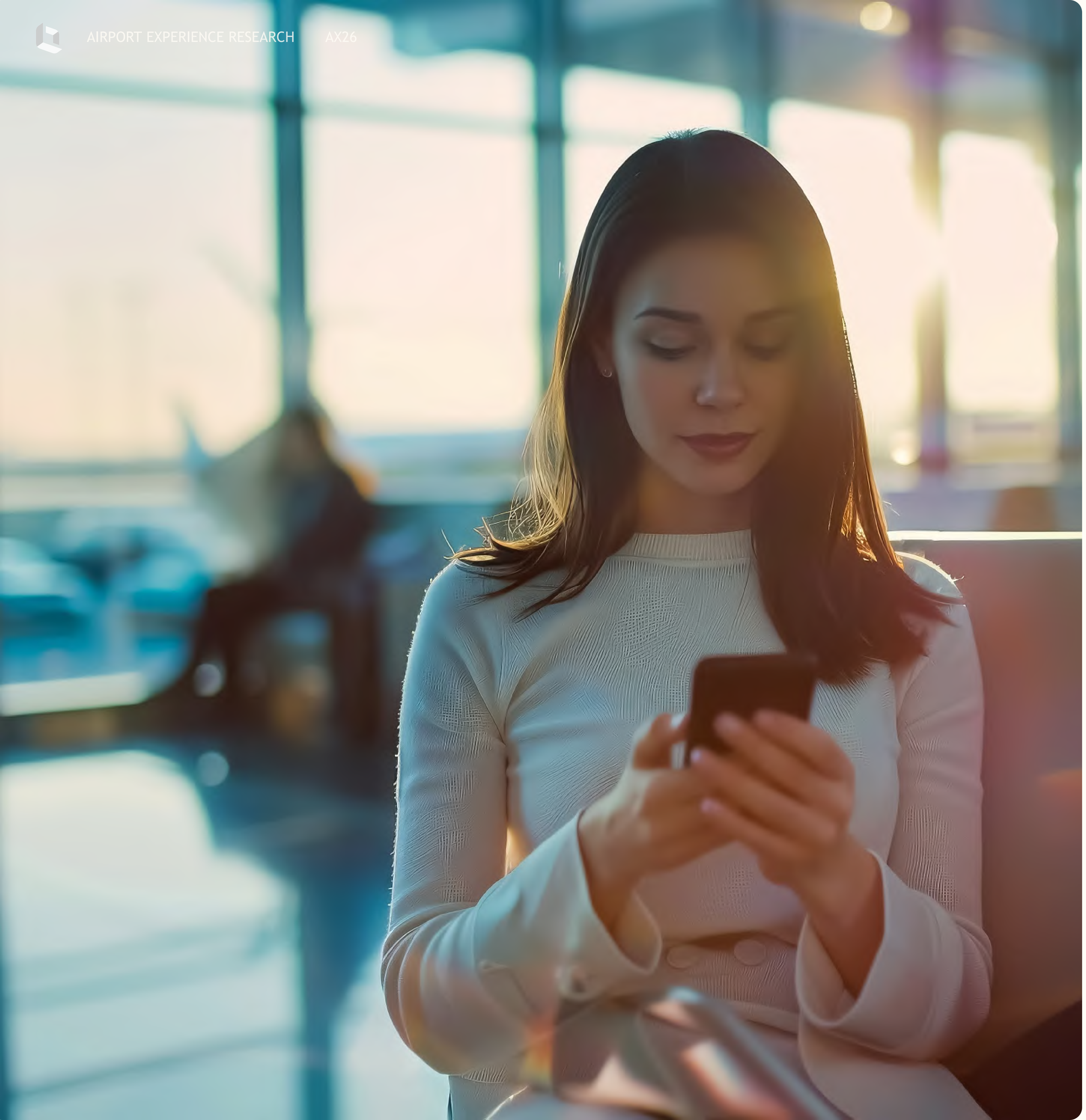
Working Together Across the Airport Journey

THE AIRPORT EXPERIENCE STUDY
2026

Airport Dimensions
A Collinson Group Company

Contents



AX26

The Airport Experience Study by Airport Dimensions tracks how the airport experience is evolving, providing insight and data to help airports and concessions better meet the needs and expectations of today’s regular traveler.

Focused on travelers who take two or more trips per year, this research reflects a more engaged, higher-value audience who are shaping the future of the airport experience.

Executive Summary

The Airport Experience 2026 Study (AX26) reveals a global airport landscape undergoing rapid transformation, driven by changing traveler expectations, rising satisfaction levels, and a fundamental reshaping of how passengers choose to spend their time and money in airports.

Discover this years top findings:

Satisfaction has reached an all-time high of 82%, underpinned by major improvements across infrastructure, service quality, and digital enablement. APAC and Middle Eastern hubs - led by **Singapore Changi's standout 97% satisfaction** - are setting new global benchmarks, while the Americas and Europe continue to make steady gains. Yet rising expectations mean that today's "good" is tomorrow's baseline: airports now operate in a new era where continual innovation is required just to stay competitive.

The ALT

A defining force in this shift is the emergence of the **Affluent Leisure Traveler (ALT).** Representing only 26% of global travelers, **ALTs generate an outsized 57% of reported airport spend**, making them the economic engine of the modern airport. Their journey is premium-led, digitally engaged, and lounge-centric - 75% of ALTs use lounges, and **they spend four times more than the average traveler**. Winning their loyalty demands experience-led, data-driven engagement across the end-to-end journey.

Lounge growth

Airport lounges have become the anchor of this new premium era. **Lounge usage has surged to 52%, fueled by younger travelers**, diversified access models, and the expansion of bank and network based membership programs. For ALTs, lounges play a central role in the journey - 75% use them regularly - and they increasingly expect curated environments, premium services, and digital integration. Premiumization is accelerating across all traveler groups, with **62% willing to pay for upgraded experiences** - from lounges and fast-track services to meet-and-greet and premium retail. Younger travelers and high spenders are driving this trend, reshaping what standard airport service means.

Retail recovery

Retail is recovering from its post-pandemic dip, **becoming once again an important driver of airport spend, now accounting for 33% of the total**, yet travelers want more than traditional duty free. They expect personalized promotions, better pricing, integrated online-offline experiences, and new hybrid retail formats that merge F&B, experiential spaces, and convenience.

The rise of digital

Across every dimension, one theme dominates: the rise of the joined-up digital relationship. **Travelers want a single airport app, proactive information, personalized offers, and seamless digital access to lounges, retail, and services** before they travel. Airports that unify their digital ecosystem - and use it to build deeper, data-powered relationships - stand to unlock the next wave of revenue growth.

Airports have built momentum. AX26 shows exactly where to take it next.

82%

Satisfaction rating at an all time high

33%

Total airport spend is through retail alone

52%

Lounge use - driven by younger travelers

"AX26 highlights a new phase in the evolution of the airport experience. As satisfaction reaches new highs, traveler expectations are evolving just as quickly, with passengers becoming more deliberate in how they spend their time, engage with services, and define value.

For airports and partners, this creates a clear opportunity. The focus now is on turning insight into more connected, personalized and commercially effective experiences that will define the next generation of the airport experience.

As our most comprehensive study to date, AX26 provides a detailed view of the behaviors and trends driving this shift, offering a clear roadmap to help the industry unlock greater value from every passenger journey."

Mignon Buckingham
CEO, Airport Dimensions

About Our Travelers

Our research target is the Mass Affluent and Affluent Leisure Traveler. They are experienced travelers, traveling two or more times a year. They have above average incomes, higher airport spend but are not especially ultra-high net worth individuals.

Most, but not all, visit airport lounges and they enjoy their travel experience.

The summary below includes low frequency travelers, for completeness, however, these are not included in the Airport Experience research outputs.

01 Low Frequency Traveler

Economy and LCC

Estimated Global Audience	738M [2]
AX base	0%
Average Trips	1.0
Age:	*Event driven, older profile*
Av Airport spend	$10-15 [1]
Satisfaction	<73% [3]

Lower levels of participation and spend, lower income, event-based travel, often needs support.

02 Mass Affluent Traveler

Mixed class, mostly economy

Estimated Global Audience	124M [2]
AX base	74%
Average Trips	3.2
Av age	41
HH Income	$41k
Av Airport spend	$55
Satisfaction	79%

Some event-based travel, but discretionary and experienced travellers, less price sensitive.

03 Affluent Leisure Traveler

More premium cabin

Estimated Global Audience	39M [2]
AX base	26%
Average Trips	5.0
Av age	38.7
HH Income	$60k
Av Airport spend	$203
Satisfaction	89%

Loves to travel and pays to enjoy the experience, spends significantly more across the airport


CONFESS

01

TREND 01

Growth in Satisfaction

Traveler satisfaction has reached record highs, reflecting the tangible impact of airport investment and the industry-wide focus on elevating the passenger experience. Younger travelers and higher spenders are leading this surge, fueling growth for airports worldwide.

Overall airport satisfaction has risen to 82%, a three-point increase over the last year. APAC and Middle Eastern markets are driving this global uplift, with Singapore Changi delivering an exceptional 97% satisfaction. While airports in the Americas and Europe lag slightly behind, the majority still achieved notable year-on-year improvements.

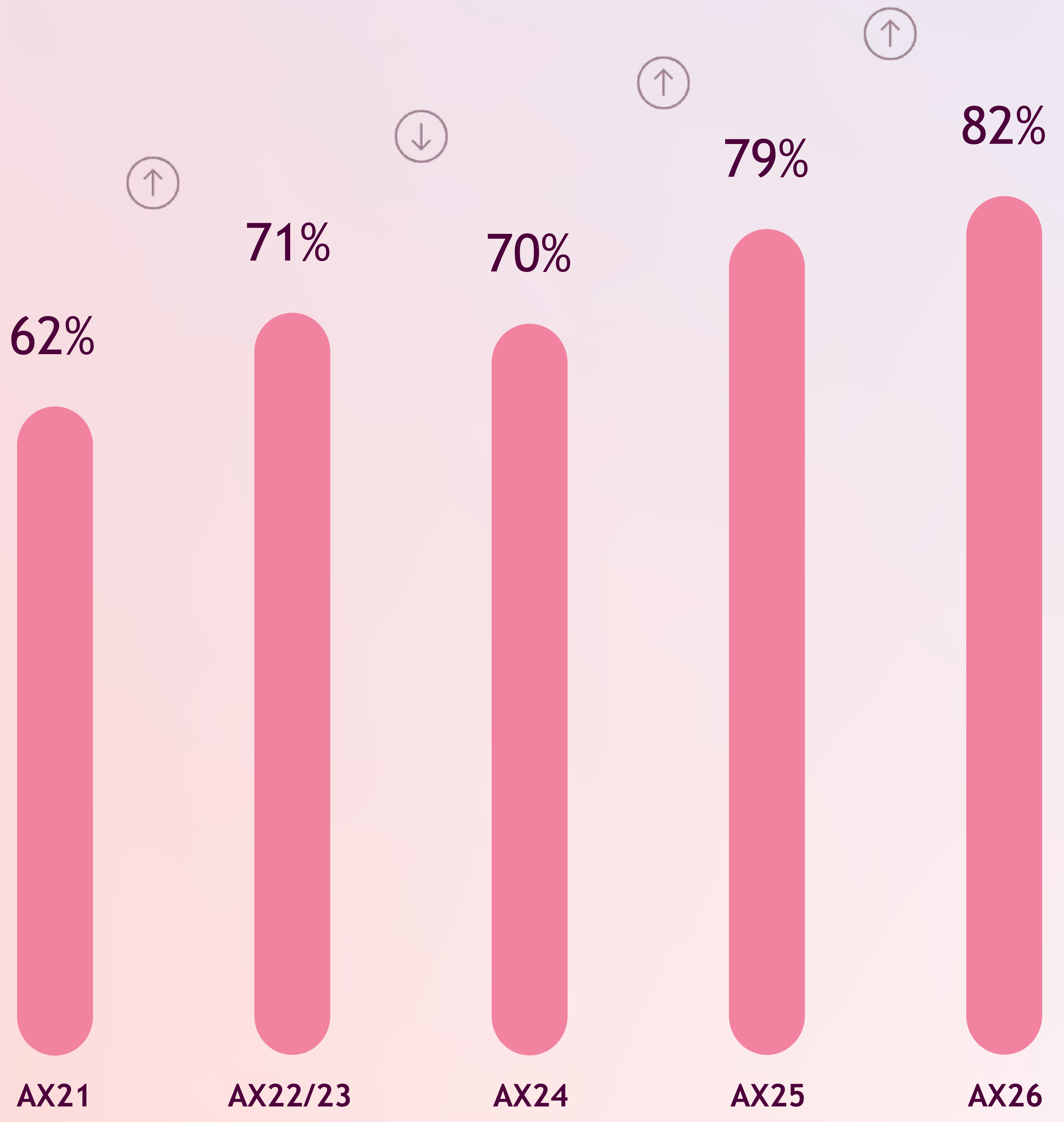
Exceptional Singapore Changi satisfaction score **97%**

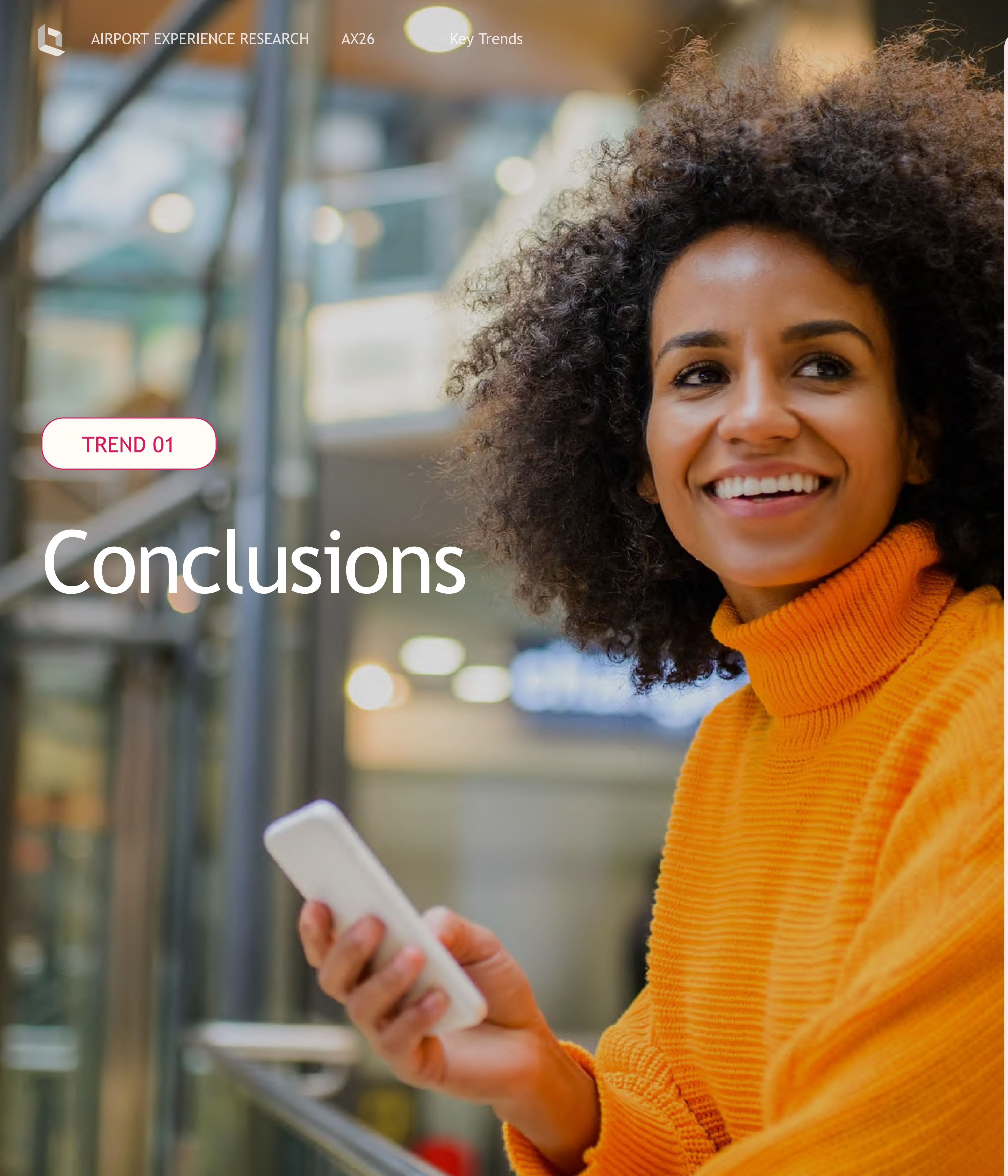
Rising Satisfaction

This momentum highlights the success of airports' efforts to enhance both physical infrastructure and service quality, and the growing recognition that the passenger must be at the heart of the journey. The research also reinforces a clear link between spending and satisfaction: **89% of high spending travelers are satisfied**, compared with **80% of lower spenders** and just **74% of those who didn't spend at all**.

Generational Differences

A widening generational gap is emerging. **Millennials and Gen Z report 84% satisfaction**, whereas only **72% of Boomers** feel the same - and a significant 9% of Boomers say they are dissatisfied. As younger travelers become an increasingly influential segment, understanding and meeting their evolving expectations and aspirations will be key to sustaining long-term growth.





TREND 01

Conclusions

Rising satisfaction sets a new competitive baseline. With nearly all airports improving, expectations are escalating. The challenge now is not just to meet standards, but to outpace them in a race to the top.

01 **Crowding** and perceived **value for money** remain pain points. As travel volumes rise, operators must proactively manage these concerns to preserve hard won gains and maintain trust.

02 ‘Hygiene’ factors are no longer enough. With most foundational improvements in place, **airports must innovate** to truly delight passengers - especially younger generations and the highest spending segments.

03 **Personalization** will define the next frontier. Deeper insight into individual needs and motivations, supported by smarter use of technology and data, will be essential to creating more meaningful, tailored airport experiences.

02

TREND 02

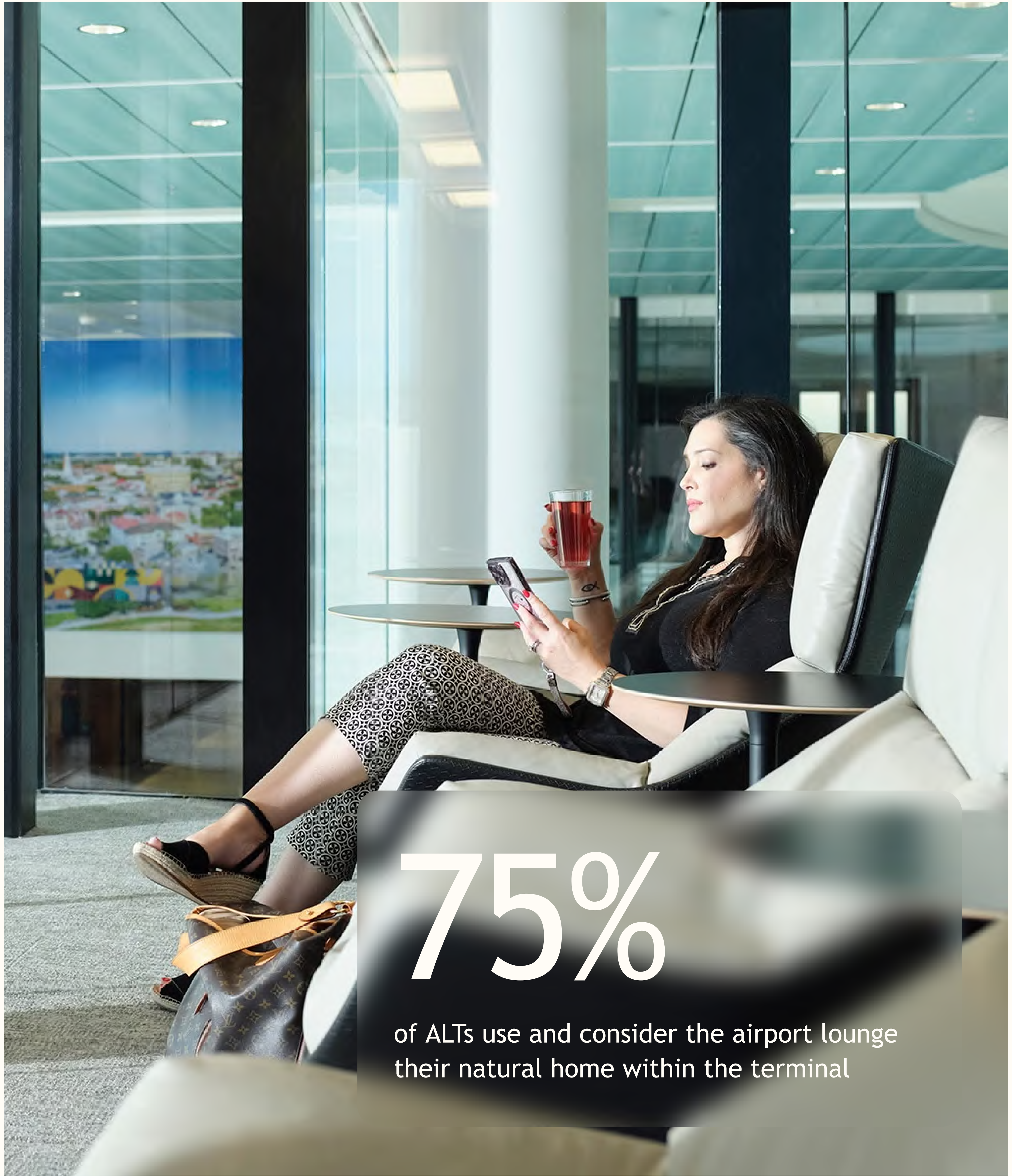
The Affluent Leisure Traveler

The Affluent Leisure Traveler (ALT) is rapidly becoming the most influential segment in the airport ecosystem. Comprising just 26% of surveyed travelers, they nonetheless account for 57% of reported spend, making them the economic engine powering the modern airport.

What sets the ALT apart is their willingness to invest in premium retail and experiential moments, driving spend levels that are four times higher than other travelers. Their satisfaction is exceptionally strong (89%), and their choices show a deep affinity for elevated environments - most notably the airport lounge, which 75% of ALTs use and consider their natural home within the terminal. This represents a critical access point for engagement, influence and incremental revenue growth.

ALTs are also **highly receptive to digital interaction and loyalty**. Nearly half (48%) actively engage with airport or travel-related digital tools, and they perceive real value in digital support provided before the journey begins.

This creates a strategic window for airports to shape decisions, inspire spend and deliver personalized experiences that align with traveler expectations.



ALT satisfaction is exceptionally strong, with their choices showing a clear affinity for elevated environments, most notably the airport lounge.

Who is the Affluent Leisure Traveler?

All comparisons vs non-ALT travelers

26%
of overall AX26 audience

42%
higher average household income than non-ALTs

39
years old, slightly younger than non-ALTs (41)

60%
more frequent travelers

52%
of travel in premium cabins vs 33%

54%
hold lounge program membership vs 27%

48%
engage with airports digitally

89%
satisfaction with the airport experience vs 79%

75%
are lounge users vs 52%

52%

actively shop and enjoy the experience vs 25%

40%

of spend is on retail vs 27%

28%

of spend is on experiences vs 18%

Strong interest in new retail concepts:

49%

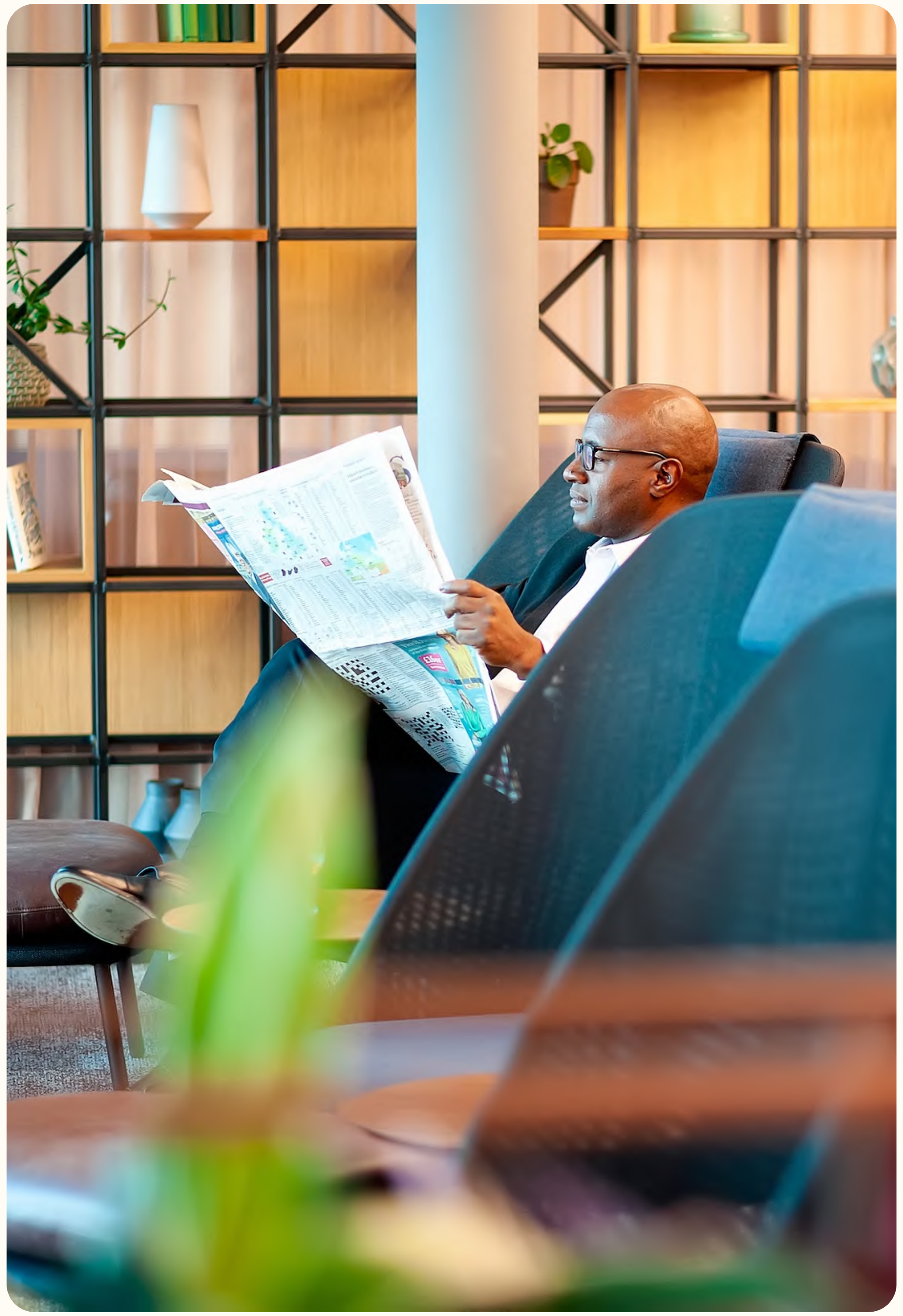
walk through duty free

44%

prefer hybrid retail

42%

seek unique or exclusive products



70%

are interested in buying duty free from the lounge vs 57%

78%

always or sometimes purchase duty free

48%

are members of airport loyalty or CRM programs vs 23%

TREND 02

Conclusions

01 There is a clear opportunity for airports to build a deeper understanding, stronger connections and more effective **motivation strategies** for the ALT.

02 **Data-driven loyalty and recognition programs** across the journey are key, - ALTs love engagement, and the right promotions and incentives will drive greater spend.

03 Consider how a premium, experience-led ecosystem anchored in the lounge could **drive wider journey spend**, turning passive waiting areas into active drivers of revenue and engagement.

04 Design and test **premium retail and experience zones** that amplify spend behavior; product immersion and brand experiences with flexible purchase and delivery options.

TREND 03

Premiumization and Segmentation

Growing traveler demand for premium experiences and services is reshaping expectations across the airport journey, with passengers increasingly willing to pay for services that offer speed, comfort, and elevated interactions.

Expanding Premiumization

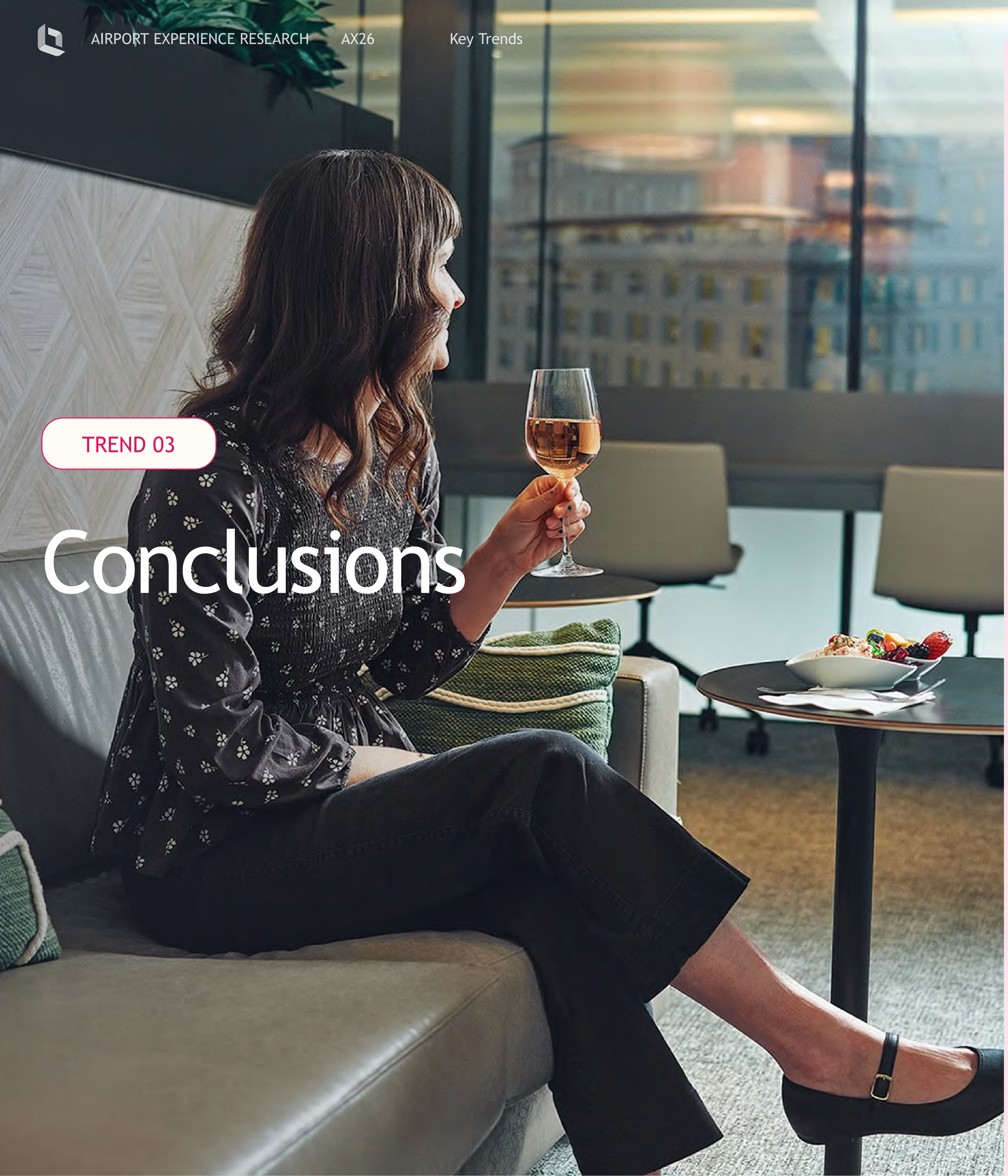
This trend extends beyond lounges to services such as fast track, meet and greet services, premium parking and transport, forming a rapidly expanding premiumization ecosystem. 62% of regular travelers indicate they are willing to pay for premium services, rising to 69% for ALTs.

Lounge access remains one of the strongest premium demand drivers. **Over 57% of lounge users say they would pay for access,** if required, increasing to 97% for Priority Pass members, underscoring both demand and monetization potential. At the same time, the shift towards Affluent leisure travel is evident, with traveling with family emerging as one of the most important drivers of consideration to purchase lounge access.

Market differences are further sharpening the opportunity. Demand for premiumization is especially pronounced in **China, Indonesia, Vietnam, and Saudi Arabia**, where travelers demonstrate higher expectations and a greater propensity to spend on upscale airport services.

Affluent travelers increasingly seek segmented premium lounges and tailored lounge services. This pivot reflects both rising expectations and a desire for more curated, exclusive experiences. Meeting this demand will require moving beyond a single "premium for all" model and instead developing differentiated tiers, experiences and services that align with traveler motivations and spending power.

Lounge access stands out as a top premium driver, with most travelers willing to pay for entry.



TREND 03

Conclusions

01 Plan ahead and work with concession partners to **understand how premium services can be developed** and deployed across the airport, whilst maintaining quality and experience for general travelers.

02 Work with lounge operators to understand and validate the **potential demand for premium lounges** and how these seamlessly integrate with other premium airports.

03 Unlike physical products, premium services especially lend themselves to being promoted and sold online, making a clear case for **digitizing the premium journey** from booking to boarding gate.

04 Premium services offer opportunities to both cross sell and bundle services into **value added packages for travelers**, enhancing their overall appeal and driving up revenue for the airport.

