VIÐSKIPTATÆKIFÆRI Á KEFLAVÍKURFLUGVELLI

Kynningarfundur á Hotel Natura

16. október 2018

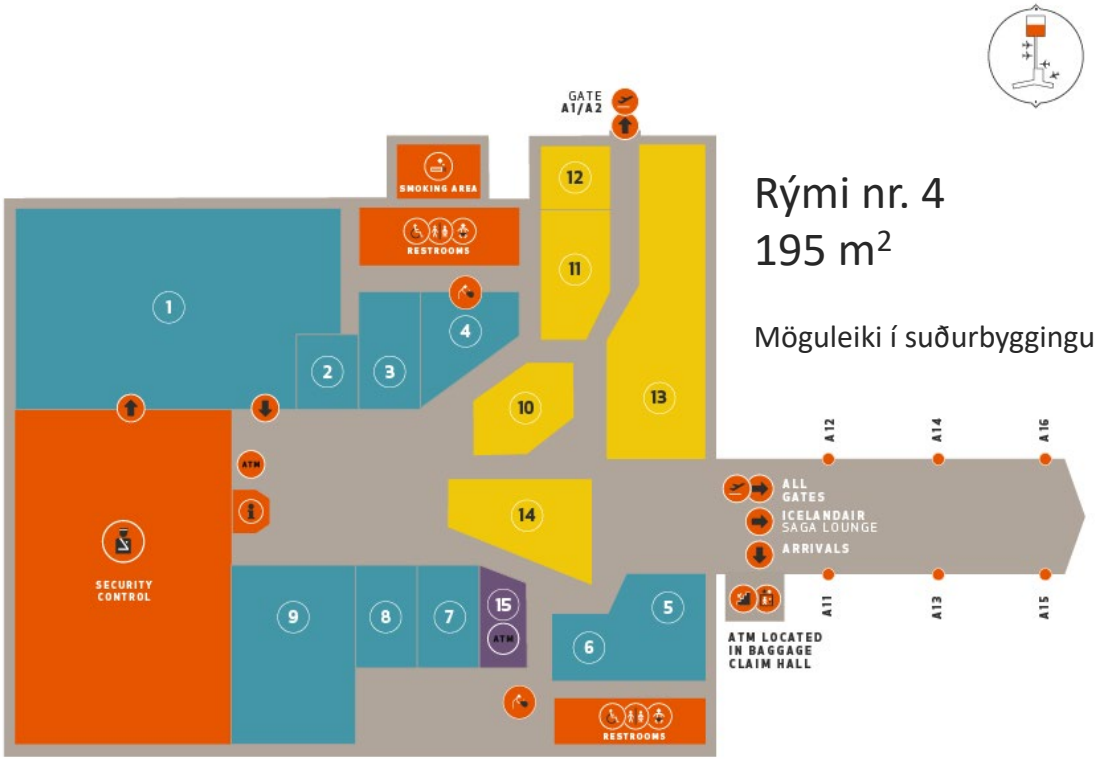
Gunnhildur Vilbergsdótir, deildarstjóri

DAGSKRÁ

- Tækifærin framundan í bókabúð og raftækjum
- Hver er viðskiptavinurinn?
- Stefnur og straumar í smásölu á flugvöllum
- Uppbyggingaráætlun Keflavíkurflugvallar

