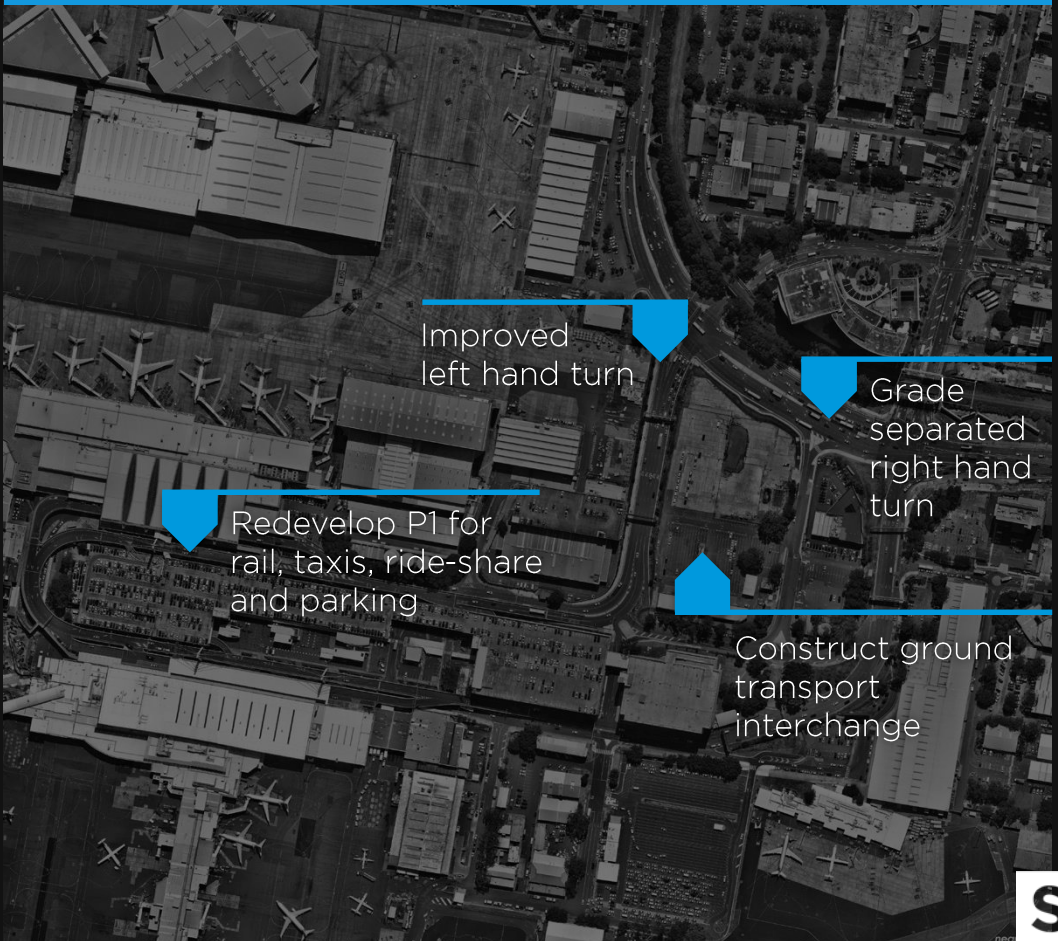
St Peters Interchange is only 1.5 km from Airport Drive