04

TREND 04

The Joined-Up Relationship

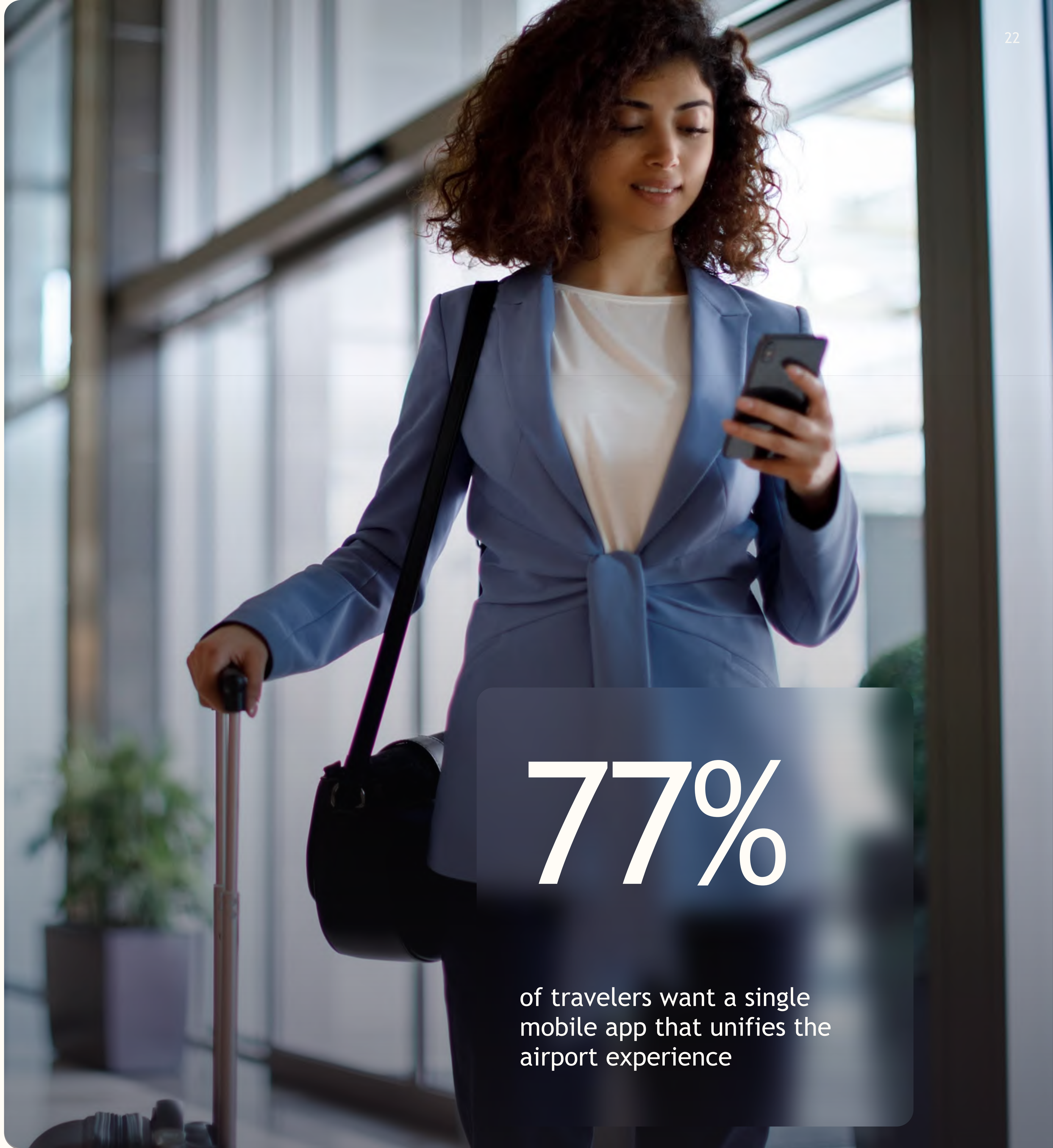
Travelers are open to deeper, ongoing and digital relationships with airports. If executed well, that relationship can deliver a seamless and joined-up journey for passengers along with revenue growth for the airport.

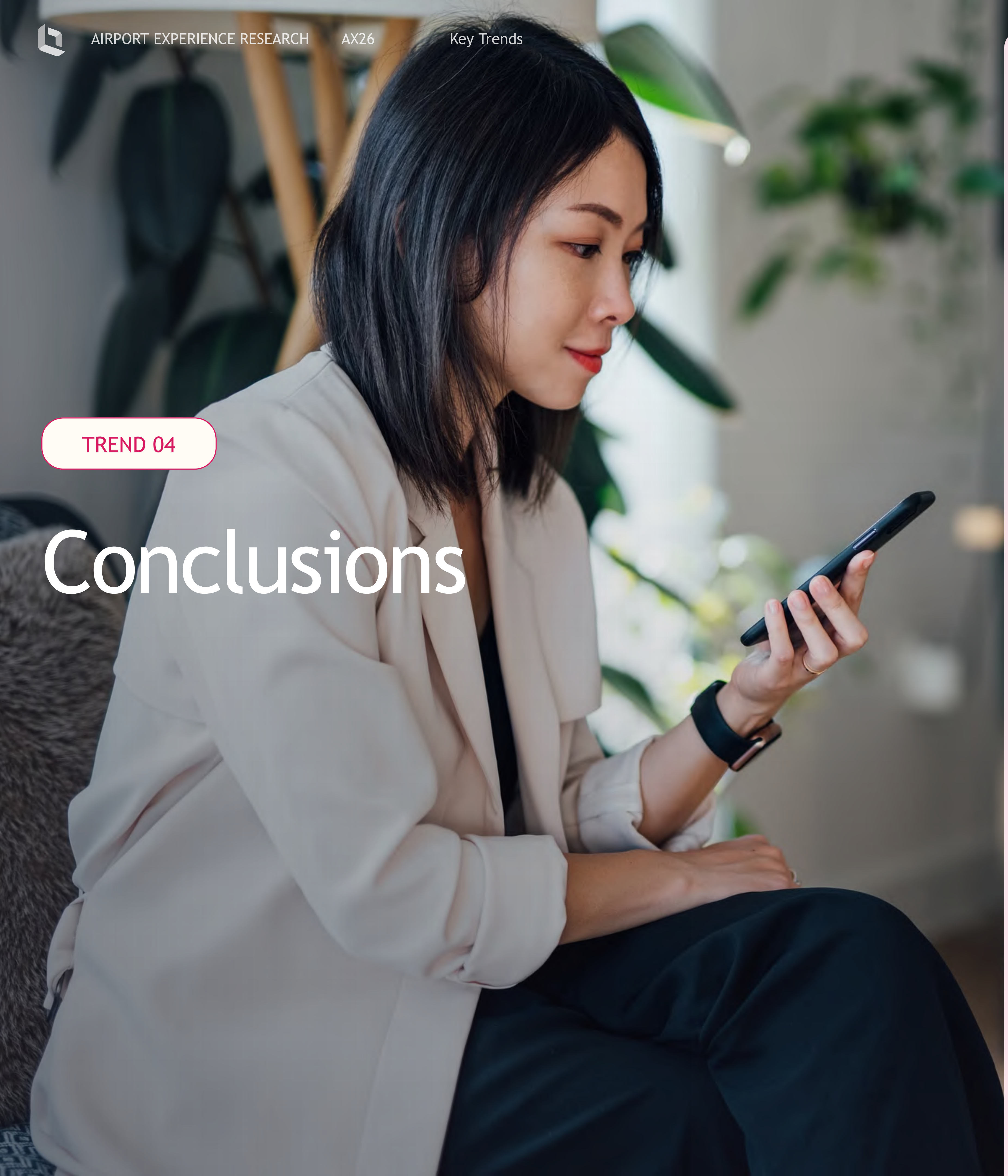
Despite this openness, **only 30% of regular travelers have an active relationship with an airport**, rising to 48% among Affluent Leisure Travelers. Membership programs resonate strongly: 71% see value in reward-based programs, and 28% say the adoption of such programs would motivate them to spend more. These findings underline the potential of loyalty led strategies to create ongoing engagement and increase spend.

Membership programs resonate strongly, with many travelers saying they would spend more if adopted.

Reducing fragmentation across the digital journey will be critical for airports. **77% of travelers want a single mobile app that unifies the airport experience.** Importantly, 30% say such an app would encourage them to spend more, demonstrating a direct link between digital enablement and commercial outcomes. 83% of travelers view proactive access to flight data as a direct enhancement to their travel experience, particularly when delivered in advance of travel. This signals a major opportunity for airports to engage earlier in the journey, shifting the relationship from transactional and day of travel to something more continuous, supportive and valued.

Support for automated support and chatbots remains more muted. Suggesting these tools may not yet deliver meaningful value in the airport context. The greater opportunity lies in building high impact, high trust, data driven digital relationships, rather than more passive forms of automation such as kiosks and chatbots.





TREND 04

Conclusions

01 Build a **unified digital platform** that anchors and deepens the airport-traveler relationship and enables online sales.

02 Consider what role a **modern, incentive-driven membership program** might play in shaping behavior and growing spend.

03 Shift engagement earlier by delivering proactive, **personalized pre-trip communication** to facilitate a more joined-up journey.

04 Prioritize **high value digital services** over automation to build trust and utility.

05

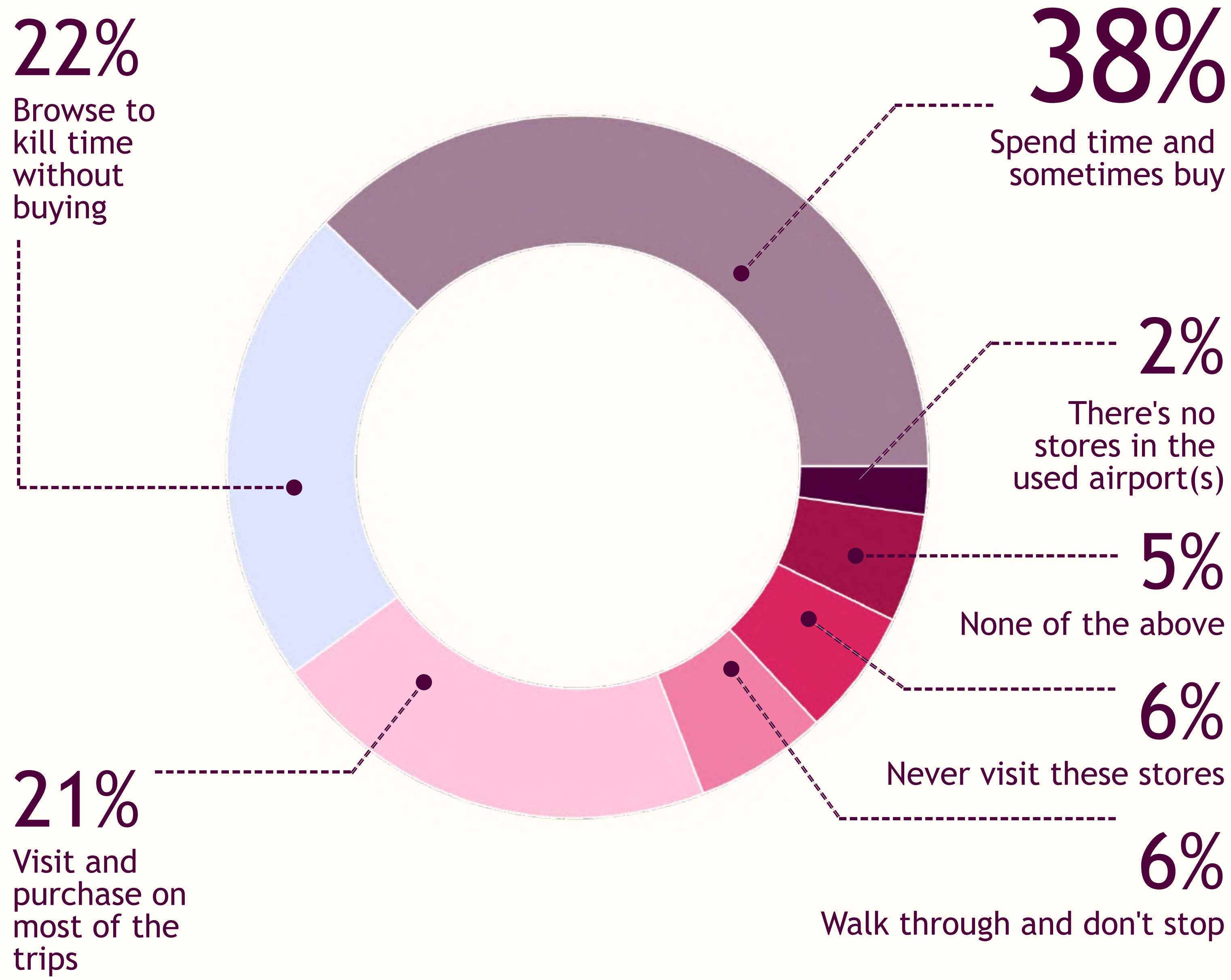
TREND 05

New and Integrated Retail

Airport retail has rebounded following recent declines, now accounting for 33% of total airport spend, with duty free contributing 24%. This reflects year-on-year growth as travelers re-engage with shopping at the airport, but travelers are also looking for a new and different experience.

Behavior is Shifting

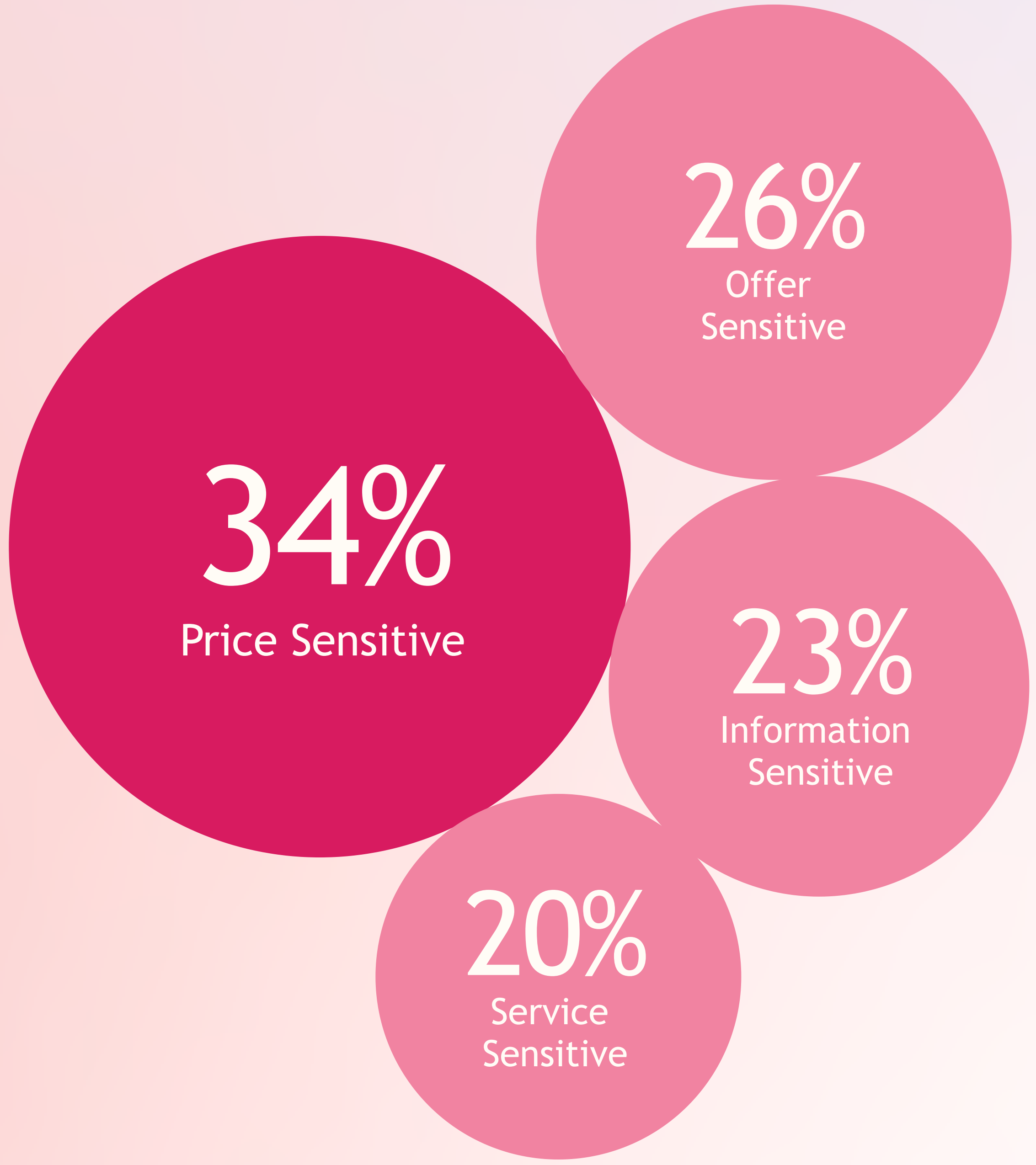
32% of regular travelers, and 52% of Affluent Leisure Travelers identify as regular shoppers, though 17% say they browse without buying. Duty free engagement varies - 21% buy regularly, 38% occasionally, and 34% never, highlighting uneven participation.



Willingness to Spend More

Perceptions of value are mixed, with **31% viewing duty free as good value** and 37% considering it only moderate. Travelers express willingness to spend more, but expect better pricing (34%), discounts (34%), FFP miles (30%), and offers before they travel (29%).

They are also open to new retail formats. 42% welcome walk-through duty free and 38% are interested in combined retail and F&B concepts, indicating appetite to make shopping a more meaningful part of the wider airport experience.



Unified Journey

Overall, travelers want airport retail to be an integrated part of the airport journey, but it must evolve to meet expectations and drive spend. **End-to-end journey integration is essential**, supported by technology that enables seamless access. A single app offering consistent engagement - at home, en route, or in the lounge - is seen as key to unlocking higher spend and creating a more personalized, connected airport retail experience.

TREND 05

Conclusions

01 Deliver a **unified digital retail ecosystem**, offering end-to-end access is increasingly critical. Travelers expect frictionless digital engagement that mirrors high-street omnichannel experiences, allowing discovery, personalized offers, and purchasing before and during travel.

02 **Reinvent retail value propositions**. Travellers say they are willing to spend more but expect better value, creating an opportunity for airports to work with concessions to reshape pricing and promotional strategies and engage the 17% who browse but do not buy.

03 Redesign spaces for experiential shopping, taking advantage of **interest in new retail experiences** to test and evolve physical environments that link immersive physical experiences with digital to create a unique offer.

04 Travelers want retail to be part of the overall airport experience - but on their terms. **Integration across touchpoints** (home → transit → lounge → gate) is essential, enabling shoppers to explore, reserve, and buy at any stage.

06

TREND 06

Driving Value for Money

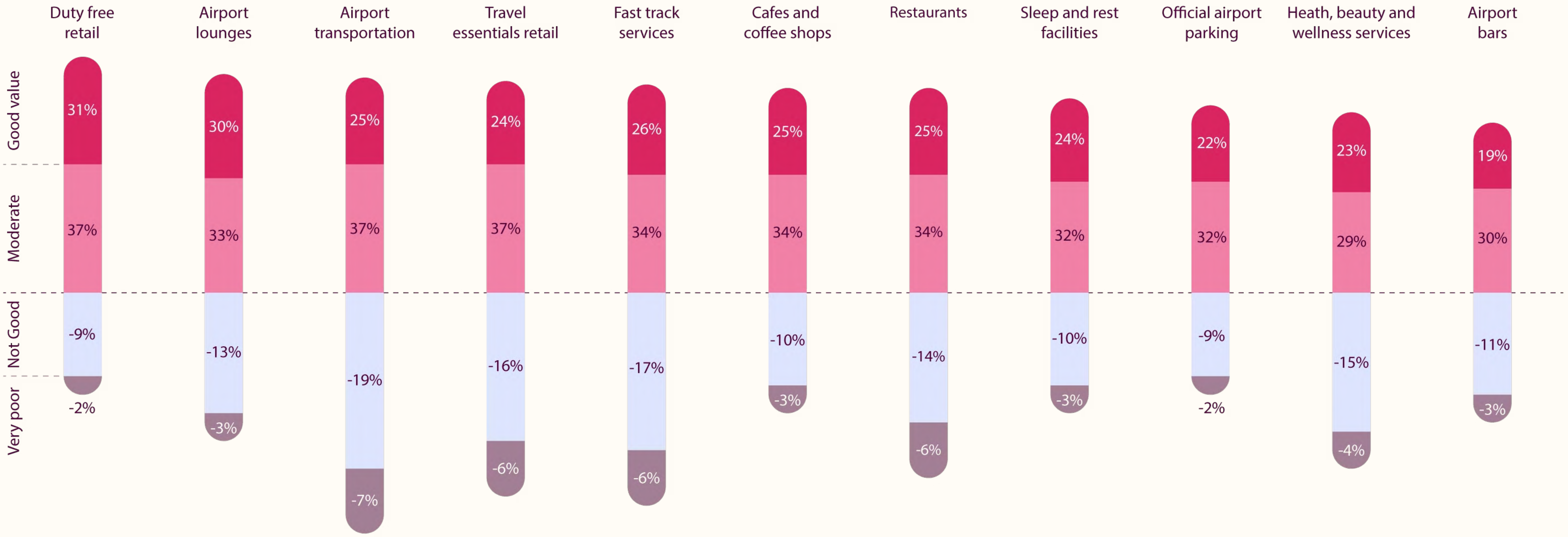
Traveler perceptions of airport value for money are improving, but significant gaps remain across services and regions. Driving better perceived value is key to unlocking growth in spend.

Value For Money

Duty free and airport lounges are perceived to offer the best value. 31% of travelers describe duty free as good value and 37% as moderate, although perceptions vary widely by market.

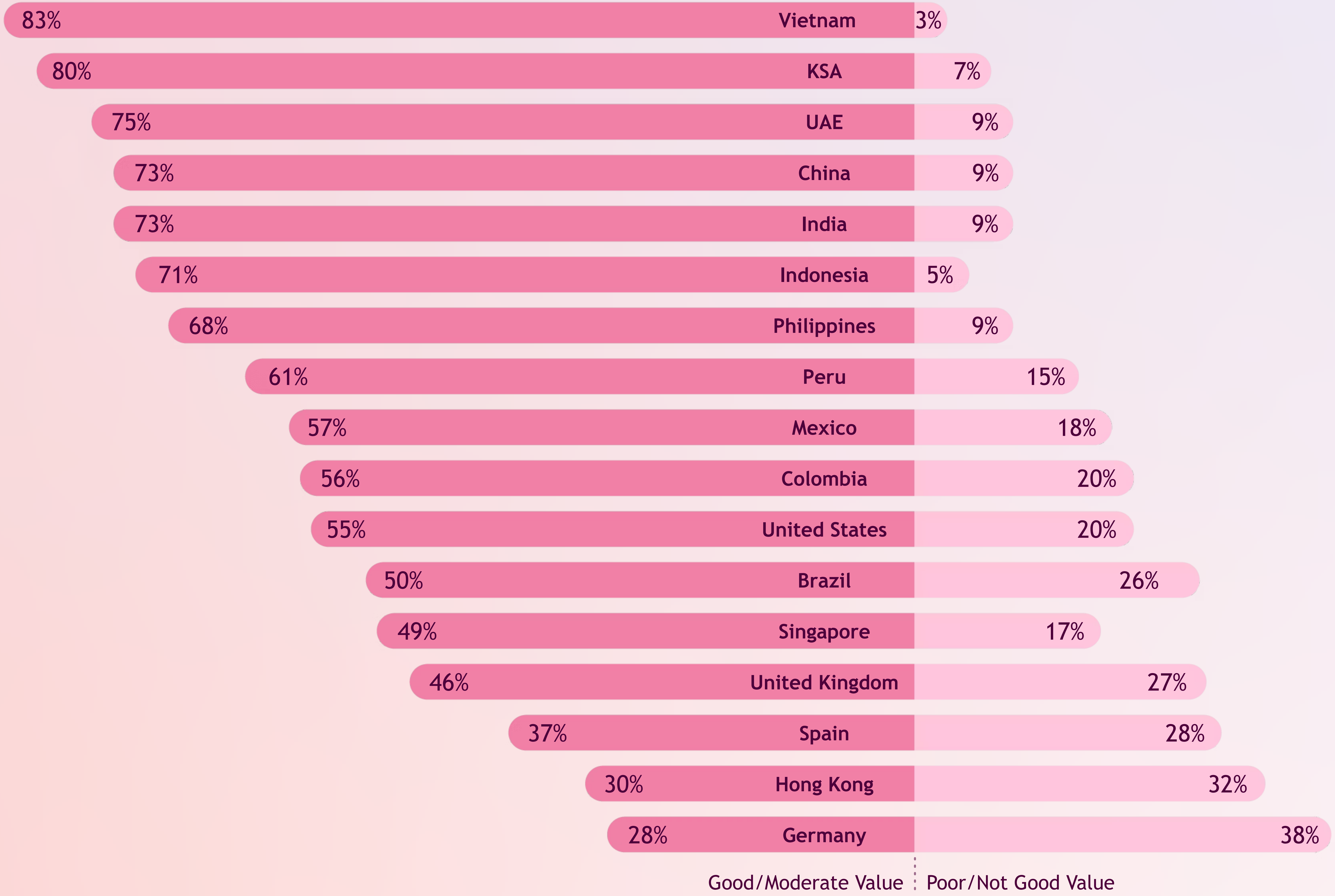
30% of travelers feel airport lounges offer good value, while 33% rate them as moderate, suggesting a generally positive but not exceptional perception.

Airport bars perform most poorly, with only 19% rating them good value and 30% moderate, highlighting an area in need of focused improvement.

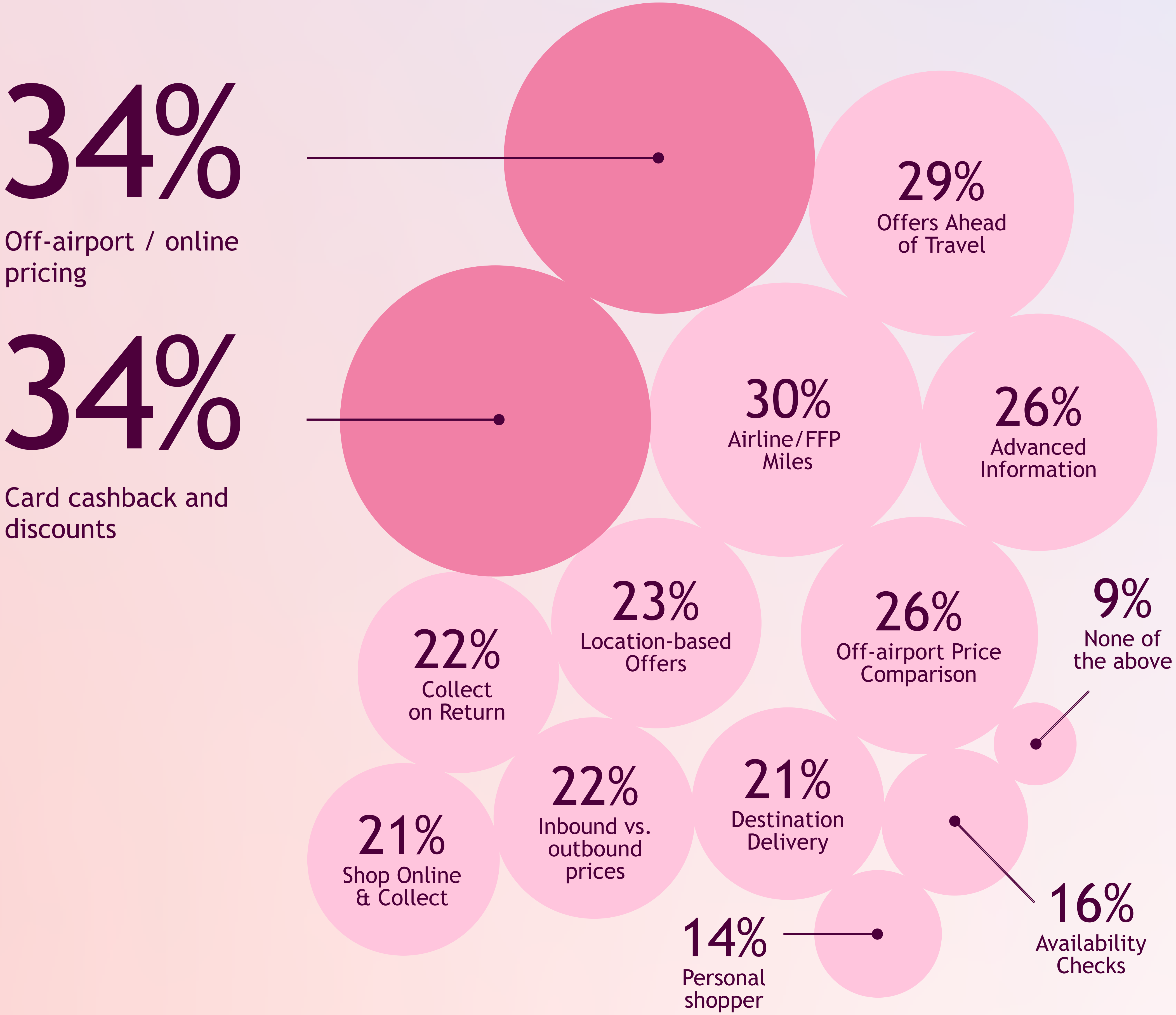


Perceived value

Satisfaction is strongest in **KSA, UAE, China, and Vietnam**, where travelers report the **highest value recognition**, but weakest in Spain, Hong Kong and Germany, indicating substantial regional discrepancies in perceived fairness and competitiveness of the airport proposition.



Strongest motivators



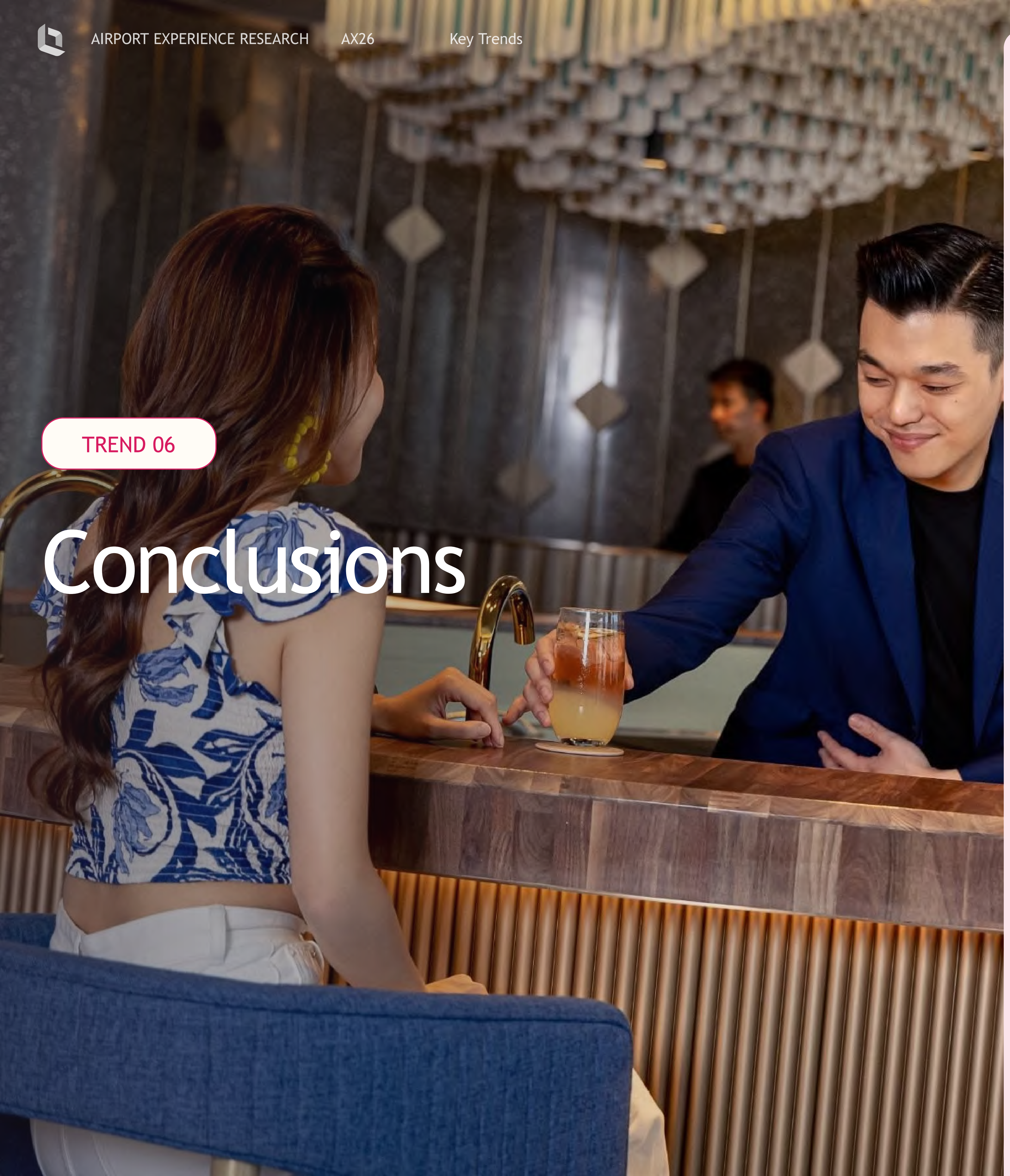
Encouragement to Spend More

Overall, sentiment trends are moving in the right direction, yet travelers consistently indicate they could spend more if airports offered **greater and more clearly communicated value**. Off-airport pricing (34%) and cashback / discounts (34%) are the strongest motivators of greater spend.

Enhancing Perceived Value

The findings highlight a clear opportunity for airports to strengthen how they communicate value propositions, better understand evolving traveler needs, and more precisely target promotions and offers to enhance overall value perception.

Strengthening clarity, pricing transparency, and customer aligned incentives remains essential to ensuring travelers across all markets feel confident they are receiving meaningful value for their spend.



TREND 06

Conclusions

01 **Strengthen perception of value** across all services, working with concessions to better engage and communicate the value proposition story across the journey.

02 Consider how **digital and e-commerce tools** can be used to drive convenience and flexibility for travelers, for example enabling price comparison tools, delivery and collection options or bundled propositions that deliver greater value.