TÆKIFÆRIÐ

BÓKAVERSLUN



Rými nr. 4
195 m^2

Möguleiki í suðurbyggingu

VELTA OG ÞRÓUN Í BÓKAVERSLUN

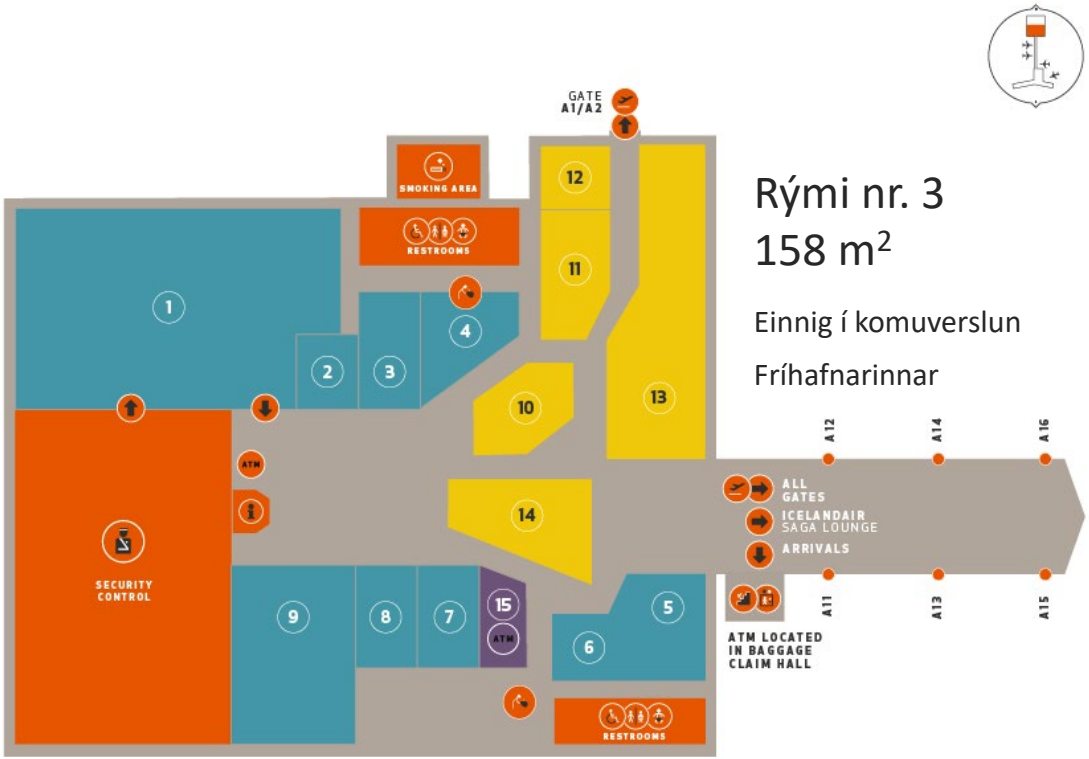
2017

velta 506 milljónir

8,3% aukning 2016-2017

6,8% aukning YTD 2018

RAFTÆKJAVERSLUN



Rými nr. 3
158 m^2

Einnig í komuverslun

Fríhafnarinnar

VELTA OG ÞRÓUN Í RAFTÆJAVERSLUN

2017

velta 1.578 milljónir

10% aukning 2016-2017

10,6% aukning YTD 2018

VIÐSKIPTAVINIRNIR

2017
KEFLAVÍKURFLUGVÖLLUR
Í TÖLUM

ANNASAMASTI DAGURINN
6. ÁGÚST:
40.147
FARÞEGAR

HEILDARFJÖLDI
FLUGFERÐA
TIL OG FRÁ
LANDINU

2016: 51.309

2017: 61.929 +20,7%

FLUG Á 8 MÍNÚTNA FRESTI AÐ MEÐALTALI

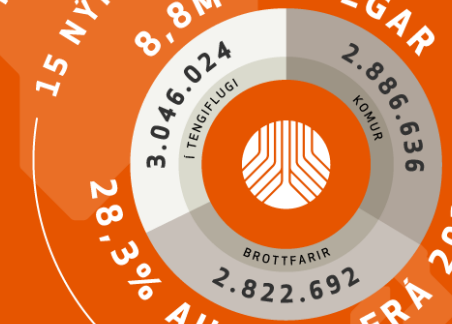
15 NÝIR ÁFANGASTAÐIR

8,8M FARÞEGAR

28,3% AUKNING FRÁ 2016

32 FLUGFÉLÖG — 106 ÁFANGASTAÐIR

5.716.925 TÖSKUR



TOPP 5

ÁFANGASTAÐIR
AMSTERDAM
KAUPMANNAHÖFN
LONDON
NEW YORK
PARÍS

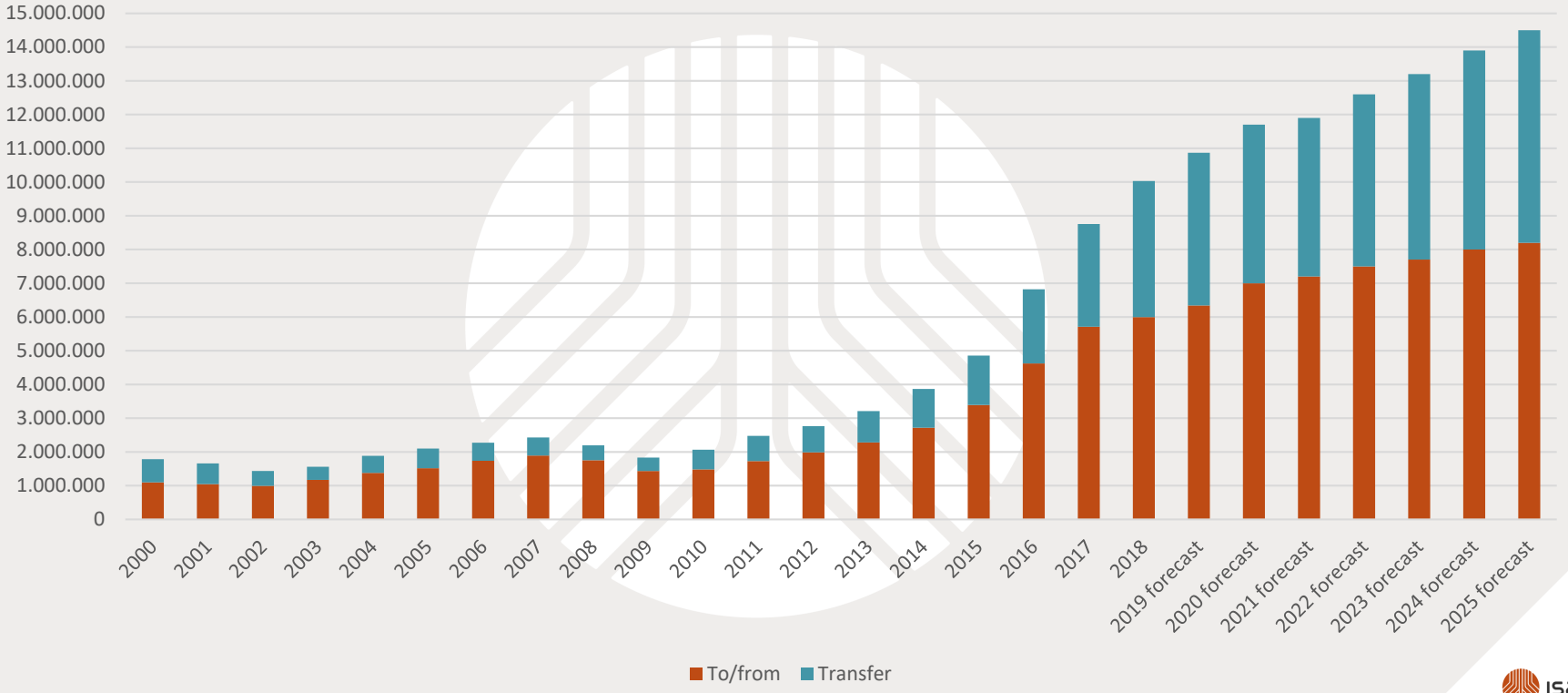
ÞJÓÐERNI
ÍSLAND
BANDARÍKIN
BRETLAND
ÞÝSKALAND
KANADA

7.332
BEIN STÖRF
30% AUKNING SÍÐAN 2016

STÆKKUÐUM FLUGSTÖÐINA
UM 7.000M²
MEÐALFÓTBOLTAVÖLLUR ER 7.140M²

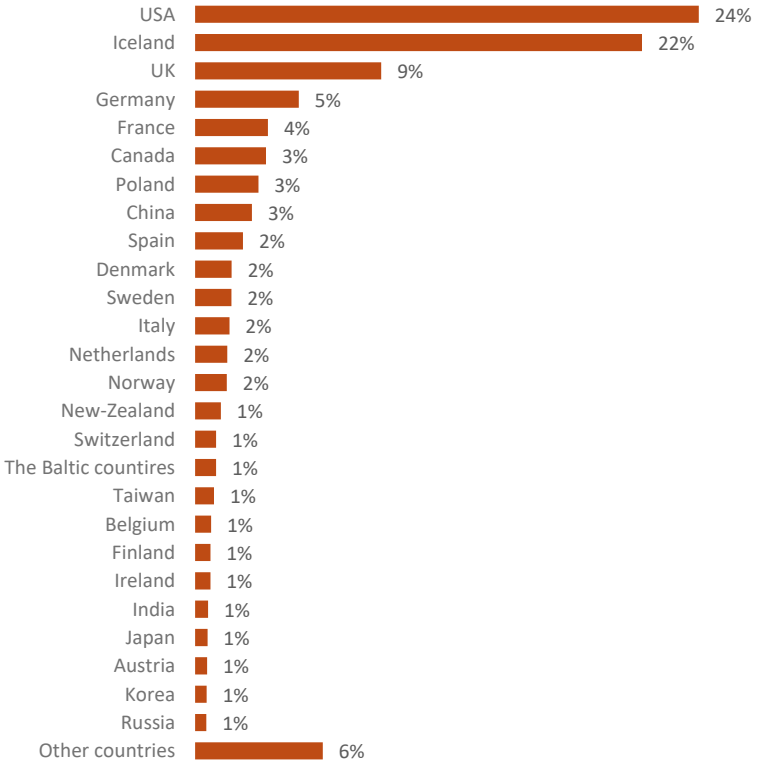
ENDURNÝJUN FLUGBRAUTA NAM
495.000 M²

ÞRÓUN FARÞEGAFJÖLDA Á KEFLAVÍKURFLUGVELLI OG SPÁ



isavia

ÞJÓÐERNI BROTTFARARFARÞEGA FRÁ KEFLAVÍKURFLUGVELLI
JANÚAR - ÁGÚST 2018



2,3m
Brottpax
jan-aug
2018

Source: Feröamálastofa (jan-aug 2018)

