

AIRPORTS COUNCIL INTERNATIONAL

ACI ASIA-PACIFIC AND MIDDLE EAST (APAC & MID)

Request for Proposal (RFP):

STUDY ON TRAVEL RETAIL IN THE POST-PANDEMIC ERA: EMERGING TRENDS, PASSENGER BEHAVIOR, AND POLICY RECOMMENDATIONS

This Request for Proposal (RFP) is issued by ACI Asia-Pacific and Middle East (APAC & MID) to commission a travel retail study focusing on emerging trends, passenger behavior, and policy recommendations applicable to the upcoming decade. The study aims to provide actionable insights that will guide airports, travel retailers, and policymakers in the Asia-Pacific and Middle East regions.

Key areas of focus include:

1. Industry Performance and Market Adaptation:

A comparative analysis of travel retail performance in 2024 vs. 2019 will highlight key trends, operational adjustments, and the impact of the recent developments in the global economy and travel retail. This includes analyzing Chinese passenger recovery and how new traveler profiles like blended (bleisure) travelers and digital nomads are reshaping retail demands.

Preliminary findings will be presented at the Trinity Forum in February 2026 in Doha, Qatar, with the final report prepared thereafter. The consultant may also chair panel discussions based on the study's insights.

2. Passenger Behavior and Spending:

The study will examine domestic and international passenger spending patterns in travel retail, particularly the preferences of different nationalities and travel types. It will explore generation-specific shopping behaviors to help tailor retail offerings and marketing strategies.

3. Economic Impact of Airport Duty Free as Key Component of Non-Aeronautical Business:

This section will quantify the contribution of Duty-Free sales to total non-aeronautical revenues across key capital airports in the Asia-Pacific and Middle East. It will analyze revenue distribution across different sales channels—on departure, on arrival, and online pre-ordering—highlighting commercial performance and emerging preferences. The findings will inform airports and retail operators on how to optimize Duty-Free operations and enhance their strategic positioning in an evolving retail landscape.

1. Introduction:

1.1. About ACI Asia-Pacific and Middle East (ACI APAC & MID)

1.1.1. ACI Asia-Pacific and Middle East (ACI APAC & MID) is one of the five regional offices of Airports Council International and functions autonomously. ACI represents the collective interests of airport members to promote professional excellence in airport management and operations. ACI APAC & MID mission is to advocate for policies and provide services that strengthen its members' ability to serve their passengers, employees, and stakeholders.

1.2. ACI APAC & MID Study

1.2.1. ACI APAC & MID decided to pursue this study to address the critical changes, challenges and opportunities facing the travel retail industry in the post-pandemic era. Our association recognizes the importance of an analysis that reflects the evolving needs of airports, retailers, and passengers in the Asia-Pacific and Middle East regions. The study aims to deliver actionable insights, focusing on trends such as passenger spending

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behavior, sustainability, and technology. The study will support both the advocacy efforts and operational strategies necessary to drive growth and enhance the passenger experience across the regions.

2. Objectives:

- 2.1. The objective of this study is to provide comprehensive, actionable insights and strategic policy recommendations for airports, travel retailers, and regulators. By focusing on the recent trends and challenges, **the study aims to enhance travel retail performance, improve passenger engagement, and support long-term sustainability and growth.** The study will delve into the following areas:

2.1.1. **Recent Trends: Travel Retail and Airport Performance in 2024 vs 2019**

- 2.1.1.1. **Objective:** To compare travel retail and airport performance in 2024 to pre-pandemic levels in 2019, highlighting the key trends and operational adaptations that have driven recovery and growth.
- 2.1.1.2. **Rationale:** The COVID-19 pandemic significantly disrupted global air travel and travel retail, resulting in drastic declines in passenger volumes and retail revenues. Understanding how the industry has rebounded and adapted to new consumer behaviors is crucial for future growth.
- 2.1.1.3. **Deliverables:**
- 2.1.1.3.1. A comparative analysis of passenger traffic, retail revenues, and spending patterns from 2019 and 2024, identifying the primary drivers of recovery and the regions or demographics that have rebounded most strongly.
 - 2.1.1.3.2. An evaluation of changes in passenger flow management, retail space utilization, and other factors.
 - 2.1.1.3.3. Strategic recommendations for airports and retailers to capitalize on recovery trends, including adapting retail offerings to evolving passenger demands and optimizing operational efficiency.