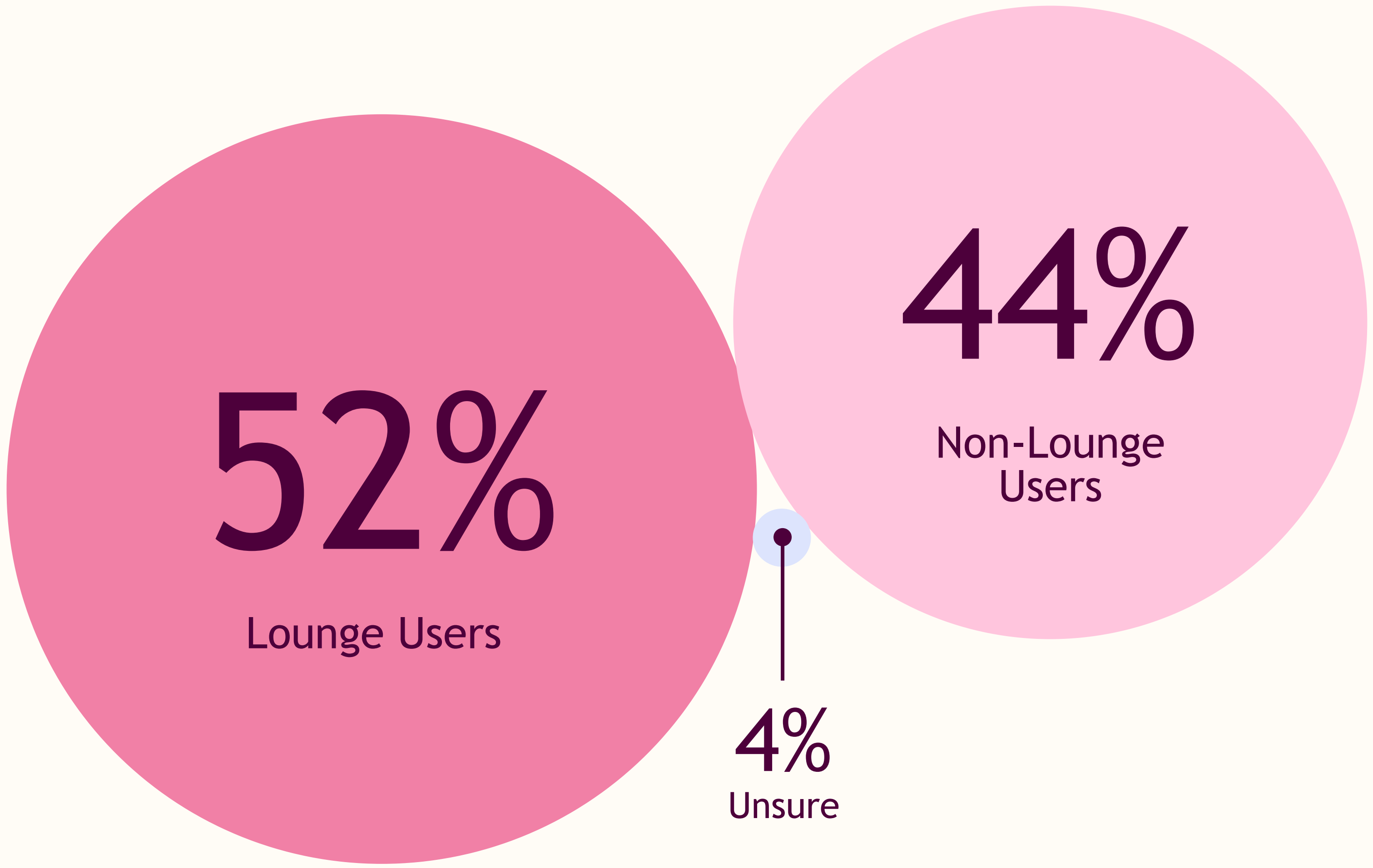
03 Leverage **targeted and exclusive data driven communication** to shape and change spending behavior. Use incentives to trial new spend areas and then value-added propositions to drive frequency and growth.

04 Better understand the traveler needs of a specific journey and use that knowledge to better **tailor spend and promotional opportunities** and thus increase perception of value.

TREND 07

Growth of The Lounge Experience

Airport lounge usage has grown significantly, with 52% of surveyed regular travelers using lounges when they travel, an increase of 11% year on year driven largely by strong uptake in the US, KSA, and Vietnam. This rising demand reflects the broader democratization of lounge access.



Rising Demand for Lounges

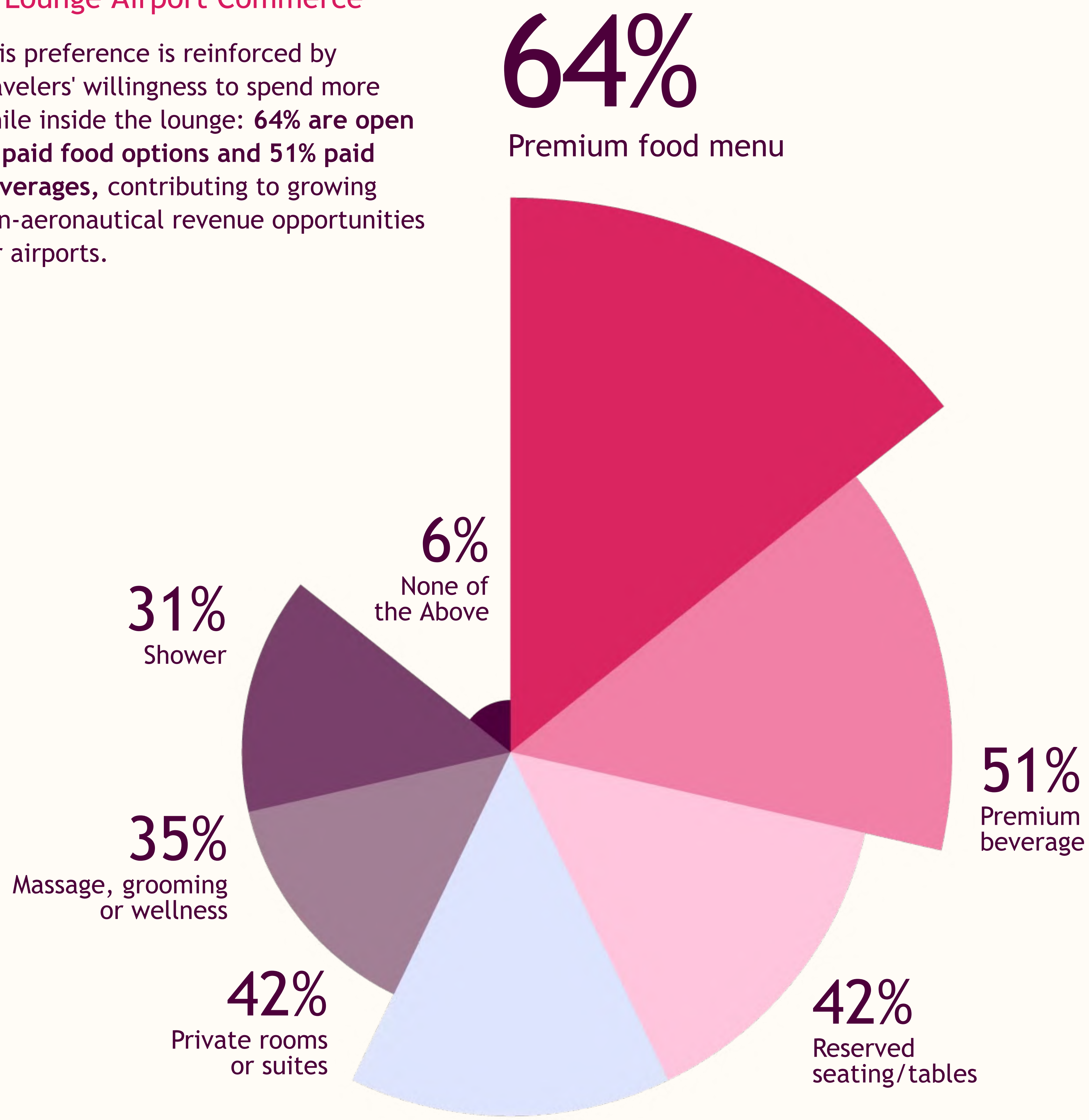
As airports become more crowded, today’s travelers, particularly younger ones, are **increasingly willing to pay for premium experiences.** Lounge usage is no longer limited to elite travelers and is becoming more diversified. Whereas in the past airline-driven access (class or status) tended to dominate (29%), bank or network program-based access (such as Priority Pass) now almost matches this (28%).
Growing numbers of travelers are also prepared to pay for direct access (24%), an increase on last year.

Once positioned as exclusive sanctuaries, **modern lounges must now cater to a multiplicity of needs**, as the traveler base broadens, and every traveler brings their own needs and wants to the lounge. Lounges continue to play an important role within the airport experience, with lounge users rating them “significantly better” than restaurants by 23 percentage points.

Lounge Users per Country

In Lounge Airport Commerce

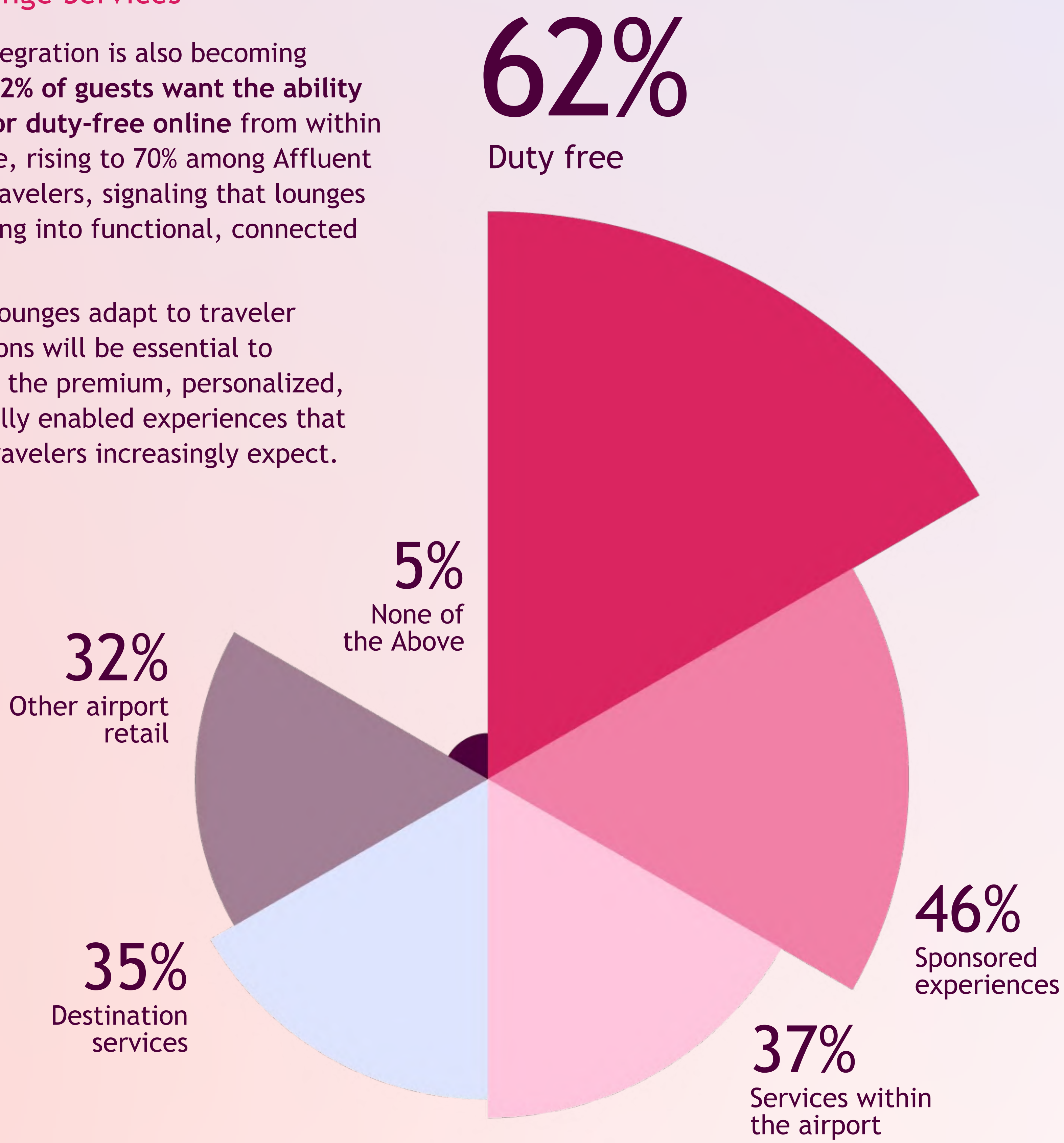
This preference is reinforced by travelers' willingness to spend more while inside the lounge: **64% are open to paid food options and 51% paid beverages,** contributing to growing non-aeronautical revenue opportunities for airports.

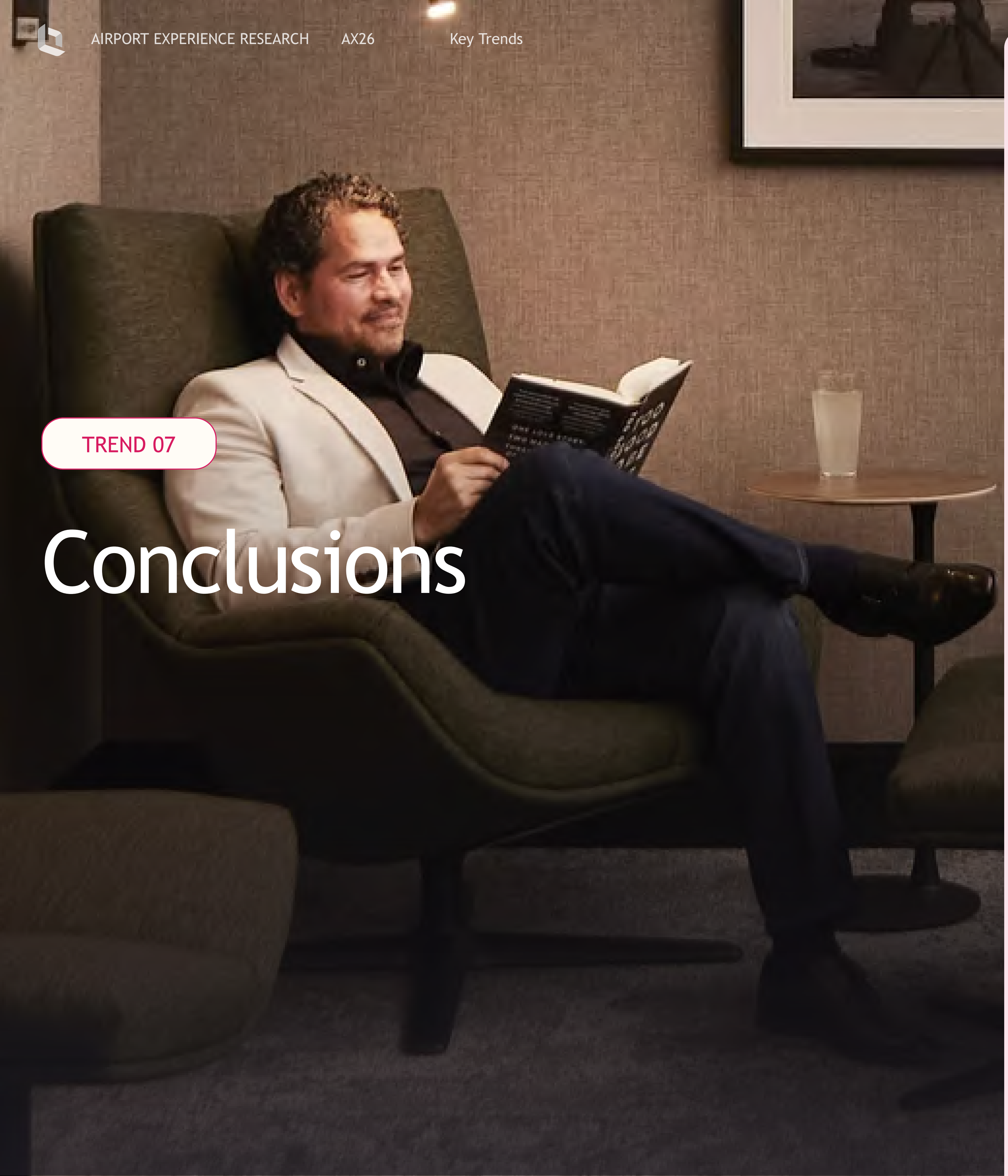


Paid Lounge Services

Digital integration is also becoming critical. **62% of guests want the ability to shop for duty-free online** from within the lounge, rising to 70% among Affluent Leisure Travelers, signaling that lounges are evolving into functional, connected spaces.

Ensuring lounges adapt to traveler expectations will be essential to delivering the premium, personalized, and digitally enabled experiences that modern travelers increasingly expect.





TREND 07

Conclusions

01 To meet growing demand, airports and lounge operators need to work together to **identify space to expand lounge coverage**

02 **Access drivers show that lounges are now part of the mainstream passenger journey**, airports must work with airlines, card issuers, and operators to ensure access models are scalable, transparent, and aligned with traveler expectations.

03 Airports and lounge operators need to work together to expedite and test **new in-lounge revenue models**, avoiding unnecessary red tape that can delay the deployment of these services.

04 **Lounge operators and concessions could seek opportunities to collaborate**, showcasing their offerings and driving spend from lounge guests into concessions across the airport.

Travel Profile

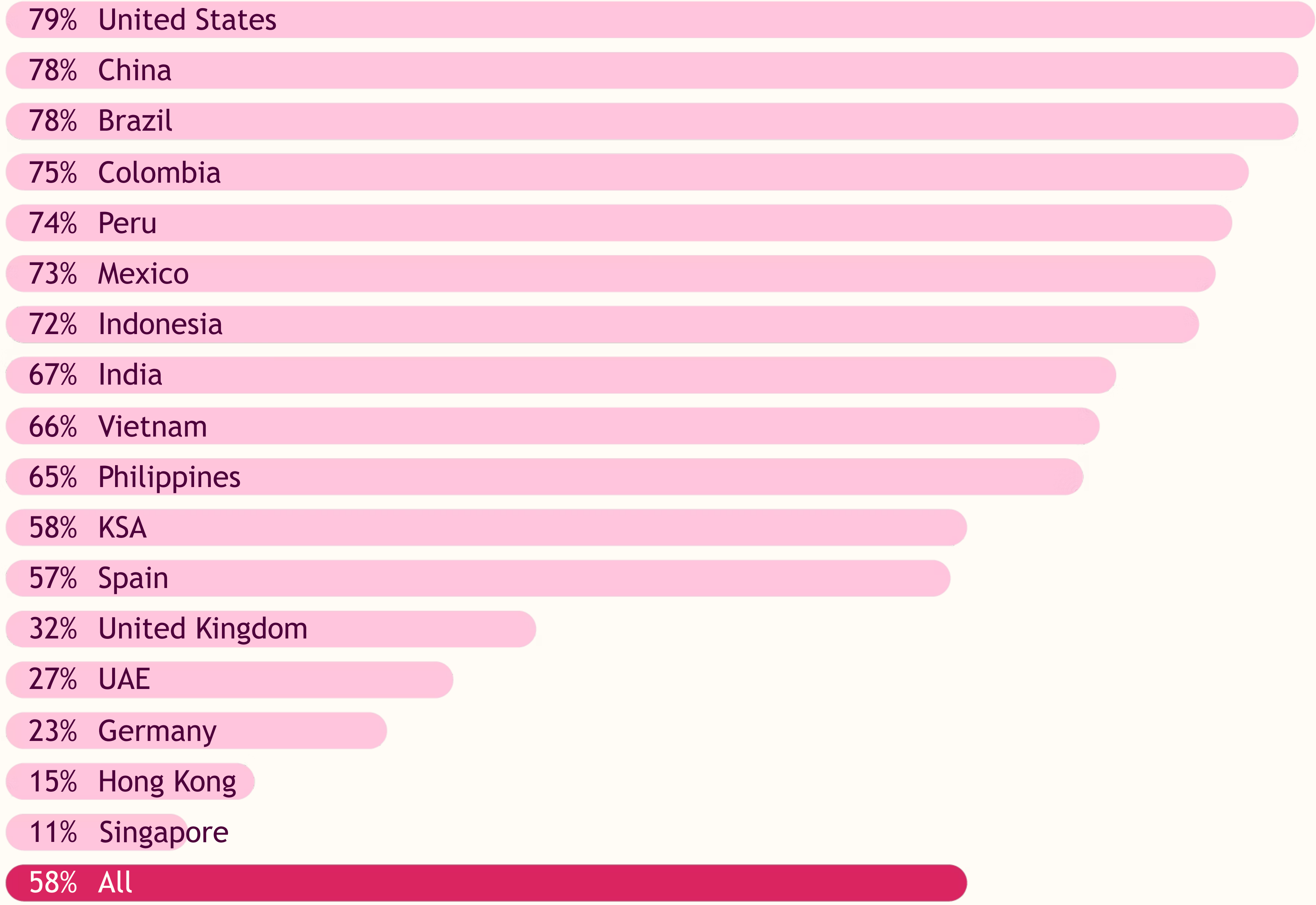
Findings

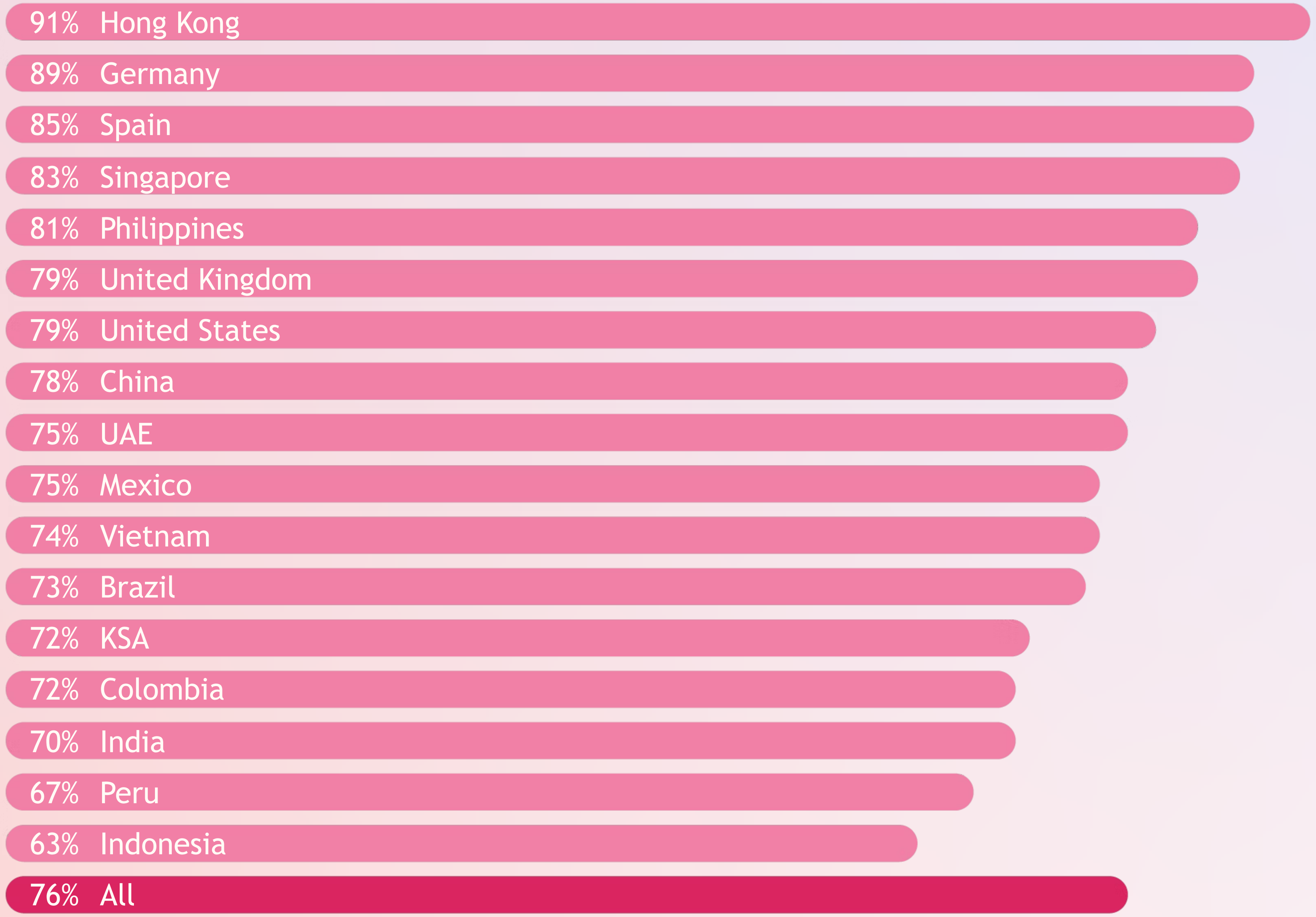
Over the past year, we've seen a subtle but notable shift from business to personal travel. To qualify for the survey, travelers must take two or more trips per year, meaning they travel more frequently than the general population and average 3.6 trips annually, as they continue to gravitate toward richer, more rewarding travel experiences.

Domestic vs International

Domestic travel accounts for 58% of all trips, though this varies widely by market. The US (79%) and China (78%) remain heavily domestic as both lean into home-market travel. Domestic share has grown in both countries year on year. Meanwhile, Singapore (11%) and Hong Kong (15%) remain the most internationally orientated.

Although neither offers true domestic routes, residents frequently travel ’domestically’ through adjacent markets such as Malaysia or mainland China.





Purpose of Travel

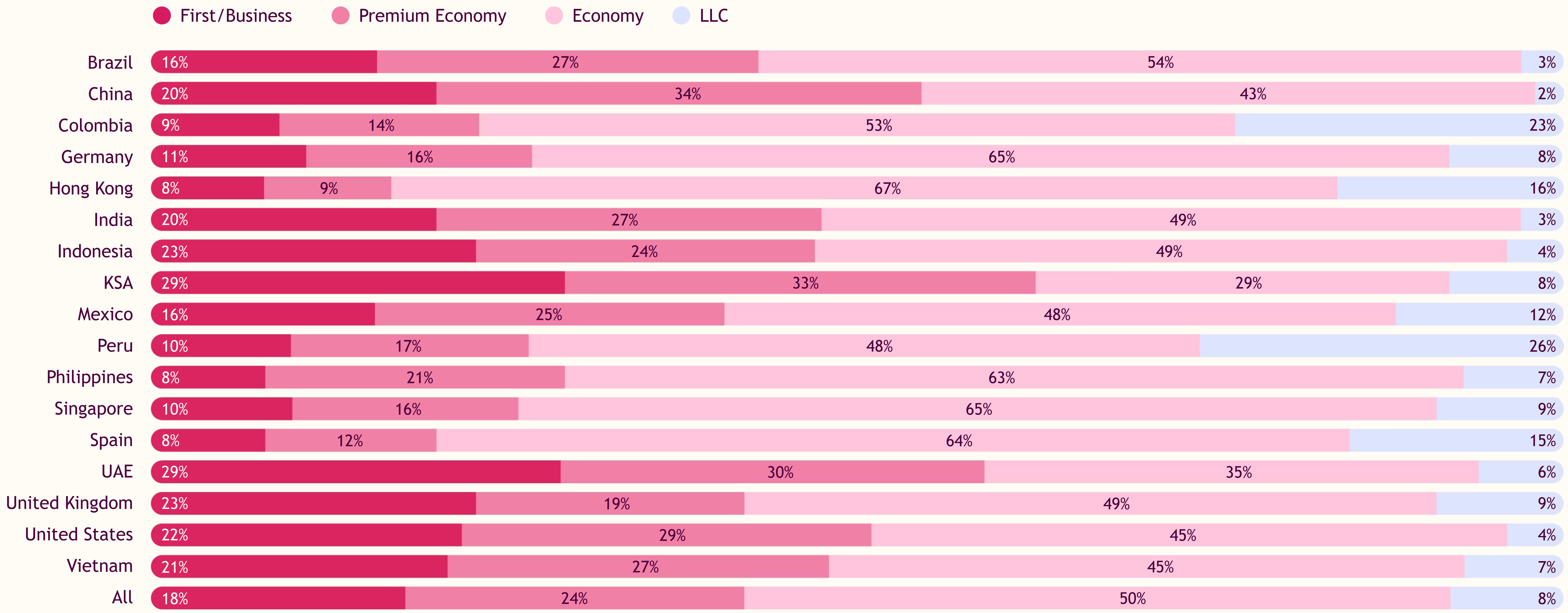
Personal travel now represents 76% of all trips. Affluent markets typically show the strongest personal travel orientation. China and Vietnam recorded the biggest year-on-year jumps (+14% and +10%), while Peru and Colombia showed the strongest pivot back toward business travel (-12% and -10%).

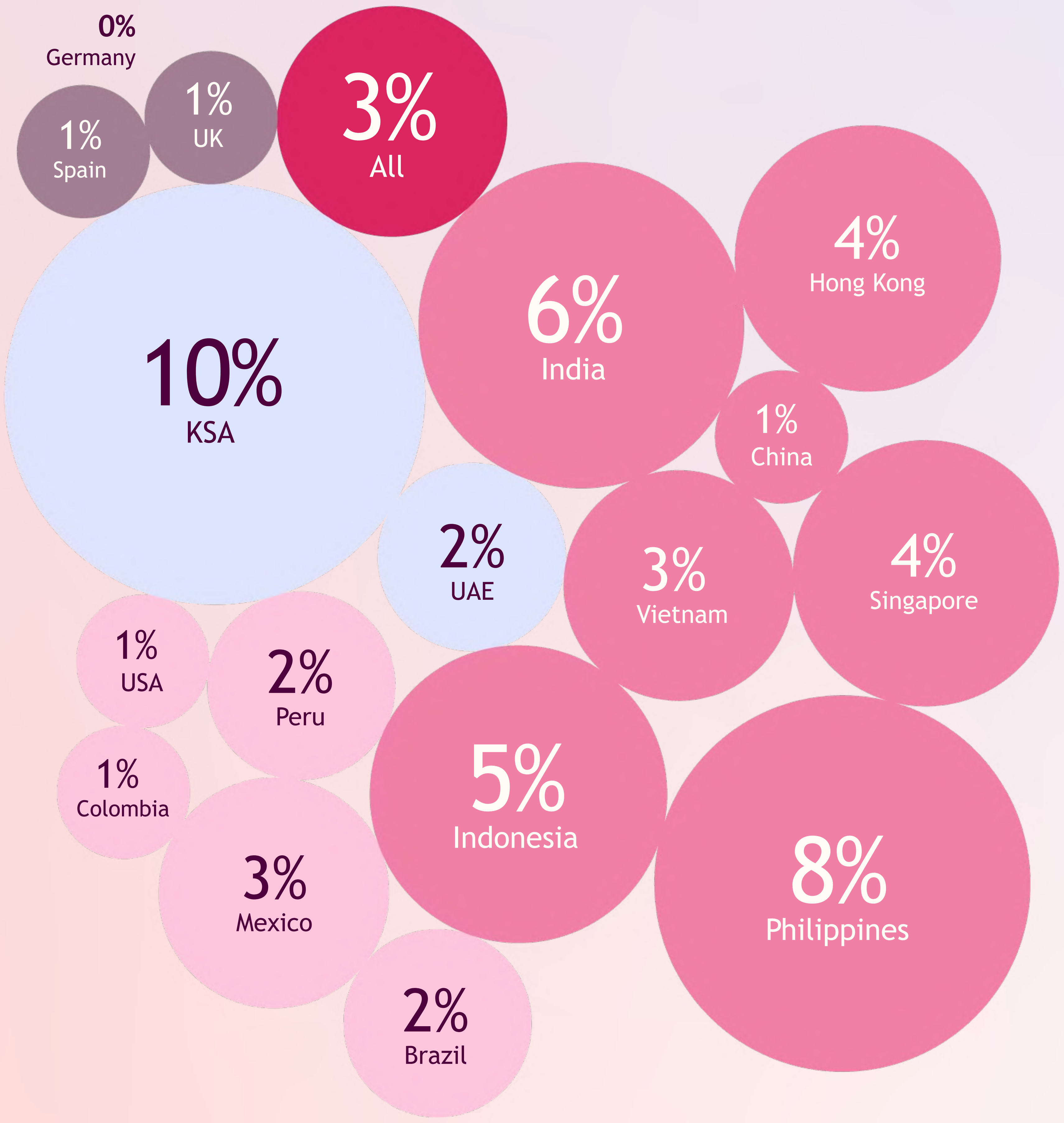
With leisure travelers generally spending more per trip, this shift represents a clear growth opportunity for airports.

Class of Travel

41% of regular travelers say they are traveling premium classes (F, C, PEY), reflecting the profile of audiences and their willingness to pay for a better overall travel experience.

One in three trips in UAE and KSA are in First / Business with around the same number in premium economy.





Offshore

Offshore travelers, defined as those whose primary airport lies outside their home country and typically at major global hubs, play an increasingly important role. Among our surveyed regular travelers, KSA shows the strongest offshore behavior, with 10% frequently flying from international hubs elsewhere in the Middle East. The Philippines follows at 8%, influenced by limited long-haul carrier options, whilst India (6%) shows similar patterns due to the dominance of Middle Eastern hubs in long-haul connectivity.

Because offshore travelers have more airport and airline choices, the challenge and opportunity to influence their decisions becomes even more significant.

Conclusions

01

Our audience of regular travelers is firmly **leisure focused**. Unlike business travelers, they fund their own experiences and seek value throughout the journey.

02

With personal travel on the rise and leisure travelers spending more, airports should consider enhancing experiential retail, dining, wellness, and entertainment to **capture increased discretionary spend**.