LÝSING FARÞEGA UM KEF OG FERÐAHEGÐUN

Kyn:

53% 47%

Meðalaldur: 34,9

Tilgangur ferðar:

Frí	Vinna	Heimsækja vini/ættingja
66%	8%	15%

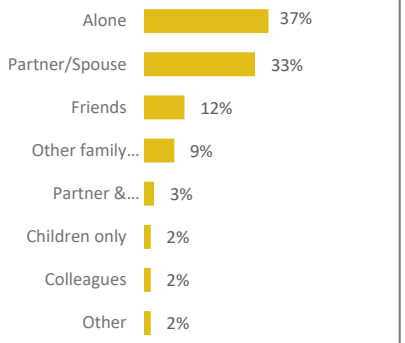
Tegund farþega:

Koma og brottfarir	Tengi
60%	40%

Ferðaklassi:

Almennt rými	Fyrsta rými
93%	7%

Með hverjum ertu að ferðast?



Fjöldi ferða á þessu ári?

1,3 *Vinnu-ferðir* | **2,8** *Frí ferðir* = **4,2** *Samtals*

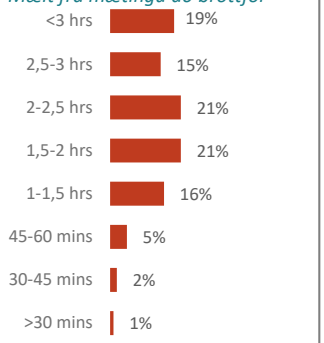
Meðal dvalartími?

Frá öryggisleit að brottfarahliði

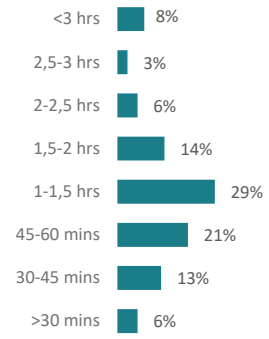
94 mins

Meðaltími á flugvellinum?

Mælt frá mætingu að brottför



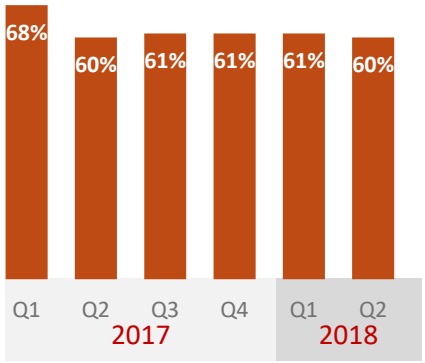
Hversu snemma komin að hliði?



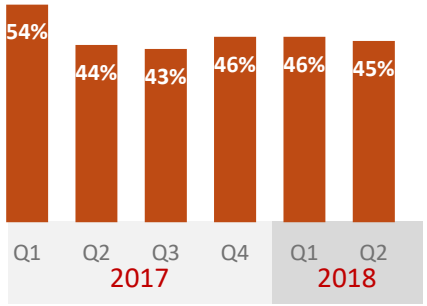
Heimild: ASQ Survey Q1 & Q2 2018; Consumer Audit Q1 & Q2 2018; Isavia passenger statistics; Kaba measures at security.

HEIMSÓKNIR, KAUPENDUR OG KAUPHLUTFALL Í SÉRVERSLUNUM Í KEF 2017-2018

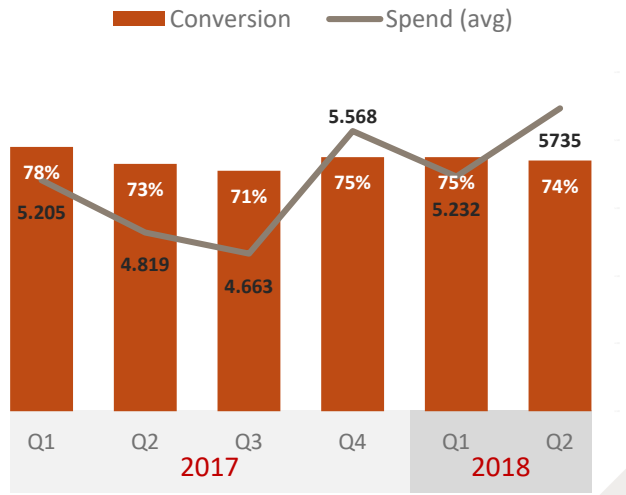
Hlutfall sem heimsækir verslanir



Kaupendur í verslun
(af heildarfjölda)



Kauphlutfall og eyðsla (meðaltal)