# 2019-2024 DRAFT GROUND TRANSPORT INITIATIVES

## T1 INTERNATIONAL



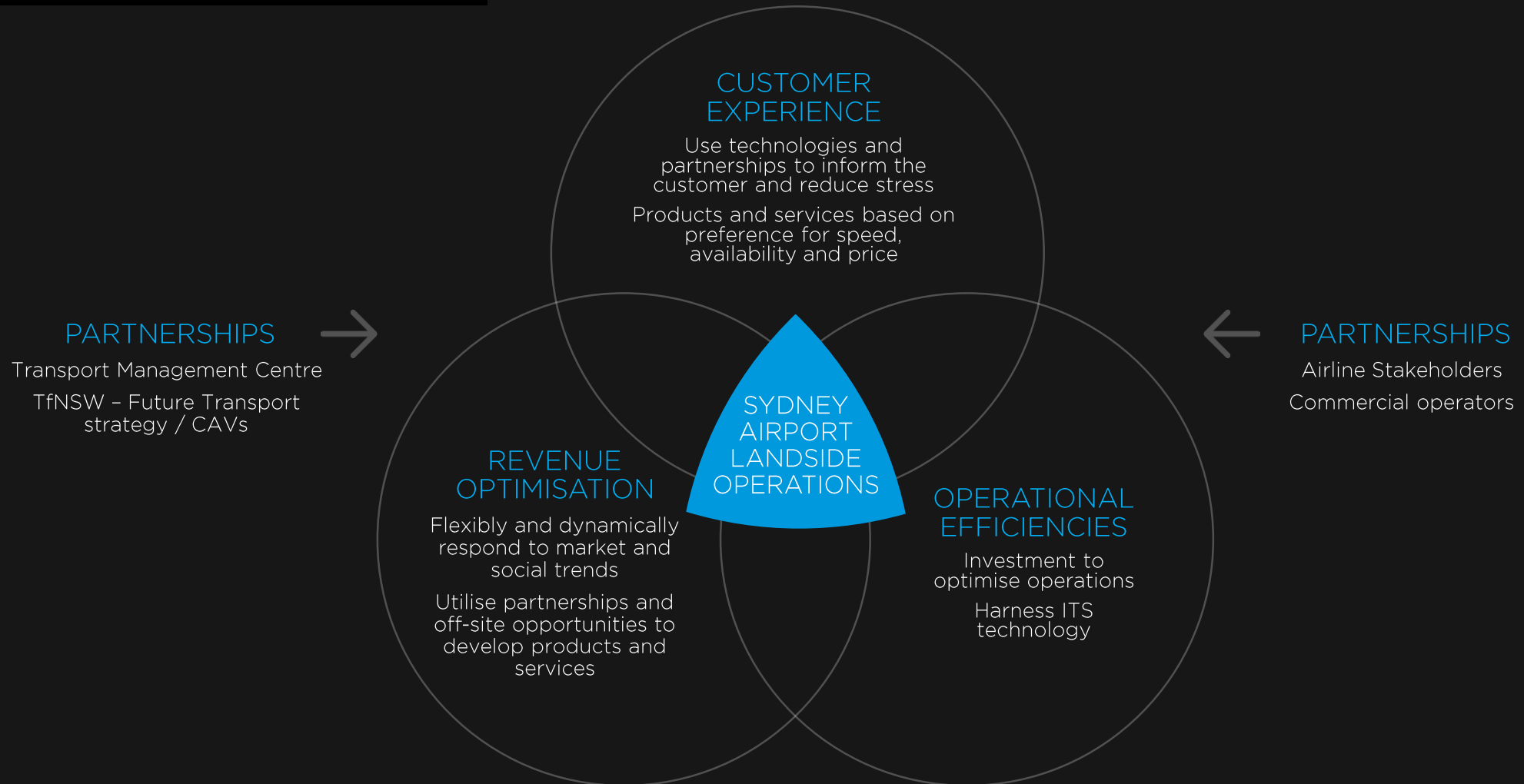
## T2/T3 DOMESTIC





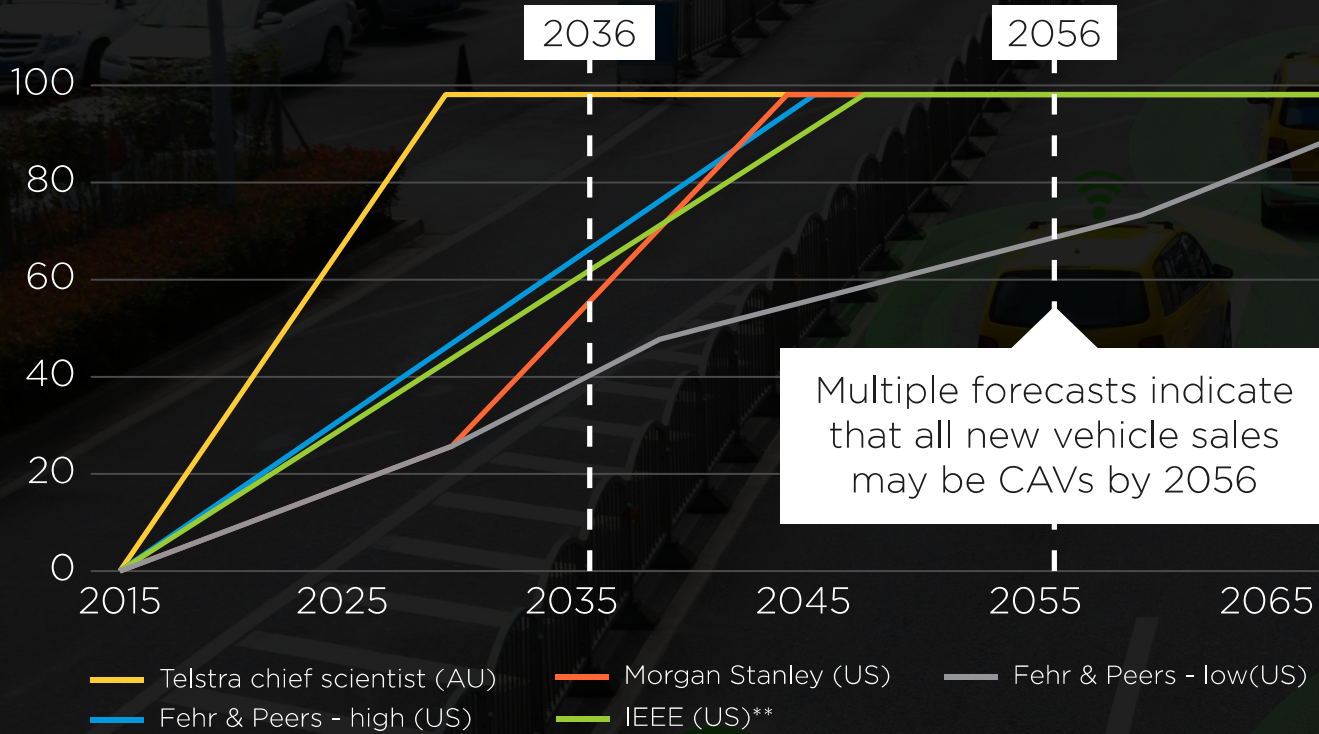
# BRING ON THE EVOLUTION!

Sydney Airport's Landside business is well positioned to take advantage of future transport developments such as CAVs, frictionless parking and road access charging



# BRING ON THE EVOLUTION!

Sydney Airport's Landside business is well positioned to take advantage of future transport developments such as CAVs, frictionless parking and road access charging





# RETAIL OVERVIEW

Glyn Williams  
General Manager Retail

Yael Bradbury  
Head of Marketing





## AGENDA

1. Retail Revenue
2. Strategy
3. Duty Free
4. T2
5. T3
6. Advertising
7. Marketing Strategy





# HOW WE WORK RETAIL REVENUE



12.7% REVENUE GROWTH 2017



REVENUE GROWTH ACROSS ALL TERMINALS



FULLY LEASED





“SYDNEY AIRPORT  
IS A FLAGSHIP  
SHOPPING  
AND DINING  
EXPERIENCE”