03

First and Business Class focused travelers seek out **premium services**, airports need to consider appropriate services and experiences and sure they are accessible.

04

Offshore travelers have more choice across airlines and airports, making the ability to influence this selection through **engagement and a more curated experience** important for target airports.

Airport Experience

Findings

Airports are well positioned to take advantage of the equity they have built in driving high levels of satisfaction. Converting this goodwill into engagement with new experiences across the airport and introducing new channels to drive revenue and spend from travelers will deliver dividends.

Satisfaction

Satisfaction with the airport experience has reached an all-time high, with 82% of our surveyed regular travelers satisfied with and enjoying their airport experience. **Only 5% of travelers were dissatisfied.** APAC and Middle Eastern airports delivered the greatest satisfaction, with Singapore taking the crown at 97% and an impressive 0% dissatisfied.

The Philippines was the APAC outlier with only 57% satisfied and 14% dissatisfaction, indicating a need to work on improving the experience. Satisfaction grew in all markets except Mexico and Spain, with strong increases posted by KSA, USA and the UK.

These results are a huge credit to the investments made by airports, but the challenge now is to look to see how these can be further improved upon and airports deliver an even better experience.

Satisfaction per Country

Airport Services Satisfaction

When we look at individual service and journey stage satisfaction, the news is also good. Most services have delivered at least slight improvement year on year.

Access to lounges has improved, reflecting work by operators to improve access management.

Perception of value for money across the airport journey has improved slightly, but remains an area of concern for travelers, as does crowding.

The dip in satisfaction once airside still exists, suggesting there are still areas for improvement if airports want to maximize spend.

Satisfaction

Landside

81%

- Check-in and baggage drop (86%)
- Public Transport (83%)
- Security (82%)
- Drop-off/farewell facilities (81%)
- Private car parking (72%)

-7%

- Private car parking (8%)
- Public Transport (8%)
- Security (8%)
- Drop-off/farewell facilities (6%)
- Check-in and baggage drop (5%)

Departures

75%

- Cleanliness of the airport (88%)
- Ease of navigation (84%)
- Comfort of public seating areas (80%)
- Customer services (78%)
- Range/quality of retail & dining (75%)
- Wi-Fi access and speed (73%)
- Crowding (69%)
- Digital Assistance (67%)
- Value for money of retail/dining (63%)

-9%

- Value for money of retail/dining (20%)
- Crowding (13%)
- Range/quality of retail & dining (9%)
- Wi-Fi access and speed (9%)
- Comfort of public seating areas (9%)
- Digital Assistance (7%)
- Customer services (5%)
- Ease of navigation (5%)
- Cleanliness of the airport (4%)

Facilities

66%

- Access to airport lounges (73%)
- Quiet areas or working facilities (70%)
- Private areas away from the crowds (67%)
- Entertainment options (66%)
- Ability to pre-order shopping (60%)
- Shopping delivery service (59%)

-8%

- Entertainment options (10%)
- Quiet areas or working facilities (9%)
- Private areas away from the crowds (9%)
- Shopping delivery service (7%)
- Ability to pre-order shopping (6%)
- Access to Airport lounges (6%)

Gate

75%

- Boarding gate experience (83%)
- Facilities at boarding gate (79%)
- Walking distance to gates (78%)
- Access to priority boarding (76%)
- Transportation to gate (70%)
- Delivery services to gate (63%)

-6%

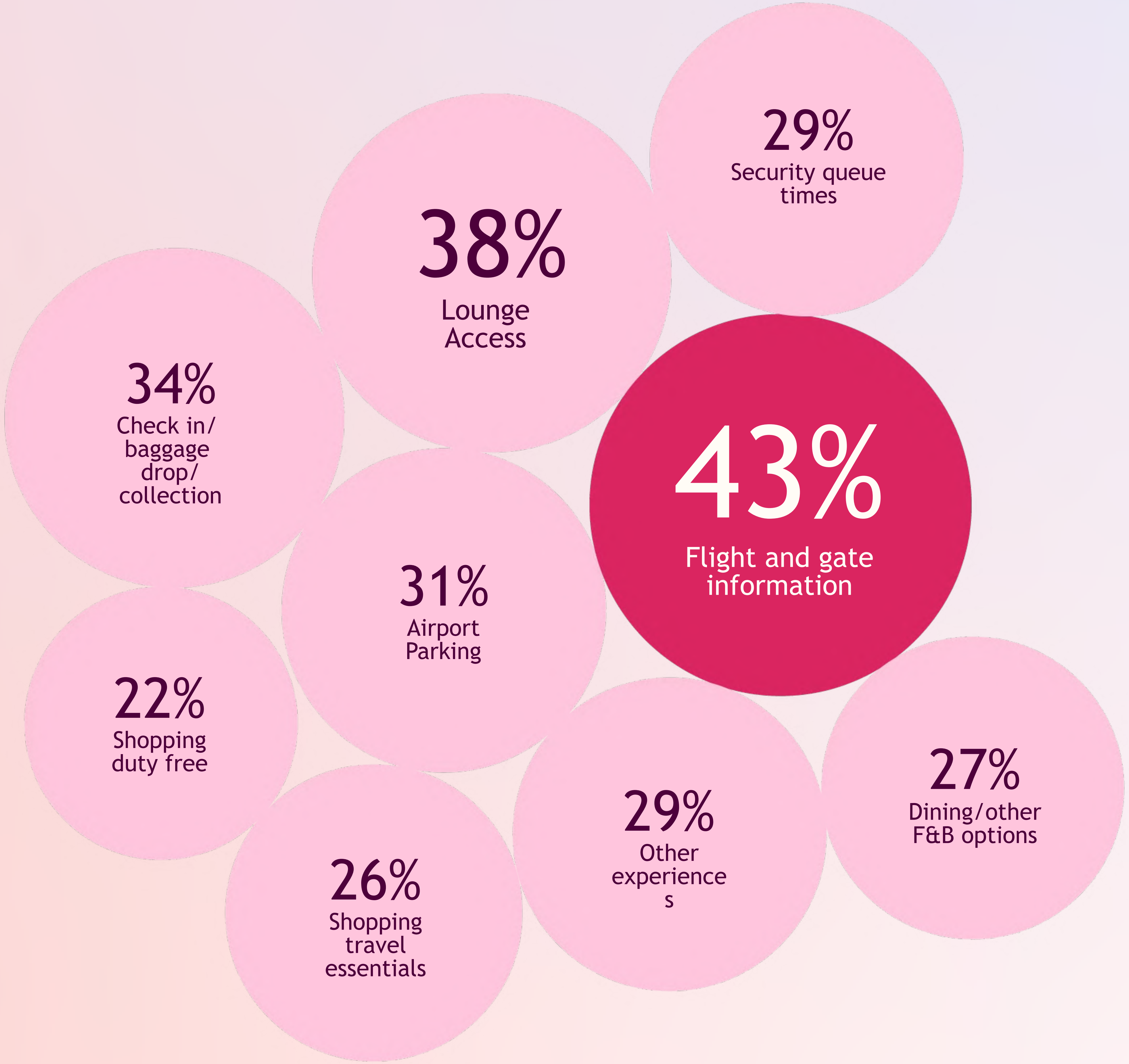
- Walking distance to gates (10%)
- Transportation to gate (7%)
- Delivery services to gate (7%)
- Facilities at boarding gate (6%)
- Boarding gate experience (5%)
- Access to priority boarding (4%)

Dissatisfaction

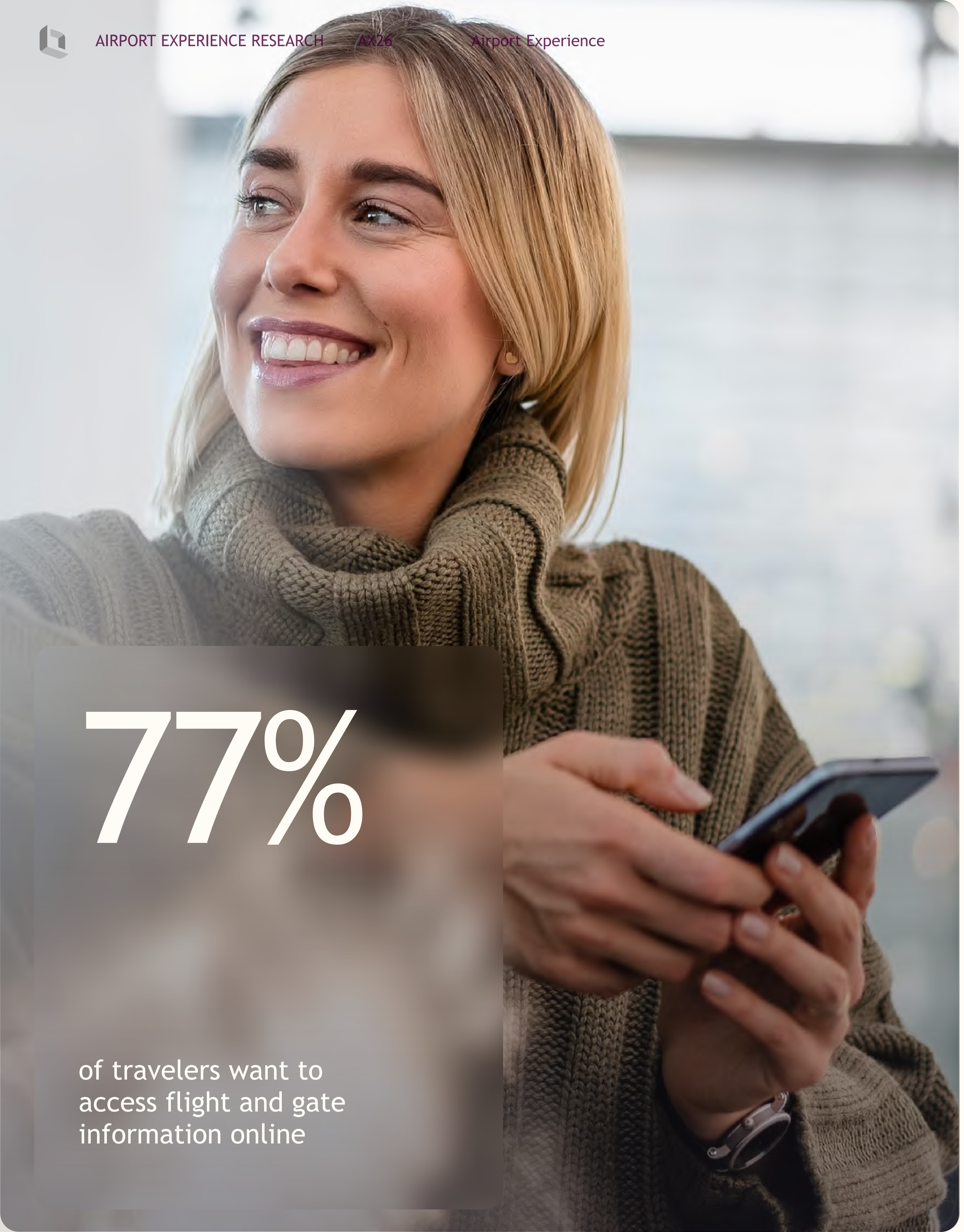
Accessing Airport Services

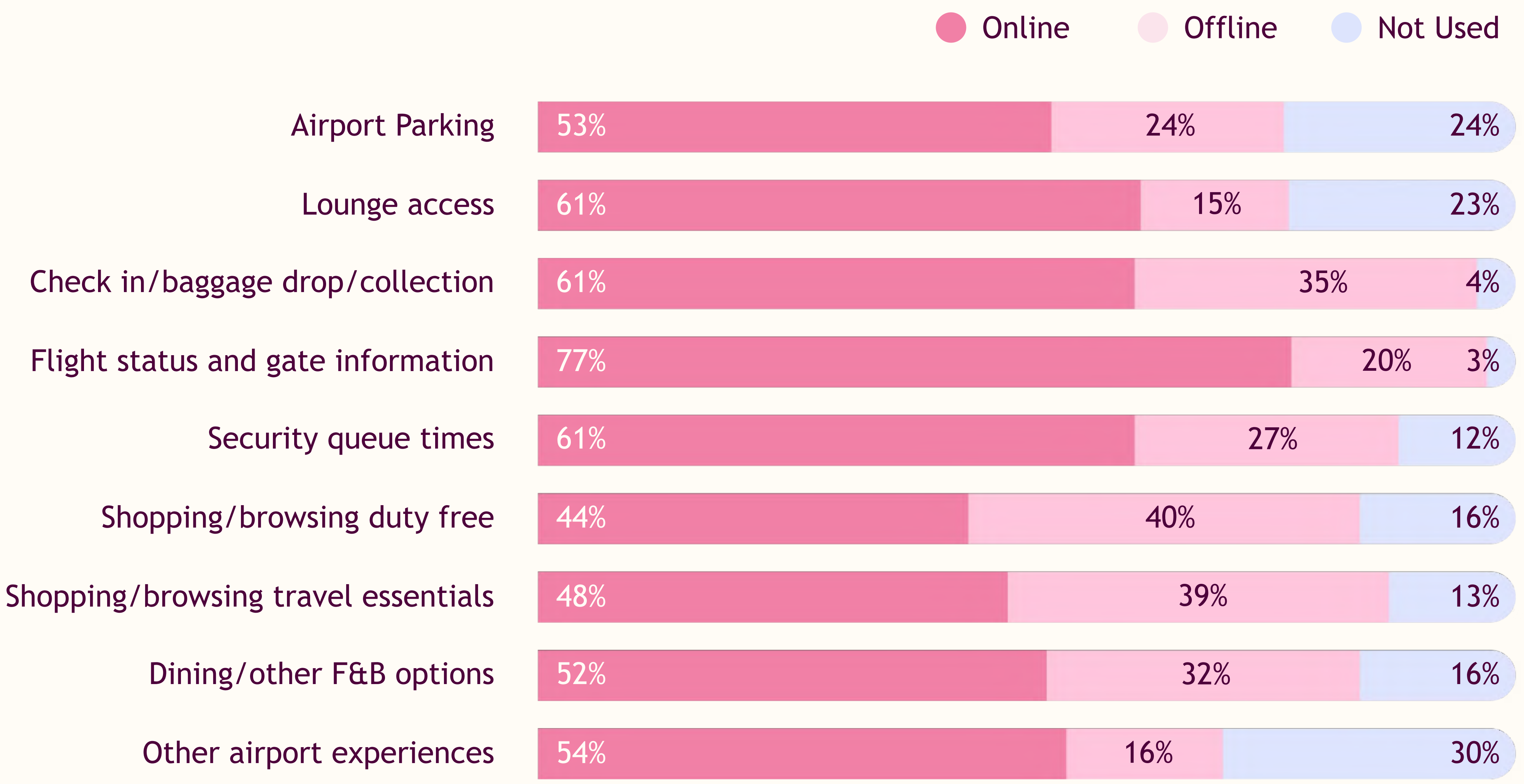
We asked our travelers how and when they wanted to access services. There was strongest demand to **access more flight information** before the journey along with **lounge access and check-in services**.

Philippines, Peru and Brazil show the strongest desire to access services in advance of travel, offering convenience and assurance for the traveler and engagement opportunities for the airport.



As travelers increasingly look to access services before arriving at the airport, the pre-travel phase is becoming a critical moment for engagement.





Accessing Airport Services

Access to airport services today implies that those services are available online.

Flight and gate information (77%) and security wait times (61%) are the ‘killer features’ for encouraging online participation and present an opportunity for airports to engage.

Accessing and securing lounges in advance is also seen as important. Whilst duty free online saw some support, almost as many see this as an offline activity for the airport.

With increasing demand for price comparisons and product information airports and retailers need to consider how they can encourage duty free engagement before travel.

When looking at desire to access any service online, China and KSA show the greatest demand. Normally technology savvy Hong Kong and Singapore lag slightly, this may reflect the general ease of access already provided at those airports.

Self-Identified Profiles

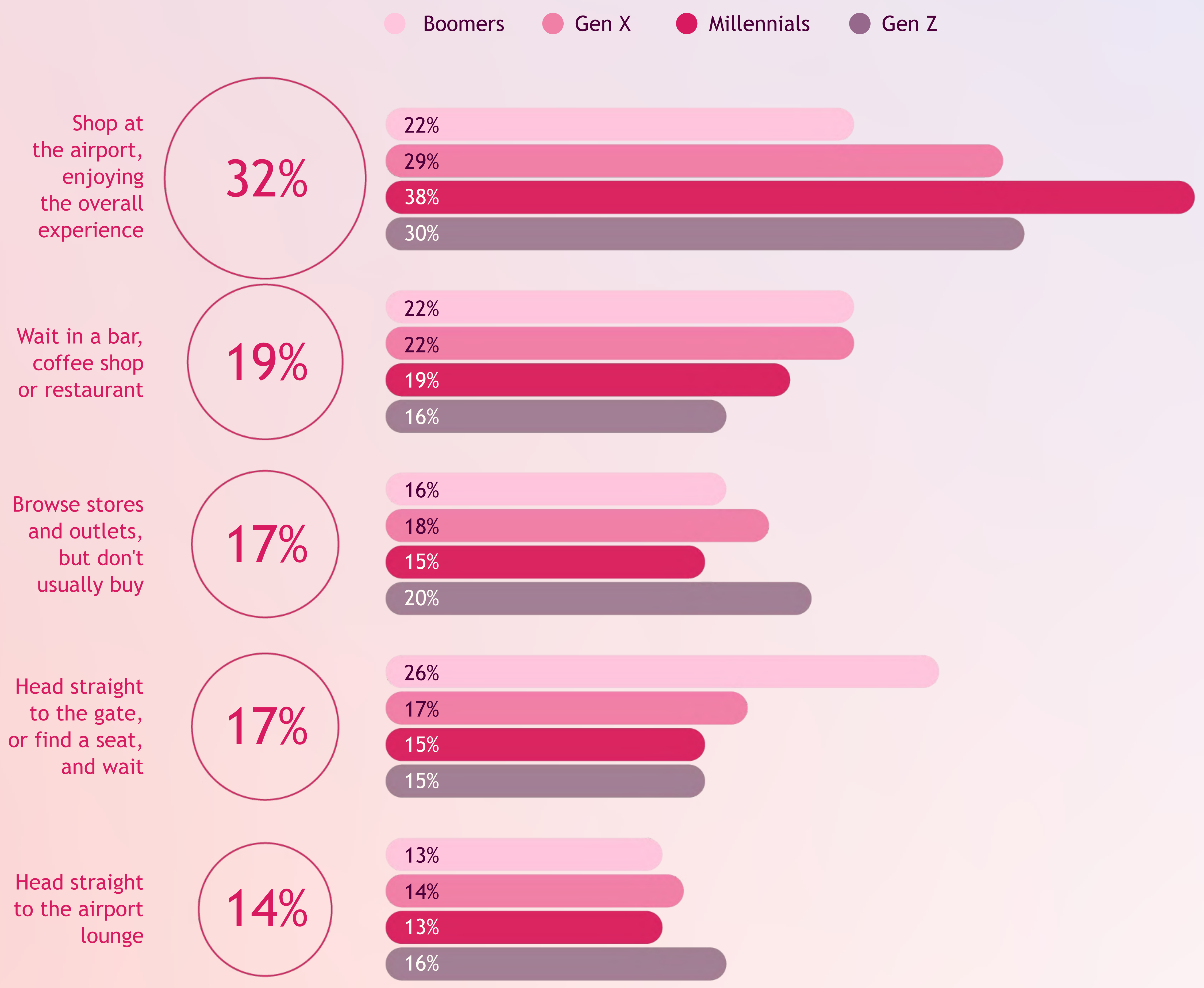
32% of regular travelers see themselves as 'shoppers' but there are missed opportunities represented by the 17% who browse but do not buy. Encouragingly, 65% of travelers have a revenue profile that shows they actively spend at the airport.

Gate hugging remains a challenge, almost a fifth of travelers identify as 'gate huggers.' Better access to information, particularly on their phone, may make these travelers more comfortable exploring the airport.

17% of travelers tell us they head straight for the lounge, saying that they avoid the shops. If we want to engage these travelers, the lounge is the place to do it.

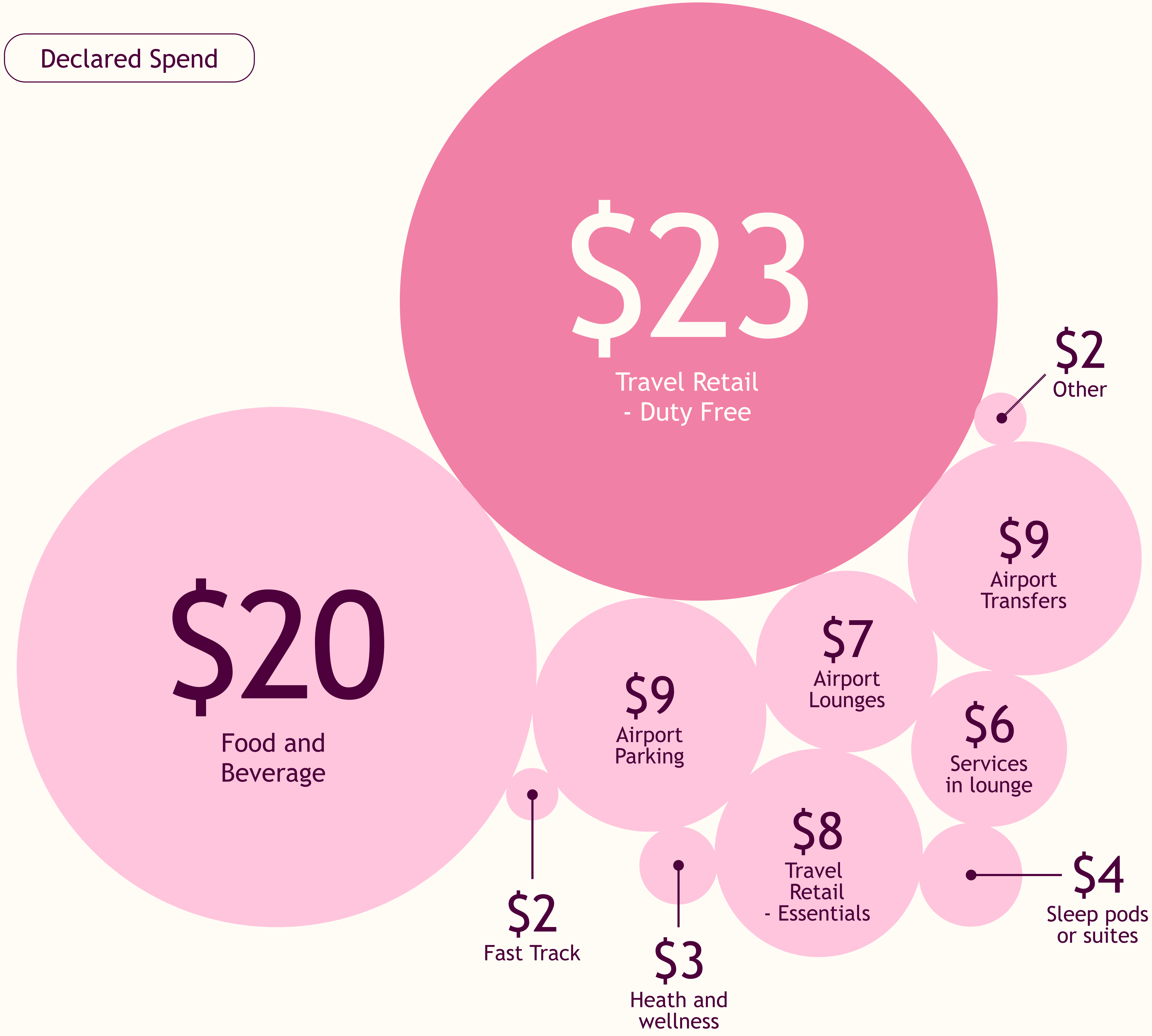
Millennials are the standout shoppers, with older travelers preferring F&B or more likely, sitting it out at the gate. As older and younger generations behavior diverges, we need to consider different strategies to manage them and ensure both receive an enjoyable journey.

By definition, our Affluent Leisure Travelers are highly engaged shoppers (52%), with a strong revenue profile of 81%.



Airport Spend

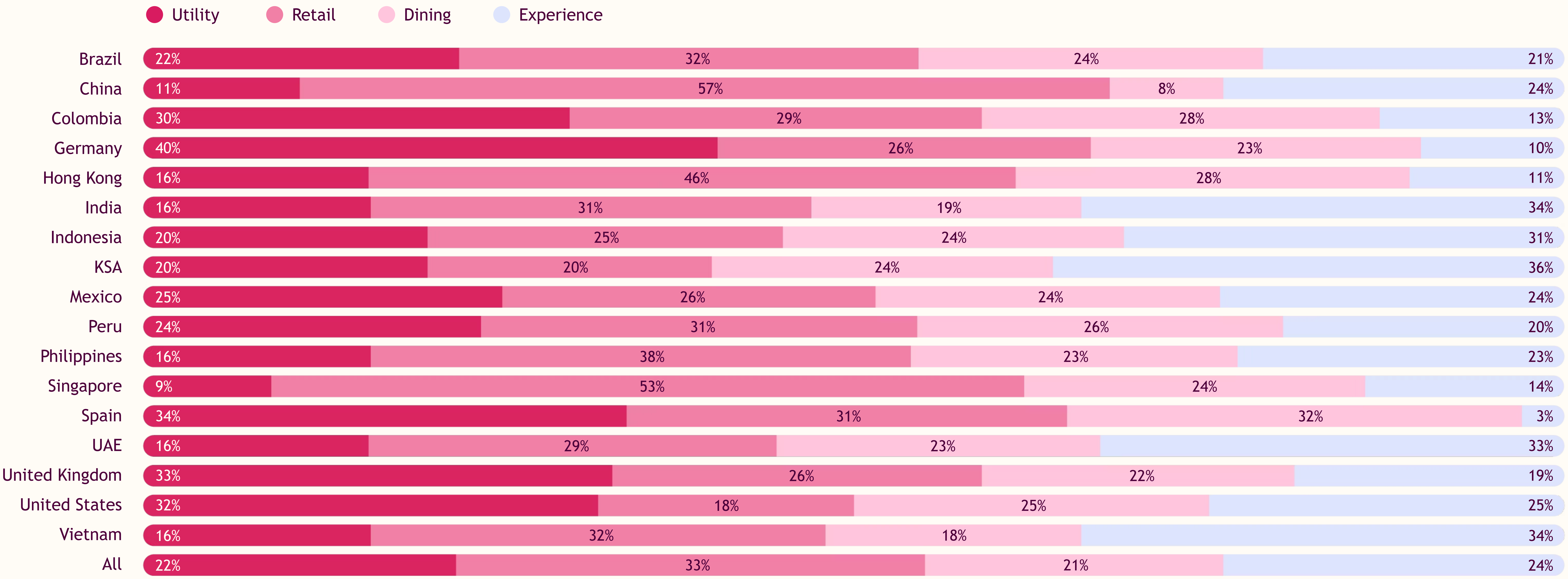
When asked how they spend across the journey, duty free has gained ground and taken the top spot with an average spend of $23. Food and beverage drops to second place at $20.



Since spend levels vary significantly by market, it is more useful to review percentage spend by category. **China is dominated by retail spend** with moderate experience based and weaker F&B performance. Singapore shows similarly strong retail performance.

Germany over indexes on utility spend with very low levels of experience based spend, as does Spain. The US and UK also show higher proportion of utility spend, driven by strong demand for airport parking.

Markets showing strongest bias towards experience spend performance include Vietnam, UAE, KSA and India.

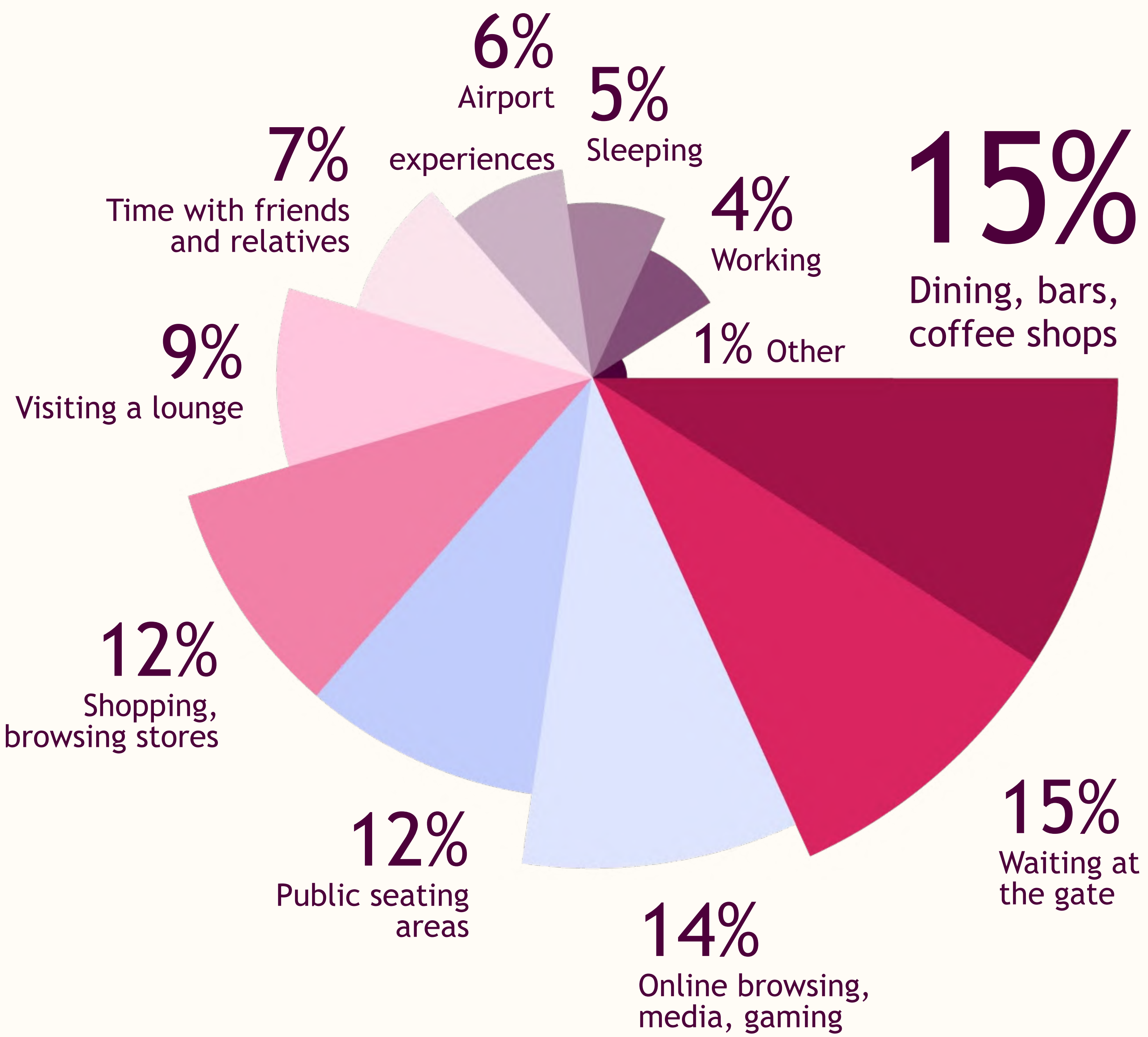


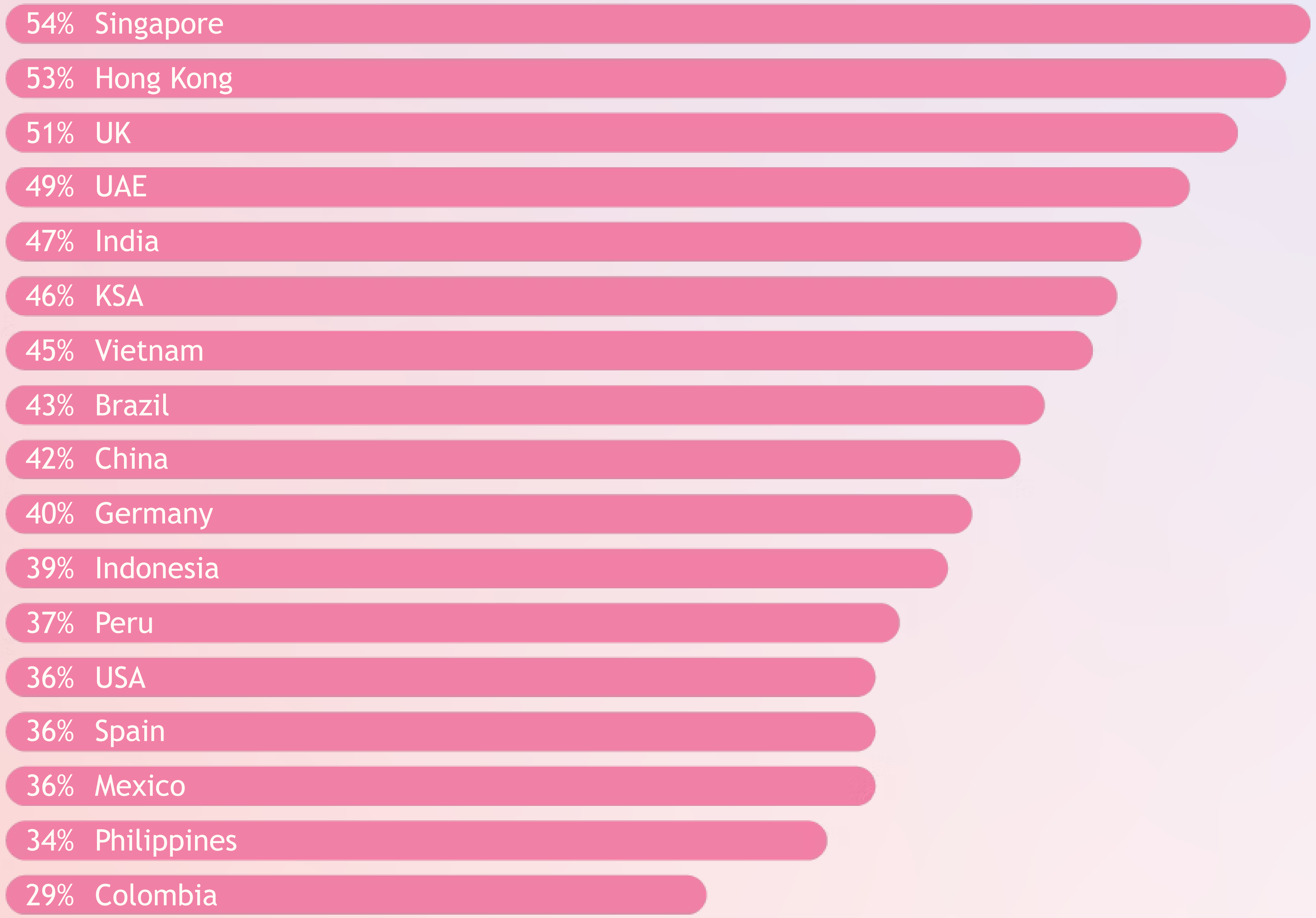
Airport Time

When asked how regular travelers spend their time at the airport, dining time is neck and neck with gate hugging (15%). Lounges and other experiences together make up 15%.