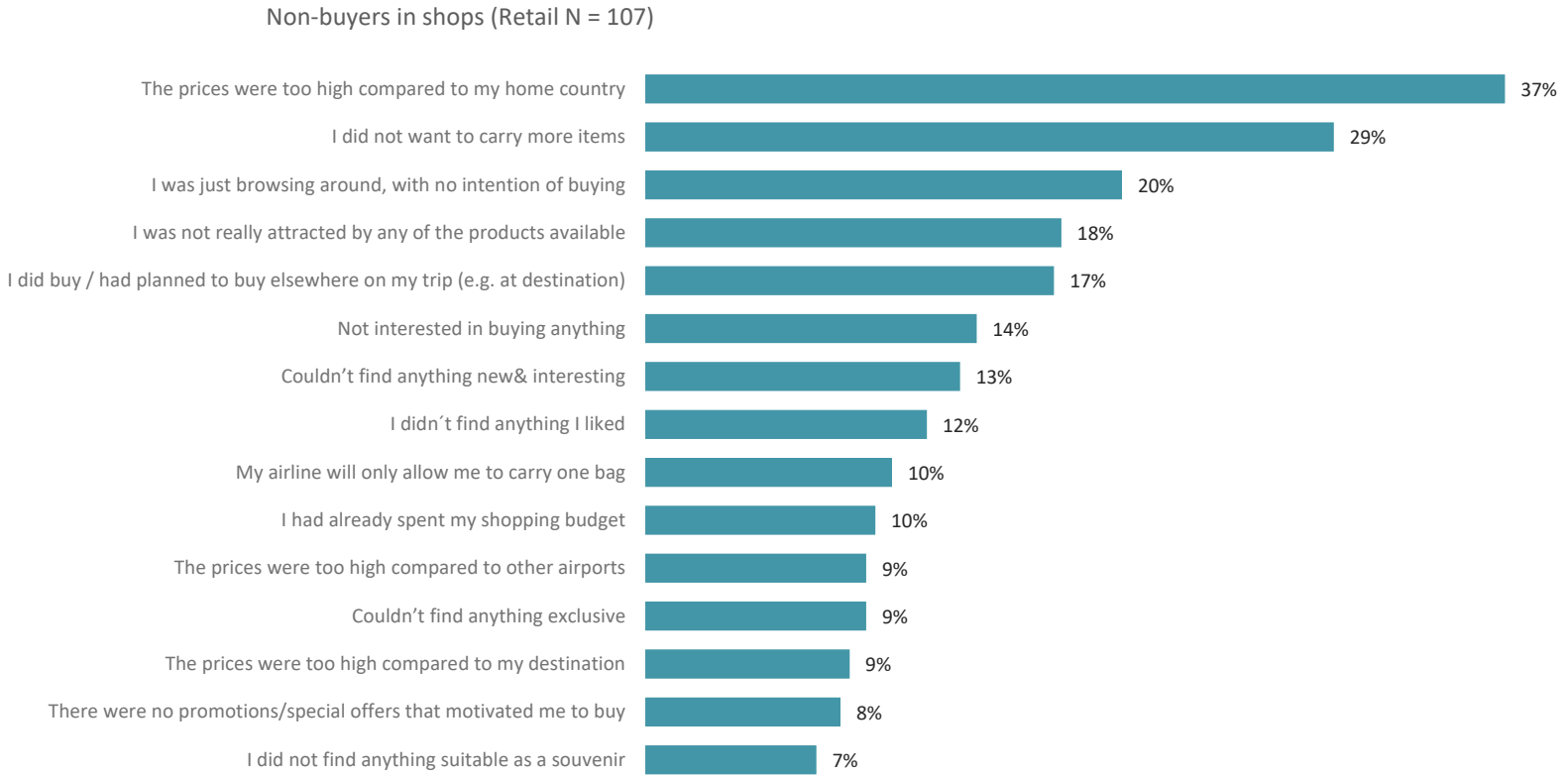
Heimild: Consumer Audit Q2 2018

ÁSTÆÐUR HEIMSÓKNA Í VERSLANIRNAR

Significant difference among type of shops are circled with red (significantly lower) and green (significantly higher).	Specialized shops (N=109)	Bookstore (N=99)
I just wanted to kill time before my flight	40%	49%
I had to walk through this area to get to my Departure gate	21%	15%
I wanted to browse around and see if I could find anything that I liked	39%	30%
I had a specific purchase in mind	29%	22%
I was looking for something to buy as a gift for someone	33%	17%
The shop looked inviting / attractive	22%	22%
I knew that there is a price advantage	11%	6%
I wanted to / felt like buying a treat for myself	20%	15%
I always shop here when I travel, it's a habit	13%	15%
To see if there was any promotion in the shop	10%	8%
I accompanied someone who was travelling with me	15%	8%
I was looking for Duty Free Exclusive Products or Sets (only available at the airport)	12%	2%
A product/brand that was visible from outside	13%	7%
I wanted to see the latest new products in the category	13%	6%
Someone had requested that I buy something for them	12%	4%
I saw an ad/promotion/mention at the airport	10%	3%
There was a promotional area outside	7%	4%