2.1.2. **Spending Behavior in Duty-Free and Retail at Regional and National level**

- 2.1.2.1. **Objective:** To examine the distinct spending patterns of domestic and international passengers, with a focus on nationality-specific and demographic-based trends. A specific sample of airports will be identified to assess the topic at a national level.
- 2.1.2.2. **Rationale:** Understanding how passengers spend differently depending on their travel type (domestic vs. international) and nationality is essential for optimizing duty-free and retail strategies. Differences in disposable income, preferences for luxury vs. experiential purchases, and familiarity with airport retail offerings influence purchasing decisions.
- 2.1.2.3. **Deliverables:**

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2.1.2.3.1. An analysis of spending behavior segmented by nationality for Asia-Pacific and Middle East (see list of countries in Appendix A), with additional insights into demographic variables such as age and income.

2.1.2.3.2. Recommendations for airports and retailers to tailor product offerings, pricing strategies, and marketing campaigns to these segments, with the goal of increasing conversion rates and boosting overall revenues.

2.1.2.3.3. An evaluation of passenger loyalty programs and their influence on spending.

2.1.3. **Generation-Specific Shopping Behavior and Preferences**

2.1.3.1. **Objective:** To study the shopping behavior and preferences of different generations (Boomers, Gen X, Millennials, Gen Z), identifying how airports and travel retailers can cater to each demographic segment.

2.1.3.2. **Rationale:** Each generation has distinct shopping preferences, with younger passengers (Millennials and Gen Z) showing a preference for digital engagement and experiential offerings, while older passengers may value luxury goods and traditional shopping experiences. Tailoring retail offerings to these preferences can increase revenue.

2.1.3.3. **Deliverables:**

2.1.3.3.1. A detailed quantitative analysis of generation-specific retail behavior across key airports, providing insights into the share of each generational group among passengers, their average spending per visit, preferred product categories, and purchasing patterns within airport retail environments."

2.1.3.3.2. Insights into the growing importance of experiential retail for younger generations, including interactive and immersive shopping experiences.

2.1.3.3.3. Strategic recommendations for airports and retailers to adjust product offerings, marketing approaches, and digital engagement based on generational preferences.

2.1.4. **Duty-Free Revenue Contribution and Channel Breakdown**

2.1.4.1. **Objective:** To quantify the contribution of the Duty-Free segment to overall non-aeronautical revenues at major capital airports across Asia and the Middle East, and to analyze the relative performance of key sales channels.

2.1.4.2. **Rationale:** Duty-Free remains a vital component of airport non-aeronautical revenue streams. Understanding its precise contribution and the performance of different channels—including departure sales, arrival sales, and online pre-ordering—can inform strategic investment and promotional decisions. Disaggregating this data by region and airport type enhances benchmarking and policy formulation.

2.1.4.3. **Deliverables:**

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2.1.4.3.1. A quantitative assessment of the share of Duty-Free revenues as a percentage of total non-aeronautical revenues for key capital airports in Asia and the Middle East.

2.1.4.3.2. A detailed breakdown of Duty-Free revenues by channel, specifically:

2.1.4.3.2.1. Duty-Free on Departure

2.1.4.3.2.2. Duty-Free on Arrival

2.1.4.3.2.3. Online Duty-Free Preordering

2.1.4.3.3. Identification of leading practices and emerging trends in Duty-Free channel management, supported by anonymized data where necessary and applicable.

2.1.4.3.4. Provision for confidential data treatment to ensure sensitivity and discretion in handling airport-specific financial information.

2.2. A simplified summary of the objectives is presented in the table below.

Item	Objective	Key focus
1	Travel Retail Performance and Trends: 2024 vs 2019	Compare 2024 to 2019; identify trends in passenger flow and spending.
2	Spending Behavior in Duty-Free and Retail	Analyze spending behavior differences between domestic and international passengers; offer recommendations to increase revenues. Analyze spending patterns by passport nationality.
3	Generation-Specific Shopping Behavior	Study generational shopping preferences; recommend tailored strategies for retail offerings.
4	Economic Impact of Duty-Free Shopping at Airports	Analyze Duty-Free contribution to total non-aeronautical revenues in 2024; disaggregate by sales channel (departure, arrival, online pre-ordering).

3. Scope of Work:

3.1. The selected research partner will be responsible for delivering a thorough and in-depth study, encompassing the following key activities:

3.1.1. Comprehensive Data Collection

3.1.1.1. The research partner will gather data using a combination of quantitative and qualitative methods to ensure robust and well-rounded insights.