All of these now exceed time spent on store visits - retail share of spend is up, but share of dwell time is down.

Looking at year on year changes, lounges, shopping and dining time are all up along with gate hugging, but at the expense of sleeping, and spending time with friends.





Revenue Time

‘Revenue time’ is defined as time spent on activities that can generate revenue for the airport.

Singapore, Hong Kong and UK spend the most time on revenue producing activities. This does not necessarily translate into higher spend, however, as retail browsing does not mean buying.

US and Germany have the highest non-revenue time driven by gate hugging.

Conclusions

01 As satisfaction has improved almost across the board, expectations increase for an even better service, often at increasingly crowded terminals. Building on this success will be key, with a focus on **making each journey more personal** and more enjoyable.

02 Travelers want access to services before they travel and this represents a win / win for airports, allowing them to engage with travelers earlier, support the journey and **start the sales process for services and experiences across the airport in advance.**

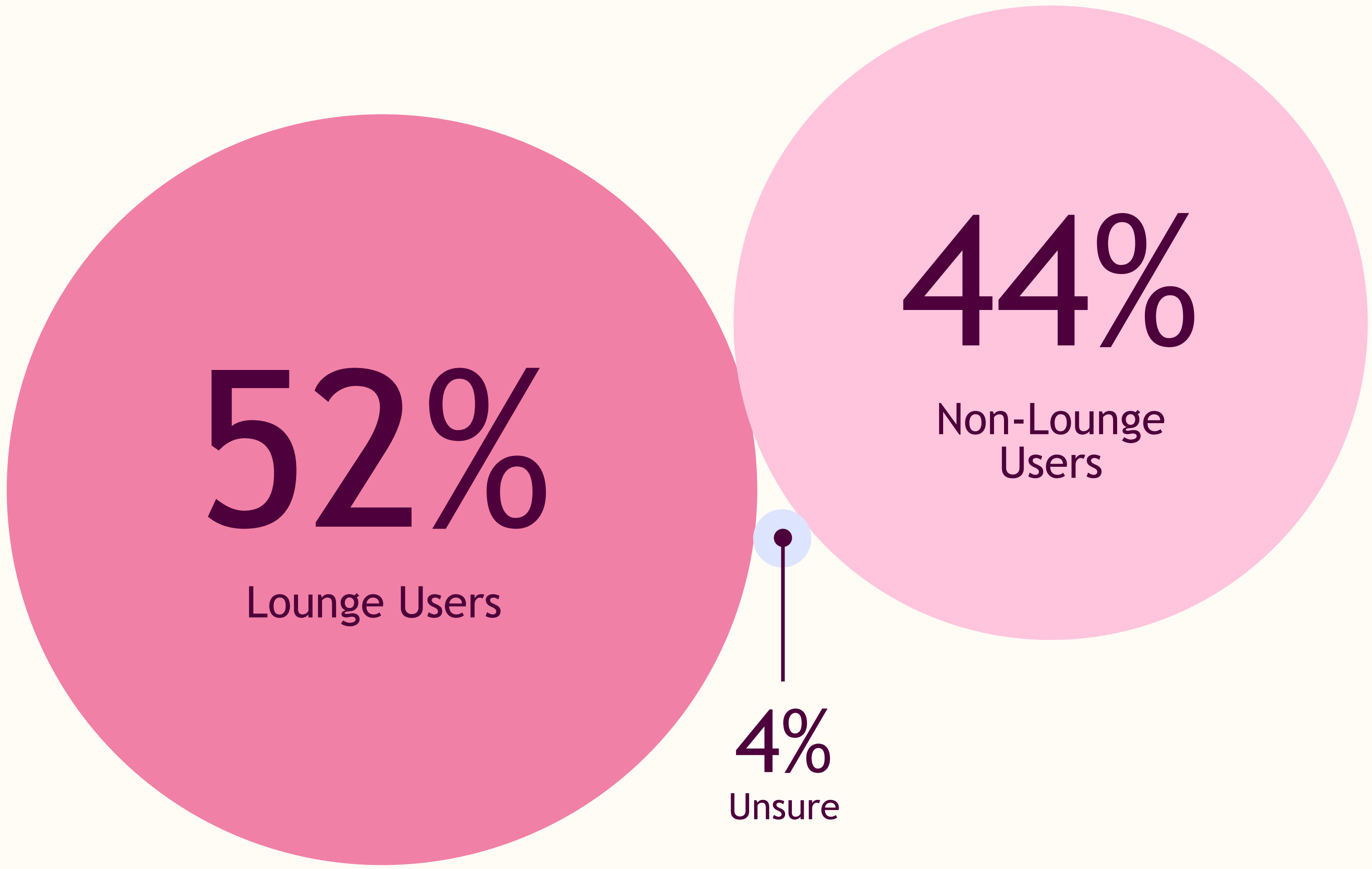
03 **Almost half of travelers say they don't typically spend at the airport**, yet many of these are higher value lounge users. Airports could consider engagement strategies for these groups to encourage spend and NAR growth for the wider airport ecosystem.

04 Retail spending at the airport is back, but it's not universal and in many countries experiential spend is taking a lead. Greater value will come from developing strategies that create stronger synergies between the two areas.

The Airport Lounge

Findings

Airport lounges are more popular than ever with 52% of surveyed regular travelers using a lounge at least once in the past year. Increasingly, as part of a premium airport experience, travelers see the lounge as the focal point of their journey and seek out additional services, such as online shopping from the lounge. This can drive new revenue for the airport.



Airport Lounge Usage

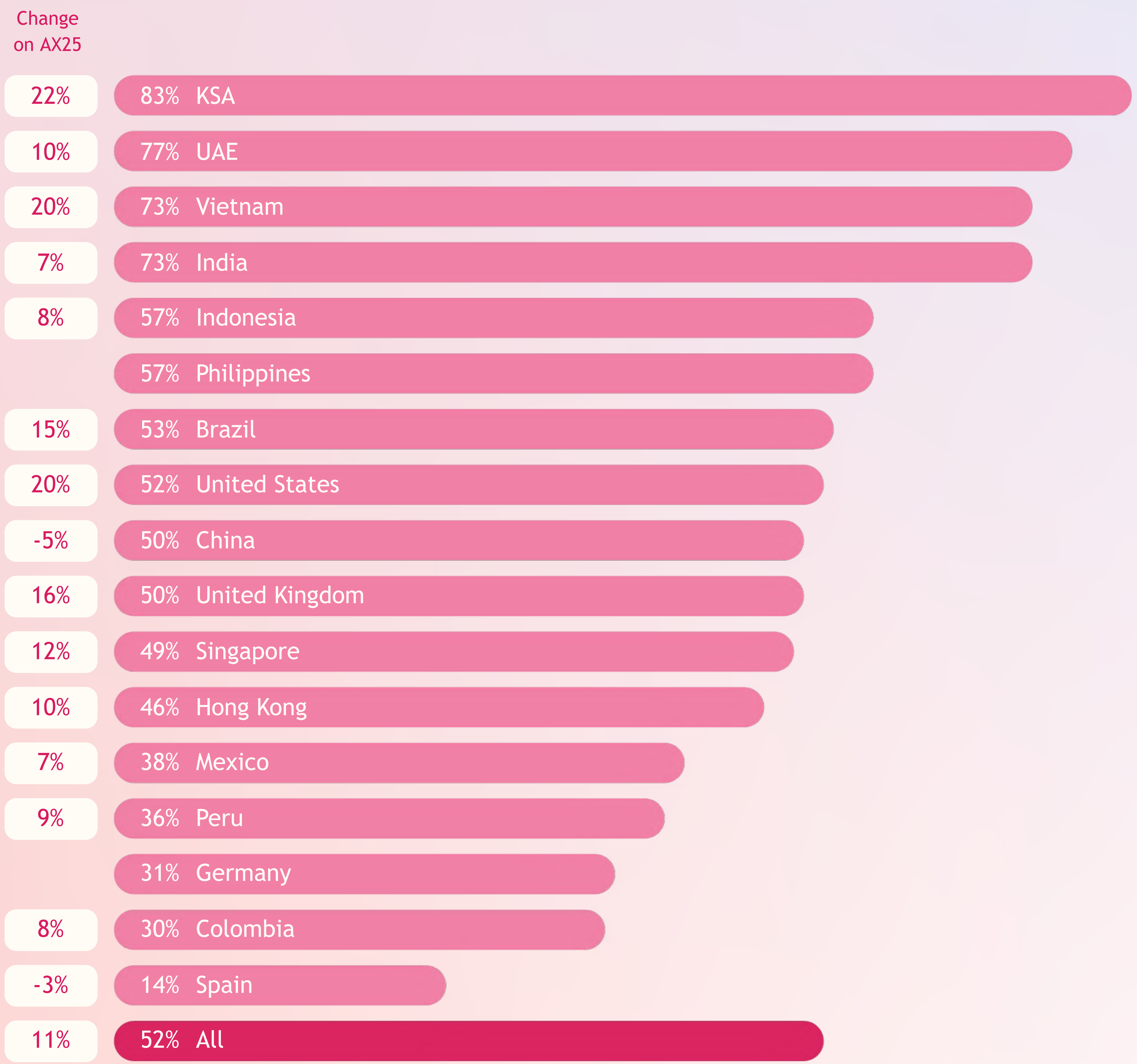
Overall, **lounge usage increased to 52%, an 11% increase year on year**. This growth is reflected across all markets except China and Spain, both of which recorded a drop.

The desire to enjoy lounges as part of the airport journey continues to grow and is made more accessible to travelers by the growth of bank / payment card related membership programs like Priority Pass.

75% of Affluent Leisure Travelers use airport lounges, showing that lounge access is core to their airport experience.

Strongest lounge demand comes from Middle East and key APAC markets, with KSA and Vietnam showing strong growth in usage. Strong growth is also seen in United States and United Kingdom.

Spain is a standout market for weak lounge demand which has also decreased year on year.

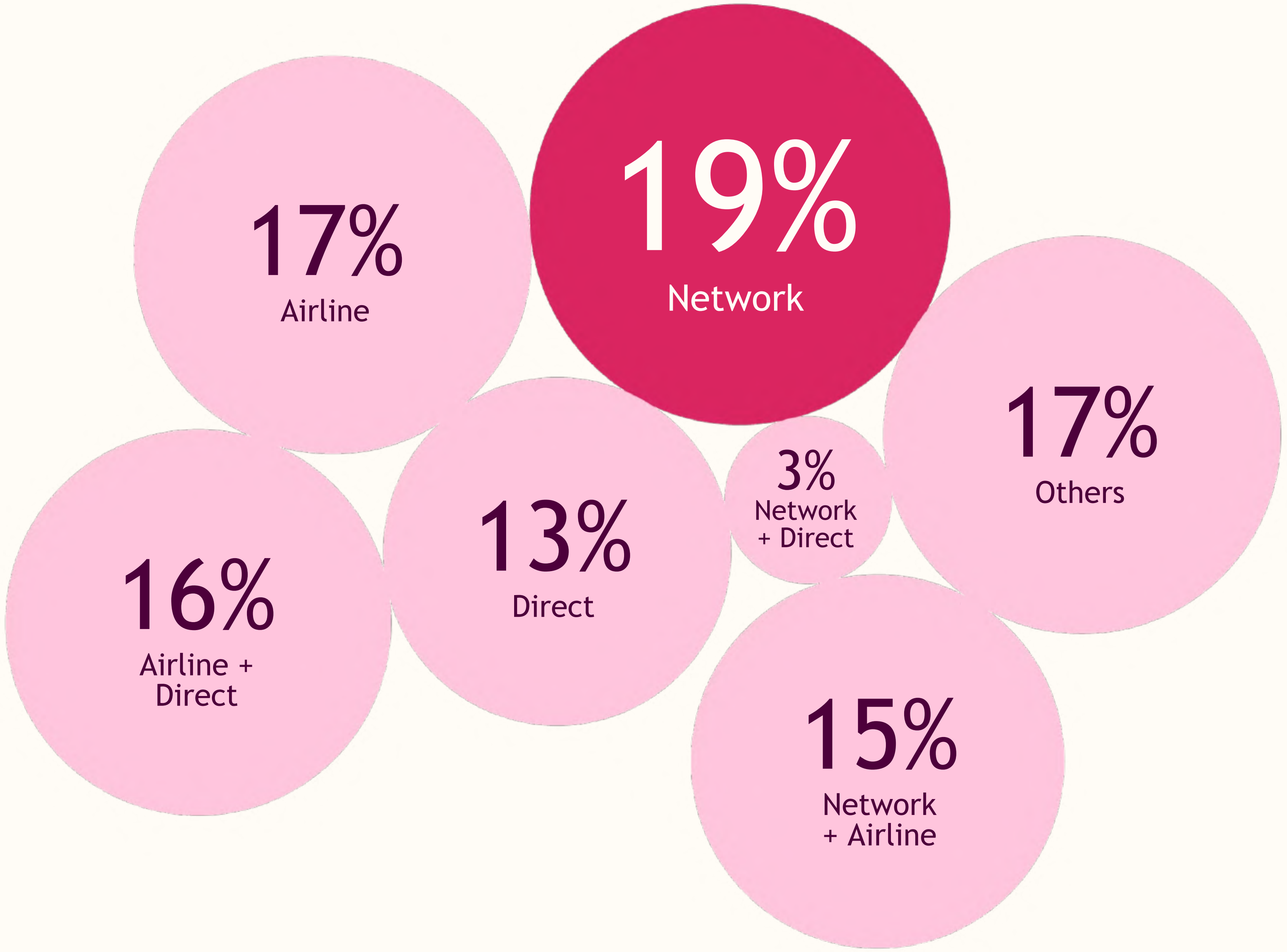


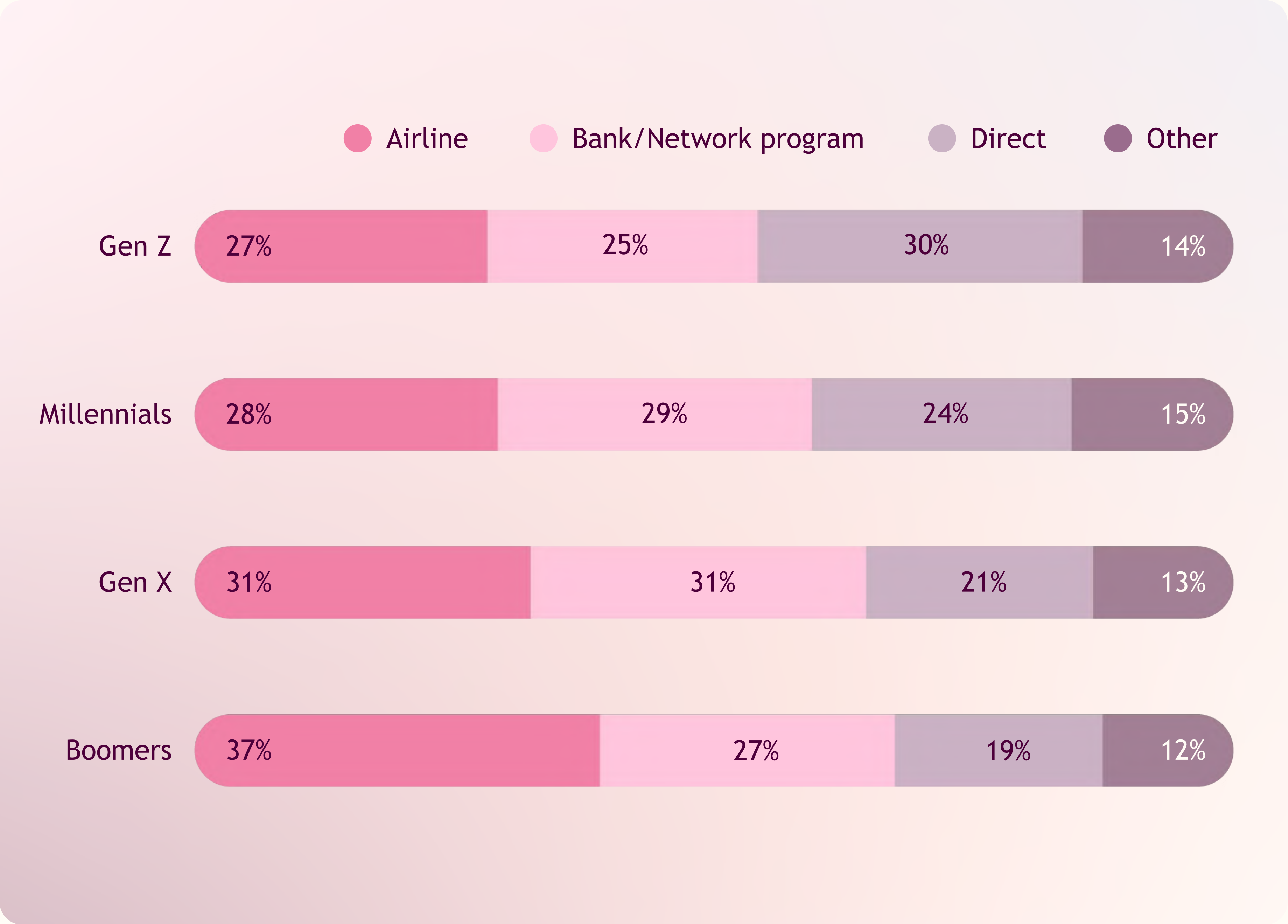
Guest Access Profile

Looking at the primary access method used by each regular traveler, network access (banks and network programs) (19%) continues to edge out airline access (class of travel and FFP status) (17%).

It should be noted that most travelers (51%) use mixed methods of access based on their travel circumstances. For example, that might mean using network access when traveling in economy class and airline when traveling front end,

Network+Direct is a small group (3%), suggesting network members may be less willing to pay when they need to or have access to other methods of entry.

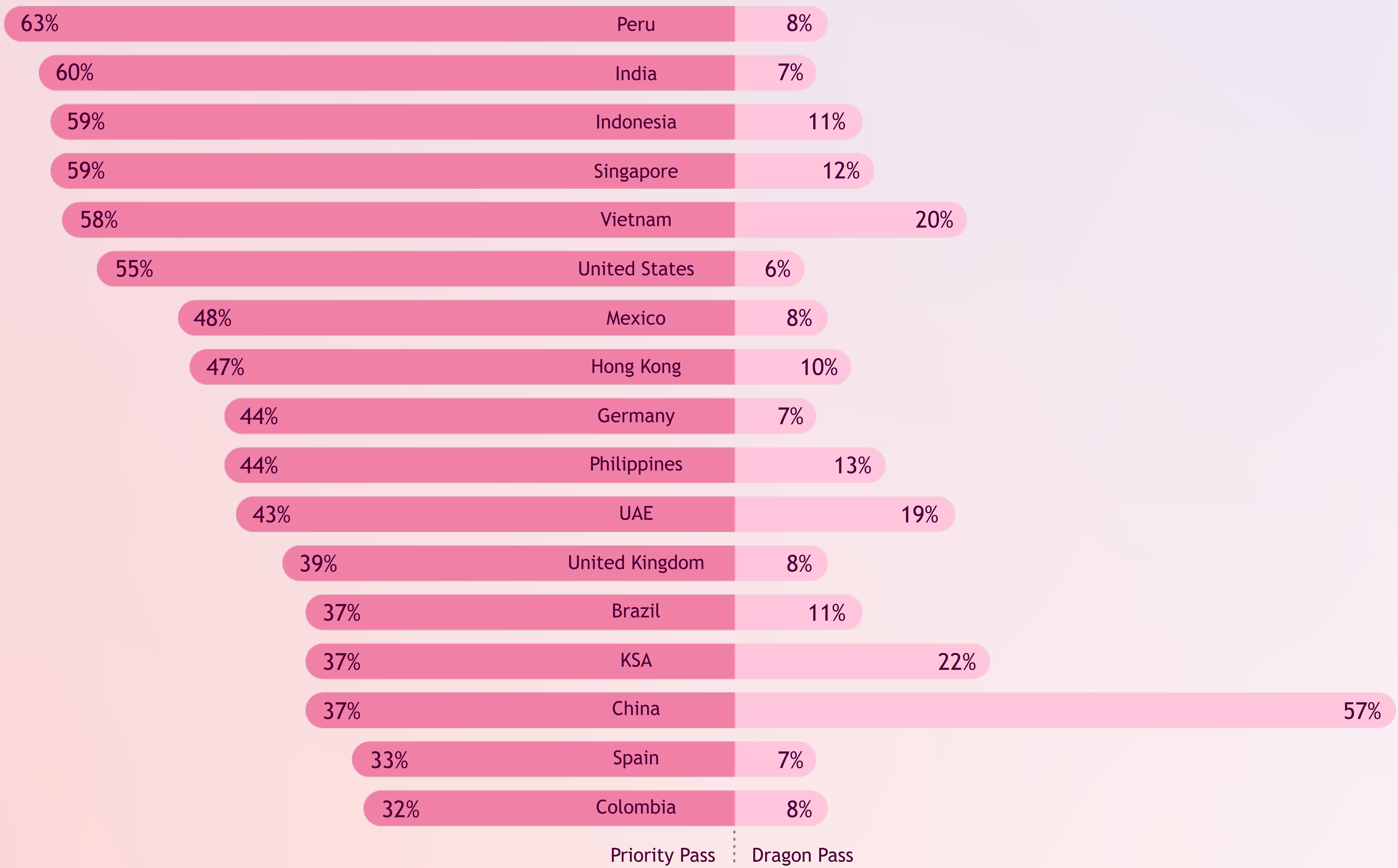




Older travelers are more likely to gain access-based airline class or FFP status, reflecting the equity that older travelers still hold in these airline programs.

Younger generations have a stronger propensity to pay directly for access - 30% for Gen Z - suggesting engagement and value propositions for this key emerging group should be considered by airports and operators.

Bank and network access however, is more constant across all generational segments.



Program membership

Globally, Priority Pass dominates, except in China where Dragonpass is stronger.

Overall, 43% of lounge users hold Priority Pass, 10% Dragonpass and 5% hold both.

58%

of lounge users are network program members.

Paying For Access

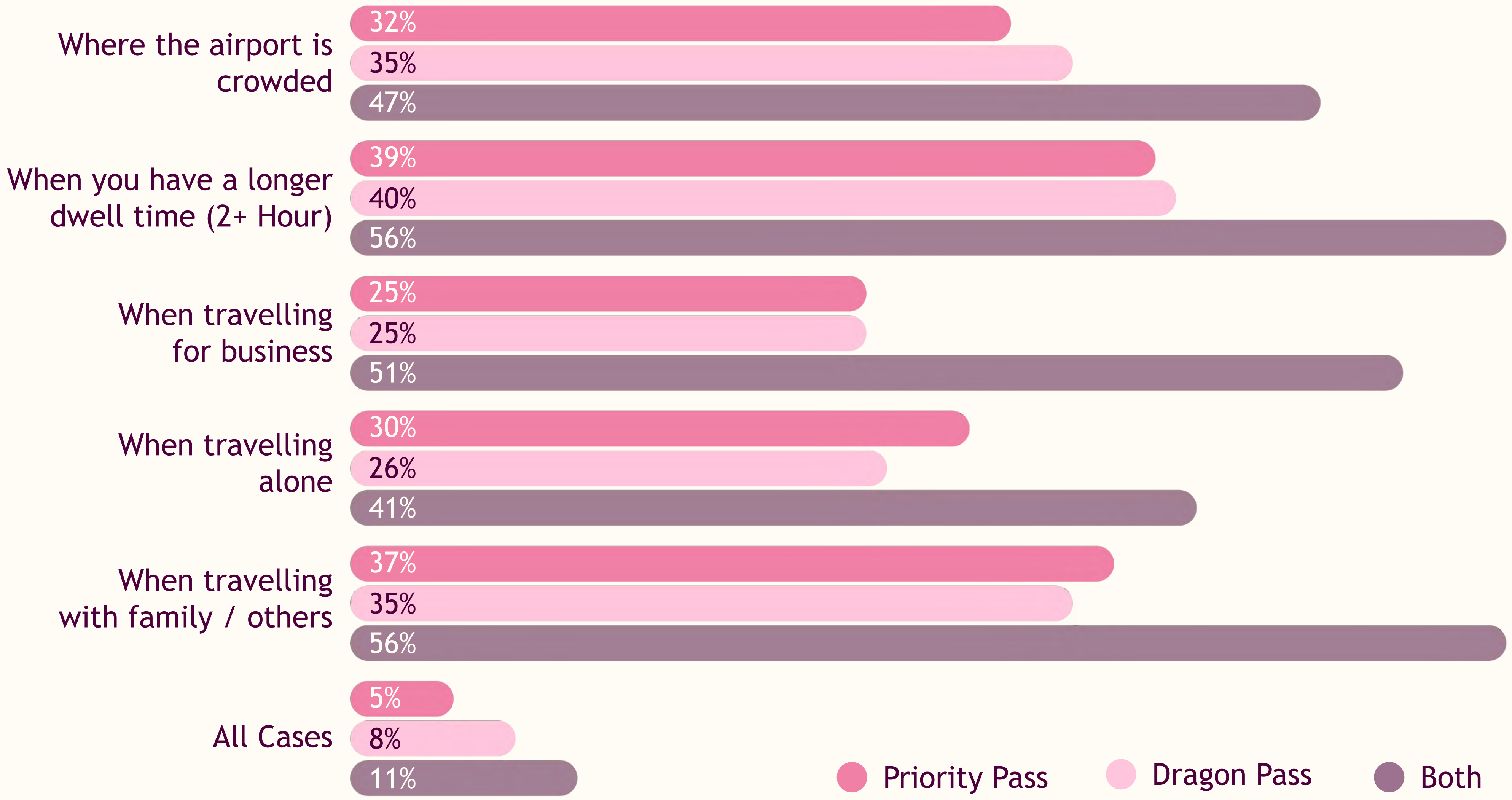
Program members often do not pay directly for access. They were asked under what circumstances they would be prepared to pay if they needed to.

Longer airport dwell time is the key driver of willingness to pay, with 41% of members saying they would consider paying.

Significantly, traveling with family / partners is the next most important driver, and seen as more important than when traveling for business, alone, or where the airport is crowded.

8% of members would pay under all circumstances. For holders of both memberships, clearly maintaining lounge access is of primary importance for them.

Chinese travelers' willingness to pay outperforms across all scenarios, followed by India and Vietnam.



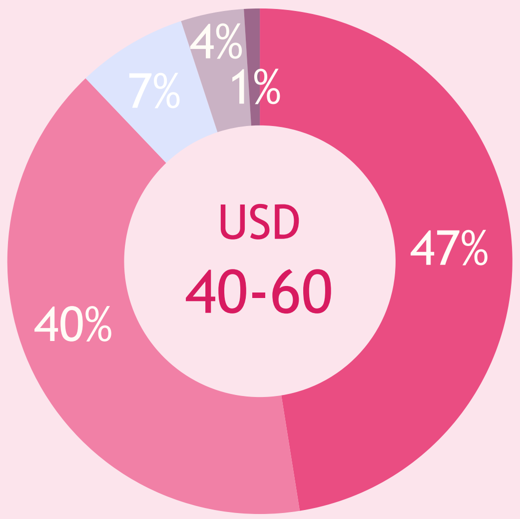
Paid Options

Program members were asked what package they would be most likely to pay for.

Standard lounge access proved the most popular package, but with strong support for both premium and express propositions.

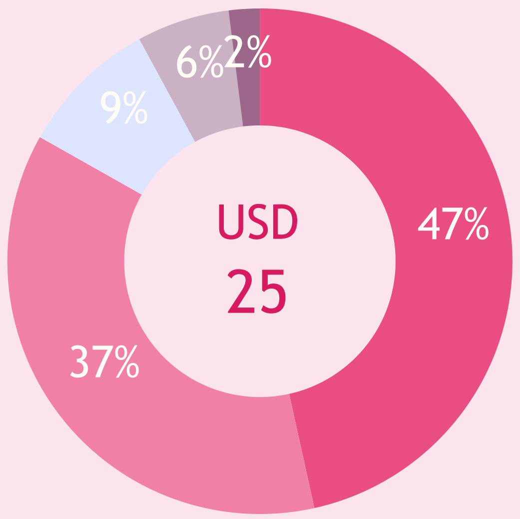
Premium coffee shop experiences also proved popular, whereas the traditional dining package was slightly less popular, perhaps reflecting the desire for multiplicity offered by lounges.

Definitely · Probably · I am not sure · Unlikely · Not at all



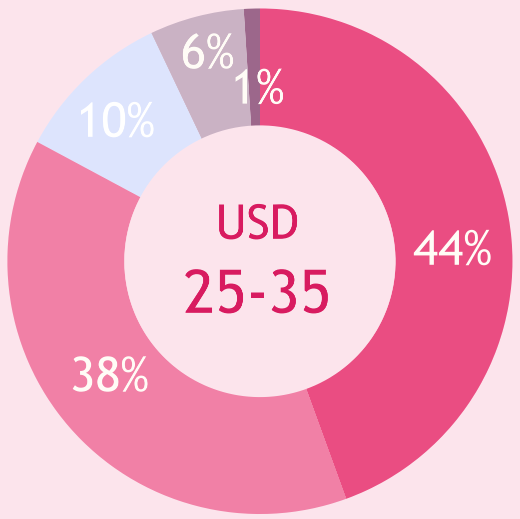
Standard Airport Lounge Access

- 2-3 hours access
- Extensive dining / buffet and beverage options
- Assorted seating options
- Amenities



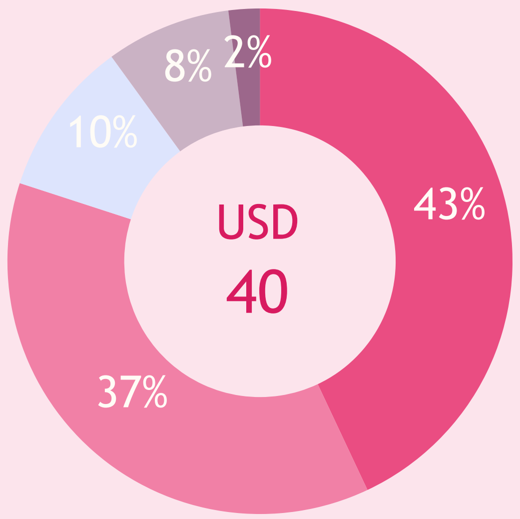
Premium Coffee Shop

- Reserved seating for up to 2 hours
- Access to charging and Wi-Fi
- Complementary coffee, tea and limited food items with table service



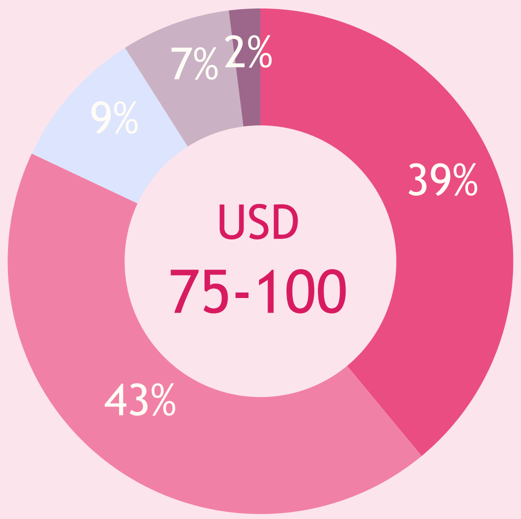
Express Airport Lounge

- Up to two hours access
- Limited food and beverage buffet
- Shared seating with other guests



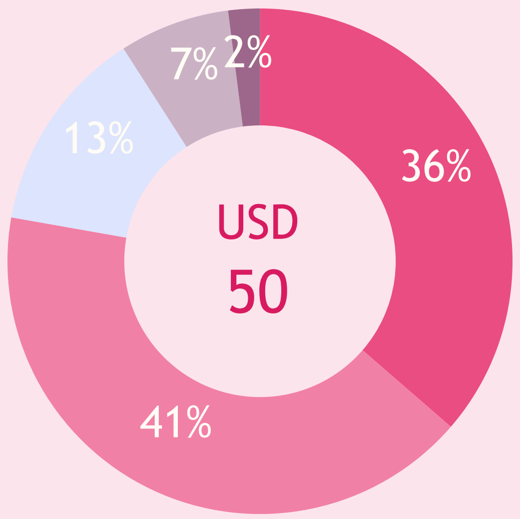
Fast Track Package

- Priority check in / baggage drop
- Security / Immigration fast track
- Golf cart service to gate (no lounge access included)



Premium Airport Lounge Access

- 2-3 hours access
- Premium dining / beverage and table service
- Reserved seating
- Premium amenities and services



Restaurant Dining Package

- Reserved or priority seating at your own table for up to 2 hours
- Fix menu or USD 60 spend credit for menu ordering

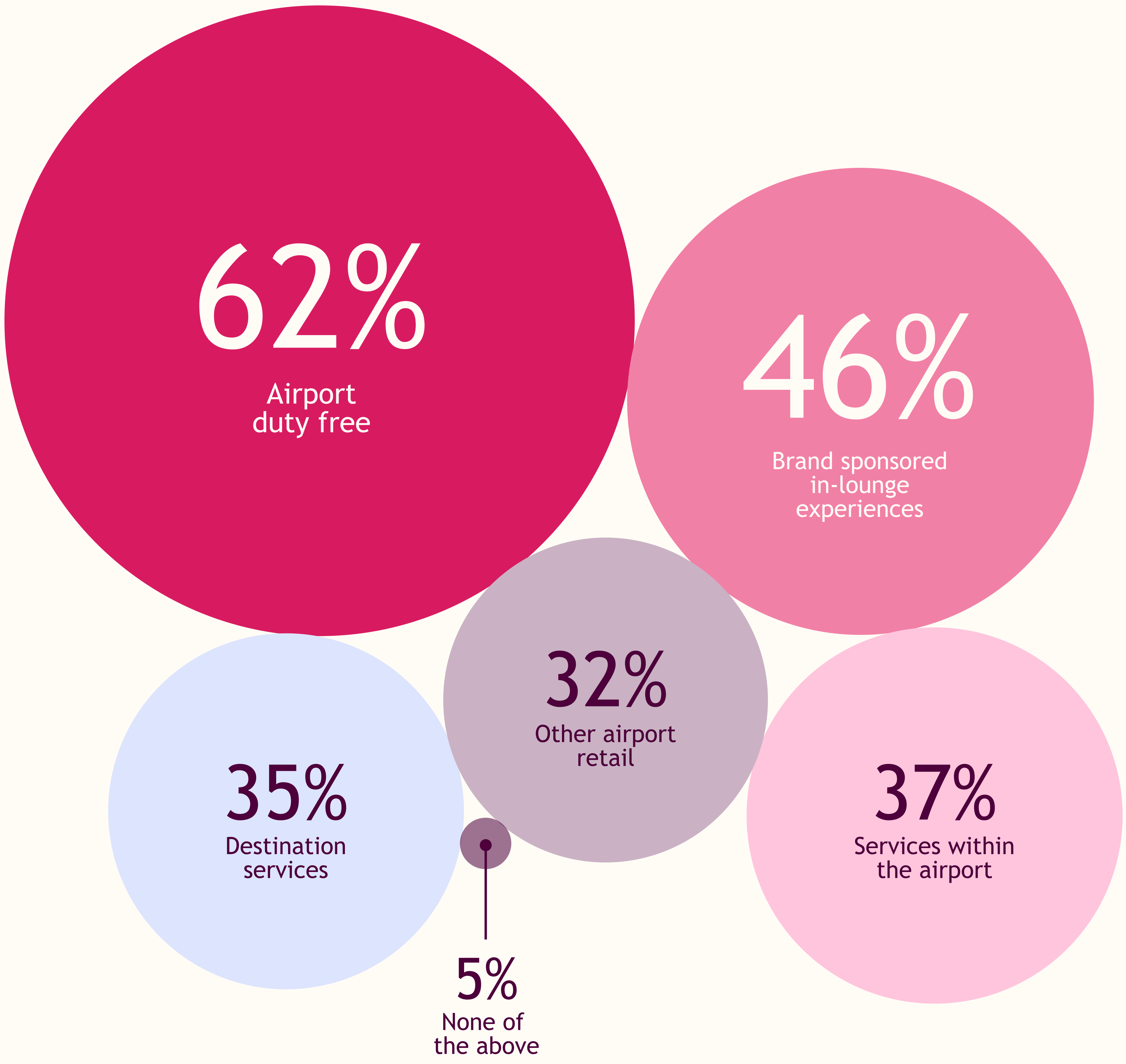
In-Lounge Commerce

Our regular travelers were asked what e-commerce services they would like to access from the lounge.