Heimild: Consumer Audit Q2 2018

ÁSTÆÐUR ÞESS AÐ EKKI KEYPT Í VERSLUNUNUM



Heimild: Consumer Audit Q2 2018

STEFNUR OG STRAUMAR Í FERÐASMÁSÖLU

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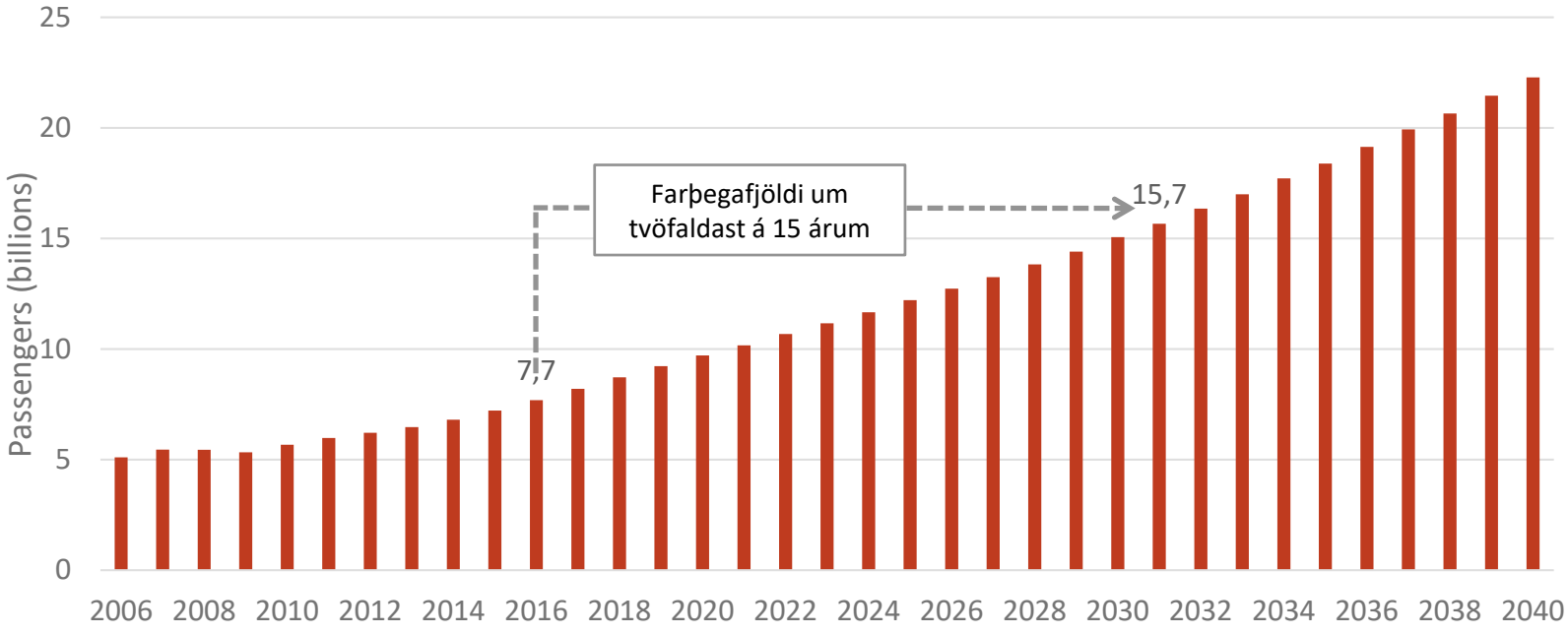
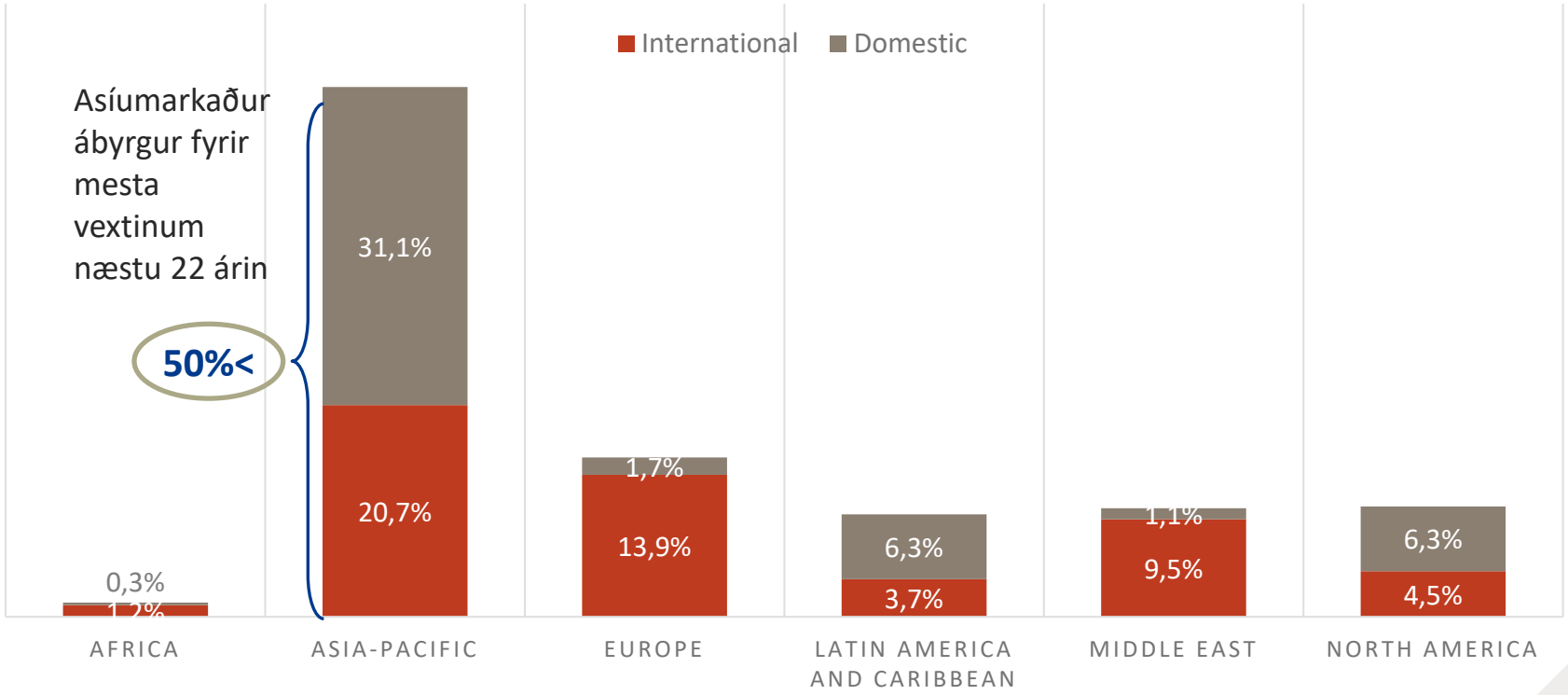
SPÁ UM FARÞEGAFJÖLDA Í HEIMINUM TIL 2040



Heimild: Airport Counsil International (2017)

SPÁ UM VÖXT EFTIR MÖRKUÐUM

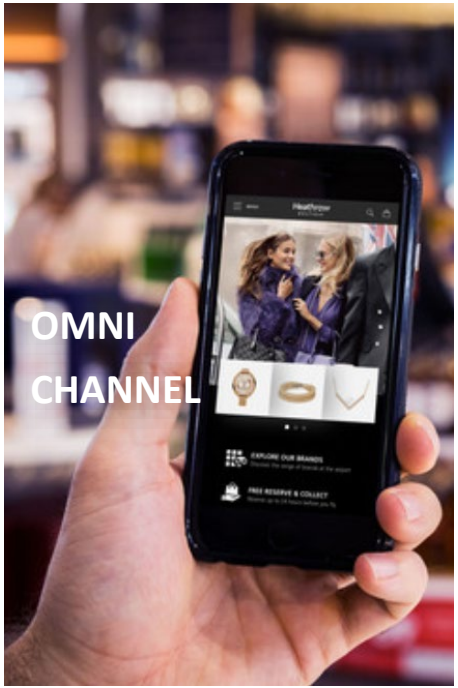


Heimild: Airport Counsil International (2017)