3.1.1.1.1. **Quantitative Methods:** These will include surveys targeting passengers, airport operators, and retailers to collect statistical data on spending habits, preferences, and trends. Data will also be sourced from existing passenger behavior datasets, such as purchase histories, passenger flows, and spending patterns, to understand broader trends.

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3.1.1.1.2. **Qualitative Methods:** In-depth interviews with industry experts, stakeholders, airport management, and travel retail executives will provide contextual insights into emerging trends and industry challenges. Additionally, case studies of specific airports or retail operations that have successfully adapted to post-pandemic realities will be developed to highlight best practices.

3.1.1.2. Analysis of Recovery Trends (2019–2024)

3.1.1.2.1. The research will include a detailed analysis of airport, travel retail, and passenger data covering the period from 2019 to 2024. This will allow for a thorough comparison between pre-pandemic and post-pandemic performance, focusing on:

3.1.1.2.1.1. Passenger volumes and changes in demographics.

3.1.1.2.1.2. Shifts in travel retail revenues and passenger spending behavior.

3.1.1.2.1.3. Operational adjustments made by airports and retailers to adapt to new health protocols, sustainability demands, and evolving consumer behaviors.

3.1.1.2.2. This analysis will identify key factors contributing to recovery, as well as ongoing challenges and areas where recovery is still lagging.

3.1.1.3. Geographical Focus on Asia-Pacific and Middle East

3.1.1.3.1. The study will focus on key markets within the Asia-Pacific and Middle East regions, with particular emphasis on emerging economies and those markets with significant travel retail activities.

3.1.1.3.1.1. This geographical scope is critical as these regions are seeing varied rates of recovery, growth, and challenges post-COVID, often driven by unique market conditions such as airspace restrictions, currency fluctuations, and evolving passenger demographics.

3.1.1.3.1.2. The study will prioritize large international hubs as well as smaller, regional airports that play a key role in connecting emerging markets.

3.1.1.4. Industry Best Practices and Challenges

3.1.1.4.1. The study will assess both industry best practices and the challenges that airports and travel retailers are facing in adapting to new passenger behaviors and retail trends.

3.1.1.4.1.1. Best practices will be drawn from airports and retailers that have successfully innovated in areas such as sustainability, digital engagement, and adaptation to changing passenger profiles. Examples may include airports leading the way in eco-friendly initiatives, digital marketing strategies, or those leveraging technology to enhance the passenger shopping experience.

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3.1.1.4.1.2. Simultaneously, the study will explore the challenges faced by operators, including supply chain disruptions, fluctuating passenger traffic, and shifts in retail demand (e.g., luxury goods vs. experiential purchases). Understanding these challenges will allow the research to provide actionable recommendations to help stakeholders overcome these hurdles.

3.1.1.4.2. This combination of data-driven analysis and qualitative insights will enable the study to deliver practical, actionable recommendations for airports and travel retail stakeholders, aligning them with industry trends and best practices while addressing the complexities of the post-pandemic landscape.

4. Deliverables:

4.1. The selected research partner will be responsible for delivering a range of comprehensive outputs that support both the strategic and operational needs of ACI APAC & MID and its respective stakeholders. The deliverables will provide clear, actionable insights grounded in rigorous analysis and supported by visual data representation. The key deliverables are as follows:

4.1.1. Comprehensive Research Report

4.1.1.1. **Detailed Findings for Each Study Objective:** The report will provide in-depth analysis for each of the four study objectives, offering a holistic view of trends in travel retail, passenger spending, sustainability, technology adoption, and post-pandemic recovery. For each objective, the report will outline the methodologies used, the data sources leveraged, and the key findings derived from both quantitative and qualitative analysis. These findings will be tailored to address specific challenges and opportunities facing airports, retailers, and policymakers in the Asia-Pacific and Middle East regions.

4.1.1.2. **Actionable Insights for Airport Operators, Retailers, and Policymakers:** The report will translate the research findings into tangible, practical recommendations. For airports and travel retailers, these insights will focus on optimizing retail offerings, adapting to evolving passenger profiles, leveraging technology, and implementing sustainability initiatives. For policymakers, the insights will emphasize regulatory frameworks that support retail growth, encourage sustainability, and liberalize air transport to foster economic development.