Airport duty free dominates interest, with potentially related and synergistic brand sponsored experiences coming in second. Within duty free and other services, interest from Millennials and Gen Z dominate.

Asian and Middle Eastern markets show strongest levels of interest, aligning to their wider spend performance.

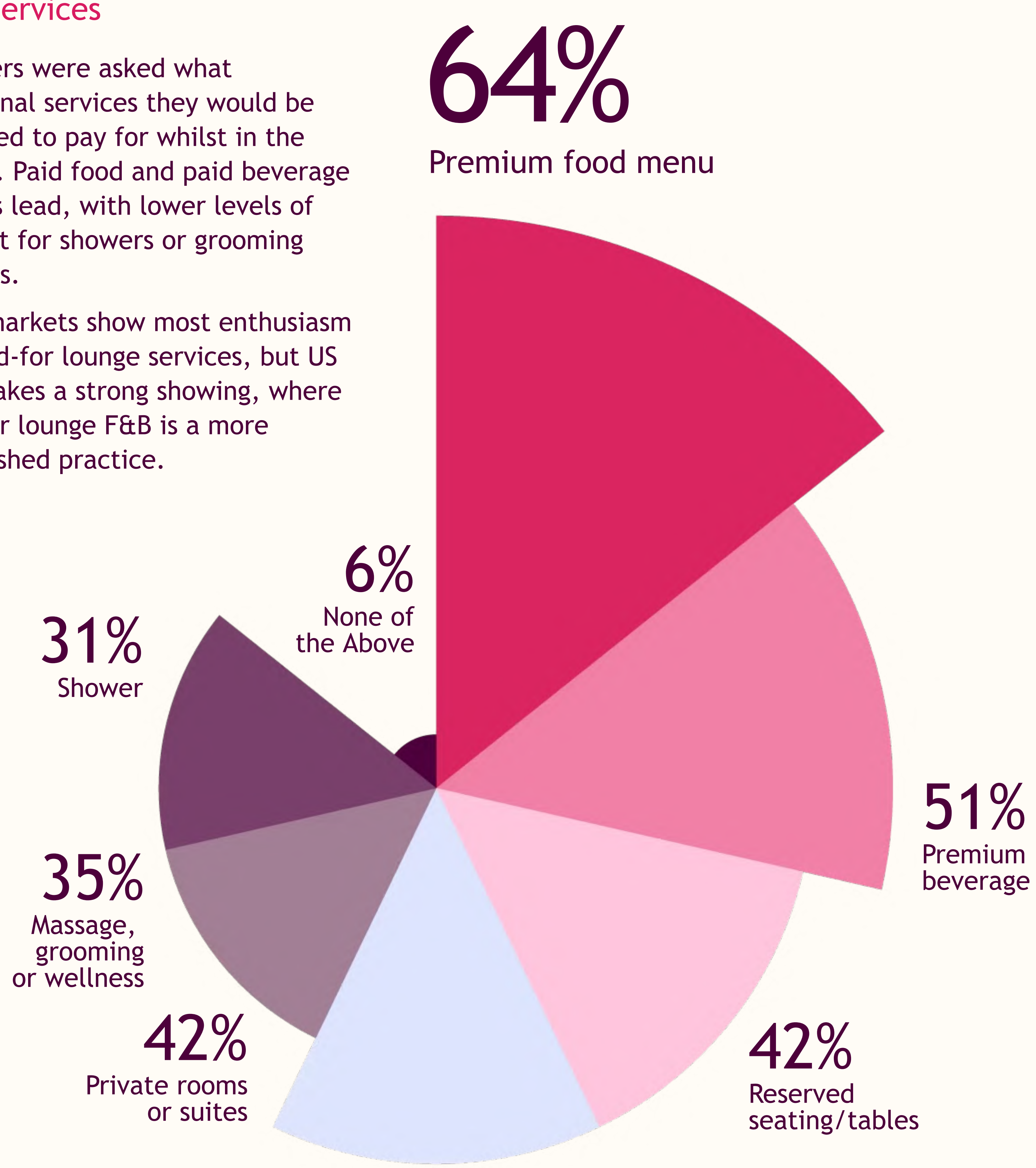
Duty free leads lounge e-commerce interest, driven largely by younger travelers.



Paid Services

Travelers were asked what additional services they would be prepared to pay for whilst in the lounge. Paid food and paid beverage options lead, with lower levels of interest for showers or grooming services.

APAC markets show most enthusiasm for paid-for lounge services, but US also makes a strong showing, where paid for lounge F&B is a more established practice.



Average in Countries

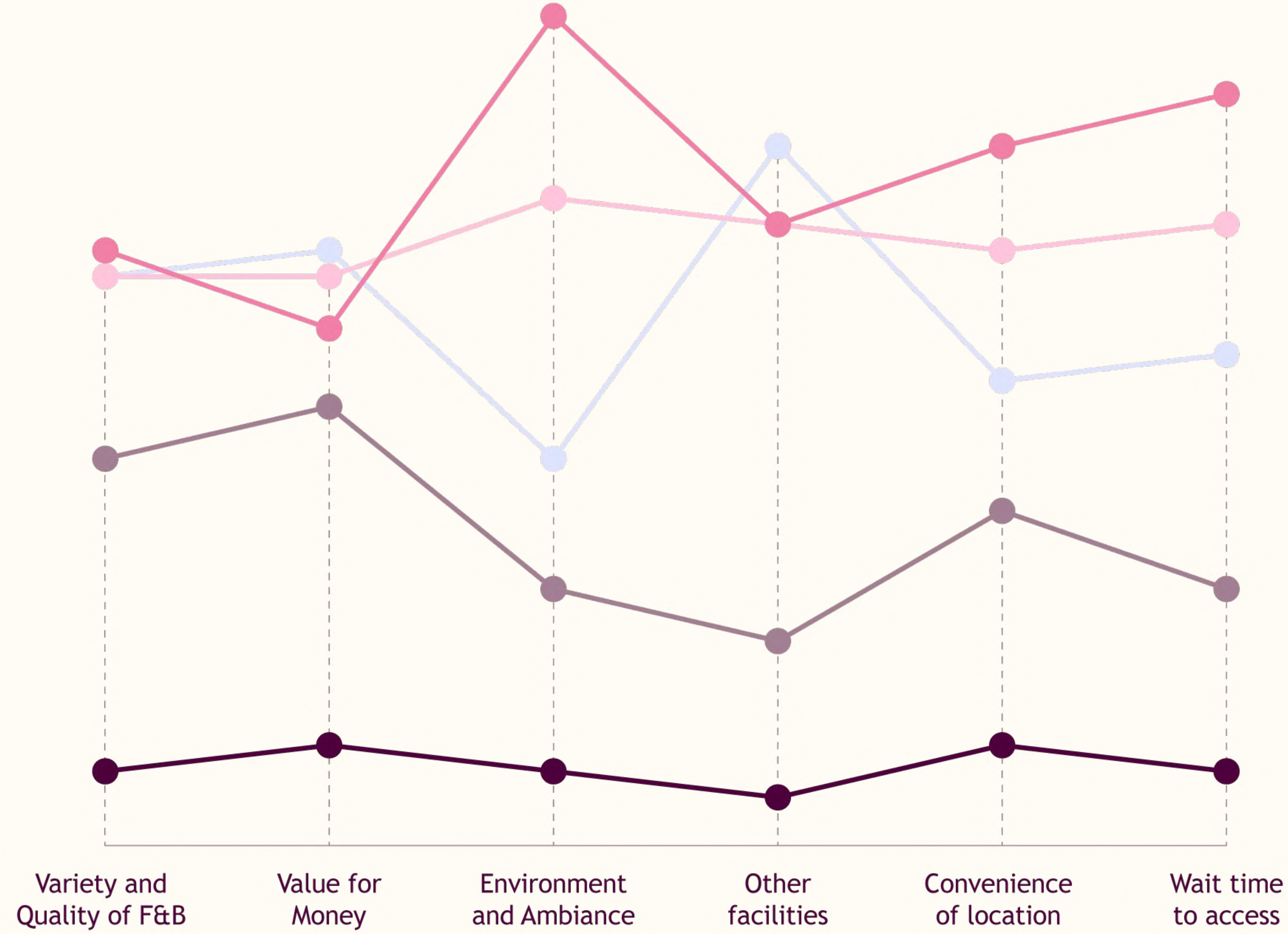
50%	Indonesia
50%	Vietnam
49%	India
47%	China
47%	United States
45%	Brazil
44%	Philippines
43%	Mexico
42%	Peru
41%	United Kingdom
40%	UAE
40%	KSA
39%	Singapore
39%	Colombia
37%	Spain
34%	Hong Kong
32%	Germany

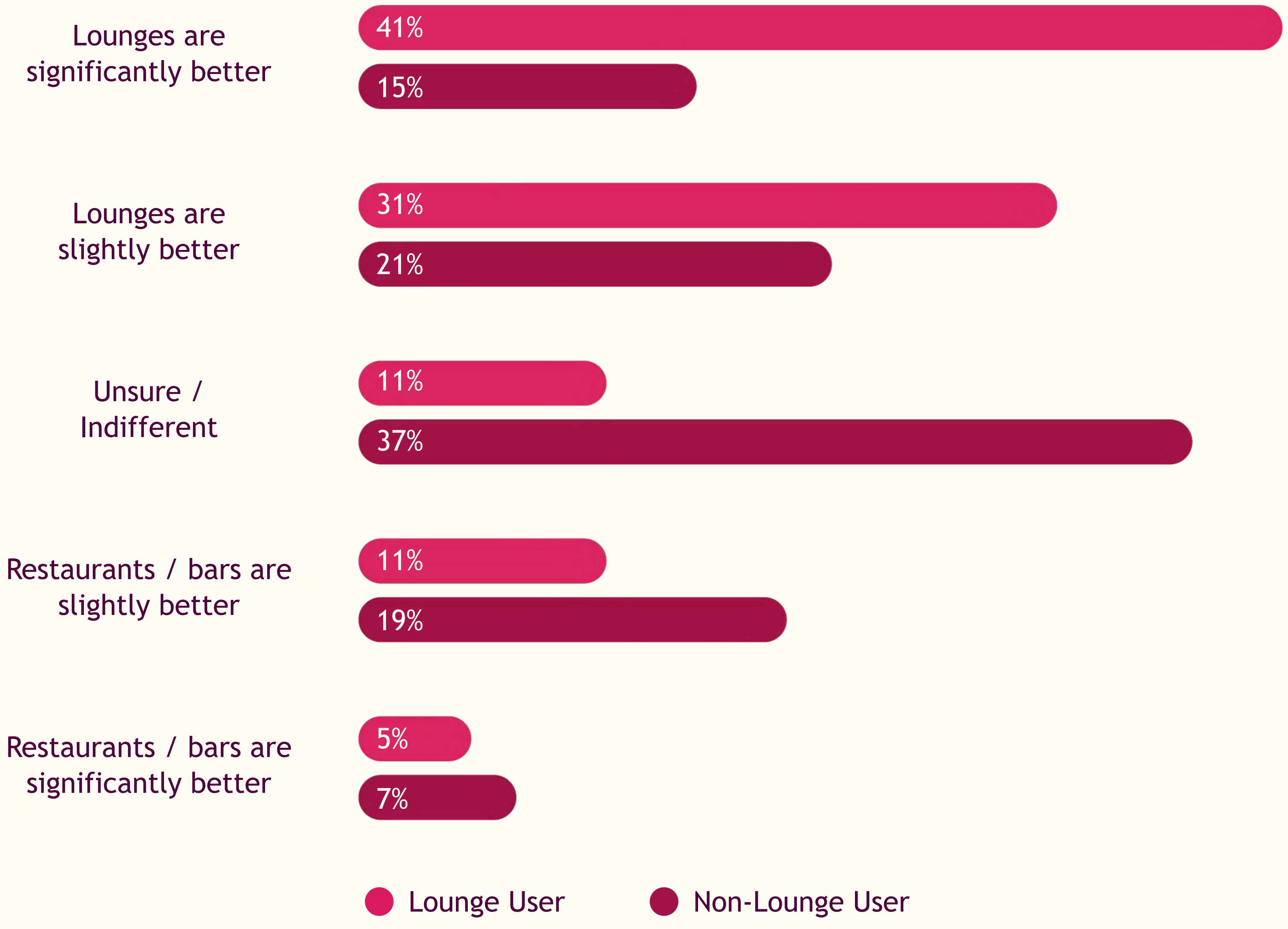
Comparing Lounges and Restaurants

When asked to compare lounges and airport restaurants, lounges are generally rated more highly across a range of attributes.

Environment and ambiance emerge as key strengths for lounges. While they continue to perform well, value for money is a relatively weaker area, reflecting the higher cost of entry for some guests.

Across all travelers, there is a perception that lounges offer a more premium experience. However, those without lounge experience tend to remain more neutral, with many indicating they are 'unsure' when making comparisons.

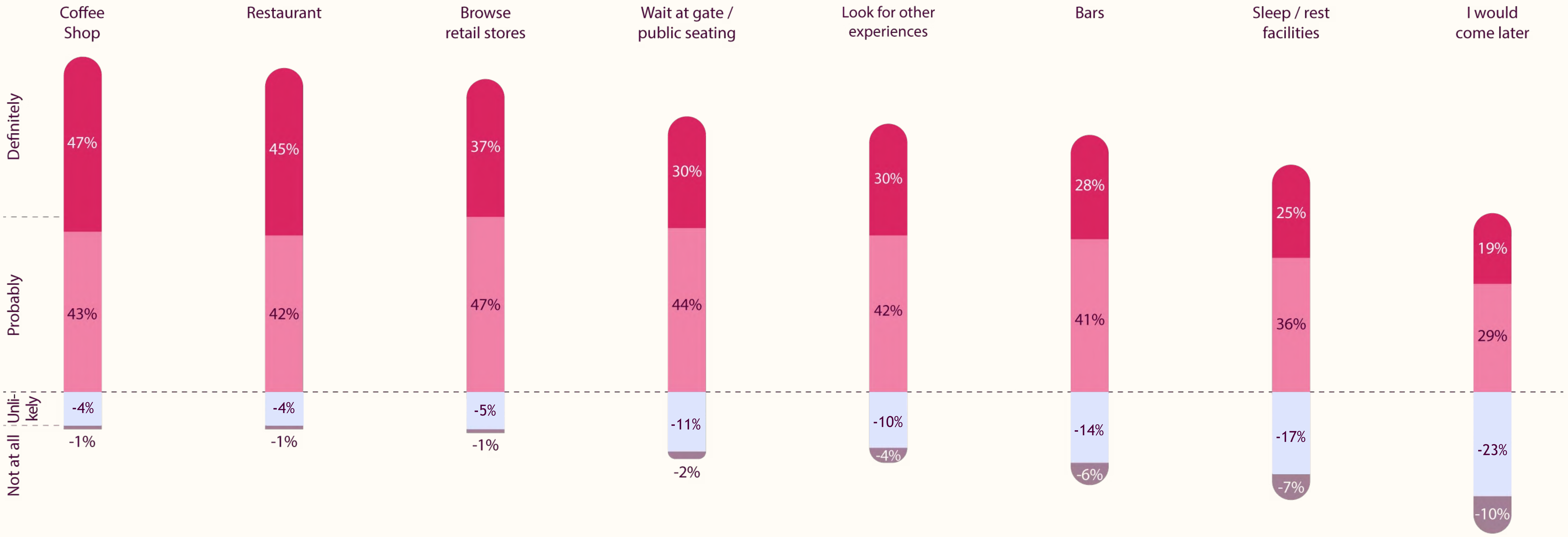


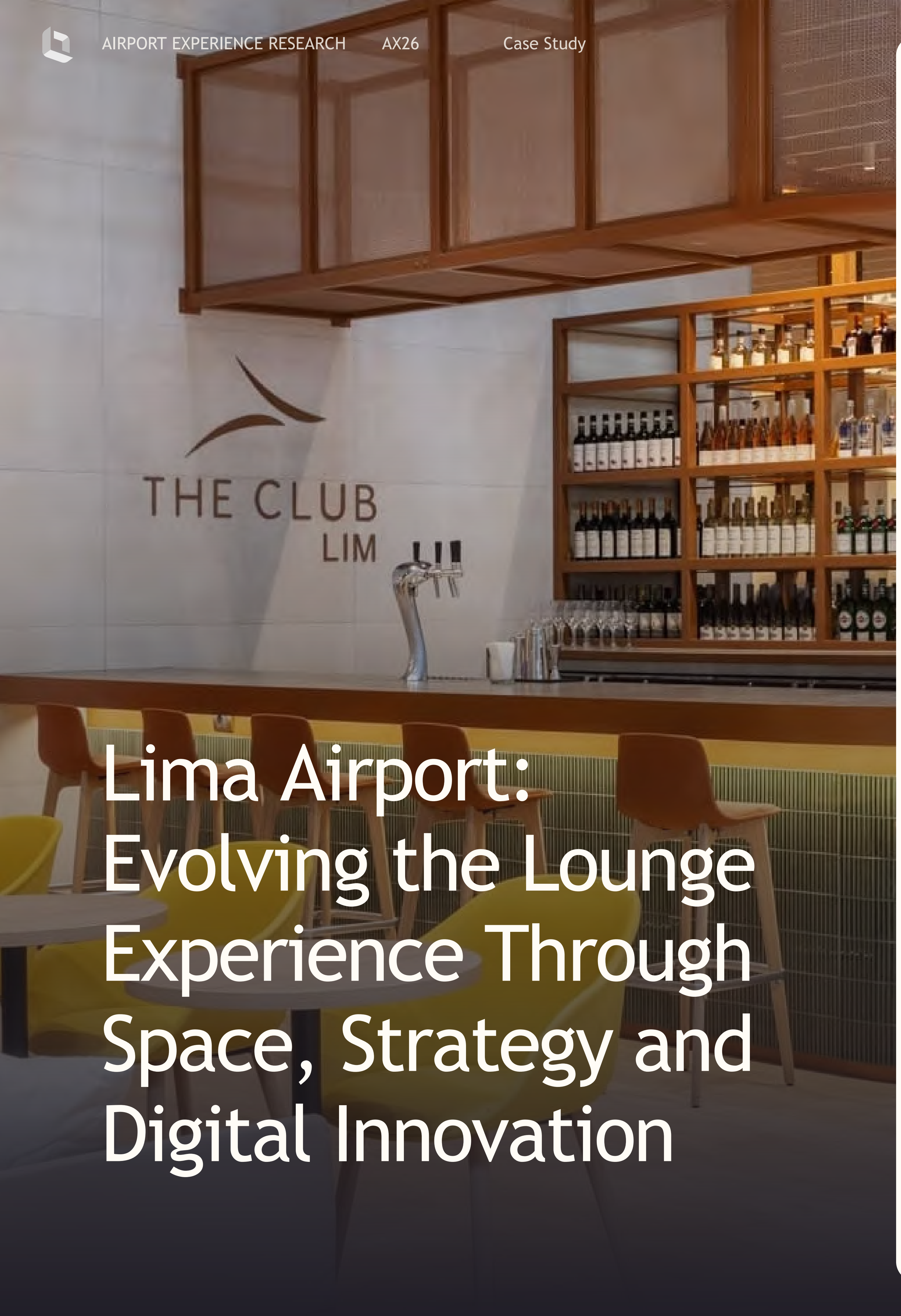


Lounge Alternatives

Where no lounge exists in an airport, coffee shops followed by restaurants are the most attractive fallback options for lounge users.

Coming to the airport later is not a very popular option, which creates the opportunity for increased spend at the airport.





Lima Airport: Evolving the Lounge Experience Through Space, Strategy and Digital Innovation

"The opening of the brand-new terminal at LIM in June 2025 gave us the opportunity to completely rethink our space programming. Recognizing the growing importance of lounges as a premium experience, a driver of concession revenues, and an attractive proposition for international airlines, we decided to more than double the space dedicated to lounges in the new terminal compared with the previous one.

This strategy has delivered strong results. We successfully allocated all lounge space and partnered with both Airport Dimensions and LATAM airlines, to develop a customer segmentation and access strategy that supports differentiated concepts and maximizes the value of our lounge portfolio.

At the same time, we prioritized prime real estate for duty-free retail and food and beverage. Positioning lounges on the mezzanine level allows them to remain easily accessible while preserving high-visibility areas for commercial activity. This balanced approach has helped us optimize performance across retail, food and beverage, and lounges.

We are also seeing growing interest in sponsored lounges, and with LIM continuing to strengthen its position as a major hub in Latin America, we believe there is strong potential for partners to develop branded experiences that attract and retain high-value customers.

Looking ahead, we will continue to evolve the airport experience. With support from Airport Dimensions, through digital innovation, we see significant potential to enable guests to purchase selected retail and duty-free items for collection or lounge delivery, while also expanding toward a broader end-to-end digital ecosystem that enhances visibility, e-commerce, and customer engagement across the airport journey. In turn, this can drive greater awareness and revenue across the LIM experience.

This also includes more targeted offers ahead of travel, an area where airports have traditionally underutilized the opportunity. Future developments may also include premium fast-track security, further enhancing the passenger experience while creating additional non-aeronautical revenue opportunities.

Good news for travelers passing through Lima, and we look forward to welcoming them to experience this transformation firsthand."

Norbert Onkelbach
Chief Commercial Officer, Lima Airport

Conclusions

01 **Expanding lounge capacity** in high-growth regions will be key, particularly in terminals where demand exceeds current capacity, alongside introducing multi-tier lounge concepts to serve diverse segments and reduce overcrowding.

02 Work with operators to design access strategies that **support network and airline models** and recognizing that most users are mixed model users, ensuing that lounge capacity is fully utilized throughout the day, to meet growing demand.

03 **Consider the role of 'express lounge" or 'café lounge' concepts** where travelers report strong interest and aspects of the lounge experience can be replicated. Small-footprint spaces near busy gates are a good match for this, augmented by and paid upgrades (quiet zone, showers, fast-track services).

04 Work with operators and concessions to activate in-**lounge e-commerce and duty free integration**, and complement these with brand pop-up experiences and product trials.

Airport Commerce and Digital Services

Findings

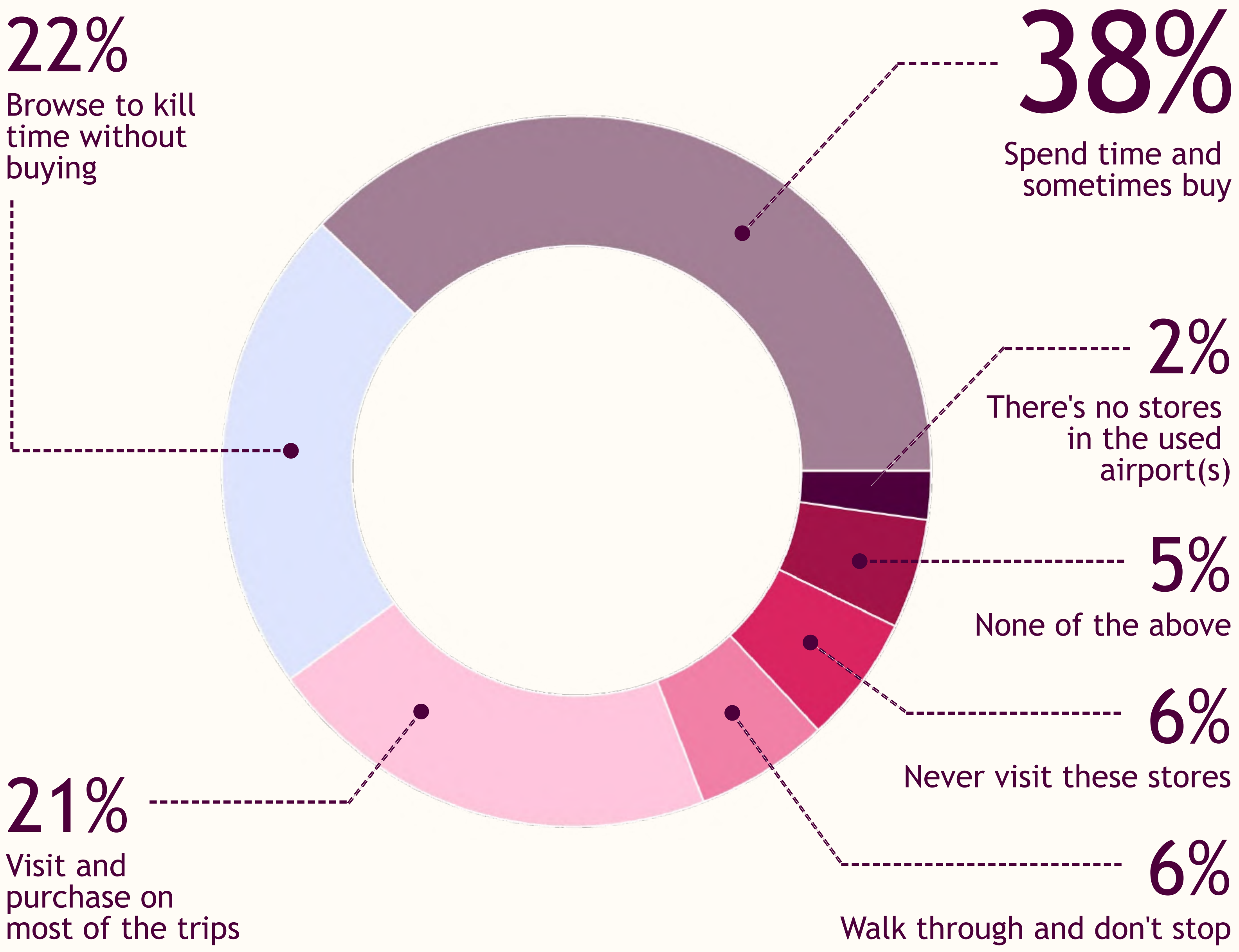
Duty free has rebounded from pandemic lows, but remains underleveraged, as strong regional demand has yet to fully translate into purchase behavior. Airports can boost relevance through collaboration, smarter engagement, tailored promotions and digital tools that drive spend, especially across emerging markets where price sensitivity, offer-driven behavior and digital openness present the biggest growth opportunity.

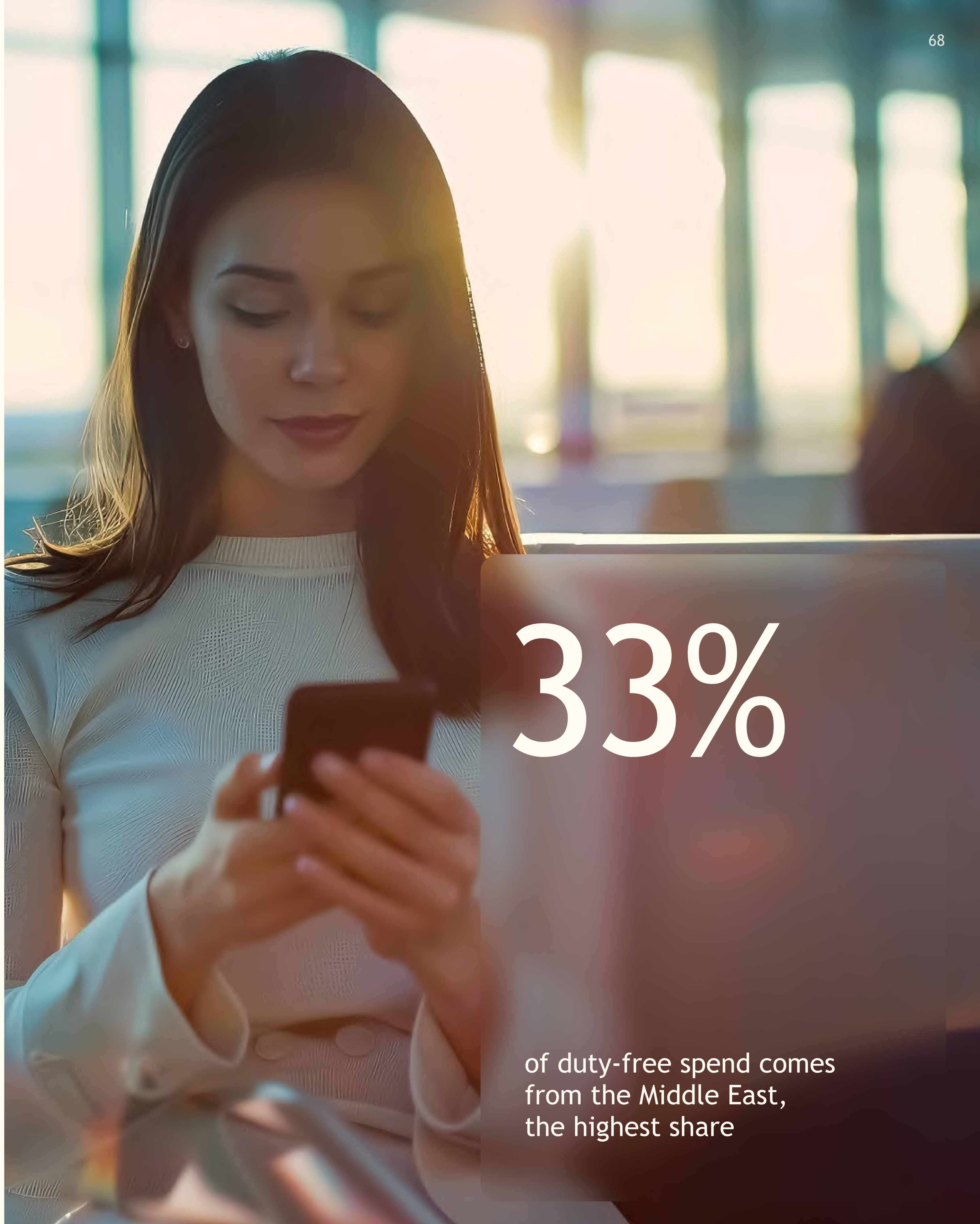
Duty Free Resilience

Duty free is back and proving resilient. One fifth (21%) of our regular travelers regularly buy from duty free stores and 38% sometimes buy. A worrying 34% say they essentially never buy.