HEIMURINN ER AÐ BREYTAST

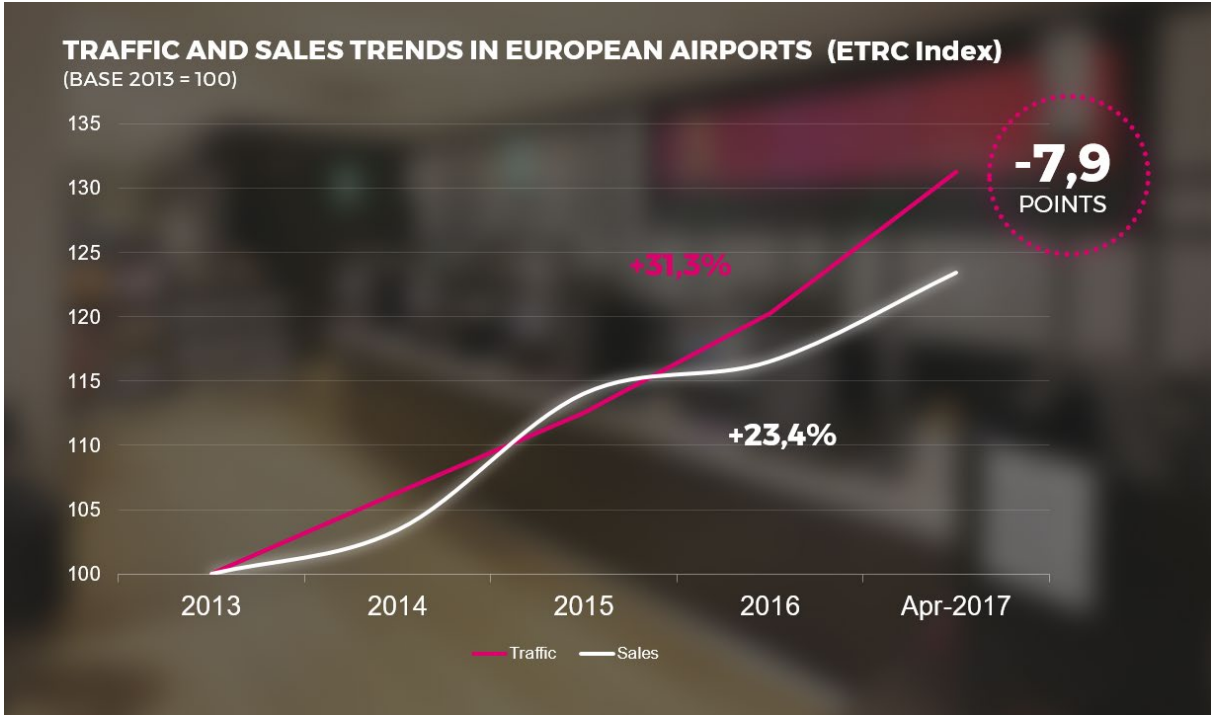
Mikil aukning ferðalaga

Breytt mynstur farþega



Breyttar kröfur

ÞRÓUN Á SÖLU PER FARÞEGA Í EVRÓPSKUM FLUGVÖLLUM



Heimild: ETRC index

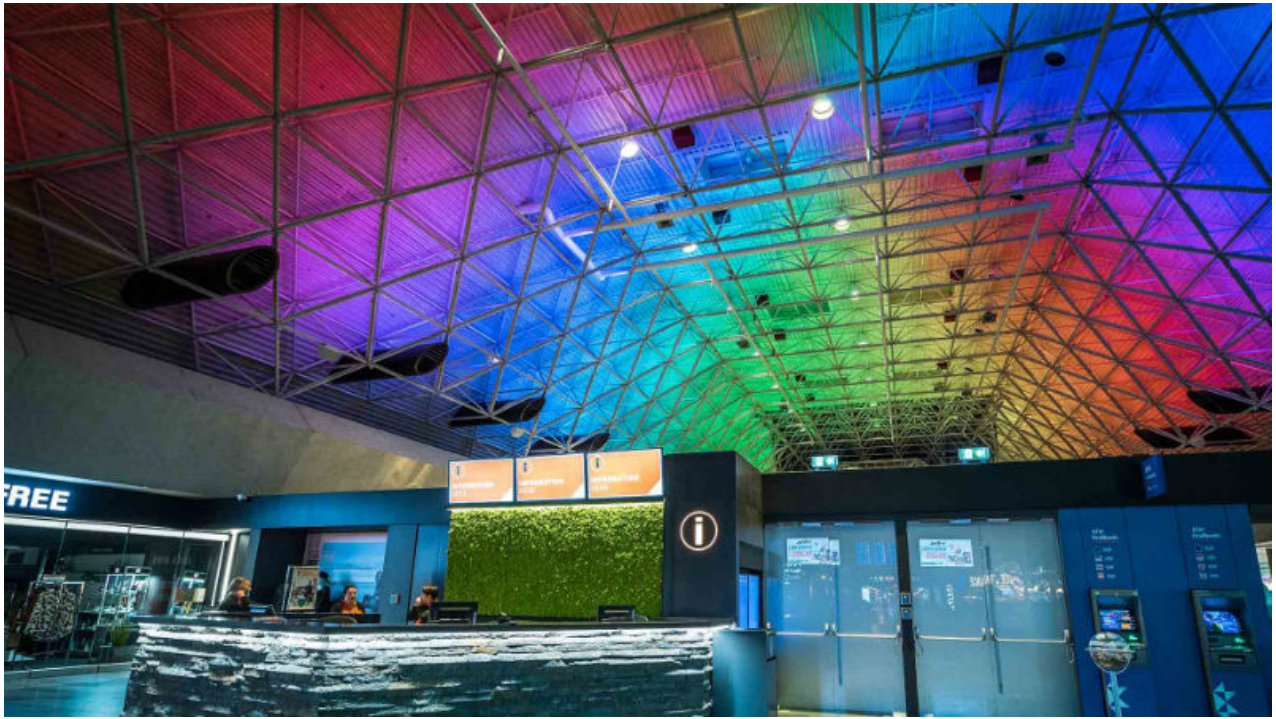
ÞARFAPÝRAMÍDI FARÞEGA

ÞÆGINDI OG SKILVIRKNI

VIRÐI

MOLTON BROWN
TRAVEL EXCLUSIVE
FLIGHT-FRIENDLY
MOLTON BROWN
LONDON
Ylang-Ylang
REPLENISHING
HAND CREAM
40ml 1.4fl oz

STERK ÍSLANDSTENGING



EINSTAKLINGSMIÐUN

UPPLIFUN

SAMKEPPNISFERLIÐ

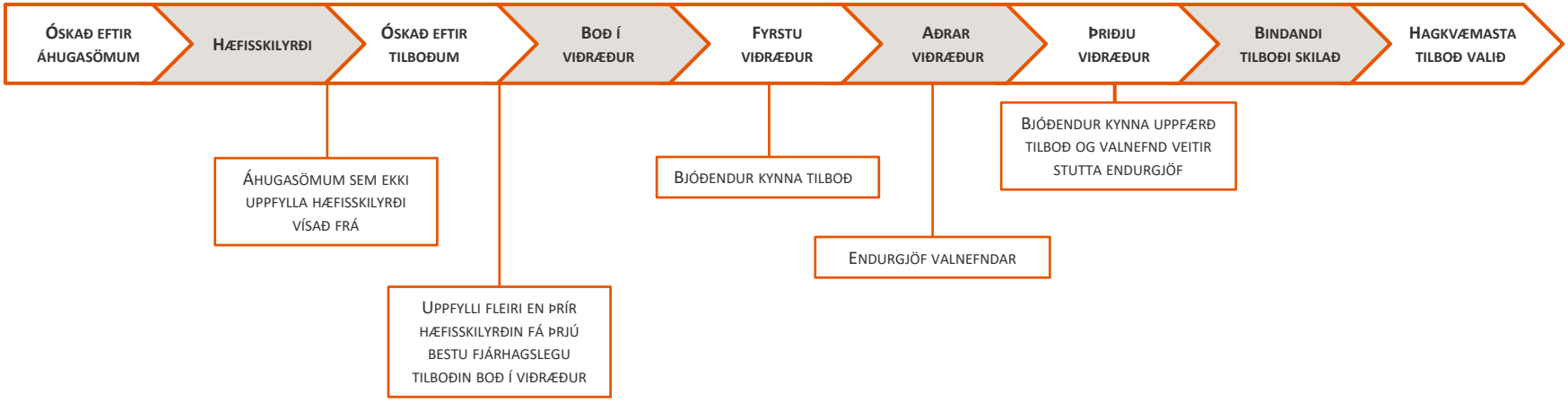
SAMKEPPNISVIÐRÆÐUR

- Um framkvæmdina gildir **sérleyfisreglugerðin** nr. 950/2017 (SLR)
  - Krafa um formlegt, fyrirfram skilgreint ferli *(ath. ekki sömu kröfur og í almennum útboðum)*
  - Meginreglur um gagnsæi, jafnræði og bann við mismunun
  - Fellur undir kærunefnd útboðsmála

- Samkeppnisviðræður
  - Þekkt og viðurkennd aðferð

- Krafa um að bjóðendur **uppfylli lögmæt hæfisskilyrði** sem og tækniskilyrði
  - VII kafli SLR

VALFERLI


Óskað eftir áhugasömum
Hæfisskilyrði
Óskað eftir tilboðum
Boð í viðræður
Fyrstu viðræður
Aðrar viðræður
Þriðju viðræður
Bindandi tilboði skilað
Hagkvæmasta tilboð valið
Áhugasömum sem ekki uppfylla hæfisskilyrði vísað frá
Uppfylli fleiri en þrír hæfisskilyrðin fá þrjú bestu fjárhagslegu tilboðin boð í viðræður
Bjóðendur kynna tilboð
Endurgjöf valnefndar
Bjóðendur kynna uppfærð tilboð og valnefnd veitir stutta endurgjöf