CHADSTONE  
MALL



WESTFIELD  
SYDNEY



SYDNEY  
AIRPORT

SYD





T 1

THE BEST  
OF GLOBAL  
AND LOCAL



T 2

URBAN  
LIFESTYLE



T 3

PREMIUM  
ASPIRATIONAL



# HOW WE WORK DUTY FREE



CONTEMPORARY OFFERING



EXCLUSIVE PRODUCTS



800 BRANDS AND 28,000 SKUS





T1

BEFORE

FRENCH  
CONNECTION

↑ Gates 50-63  
Lounges Shops

seed

FIRE HOSE ROLL  
FIRE HYDRANT  
FIRE EXTINGUISHER





T 1

AFTER



# HOW WE WORK

# T2



TRANSFORMING THE PRODUCT



FIRST TO AUSTRALIA BRANDS



33% UPLIFT IN SALES

# JUICE

hut

Quikshots

Quikshots

Quikshots  
COFFEE

**SYD**



# T2

BEFORE







# T2

AFTER



# HOW WE WORK IMPROVEMENTS



REVITALISED PIER B



14 NEW RETAIL STORES



MORE SEATING





# HOW WE WORK IMPROVEMENTS





# HOW WE WORK IMPROVEMENTS





HOW WE WORK  
IMPROVEMENTS





## HOW WE WORK

# T3



LEASE EXPIRY PROFILE



UNDERSTANDING THE PASSENGER



ADVERTISING RIGHTS 2H 2019



# Camilla





T3  
BEFORE



T3

AFTER





# HOW WE WORK ADVERTISING

- 📶 SUBSTANTIAL GROWTH SECTOR
- 📶 LARGEST OOH CONTRACT IN AUSTRALIA
- 📶 500 SIGNS
- 📶 HIGHLY FLEXIBLE MESSAGING

## ULTIMATE ELEGANCE.

THE NEW BMW 4 SERIES  
GRAN COUPÉ.



APN









# HOW WE WORK RETAIL MARKETING STRATEGY

 EXPERIENCESYD

 CONNECTING WITH THE CUSTOMER

 EAT SHOP FLY



OUR APPROACH  
RETAIL MARKETING  
EVOLUTION

PILLARS



ENGAGE PRE  
JOURNEY



TERMINAL  
BRANDS



UNIQUELY  
SYDNEY

PRIORITY  
AUDIENCE



OUR APPROACH  
RETAIL MARKETING  
EVOLUTION

2015-2017

Social channels

Lunar New Year  
Christmas

Best of local & global

Australia & China

Growth audiences  
(Vietnam, Philippines  
and USA)



PILLARS

 ENGAGE PRE  
JOURNEY

 TERMINAL  
BRANDS

 UNIQUELY  
SYDNEY

PRIORITY  
AUDIENCE



OUR APPROACH  
RETAIL MARKETING  
EVOLUTION

2018-2020

One channel  
One voice  
One Sydney Airport

Tapping into our  
passengers realm of  
influence

Powerhouse Museum  
City of Sydney  
Key non-competing  
tourist destinations

Australia  
Asia Pacific region  
Growth audiences  
(e.g. USA)

2015-2017

Social channels

Lunar New Year Christmas

Best of local & global

Australia & China

PILLARS

 ENGAGE PRE  
JOURNEY

 TERMINAL  
BRANDS

 UNIQUELY  
SYDNEY

PRIORITY  
AUDIENCE



HOW WE WORK

# B2C



ENGAGE PRE JOURNEY



TERMINAL BRANDS



UNIQUELY SYDNEY



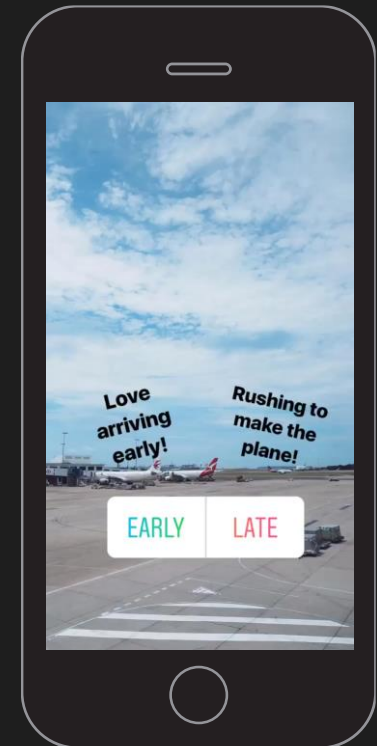
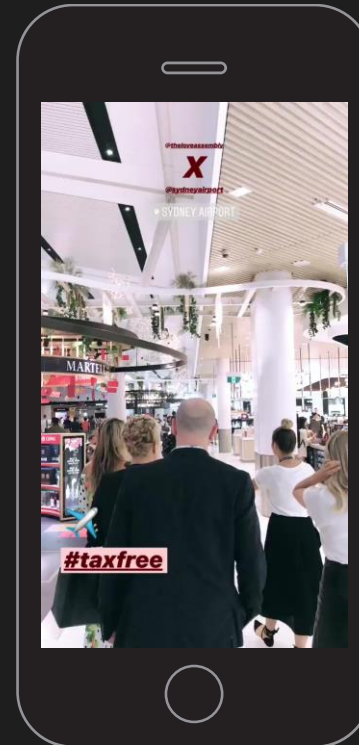


