

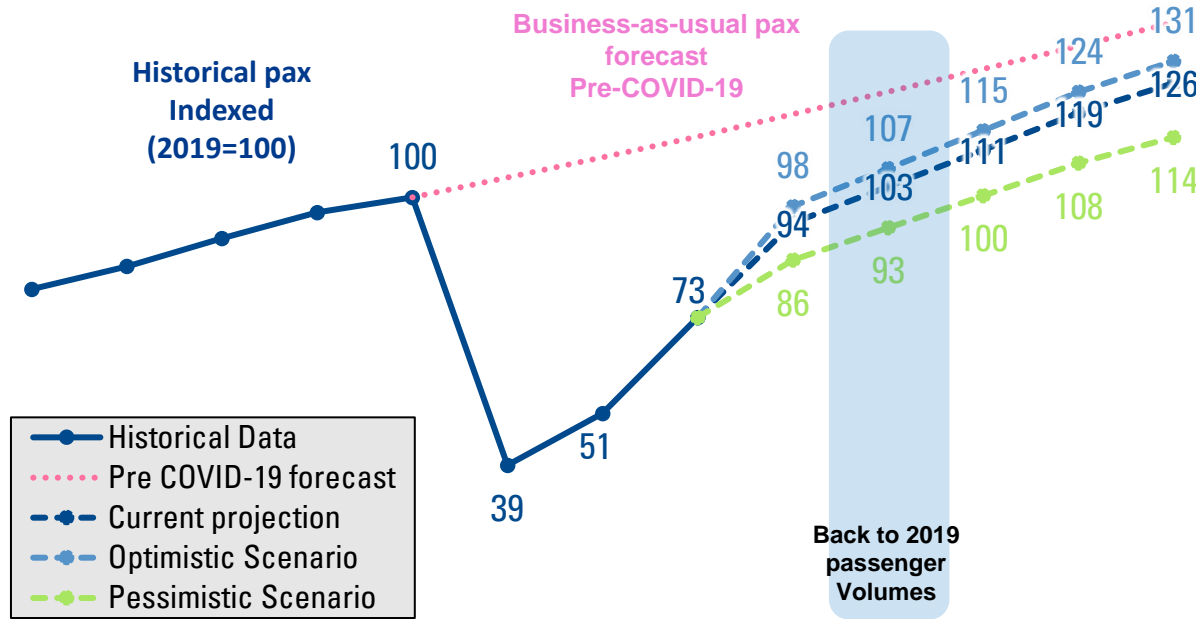
ACI ANARA TFWA WORKSHOP

October 2023



Outlook for passenger traffic recovery

2023-2027



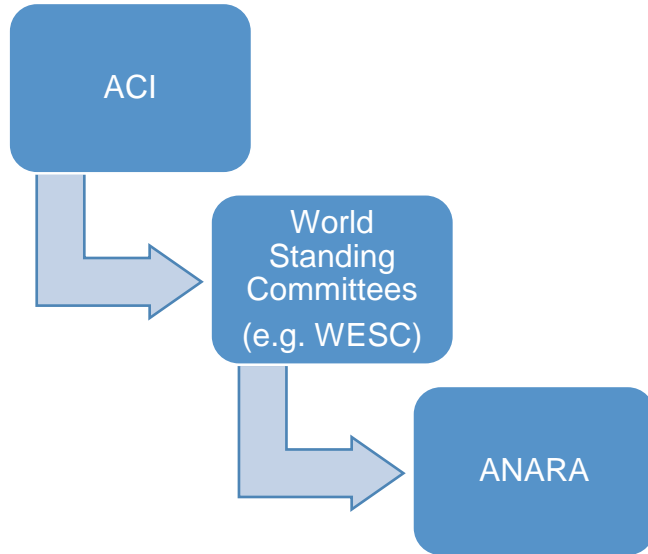
- ✍ Inflation – Jet fuel prices
- ✍ Rising interest rates
- ✍ Geopolitical conflicts
- ✍ Labor market bottlenecks



- ✍ End of COVID-19 emergency
- ✍ Intl restrictions lifted
- ✍ Pent-up demand – “Vacation deprivation”
- ✍ Accumulated savings

2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027

ANARA: Airports Non-Aeronautical Revenues and Activities



- **Sub-Committee** of ACI's World Economics Standing Committee (**WESC**).
- Forum for experts to **exchange knowledge and intelligence** on non-aeronautical revenues.
- Develops **best practices and recommendations** for the improvement of airports' commercial businesses.
- Organized by **working groups** on specific subjects.

Airports Non-Aeronautical Revenues and Activities Study Committee (ANARA)

ANARA Working Groups



WG1: Digital



WG2: Concession agreements



WG3: Retail



WG4: Ground access



WG5: Food and beverage



WG6: Sustainability

Publications

Available at the ACI World Publications site [here](#)



New publications



**Concession Agreements:
Guide for Airport Managers
and Commercial Operators**



**Retail Optimization for
Small and Medium-Sized
Airports White Paper**



**White Paper – Path to
Recovery: The Airport
Retail Perspective**



**White paper – Regulatory
Threats and Opportunities
in Airport Retail**



**White Paper: Airport
Concession Agreements**



**White Paper: Business
Models between Airport
Operators and
Concessionaires**



**Handbook: Optimal
Integration of Airport
Ground Access Services**



**Policy Paper: Sustainable
Airport Ground Access**

Upcoming publications:

- White paper: Sustainability considerations for non-aeronautical concessionaires
- Handbook: Airport Commercial Digital Transformation - Best Practice & New Revenue Streams Post Covid

Retail Optimization for Small and Medium-Sized Airports

The main objective of this document is to provide airport operators with concrete elements to foster awareness of their management, inform their potential customers, and **help them optimize current and future retail outlets**. The objective is to **increase passenger purchases** in airport retail areas.

This document is primarily focused on small or medium-sized airports around the world, with international flight connections.

CONSIDER DE
BASICS

INCLUDE DIGITAL

ENHANCE THE
SHOPPING
EXPERIENCE

ANTICIPATE
GROWTH



Retail Optimization for
Small and Medium-Sized
Airports White Paper

Changing Passenger Profiles

- Despite the occasional travel disruptions and crowds of the past year, **81% of travelers rate their last trip “Outstanding” or “Very Good”**.
 - Only 3% rated their most recent trip “Fair” or worse.
- Travelers took an average of **2.6 international trips in the past year, 2.0 of them by air**.
 - The trip number is down a little from 2018’s average of 2.8. This is because there are far more single trip travelers and fewer who take 3 trips or more.
- **71% of travelers made a purchase in an airport during their last trip**. This is up from around two-thirds before the pandemic.
- Alcohol and electronics are grabbing larger shares of the increase in traveler spending than other categories.
 - Two-thirds of travelers will purchase spirits, wine or champagne in an airport at some point during their trip.
- **Shopping continues to become more planned**: now 48% of purchases are decided before passengers even leave on their trip, versus 42% pre-pandemic, and 35% in 2012.
- Travelers are looking to share a lot more and gift a bit less. In 2018 10% of spending was for sharing, and that has doubled in 2022-2023. Sharing is most popular in alcohol, with almost a third of purchases intended to be shared.
- Grocery stores have leapt in appeal, now 45% of travelers list them among their top 3 places to shop when they travel, up 11 points from 2018.
- Online, while a newer option, is growing in popularity. **15% of travelers say one of their top three preferred ways to buy is to order online and pick up in the airport**.





T3 GUCCI