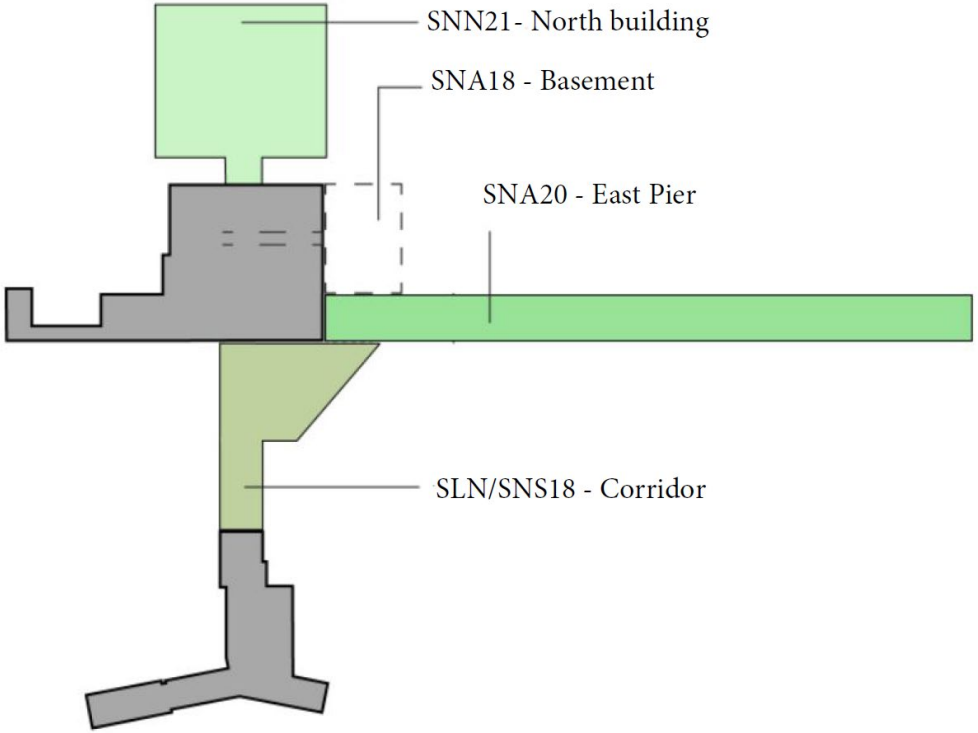
YFIRLIT YFIR HELSTU MATSÞÆTTI

50% - TÆKNILEGUR HLUTI
VÖRUÚRVAL & GÆÐI VARA
AFGREIÐSLA
ÞJÓNUSTA
HÖNNUN & ÚTLIT
MARKAÐSSTEFNA
VERÐSTEFNA

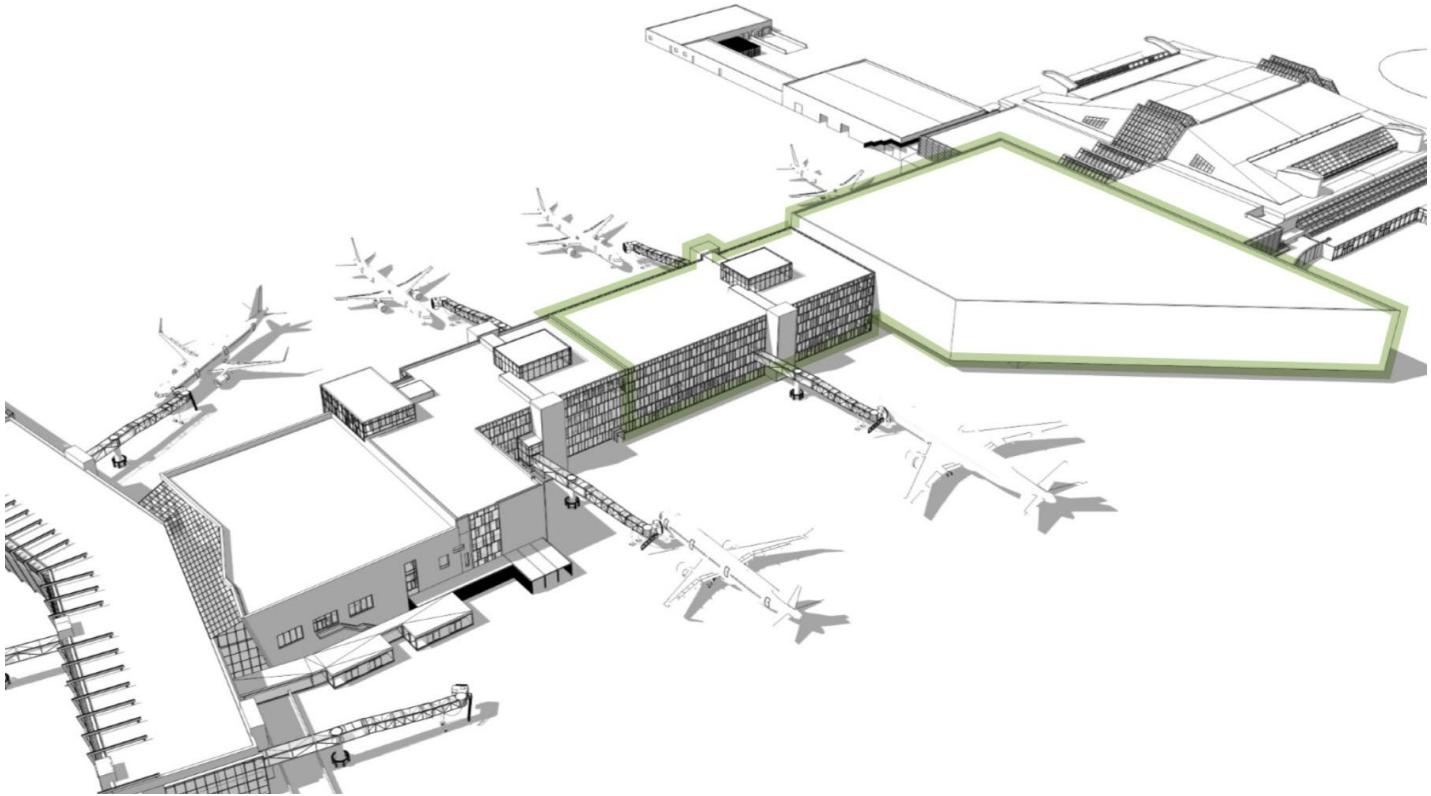
50% - FJÁRHAGSHLUTI
RAUNHÆF VIÐSKIPTÁÆTLUN