# INFLUENCERS B2C

📶 ENGAGE PRE JOURNEY

🏷️ TERMINAL BRANDS

🍁 UNIQUELY SYDNEY





# INFLUENCERS B2C

 ENGAGE PRE JOURNEY

 TERMINAL BRANDS

 UNIQUELY SYDNEY

72K  
TOTAL POST  
ENGAGEMENTS

637K  
TOTAL STORIES VIEWS



66K  
TOTAL ENGAGEMENT KPI

710K  
ENGAGEMENT ACHIEVED

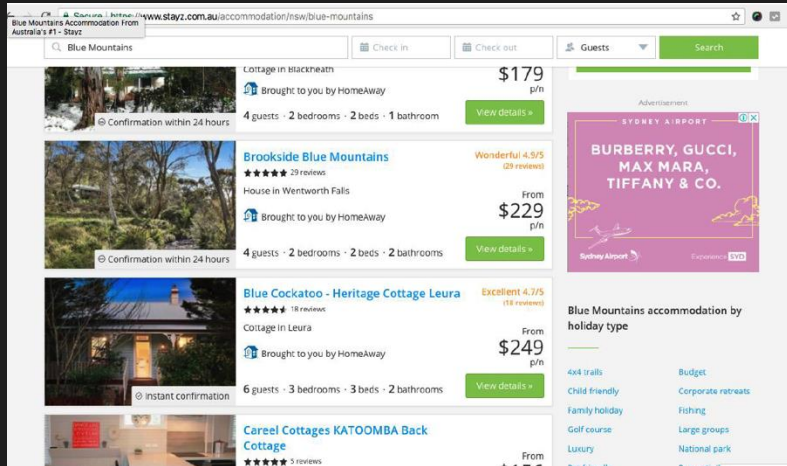


# THE DIGITAL JOURNEY AUSTRALIA





# GOURMET TRAVELLER



RESEARCHING/  
BOOKING FLIGHTS



ENGAGE WITH KEY  
INFLUENCERS ACROSS  
SOCIAL NETWORKS

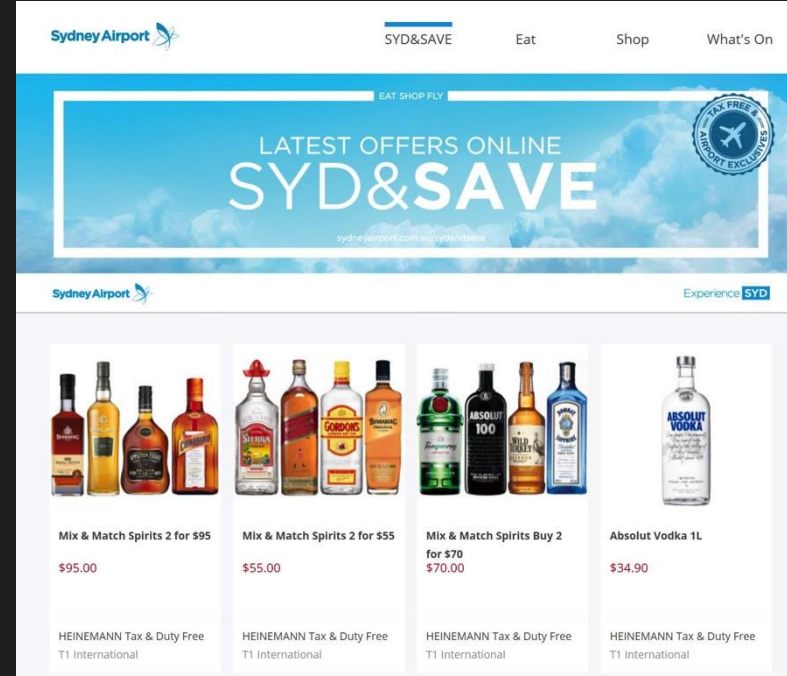


ENGAGE PRE-JOURNEY





REINFORCE KEY MESSAGES  
ACROSS BOUGHT MEDIA



RETAIL FOCUS ACROSS  
OWNED CHANNELS

ENGAGE PRE-JOURNEY



EAT. SHOP. FLY



  
kate spade  
NEW YORK

LOCATED NEAR GATE 30

Sydney Airport 

