

2025 ACI-NA Concessions Benchmarking Survey (Part 3: Duty Free, News & Gift, Specialty Retail and Airport Lounges)

General Information

The Concessions Benchmarking Survey is designed by the Steering Group of the ACI-NA Commercial Management Committee to collect important airport concession data, with the goal to build a comprehensive database of key industry measures that member airports can use for comparing and contrasting with their peers. Survey findings will be presented in the Summer to ACI-NA members. All participating airports will receive access to the survey data and summary presentation.

Please complete the survey no later than Friday, April 11, 2025.

This is Part 3 of the survey with a focus on your Duty Free, News & Gift, Specialty Retail and Airport Lounges. Part 1 of the survey is about General Information of your airport concession program. Part 2 of the survey focuses on Food & Beverage. If you do not have the answer to certain questions, please feel free to leave it blank.

Canadian Airports: Annualized Exchange Rate for 2025 is \$0.70 (i.e. \$100 CAD = \$70 USD)

If you have any questions, please contact Philippe Villard at pvillard@airportscouncil.org and Pragn Pande at ppande@airportscouncil.org. Thank you very much for your participation.

Your information *

Airport Three Letter
Code

Email Address

Duty Free, News & Gift and Specialty Retail General Questions

Please use the following definitions for questions on this Part 3 of the survey:

Prime operator - Airport leases packages of locations to one or more operators, each of which has multiple locations (more than 3) within the airport.

Master concessionaire - Airport leases all food service concessions to a single operator, who may or may not also operate retail. The Master Concessionaire may sublease some of the locations to other operators.

Direct leasing - Airport leases individual locations or small groups of locations (no more than 3) directly with the operators.

Developer/manager - Airport has agreement with a third party to develop/lease and manage the concessions without operating any directly. Developer can invest in the facilities directly.

Duty Free shops are retail shops that mainly sell high-end luxury goods such as designer fragrances, cosmetics, jewelry, watches, chocolates, cigarettes, liquor and, with some exceptions, sell merchandise that is free of import duties, excise taxes, and local and state sales taxes. Sales are, by law, limited to departing international passengers.

News/Gift (also referred to as Convenience Retail, Newsstand or Sundries Retail) - A type of Concessions Operation that specializes in the sale of magazines, newspapers and other periodicals, candy, gum, snacks, sundries, paperback books and souvenirs. Some news/gift stores may sell hardcover books as part of its product mix, but such books are not the primary item offered. Single-serve canned or bottled drinks may also be sold at such locations.

Specialty Retail - A type of concessions operation that specializes in the sale of a particular category of consumer product such as clothing, sporting goods, electronics, travel accessories, books, leather goods and luggage, souvenirs, lotions and personal care items, and home accessories. Stand-alone bookstores should be included as specialty retail.

Automated retail (e.g. ZoomSystems, BestBuy) means a vending solution that dispenses goods that would generally be sold in specialty retail shops; may be included under the Specialty Retail category; may be individual locations or small "stores-within-a-store" that are accounted for separately from the larger location.

Total Rent - Total rent is defined as consideration received by the airport for the right to operate concessions at your airport, not including fees paid for parking, security badging, deliveries, marketing, support space, etc.

Airport/Proprietary Brand – Shop/store which only appears at airports.

Local/Regional Brand - A brand that is developed, distributed and promoted within a defined geographical area, usually found in more than one metropolitan market that appeals to, is

recognized by, and meets the specific and unique needs of the population of a particular locale or region.

National/International Brand - A brand that is marketed and distributed nationally/internationally.

Carts/Kiosks - Any non in-line unit, including mobile and non-mobile facilities, stand-alone “grab ‘n go” units, etc.

Square footage - Square footage for all concessions shall be the leased premises, excluding (a) common seating space and (b) public circulation area.

1. Using the above definitions, please select the airport’s Duty Free, News & Gift and Specialty Retail concession model (check all that apply):

- Prime Operator
- Master Concessionaire
- Direct Leasing
- Developers/Managers
- Other - Write In

2. Does the airport have a Duty Free store(s)?

- Yes
- No

3. Does the Duty Free store(s) also offer duty paid goods to domestic passengers?

- Yes
- No

4. Using the above definitions, please provide the Total Gross Sales in U.S. dollars for the following categories (whole numbers only):

	Duty Free	News & Gift	Specialty Retail (includes Spas):	Other In-terminal (excluding advertising, food and beverage, and items above)
CY2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

5. Please provide the Total Rent (Minimum Annual Guarantee "MAG" or percentage of fees) collected from Duty Free, News & Gift and Specialty Retail for in U.S. dollars for the following categories (whole numbers only):

	Duty Free	News & Gift	Specialty Coffee	Specialty Retail (includes Spas)	Other In-terminal (excluding advertising, food and beverage, and items above)
CY2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. How is the rent calculated for the News and Gift concession program?