4.1.1.3. **Visualized Data, Including Charts and Graphs:** To facilitate easy interpretation and communication of key findings, the report will include visual data representations such as charts, graphs, and infographics. These visuals will highlight trends, recovery comparisons (e.g., 2024 vs. 2019 data), generational spending behaviors, and geographic variances in retail performance. Such visualizations will be essential for summarizing complex data and presenting it in a format that is

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accessible to a broad range of stakeholders, from airport executives to regulatory bodies.

4.1.2. PowerPoint Presentation Summarizing Key Findings and Recommendations

4.1.2.1. The research partner will deliver a concise and visually engaging PowerPoint presentation that summarizes the most important findings from the comprehensive report. This presentation will be designed for use in meetings with key stakeholders, such as ACI Asia-Pacific and Middle East members, policymakers, and industry partners. It will cover:

4.1.2.1.1. Key trends identified in the study.

4.1.2.1.2. High-priority recommendations for airports and retailers to act upon.

4.1.2.1.3. Supporting visuals that distill the most significant data points. The presentation will be structured to communicate the study's findings effectively, ensuring stakeholders can quickly grasp the core insights and policy implications.

4.1.3. Policy Recommendation Framework

4.1.3.1. **Identifying Regulatory and Advocacy Opportunities:** The research partner will develop a policy recommendation framework aimed at assisting ACI APAC & MID and its members in influencing policy discussions. This framework will:

4.1.3.1.1. Outline specific regulatory changes that could enhance travel retail and airport performance, such as liberalizing duty-free allowances or encouraging sustainable retail practices.

4.1.3.1.2. Highlight opportunities for advocacy efforts, particularly in engaging governments and regulators on the benefits of open skies policies, easing retail regulations, and implementing sustainability standards that align with global best practices.

4.1.3.1.3. Provide a roadmap for future policy initiatives, helping ACI APAC & MID to proactively engage with policymakers and industry bodies.

4.1.4. Regular Updates and Interim Report

4.1.4.1. Throughout the research process, the selected partner will provide regular updates to ACI APAC & MID, ensuring alignment with project expectations and timelines. These updates will include:

4.1.4.1.1. Bi-weekly progress reports outlining key developments in data collection, stakeholder engagement, and preliminary findings.

4.1.4.1.2. An Interim Report delivered mid-project, summarizing early trends, insights, and potential areas for further exploration. This interim report will allow ACI APAC & MID to provide feedback and ensure that the research is addressing the most critical issues and opportunities. These continuous updates will

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ensure that the study remains relevant to stakeholder needs and can adapt to any emerging issues or new data.

5. Proposal Submission Requirements

- 5.1. To ensure the selection of a qualified and capable research partner, proposals should comprehensively address the following areas. Each section should demonstrate the proposer's understanding of the project's objectives and their capacity to deliver high-quality, actionable insights.

5.1.1. Company Background

- 5.1.1.1. The proposal should begin with an overview of the organization, highlighting its relevant expertise and experience in airport operations, travel retail, sustainability, and passenger behavior research. This section should clearly explain the company's:
- 5.1.1.1.1. **Core competencies** in conducting research within the travel retail or aviation sectors, including its knowledge of the unique challenges facing these industries post-pandemic.
 - 5.1.1.1.2. **Track record** in delivering successful studies related to airport management, retail strategies, passenger engagement, or sustainability practices.
 - 5.1.1.1.3. **Previous relevant work:** The proposer should include detailed descriptions of past projects in the travel retail or aviation sectors that demonstrate their ability to deliver results. This could include case studies of previous work on passenger behavior research, airport operational efficiency, or sustainability initiatives that align with the study objectives. Ideally, this work should show the proposer's experience in the Asia-Pacific and Middle East regions, or in other similar markets.

5.1.2. Research Approach and Methodology

- 5.1.2.1. This section should provide a detailed explanation of the research methods and approach the proposer intends to use in addressing each of the study objectives. A strong methodology will demonstrate the proposer's ability to deliver accurate and actionable insights, including:
- 5.1.2.1.1. **Research Methods:** The proposer should outline both quantitative and qualitative research methods, explaining how they will collect data on passenger spending behavior, technology engagement, sustainability practices, and post-pandemic recovery trends. Methods may include surveys, in-depth interviews, focus groups, and case studies.
 - 5.1.2.1.2. **Proposed Data Sources:** The proposal should detail the data sources that will be leveraged, such as airport databases, passenger transaction data, industry reports, and publicly available statistics on passenger volumes and spending trends.