Experience **SYD**

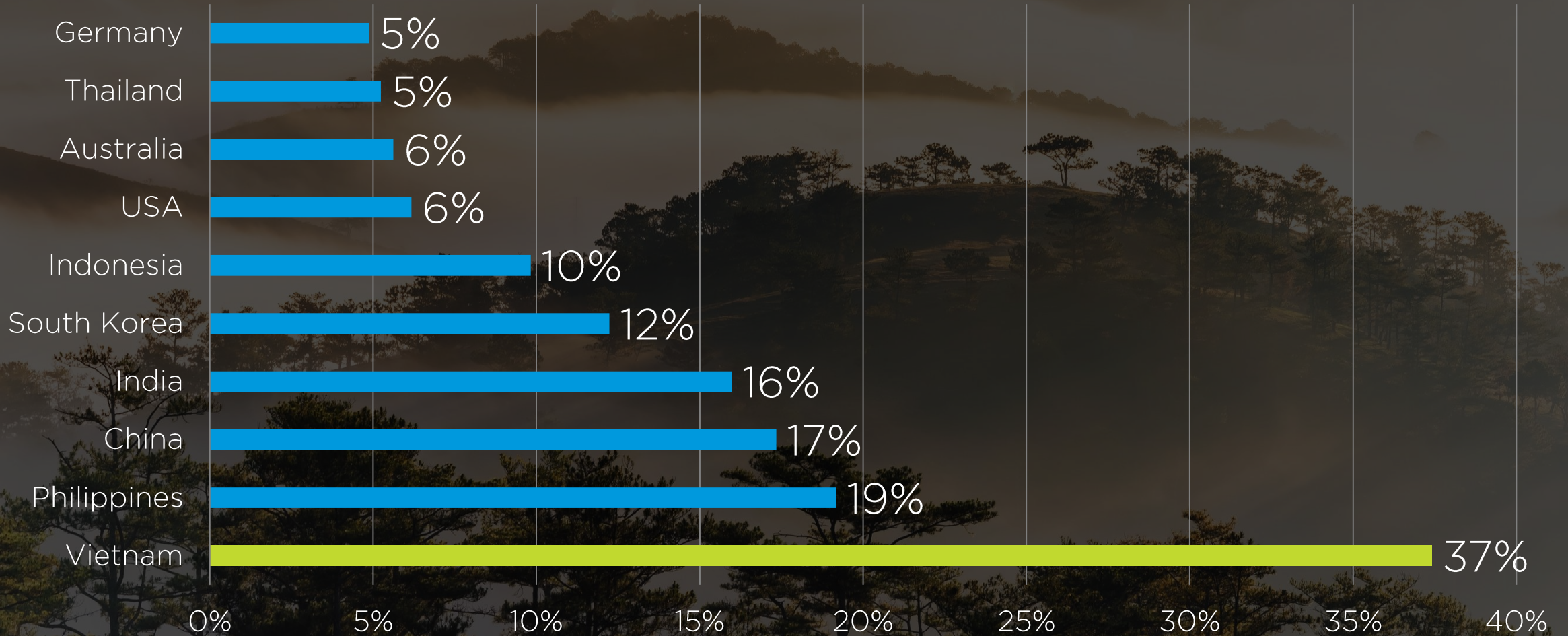
RETAIL ARTWORK CURATED  
ACROSS THE TERMINALS ACROSS  
THE PASSENGER JOURNEY



IN-TERMINAL



# THE ASIAN STORY





THE DIGITAL  
JOURNEY  
CHINA







SYDNEY AIRPORT WECHAT



CHINESE WEBSITE  
HOSTED IN HONG KONG



ENGAGE PRE-JOURNEY  
IN CHINA





ENGAGE WITH THEM THROUGH OWNED AND BOUGHT CHANNELS



EAT SHOP FLY

# CELEBRATE THE CHINESE NEW YEAR 恭贺新春



Buy your loved ones the gift of limited edition at HEINEMANN Tax & Duty Free  
为您的挚爱在海内曼免税店选购限量版礼盒。



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Sydney Airport 

Experience **SYD**

BRING TO LIFE THE TERMINAL BRAND



AT SYDNEY AIRPORT





THANK YOU

Glyn Williams  
Yael Bradbury