Making duty more relevant and attractive for the combined 72% of reluctant shoppers is key for retailers and airports. This requires the right combination of promotions and engagement.

Middle East (33% buy regularly) and India (29%) dominate duty free spending markets, with Hong Kong (33%) and Singaporean and German travelers (both 30%) standing out as users of duty free to kill time but not to buy.

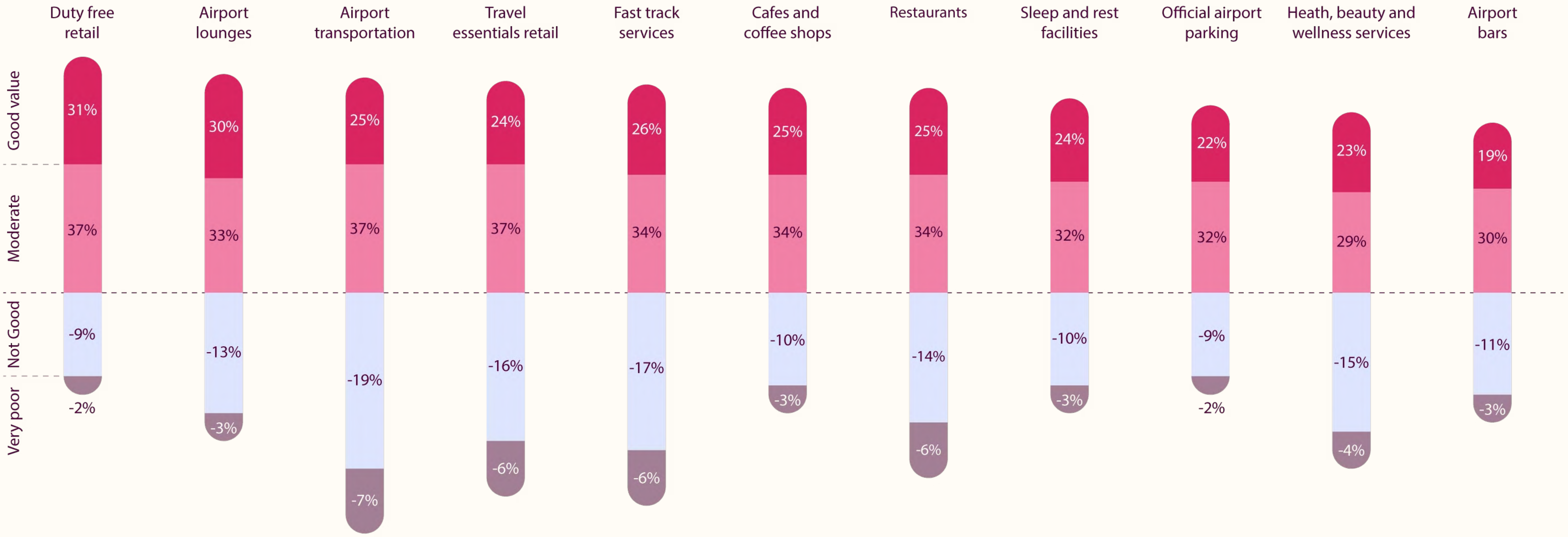




Value For Money

Whilst some concerns do exist, globally there is a consensus that **airports offer reasonable value, with duty free and lounges leading** the way. Food and Beverage options perform slightly less well.

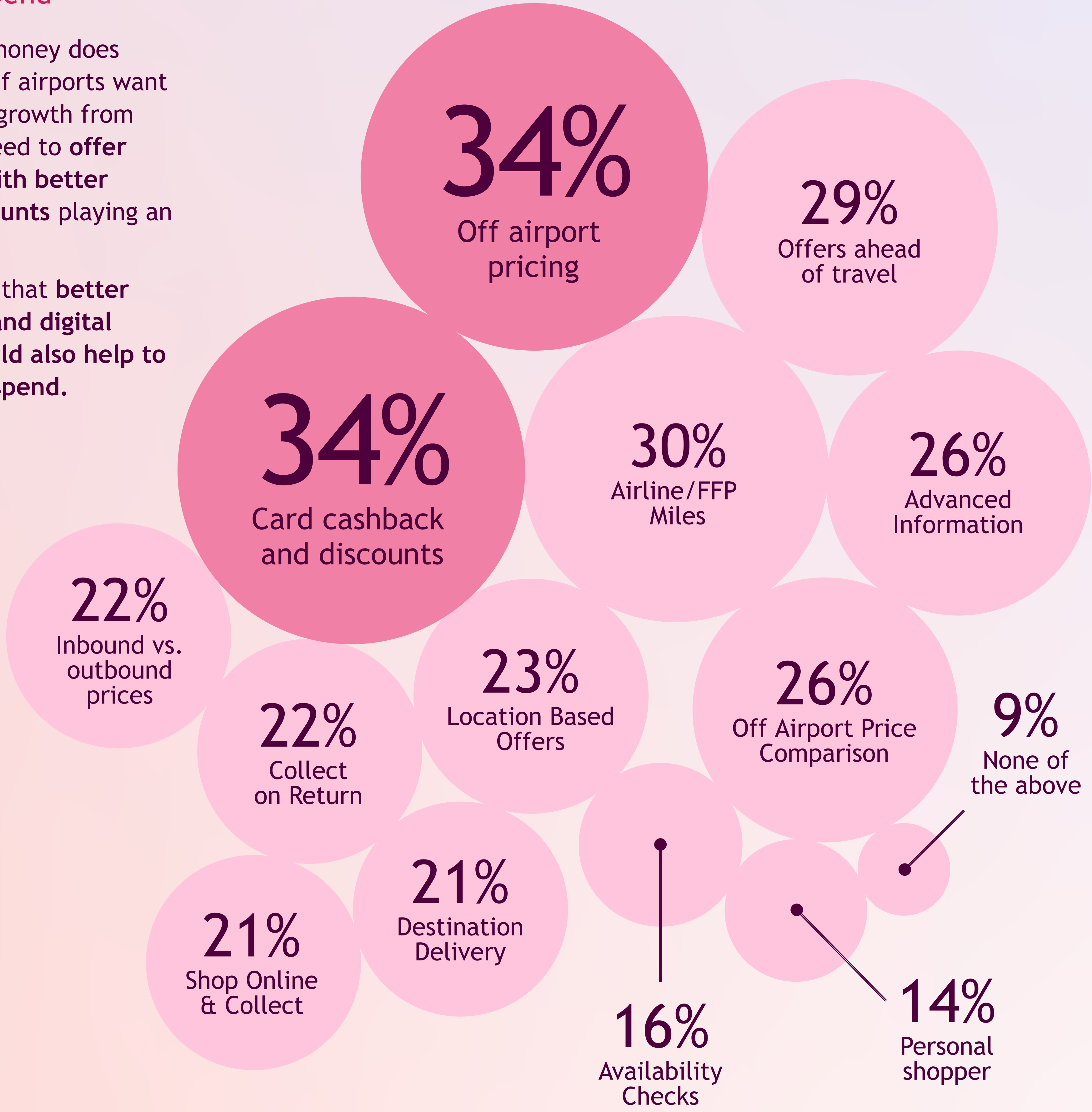
Vietnam and the Middle East stand out as offering the best perceived value, followed by China. Germany, Spain and Hong Kong stand out for particularly poor perceived value, with UK not far behind.

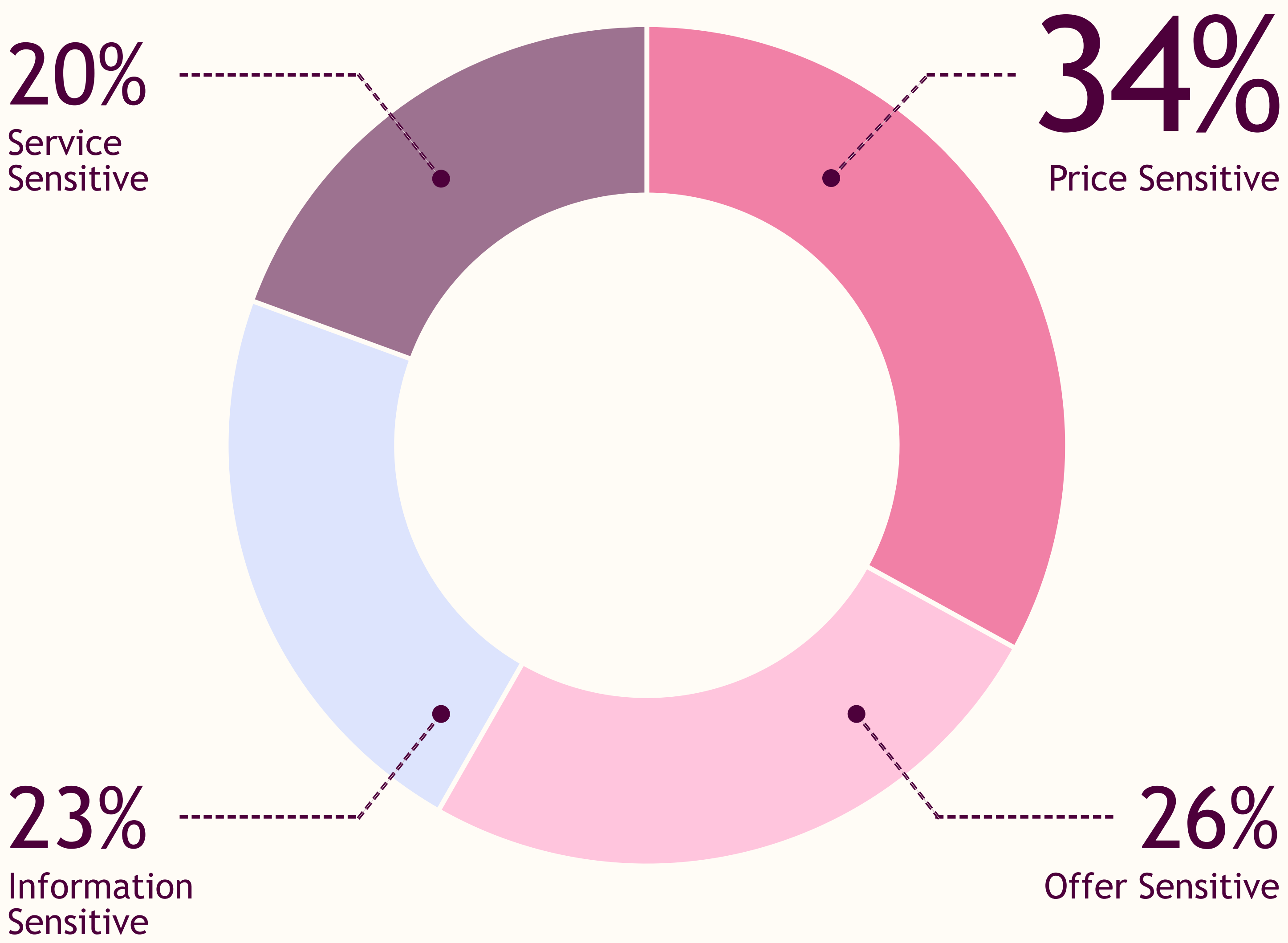


Driving New Spend

Whilst value for money does reasonably well, if airports want to drive revenue growth from travelers, they need to **offer greater value, with better pricing and discounts** playing an important role.

Travelers suggest that **better communication and digital engagement would also help to drive increased spend.**





Price as a Motivator

Classifying travelers by their broader spend motivator, **price sensitivity is the most important driver**. 26% of travelers are offer-sensitive, where promotions can motivate increased spend.

Understanding the strongest motivator for each segment and targeting this is key to non-dilutionary revenue growth.

Philippines, India and Indonesia are the most price sensitive when it comes to driving new spend. Vietnamese travelers are motivated by offers, as is Mexico's traveler. Germany stands out as a market where motivation to spend is low across all categories.

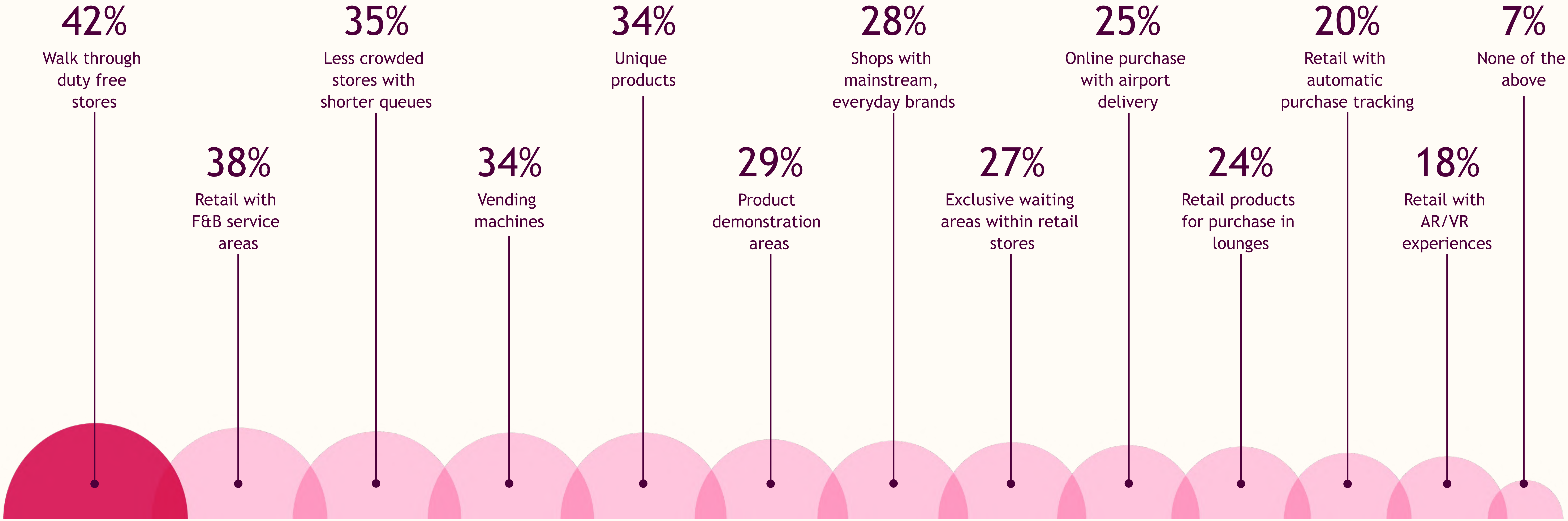
New Retail Experiences

Walk through duty free remains a popular new experience for travelers; globally, 42% of regular travelers would likely use this, although that dramatically drops to 15% for UK-based travelers.

There is growing interest in hybrid retail, combining F&B (38%) and interest in vending machines (34%).

Automated stores (20%) and virtual reality (18%) were less popular, suggesting travelers may not be ready for this sort of experience.

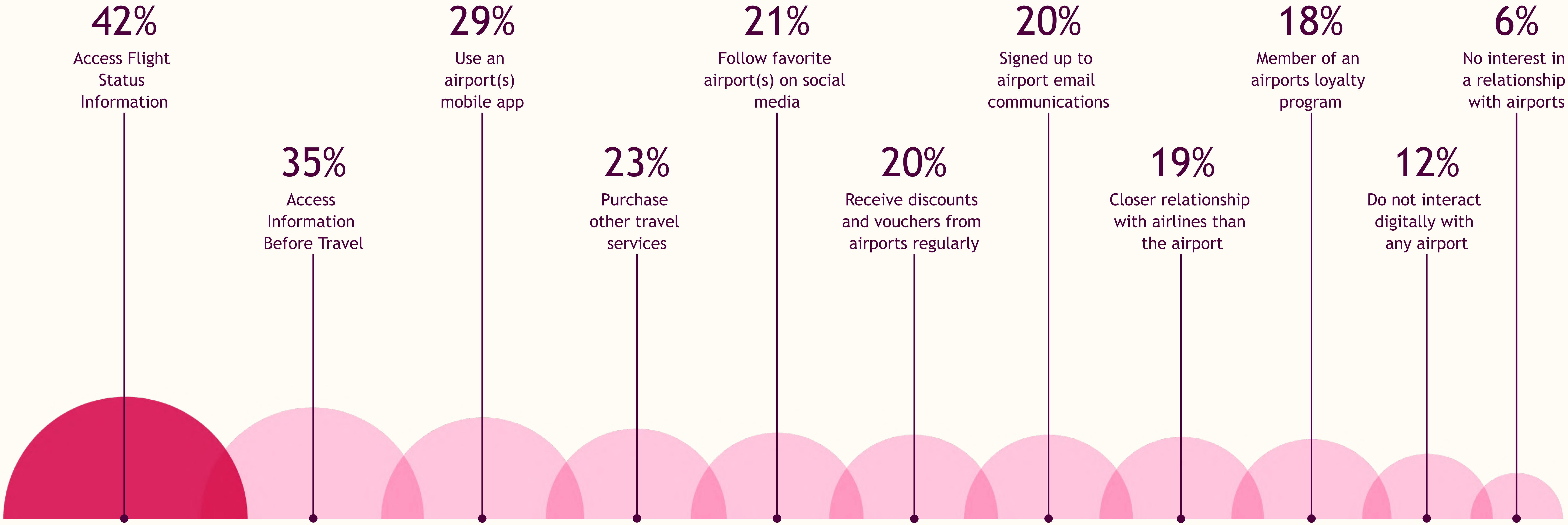
Airports should consider how new retail experiences can combine with broader relationship drivers to support increased spending across the journey.



Digital Services

Access to information is the top motivator to use airport digital and relationship services. 29% of regular travelers say they use an airport app and 1 in 5 receive promotional emails from their airport.

12% of travelers have no digital interaction with the airport, although encouragingly only 6% say they have no interest in any sort of relationship.



Digital Engagement Opportunity

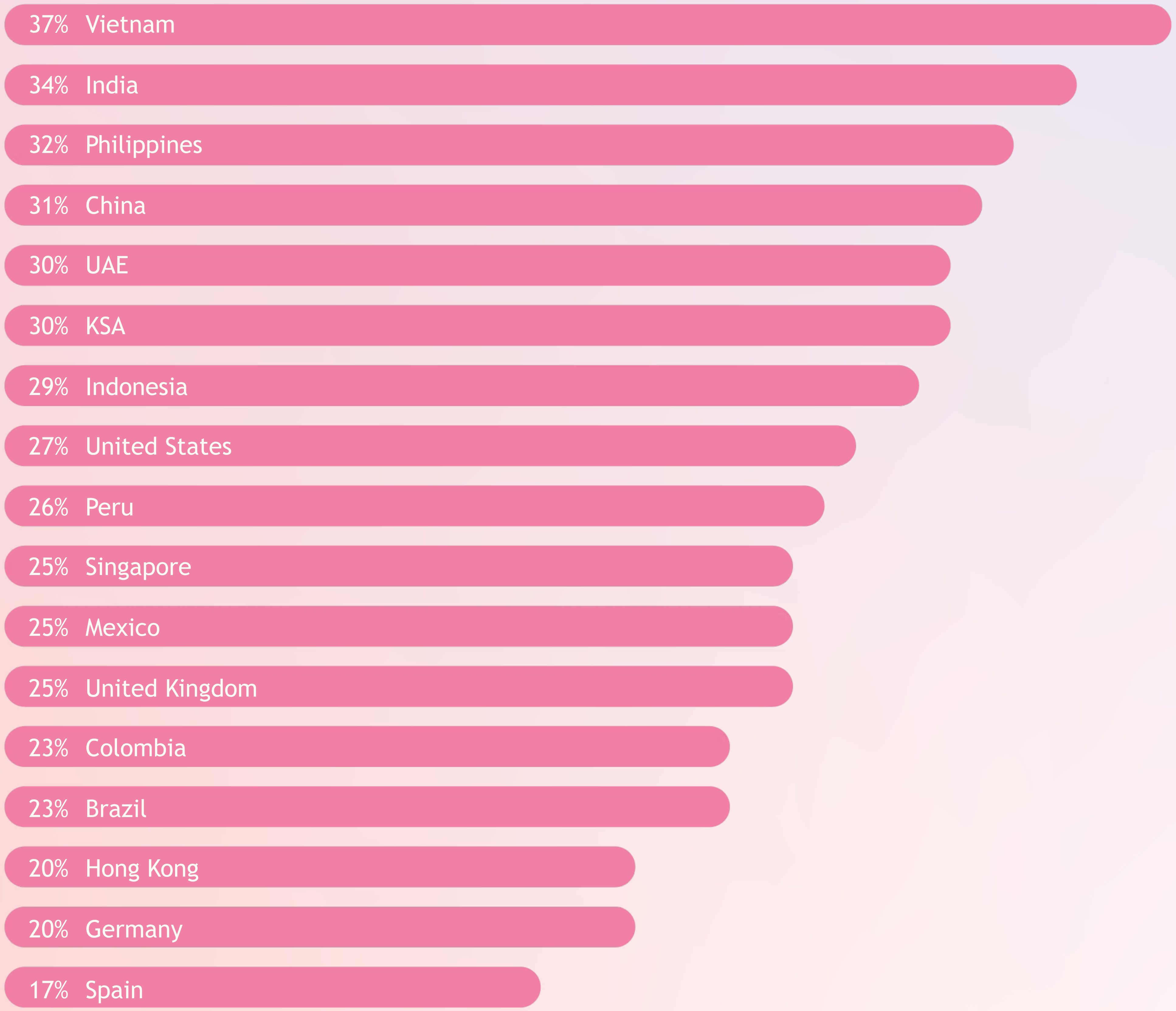
On average **27% of travelers are engaged across digital services** with Vietnam (37%), India (34%) and Philippines (32%) travelers seeing the most enthusiastic users. They significantly outperform Spain (17%), Germany (20%) and Hong Kong (20%).

The average for Affluent Leisure Travelers is 36%, suggesting they are significantly more digitally engaged than other travelers.

As acceptance of digital tools grows, ensuring they are deployed at the right points in the journey will be key to maximizing benefit for both travelers and airports.

Digital engagement sits at 27% overall, rising to 36% among Affluent Leisure Travelers, making them the most digitally engaged segment.

Digital Interaction per Country



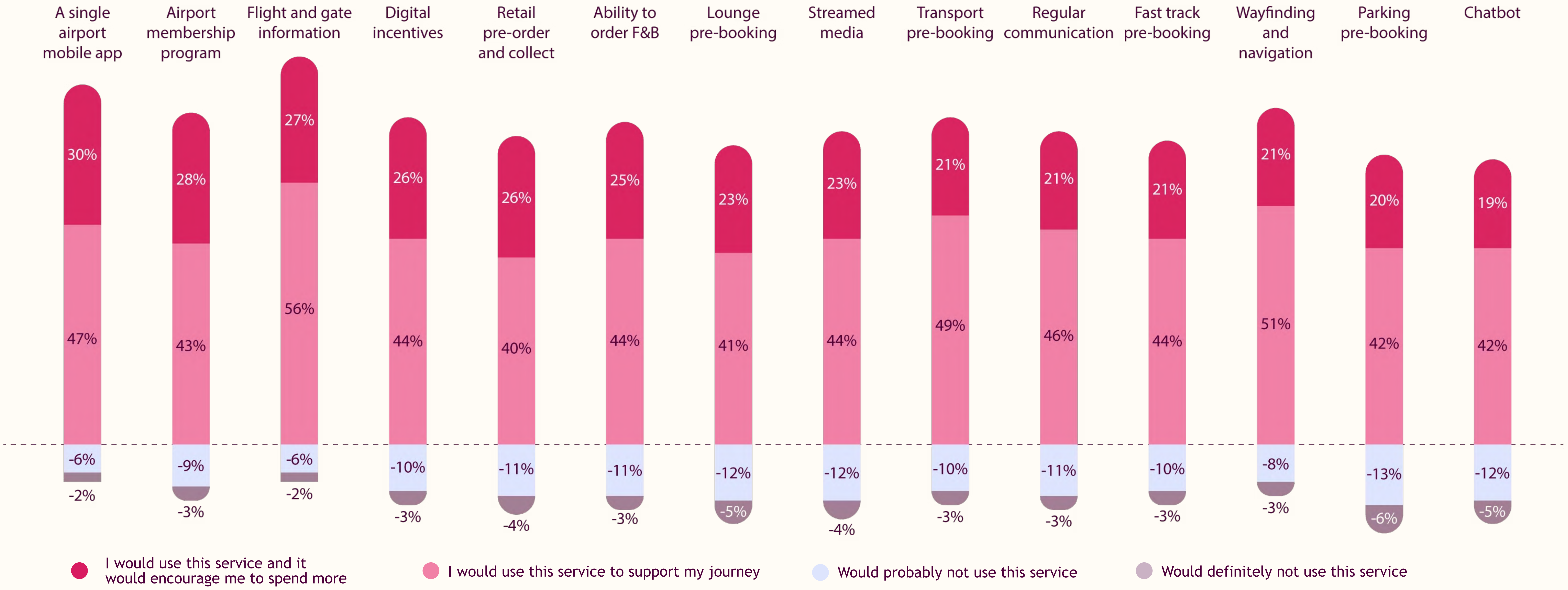
Supporting The Journey

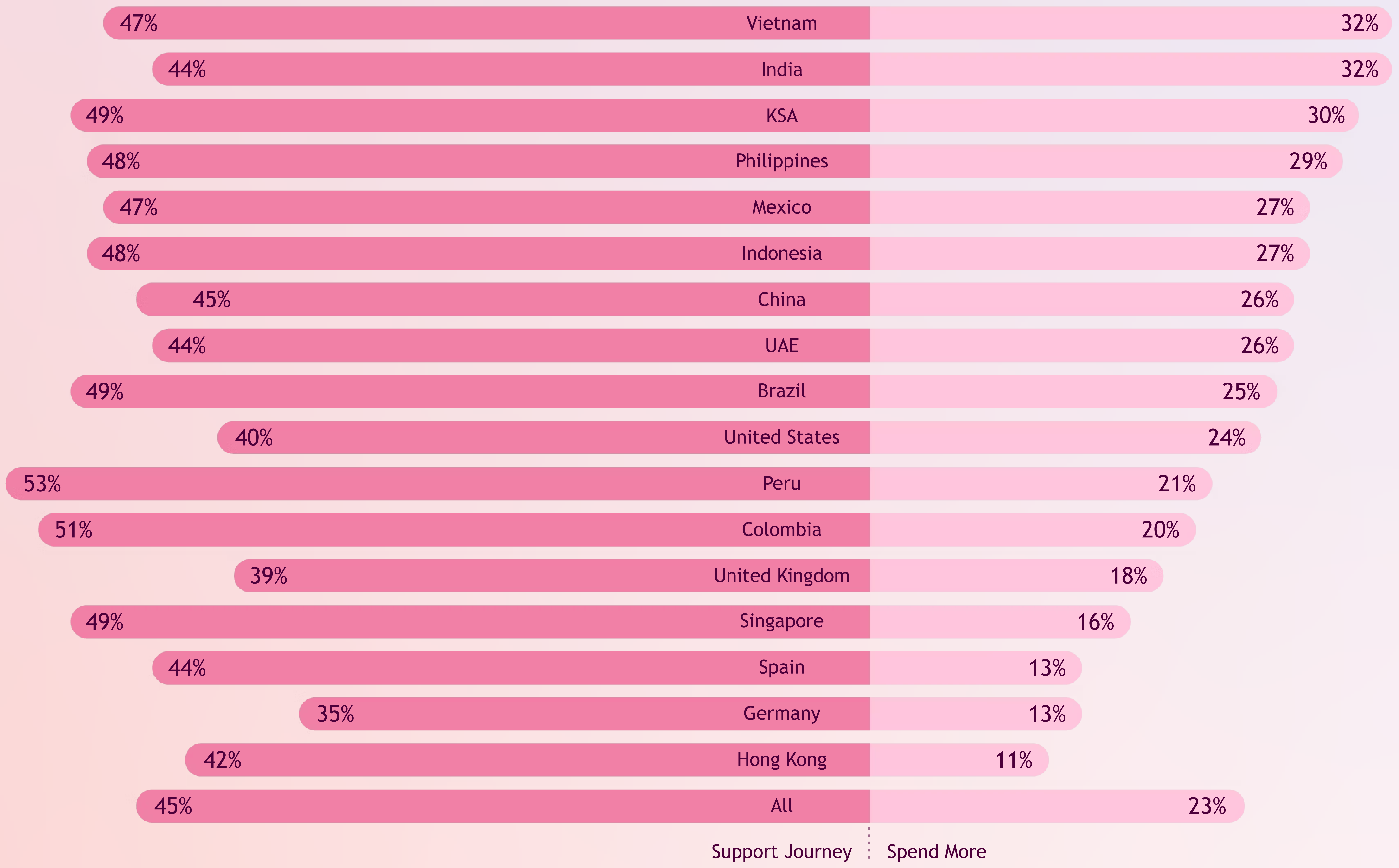
Travelers are clear that these tools both support a better journey and encourage them to spend more. **Travelers say a single app (30%) and loyalty tools (28%) are likely the greatest driver of increased spend at airports,** with other services showing complementary positive spend support.

Even without a revenue upside, travelers see significant value in digital services to improve their airport experience, and for the airport, there are clear operational benefits.

Access to information is a gateway service for driving wider airport engagement, closely followed by a single app.

There is clear need and opportunity for airports to enhance their digital and relationship proposition.





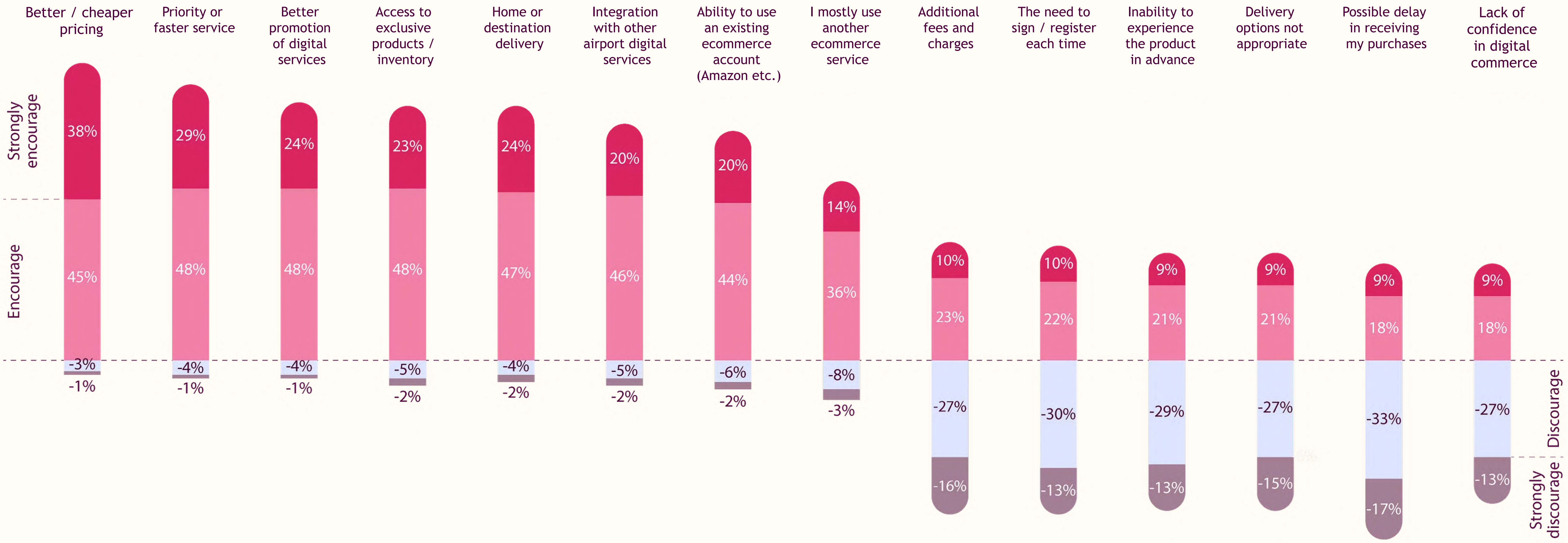
Looking at perceived value of all services, there is **strong universal acceptance of the value of digital tools** for increasing spend and supporting the journey.

Digital first, emerging markets show strongest support, with European markets, Hong Kong and Singapore are slightly less enthusiastic.

Encouraging E-commerce

It is a very simple step from online tools to online sales, but **we need to ensure we provide the right motivation for travelers.** Better pricing (45%), better service (48%) and better promotions (48%) would all strongly encourage e-commerce growth for airports.

There are also areas which could discourage e-commerce, including additional transaction or service fees and the need to repeatedly log in to multiple websites or accounts.