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5.1.2.1.3. Data Collection Methods: This section should describe the tools and strategies for gathering data, including how the proposer will engage with stakeholders such as airport operators, travel retailers, passengers, and industry experts to gather insights. The proposer should clarify how they will access proprietary data or work with relevant industry bodies to secure information.

5.1.2.1.4. Analysis Techniques: The proposal should explain the analysis techniques that will be used to draw meaningful conclusions from the data. This may include statistical analysis, trend forecasting, segmentation analysis, and comparative studies (e.g., 2019 vs. 2024 data). It should be clear how the data analysis will tie back to the study's objectives and lead to actionable recommendations.

5.1.3. Project Timeline

5.1.3.1. The proposer should provide a detailed project timeline that outlines key milestones from project initiation through to final delivery. The timeline should include:

5.1.3.1.1. Start and End Dates: The expected start date and proposed project completion date.

5.1.3.1.2. Interim Milestones: Deadlines for key phases of the project, such as the completion of data collection, interim report submission, and feedback periods.

5.1.3.1.3. Deadlines for Deliverables: Specific dates for the submission of major deliverables, including the comprehensive research report, PowerPoint presentation, policy recommendation framework, and the interim progress report.

5.1.3.2. A well-structured timeline will demonstrate the proposer's ability to meet project deadlines and adjust to feedback or unforeseen challenges.

5.1.3.3. The final report should be completed in time for the **Trinity Forum held in Doha, Qatar, scheduled for 5–6 February 2026.**

5.1.3.3.1. The research partner is expected to submit the final report ahead of the Trinity Forum 2026, a prestigious global conference that brings together key stakeholders in the airport commercial revenue sector, including airports, airlines, travel retailers, and brands. This forum, co-organized by The Moodie Davitt Report and ACI, serves as a major platform for discussing innovations, trends, and challenges in travel retail and commercial airport revenues.

5.1.3.3.2. The Trinity Forum is recognized for its high-level participation and thought leadership, where key players in the aviation and travel retail industries come together to share insights, best practices, and new strategies for enhancing non-aeronautical revenue streams. The 2026 event will take place on 5–6

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February 2026, providing an ideal opportunity to present the findings of this study to a global audience of industry leaders and decision-makers.

5.1.3.3.3. Ensuring that the report is ready by this time allows for the dissemination of key insights during one of the most influential events in the travel retail calendar. Additionally, presenting the findings at the Trinity Forum will contribute to the industry-wide dialogue on post-pandemic recovery, technology in retail, sustainability, and the evolving behaviors of passengers in the Asia-Pacific and Middle East regions.

5.1.3.3.4. In addition to completing the report in time for the Trinity Forum 2026, the **project director or a senior representative from the selected consulting partner may be invited to moderate a discussion session at the event.** This session will be largely centered around the key findings of the report, providing a platform for in-depth discussion on emerging trends in travel retail, passenger behavior, sustainability, and post-pandemic recovery. The moderator will lead conversations with industry experts, airport operators, and travel retail stakeholders, allowing for a dynamic exchange of insights.

5.1.4. Costs

5.1.4.1. The proposer should present a detailed budget, breaking down the estimated costs of completing the project. The budget should be transparent, providing a clear view of how funds will be allocated across different aspects of the study. The budget should include:

5.1.4.1.1. **Cost Breakdown by Task:** A line-item breakdown of costs for each task, including data collection, analysis, report writing, stakeholder engagement, and presentations.

5.1.4.1.2. **Personnel Costs:** A detailed explanation of personnel costs, including the time and resources required for each team member involved in the project.

5.1.4.1.3. **Additional Expenses:** Any additional expenses that may be incurred, such as travel, software tools for data analysis, or access to proprietary datasets.

5.1.4.2. The proposer should ensure that the budget aligns with the scope of work and that all potential costs are accounted for.

5.1.5. Key Personnel

5.1.5.1. This section should provide a list of the key personnel who will be working on the project, highlighting their roles, expertise, and relevant experience. The proposer should provide:

5.1.5.1.1. **Team Composition:** An overview of the team structure, including the project lead, research analysts, data scientists, and any other key personnel.

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5.1.5.1.2. **Individual Expertise:** Detailed bios for each team member, focusing on their experience with similar research projects in the travel retail, airport management, or sustainability fields. Special emphasis should be placed on team members who have experience working in the Asia-Pacific and Middle East markets.