- A fixed amount (e.g. MAG)
- A percentage of gross sales, please state the percentage range of gross sales in the box provided (e.g., between 5% and 7%)

- MAG or % gross sales, whichever is greater

- Other - Write In

7. How is the rent calculated for the Specialty Retail concession program?

- A fixed amount (e.g. MAG)
- A percentage of gross sales, please state the percentage range of gross sales in the box provided (e.g., between 5% and 7%)

- MAG or % gross sales, whichever is greater

- Other - Write In

8. Please provide the square footage of Landside, Airside, and Total area for the following categories (whole numbers only) for **CY2024** (if significant changes occurred during the year, please use the year-end number and add a comment in the comments box at the end of this survey):

	News & Gift	Specialty Retail	Duty Free	Storage/Support Space	Other
Landside (Pre-Security)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Airside (Post-Security)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Square Footage	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

9. Please provide the total square footage of Remote Duty Free, News & Gift and Specialty Retail storage/support space (not in terminal, but on airport property) (whole numbers only):

CY2024

10. Please provide the average length of the existing concession agreements for the following categories (number of years):

Duty Free

News & Gift

Specialty Retail

Other

11. Using the above definitions, please provide percentage distribution in terms of square footage for the following areas of airport Duty Free, News & Gift, and Specialty Retail program: (Whole numbers only):

Percentage of Airport Brands/Proprietary Brands

Percentage of Local Brands/Regional Brands

Percentage of National Brands/International Brands

0 out of 100% Total

12. Are the airport tenants charged separately for storage/support space?

- Yes
- No

13. If airport tenants are charged separately for storage/support space, then what is the lease rate?

- Certain types of airline rental rate, recalculated annually
- Fixed rate specified in the concession lease, with or without inflation adjustments
- Other - Write In (Required)

14. What is the current storage/support space rental amount per square foot?

15. Please complete the following table concerning automated retail units:

	Number of automated retail operating units	Total gross sales for CY2024 in U.S. dollars
Landside (Pre-Security)	<input type="text"/>	<input type="text"/>
Airside (Post - Security)	<input type="text"/>	<input type="text"/>
Total Square Footage	<input type="text"/>	<input type="text"/>

16. How is the percentage of rent associated with the News & Gift and Specialty Retail carts/kiosks program?

- Specified in a separate carts/kiosks agreement
- Included in each news & gift and specialty retail lease at the same rate as other gross sales
- Included in each news & gifts and specialty retail lease at different rates

Planning and Operational

17. Do the Duty Free, News & Gift and Specialty Retail agreements include a mid-term refurbishment requirement?

- All agreements have mid-terms
- Some agreements have mid-terms
- No agreements have mid-terms

Airport Lounges

18. Does your airport have an airport lounge? (Check all that apply)

- Airline Lounge
- Third-Party Lounge
- No Lounge

19. Is the airport lounge an airline or common-use lounge?

- My airport has an airline lounge(s)
- My airport has a common-use lounge(s)
- Other - Write In (Required)

20. When was the airport lounge opened? (Date format: mm-yyyy)

Airline Lounge

Common-use Lounge

21. Please provide the square footage of airline, common-use, and total area for the following categories (whole numbers only) for CY2024.

Airline Lounge Area

Common-use Lounge Area

Total Lounge Area

22. How is the rent calculated for the airport lounge?

- A fixed amount
- A percentage of gross sales, please state the percentage range of gross sales in the box provided (e.g., between 5% and 7%)

- MAG or %gross sales, whichever is greater
- Other - Write In (Required)

23. Please share any additional comments about your survey response in the comments box below.

Thank You!

Thank you for taking our survey. This is Part 3 of the 2025 ACI-NA Airport Concessions Benchmarking Survey.

Please respond to Part 1 (General Information) and Part 2 (Food & Beverage) of the survey to make sure we have a complete response from your airport.

Thank you and as always, we sincerely appreciate your participation and efforts. You will now receive a confirmation email.