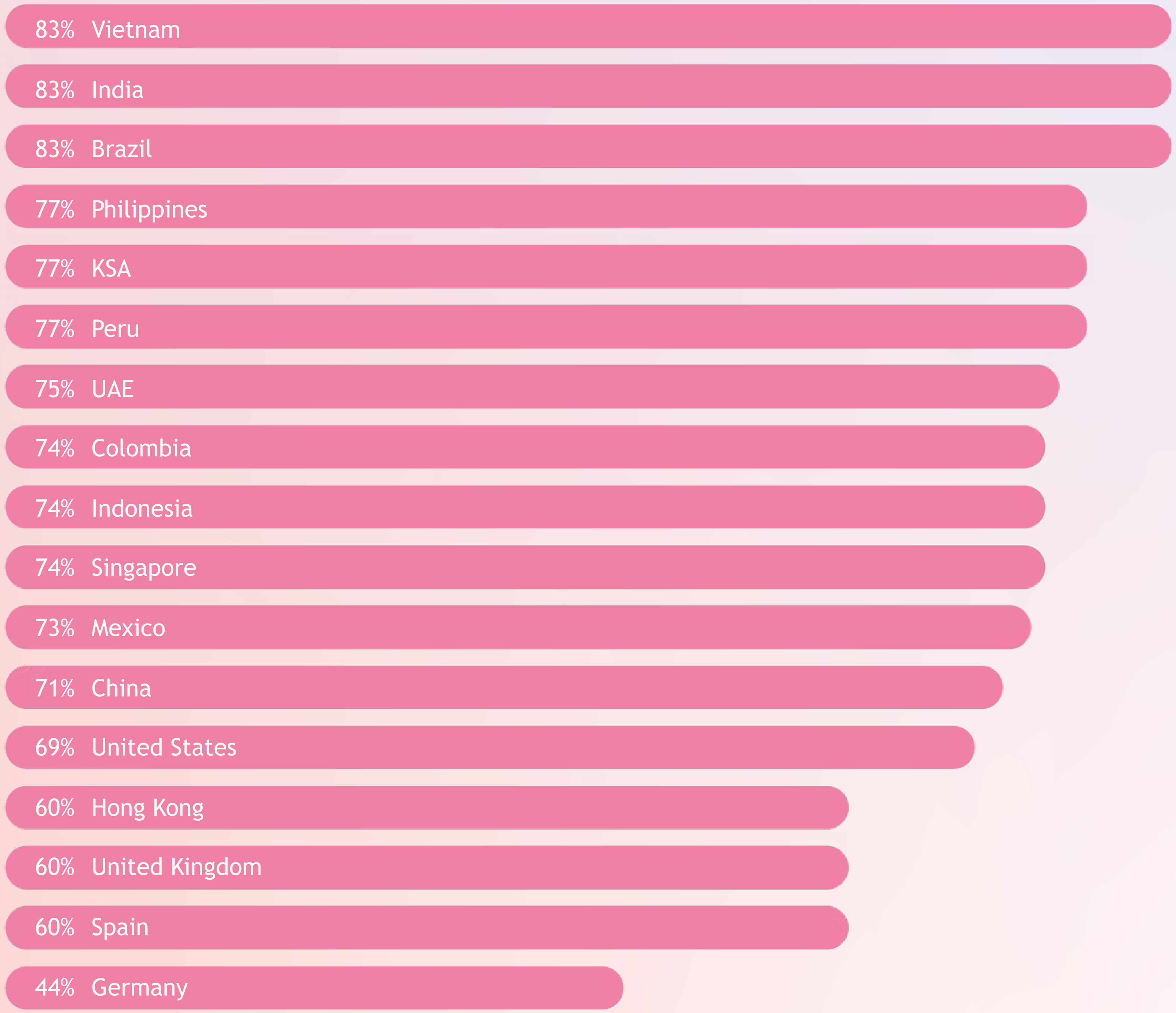


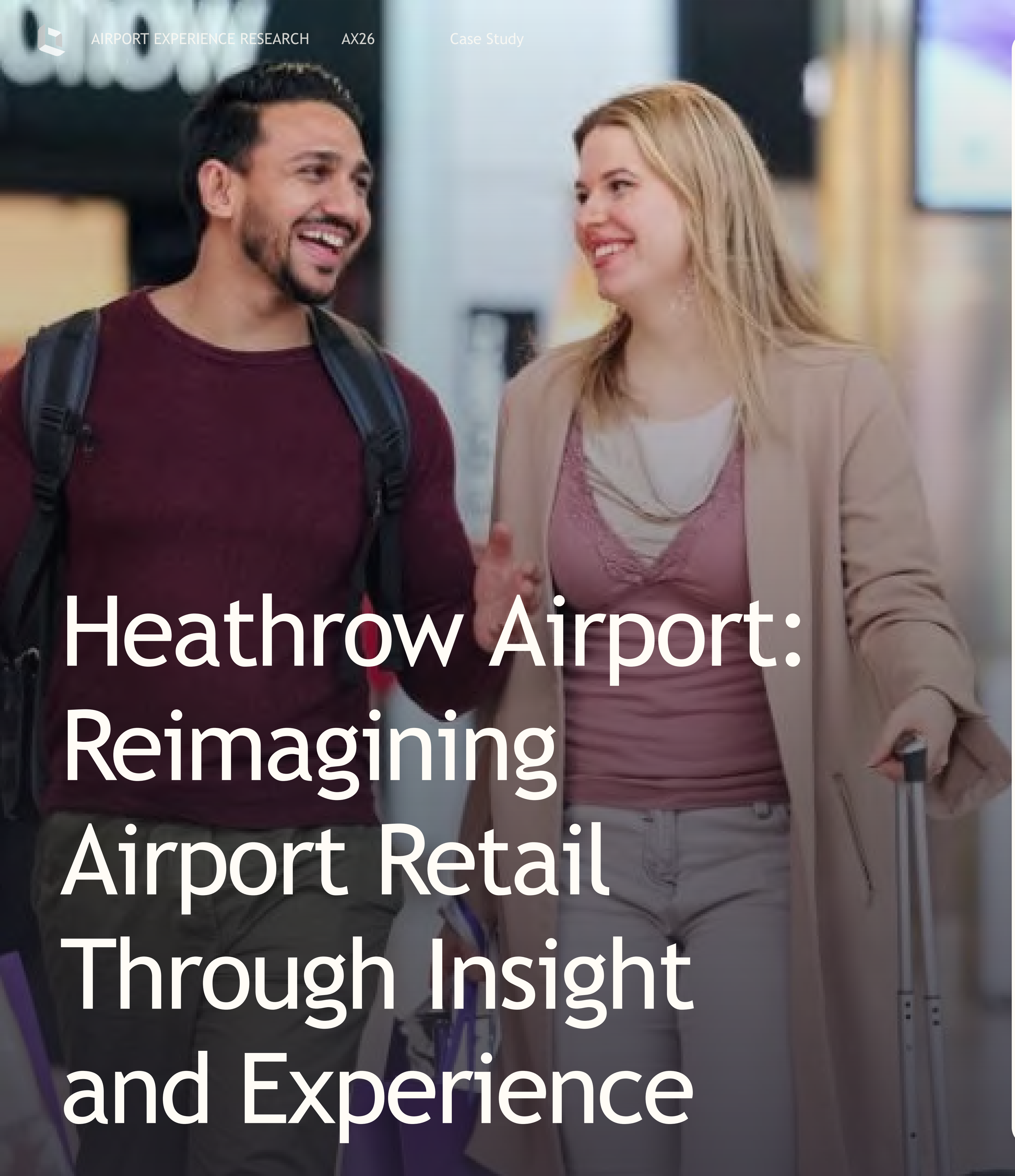
Markets emerge where there is a clear opportunity to have significant positive e-commerce impact, **Vietnam, India, Brazil (all 83%) stand out.**

China is slightly less enthusiastic (71%), but the existing utility and ubiquity of digital commerce in China may be a factor here.

High-growth markets present the greatest opportunity for e-commerce impact, led by Vietnam, India and Brazil.

Digital Commerce per Country





Heathrow Airport: Reimagining Airport Retail Through Insight and Experience

"At Heathrow, we are continually exploring ways to improve our offering to deliver a better passenger experience while driving commercial value for our partners.

Retail plays a major role in this, and our recent recognition as the world's Best Airport Shopping destination at the Skytrax Awards reflects our commitment to adapting our offer in line with evolving passenger needs. To address challenges such as limited terminal space and growing passenger numbers, we implemented our four-pillar retail strategy, 'DESO' (Digital, Experience, Space, Offer). This approach supports our goal of **delivering unique physical and digital retail experiences while maximizing the use of available space.**

We recognize that shopping habits vary depending on travel context and spending priorities, so a one-size-fits-all approach to retail simply does not work. Instead, we have curated a **diverse mix of more than 300 outlets, spanning premium, lifestyle and high-street brands** across categories including fashion, fragrance, food and gifts, ensuring there is something for everyone.

To better understand consumer behavior, we gather data on passenger demographics and spend across our terminals. These insights support the continued growth of retail at Heathrow and have inspired developments such as the launch of our **Reserve & Collect service**, which allows passengers to browse and purchase goods before arriving at the airport.

Looking ahead, we aim to further increase digital integration by enhancing services like Reserve & Collect and mobile ordering at the gate, creating a frictionless shopping experience, with **digital supporting physical shopping rather than replacing it.**

Ultimately, we are continually seeking new ways to apply our DESO strategy to create a smarter, more accessible retail environment that supports our partners and helps us progress towards our vision of becoming an extraordinary airport, fit for the future."

Fraser Brown
Heathrow Retail Director

Conclusions

01

Airports could accelerate the building of a unified digital commerce ecosystem to drive spend and loyalty. Digital services are proven spend accelerators directly lift purchasing, but airports should consider how to deliver a one-stop digital layer integrating information, e-commerce and personalized offers.

02

Use data and the power of the relationship to better understand travelers' needs and wants on any given journey and then drive personalized offers and incentives that shape spend without dilution.

03

Accelerate e-commerce adoption with pricing power, seamless experience, and customer-specific incentives. Create a next-generation retail experience strategy, focused on inspiring and frictionless journeys that can capitalize on demand for walk-through duty free, hybrid retail and even vending machine formats. Design experiences that convert time-killing into buying.

Loyalty and Relationships

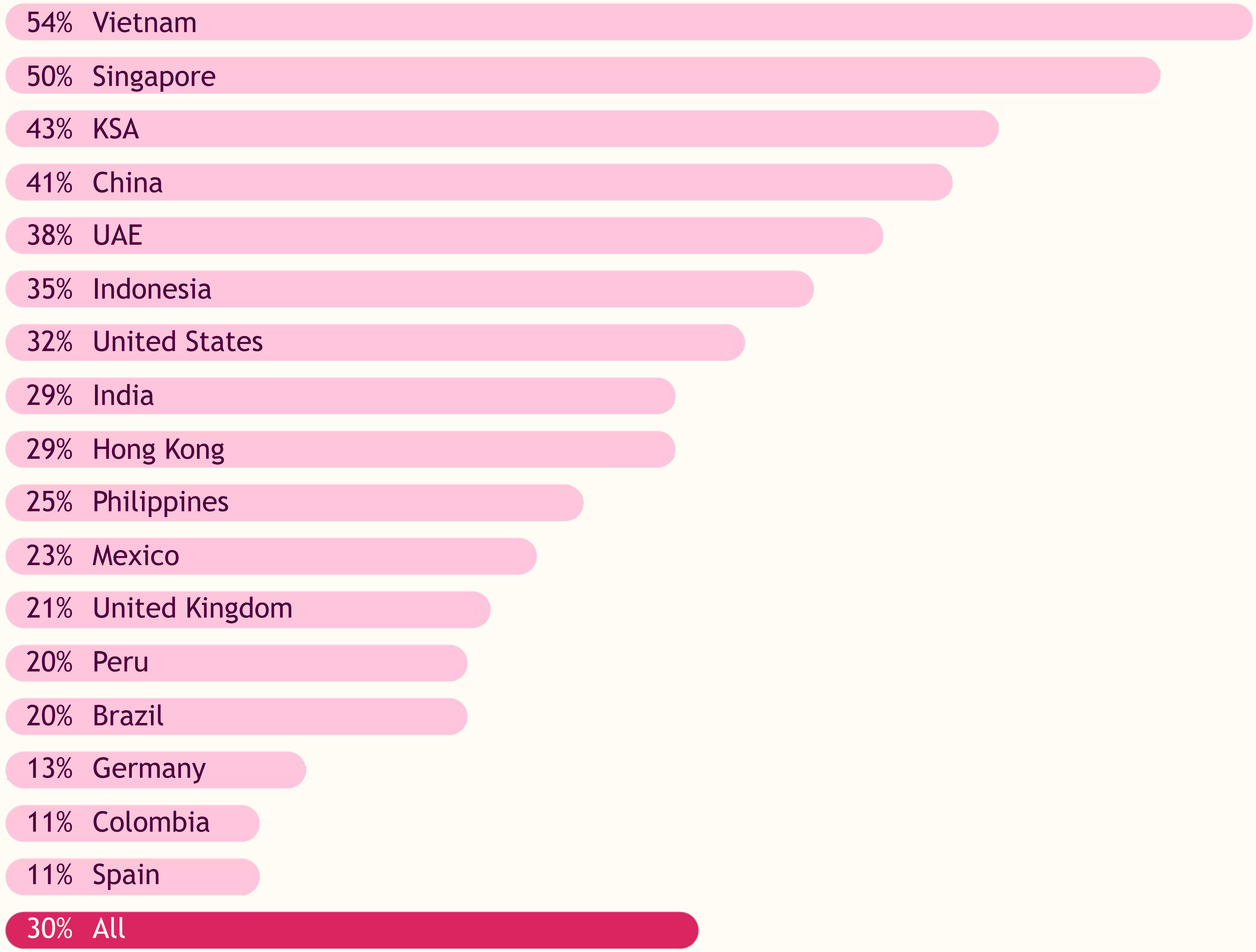
Findings

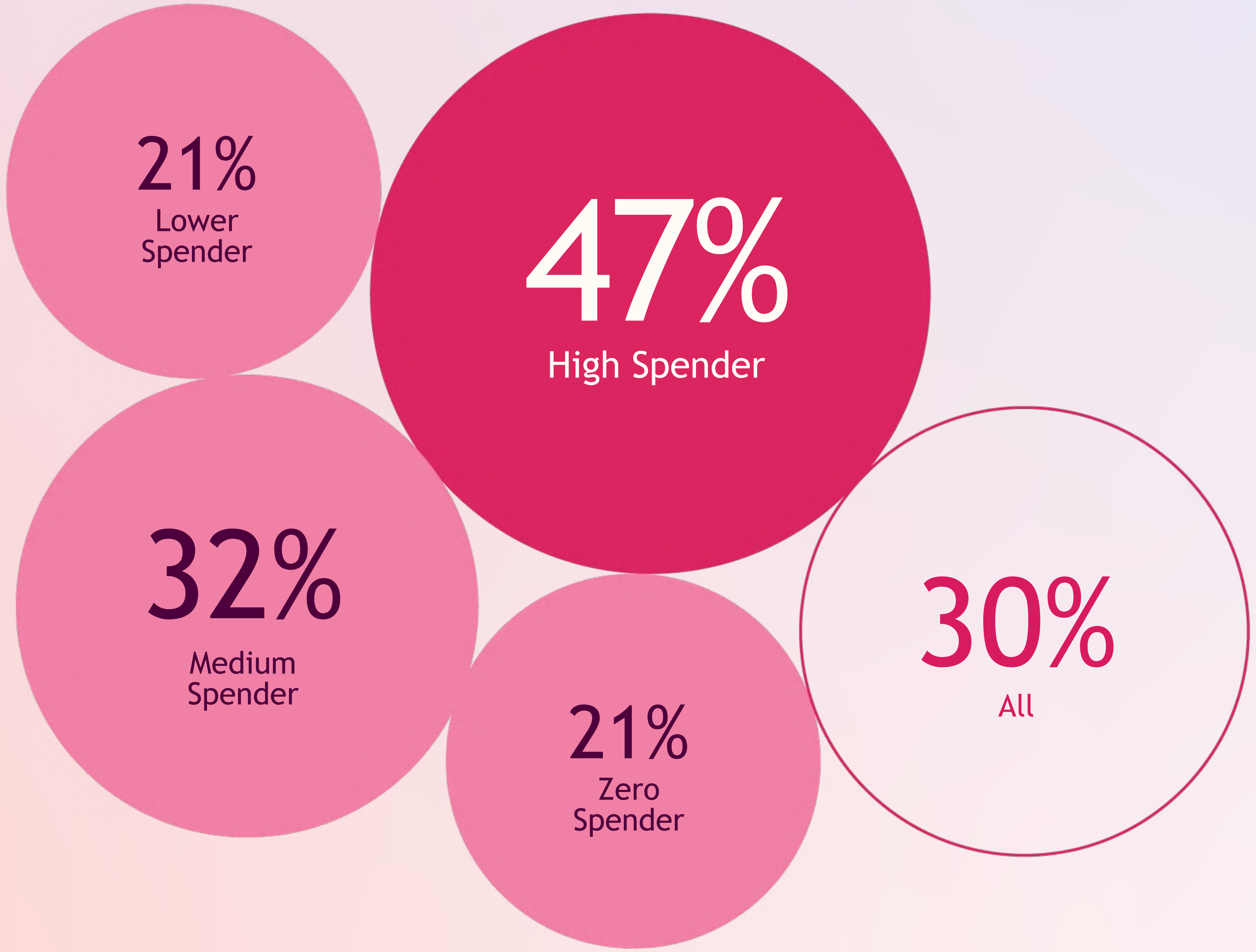
We live in a relationship age, where most global brands now cultivate and leverage a direct relationship with their customers. Travelers clearly see value in loyalty and relationships, but airports are still playing catch up. Access to tools and data make starting a relationship and driving revenue easier than ever.

Airport Engagement

Overall **direct engagement and relationships between airports and passengers has grown from 25% to 30% year on year** showing the increasing importance of this function, and investments by airports starting to pay off.

Most markets have shown solid growth, with the exception of China and Hong Kong which both dropped over last year.





Spenders Engagement

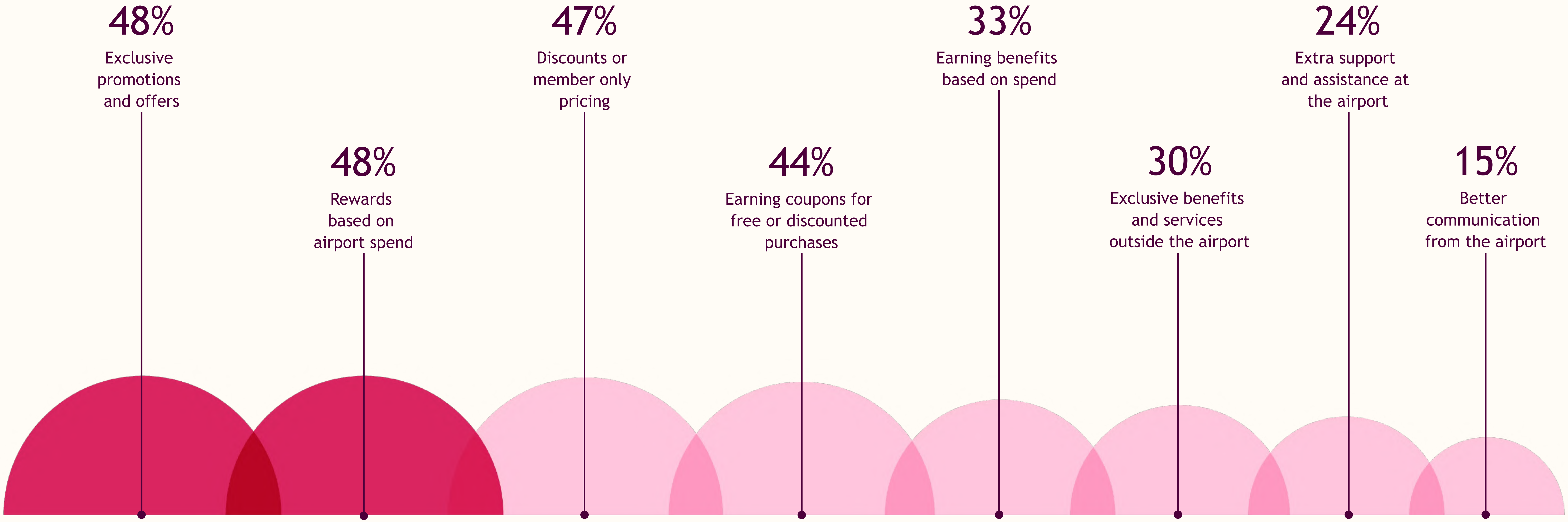
Engagement is strongest for the highest spenders (47%), this is a key group that airports should talk to and better understand. But even zero spenders see value in engaging with the airport (21%), and engagement can only encourage increased spend.

Almost half of Affluent Leisure Travelers (48%) are engaged in airport relationships. A relationship is a critical tool for capturing and influencing this most important spending group.

Loyalty Drives Spend

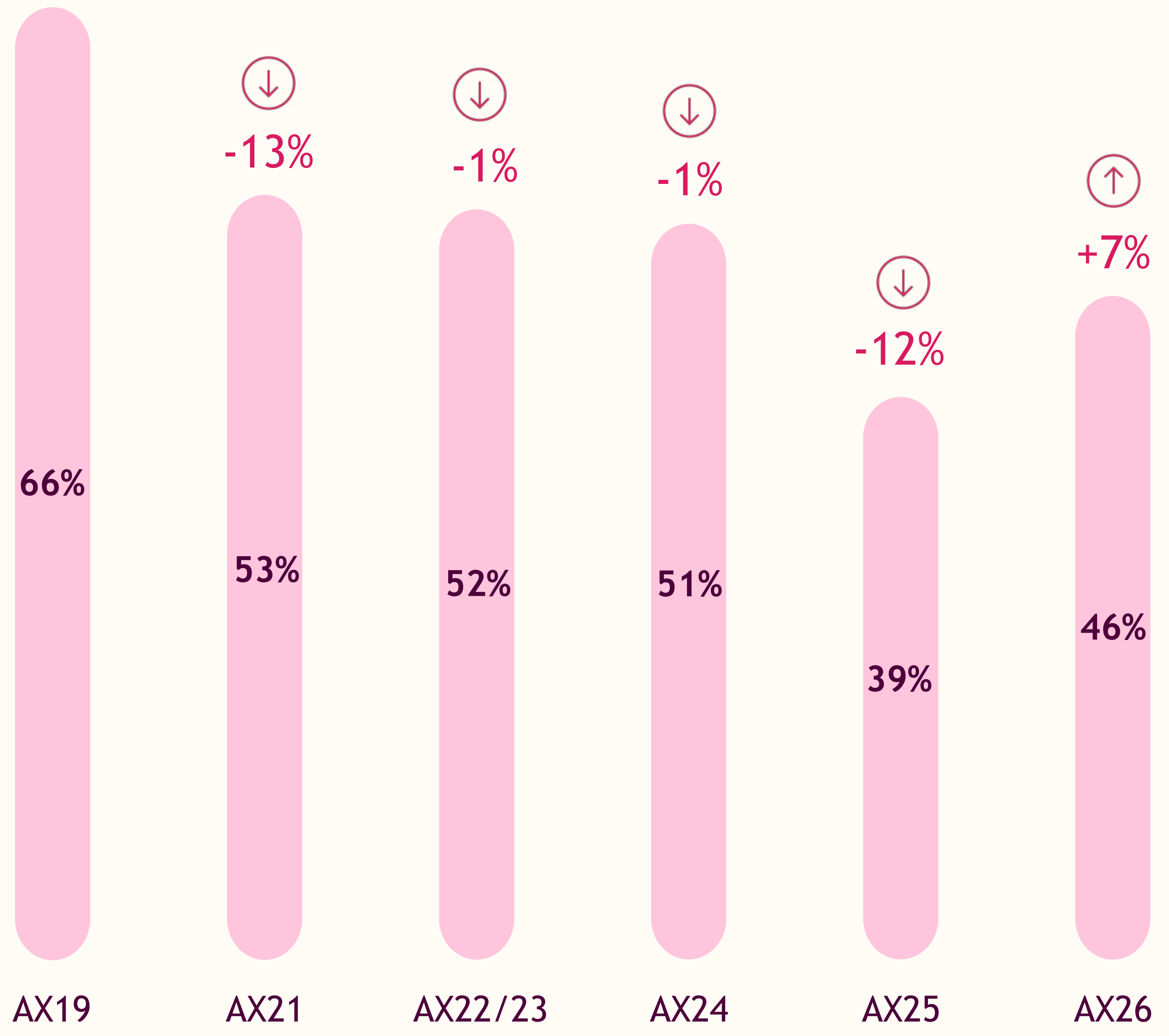
Travelers were asked how airport loyalty programs could drive increased spend. **Target promotions (48%), rewards (48%) and exclusive pricing (47%)** were all key in driving and shaping increased performance.

Markets with strong existing airport loyalty programs returned stronger promotional motivation, suggesting these are working. Overall feedback suggests that travelers are responsive to the role that airport loyalty programs can play.



Frequent Flyer Programs

Having declined since 2019, airline frequent flyer programs (FFPs) participation has finally turned around and started to grow. **46% of surveyed regular travelers participate in these programs.** FFPs remain favored by older travelers.



Participation of FFP Members

Change on AX25	Participation	Market
10%	67%	Singapore
11%	66%	Hong Kong
18%	58%	USA
7%	57%	Brazil
10%	55%	Vietnam
9%	47%	KSA
-5%	45%	China
9%	44%	UAE
11%	41%	Indonesia
16%	41%	UK
10%	39%	Colombia
10%	39%	Peru
7%	38%	Mexico
	36%	Philippines
0%	33%	Spain
7%	32%	India
	27%	Germany

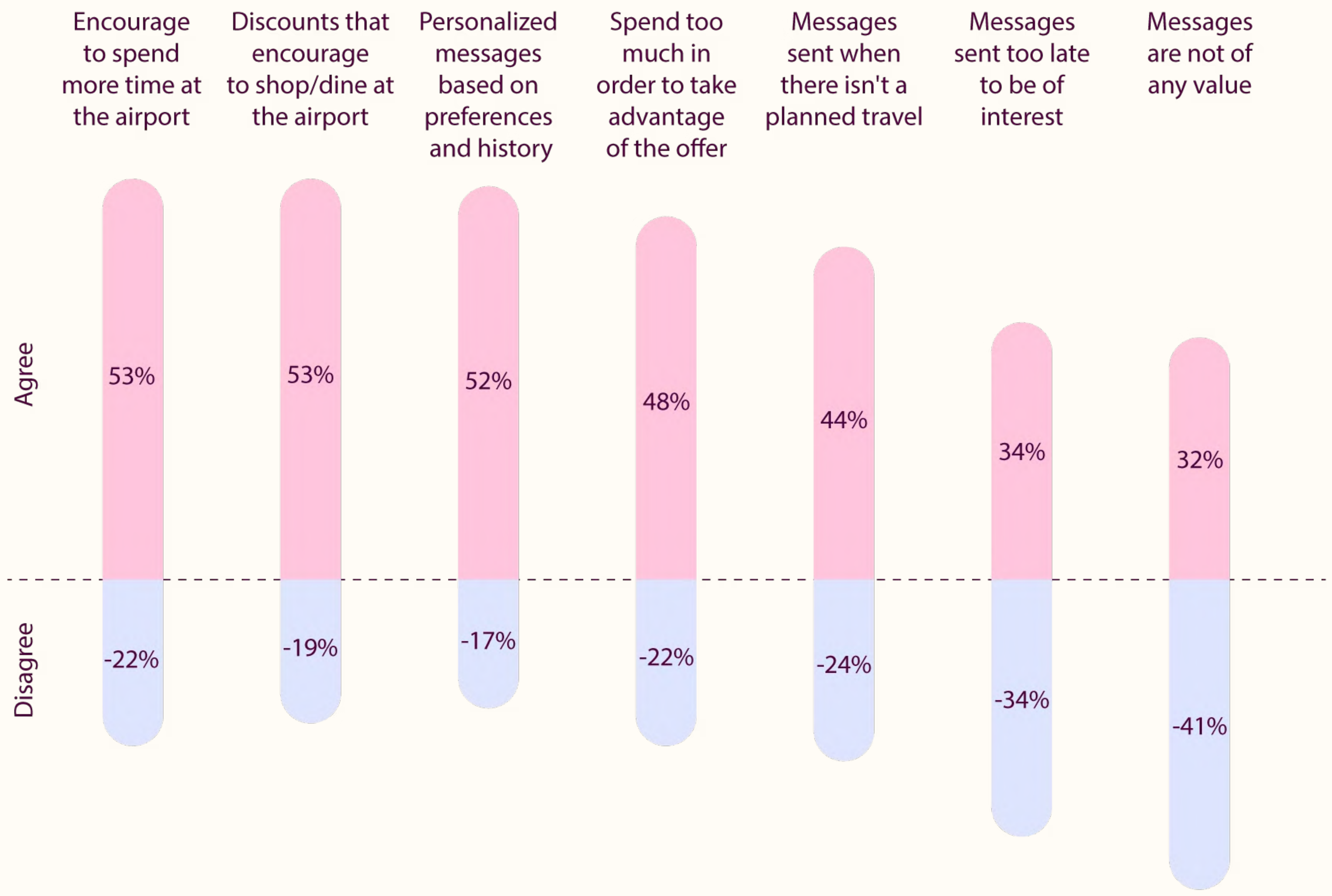
Most markets have seen an increase in FFP participation with particularly **strong growth from Vietnam and US.**

Airline programs are important participants in any digital airport ecosystem and miles are a powerful reward currency driving discretionary spend across the airport.

Airport Communication Performance

Broadly, where airports communicate, this is effective and valued by travelers. For a number of years, **travelers have highlighted the need to improve the timing and relevance of communication.**

While there has been overall growth in airport-driven direct communication, there is still more to do to ensure messaging is targeted and insight-driven.



Conclusions

01 Growing engagement = growing revenue influence. Engagement is highest among top spenders, meaning deeper relationships directly translate into higher commercial returns. Build segmented CRM journeys with tailored incentives for different spend levels to maximize conversion across all groups.

02 Loyalty programs are powerful but under-optimized. Travelers clearly respond to loyalty levers, but only a few airports are successfully exploiting this. Consider what loyalty propositions might work for your passengers and your needs.

03 Airline FFP momentum should be integrated, not ignored. With FFPs once again in growth, consider how integration creates a win / win. For example, leverage miles as an airport-wide reward currency and co-create joint campaigns with airlines to extend reach and relevance.

04 Communications work, but there is room for improvement. Airport communication is valued, but passengers want better timing, smarter relevance, and data-driven offers. Poorly timed communications limit engagement and spending potential.

Implications and Actions For Airports

Findings

This year's Airport Experience research highlights more clearly than ever the opportunity for airports to deepen their relationship with passengers and rethink how they manage the journey. It reinforces the need for airports, concessions and the wider travel community to work together to transform the commercial landscape, as passengers demand change and are willing to spend more when that change is delivered.

Conclusion and Implications

Travelers are looking to engage earlier and seeking advance information which will support their journey - especially in emerging markets

01 Proactively promote early digital access to flight and travel information

02 Use this early engagement to capture travelers onto a permissioned relationship

03 Ensure you understand and connect with the Affluent Leisure Travelers to drive engagement and performance

Conclusion and Implications

Digital fragmentation is hurting the passenger experience, 77% want a single app to remove friction from the airport journey

01 Consider how you would deploy a unified single platform / application across the airport, an approach which both sells and supports the journey

02 Work with concessions to seamlessly integrate services into the platform and ensure concessions are supported with the right promotional capability

Conclusion and Implications

Personalization is a hygiene factor for most businesses' direct relationships with customers and is key to driving increased spend from passengers

01 Customers expect a high level of personalization from the brands they trust, highlighting an opportunity for airports to deliver more tailored and relevant experiences.

02 Airports need to personalize the journey based on understood traveler segments and recognize that passenger have different needs on different days

03 Passengers say they would spend more where they are offered more value. Dynamic and targeted offers are the only way to deliver this whilst avoiding dilution of existing spend

Conclusion and Implications

Increasing demand for lounge means new opportunities for airports

01 Demand for airport lounge access grew by 11% from last year, travelers are not just looking to escape the crowds but they want and are prepared to pay for an elevated experience

02 Airports should work closely with lounge operators to identify underperforming spaces to meet this demand

03 Integrate lounges into the wider premium service journey seamlessly combining with parking, fast track etc.

04 Ensure that lounge access and sales are available the airport digital ecosystem, 38% say they want to access this before they travel

Conclusion and Implications

As Affluent Leisure Travelers migrate to the lounge (75% of ALTs) this is where they will shop and spend their money

01 The airport needs to take the lead to bring together concessions and lounge operators to ensure that seamless systems can provide access to the services lounge guests want

02 70% of ALTs are looking to purchase duty free in lounge and 46% of lounge guests want brand promotions in lounge. These types of activities, when done well, connect directly to digital sales opportunities

Conclusion and Implications

Retail is coming back, but its needs re-invention to fit in the new customer centric order across the airport

01 Create hybrid retail experiences (retail + F&B + fast pickup etc.) where travelers naturally dwell. The secret lies in designing retail around behavior, not terminals

02 Connect these new experiences to the digital ecosystem offering passengers choice and control over how they buy

03 Leverage newly established relationships to present retail opportunities and nudge passengers to take action

Conclusion and Implications

Airline FFPs are growing in popularly and are a potentially important part of the airport ecosystem

01 Consider how you can work with airlines to provide access to airport services, this opens up a new distribution channel.

02 FFP miles are a powerful reward and are best spent on special treats and indulgences, integrate ‘pay with points’ technology to make spending miles to enjoy the airport seamless and fun

About Airport Dimensions

Pioneering Experiences for Passenger Enjoyment and Airport Growth

For over two decades, Airport Dimensions has led passenger first experiences, evolving how travelers spend their time and how airports unlock value.

Our unrivaled level of insight and a breadth of expertise across lounges, sleep, entertainment, and digital, we have built a diverse portfolio that creates choice and enjoyment for passengers, amidst ever-evolving expectations.

Our deep understanding of airports and a commitment to true partnership help you transform your space, grow non-aeronautical revenue, and deliver a greater passenger experience.

Together, we can shape and enrich the airport experience of today and tomorrow.

To discover more about Airport Dimensions, click here.
To contact us, click here.

Appendix

Research methodology

Methodology

We have a minimum qualifying threshold of those travelers who make two or more air travel trips per year. This allows us to access a broad audience of travelers but also ensures that they have sufficient experience to understand and value what the airport has to offer. As a subset of all travelers, our target offers greater value and greater potential for the airport.

In late 2025 we surveyed **11,165 travelers across 17 key markets**. With fieldwork being undertaken by leading research bureau PureSpectrum. The targets represented balanced gender and age demographics by market.

The research looks to understand the traveler experience across a number of **key areas** of profile and experience areas, these include:

- Demographics
- Travel Behavior
- Airport Services and Experience
- Airport Commerce
- Airport Relationships and Engagement
- Airport Lounges and Other Experiences