5.1.5.1.3. **Project Roles:** A clear explanation of each person's role in the project, outlining who will be responsible for data collection, analysis, stakeholder engagement, report writing, and project management.

6. Evaluation Criteria

6.1. The selection of the research partner for this study will be based on a rigorous evaluation of the submitted proposals, ensuring that the chosen partner has the expertise, methodology, and resources required to deliver high-quality, actionable insights. The following criteria will be used to assess each proposal:

6.1.1. Demonstrated Understanding of the Study Objectives

6.1.1.1. Proposals will be evaluated on how well the research partner understands the overall objectives and scope of the study. This includes:

6.1.1.1.1. **Clarity of Purpose:** The proposal should clearly articulate an understanding of the strategic goals of the study, which include providing insights into passenger spending behavior, sustainability initiatives, post-pandemic recovery trends, and the impact of emerging technologies in travel retail.

6.1.1.1.2. **Alignment with ACI APAC & MID's Vision:** The research partner should demonstrate their ability to align their research with ACI objectives to drive industry-wide policy changes, improve airport operations, and enhance travel retail strategies.

6.1.1.2. Proposals that show a thorough grasp of the industry challenges, especially within the Asia-Pacific and Middle East contexts, and link these to the study objectives will score higher in this criterion.

6.1.2. Expertise in Travel Retail, Sustainability, and Passenger Behavior Research

6.1.2.1. The research partner's expertise in the relevant fields is a critical evaluation criterion. The proposal should:

6.1.2.1.1. Prove experience and competence in conducting research in the areas of travel retail, sustainability, and passenger behavior. This includes expertise in understanding retail trends, generational differences in shopping behavior, and how sustainability practices influence both operational efficiency and consumer preferences.

6.1.2.1.2. Demonstrate familiarity with sustainability initiatives in airports and retail settings, as well as the latest technologies enhancing passenger engagement.

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6.1.2.1.3. Show experience in passenger behavior analysis, particularly in how post-pandemic changes have impacted spending habits and preferences in airports. Proposals that showcase prior work on similar studies in these fields, particularly within the context of airport operations and travel retail, will be favored.

6.1.3. Research Approach and Methodology

6.1.3.1. The research approach and methodology presented in the proposal will be assessed for its rigor and suitability to address the study objectives. This includes:

6.1.3.1.1. A clear explanation of how quantitative and qualitative data will be collected, analyzed, and synthesized to provide actionable insights.

6.1.3.1.2. Use of innovative and proven research techniques to extract insights, such as surveys, interviews with industry stakeholders, and data analytics methods to explore passenger behavior and spending patterns.

6.1.3.1.3. A robust plan to ensure accuracy, reliability, and relevance of the data sources, including how the research partner plans to engage with key stakeholders such as airports, retailers, and policymakers.

6.1.3.2. The evaluation will focus on whether the proposed methodology is sound, feasible, and appropriate for achieving the study's outcomes.

6.1.4. Experience with Airports and Travel Retail in the Asia-Pacific and Middle East Regions

6.1.4.1. Given the geographical focus of the study, the experience and familiarity of the research partner with the Asia-Pacific and Middle East markets will be an important evaluation criterion. The proposal should:

6.1.4.1.1. Highlight previous projects involving airport operations, travel retail, or policy development in these regions.

6.1.4.1.2. Demonstrate a clear understanding of the unique challenges and opportunities faced by airports and travel retailers in the Asia-Pacific and Middle East, such as regulatory variations, passenger demographics, and regional economic factors.

6.1.4.1.3. Provide examples of previous work that has involved understanding cultural, economic, and regulatory differences across these regions and how they impact travel retail and airport strategies.

6.1.4.2. The more region-specific experience the research partner has, the more confidence they can inspire in their ability to deliver relevant and context-aware recommendations.

6.1.5. Project Timeline and Budget Feasibility

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6.1.5.1. The feasibility of the proposed project timeline and budget will be thoroughly evaluated to ensure that the research partner can deliver the study within the required timeframes and budgetary constraints. The proposal should:

6.1.5.1.1. Present a detailed project timeline with realistic milestones for key deliverables, such as data collection, interim reports, final report submission, and preparation for the Trinity Forum 2026.

6.1.5.1.2. Demonstrate the ability to meet the deadline for the final report in time for the Trinity Forum in early February 2026.

6.1.5.1.3. Provide a transparent and comprehensive budget breakdown, clearly outlining costs for each phase of the project, including personnel costs, data collection, analysis, and any associated expenses (e.g., software, travel).