LEIGA SEM HLUTFALL VELTU
LÁGMARKSGJALD

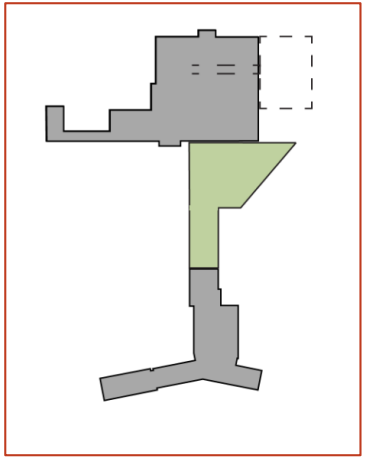
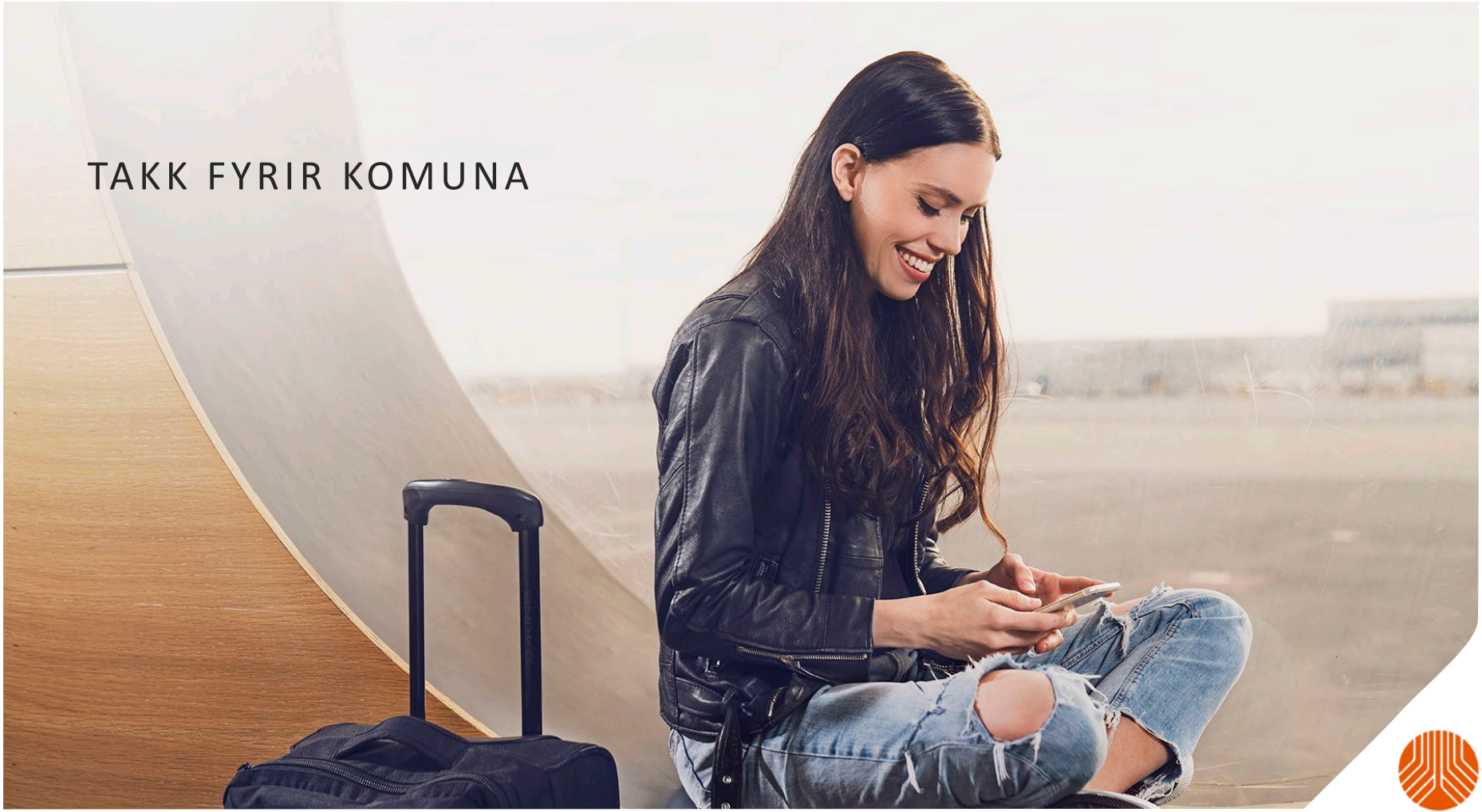
UPPBYGGINGARÁÆTLUN KEFLAVÍKURFLUGVALLAR

UPPBYGGINGARÁÆTLUN 2018-2025



SLN STÆKKUN LANDGANGS TIL NORÐURS





TAKK FYRIR KOMUNA