6.1.5.1.4. Ensure that the proposed budget is cost-effective without compromising on the quality of the research, showing a clear understanding of the project's resource requirements.

6.1.5.2. Proposals that provide clear and well-planned timelines and budgets, with built-in contingencies for unforeseen challenges, will be rated higher.

6.1.6. Quality of Key Personnel

6.1.6.1. The expertise and experience of the key personnel assigned to the project will be a significant consideration. The proposal should include:

6.1.6.1.1. **Bios of the key team members**, detailing their roles, relevant experience, and qualifications. Personnel with direct experience in travel retail research, airport management, sustainability, or passenger behavior will be considered strong assets.

6.1.6.1.2. **Project leadership**: The proposal should identify the project director and/or senior members who will lead the study, ensuring they have the credentials to manage the project effectively and interact with stakeholders.

6.1.6.1.3. **The consulting team's capability** to engage with ACI APAC & MID members and moderate discussions at major industry events such as the Trinity Forum 2026.

6.1.6.1.4. **Demonstration of previous success in managing similar projects**, including examples of how key personnel have contributed to the delivery of high-impact research outcomes.

6.1.6.2. Proposals that highlight experienced, capable team members with a history of delivering complex research projects on time and within budget will receive higher scores.

7. Data

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7.1. Data Responsibilities

7.1.1. The selected consultant will be responsible for identifying, acquiring, and utilizing accurate, up-to-date, and reliable data to perform the analyses required for this travel retail study, as outlined in this Request for Proposal (RFP). The consultant should aim to cover key markets in the Asia-Pacific and Middle East regions, with particular focus on the emerging markets and major travel retail hubs. The data should address the study's objectives, such as analyzing passenger spending behavior, sustainability initiatives, technology adoption, and post-pandemic recovery trends in travel retail. Furthermore, the consultant should identify gaps, challenges, and opportunities within these markets and provide actionable recommendations tailored to each region.

7.2. Data Access and Support

7.2.1. To support the data requirements for this study, ACI APAC & MID will provide the selected consultant with access to various data sets. These data sets will include historical passenger data, retail revenue reports, sustainability benchmarks, and other relevant industry insights. The consultant will also be updated regularly with additional sources of data, where applicable, to ensure that the analysis remains current and reflects the most recent developments in the travel retail and aviation sectors.

7.2.1.1. **ACI ANARA Publications.** Under the Airports Non-Aeronautical Revenues and Activities (ANARA) framework, ACI has published several key guidance documents focused on helping airports maximize non-aeronautical revenue streams. These publications provide practical insights into enhancing airport commercial operations, which have become even more critical as the aviation sector recovers from the COVID-19 pandemic.

7.2.1.1.1. **Optimal Integration of Airport Ground Access Services Handbook:** This handbook provides guidance on how airports can better integrate ground access services such as public transport, parking, and ride-hailing. It focuses on optimizing these services to improve the passenger experience while simultaneously enhancing revenue through strategic pricing and service offerings.

7.2.1.1.2. **Sustainable Airport Ground Access Policy Paper:** This paper outlines strategies for developing sustainable ground access to airports. It includes recommendations for reducing the environmental impact of access services while maintaining or increasing revenue potential. Examples include promoting electric vehicle charging stations, remote parking, and other environmentally friendly options that appeal to modern travelers.

7.2.1.1.3. **Regulatory Threats and Opportunities in Airport Retail White Paper:** This document addresses both the regulatory challenges and opportunities that airports face within the travel retail space. It explores how changing passenger demographics, regulatory frameworks, and technology are

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reshaping airport retail. The white paper also offers strategic recommendations to adapt to these changes and capitalize on emerging trends.

- 7.2.1.1.4. **Retail Optimization for Small and Medium-Sized Airports White Paper:** This white paper provides tailored recommendations for smaller airports looking to improve retail offerings. It covers topics such as customer journey mapping, enhancing digital engagement, and adjusting retail mixes to meet the preferences of specific passenger demographics.
- 7.2.1.1.5. **Airport Concession Agreements White Paper:** This white paper explores the evolving landscape of concession agreements between airports and commercial partners, especially in light of the COVID-19 crisis. It includes strategies for mitigating risk and adapting business models to future challenges.
- 7.2.1.1.6. **Business Models Between Airport Operators and Concessionaires White Paper:** This document addresses how the business relationship between airport operators and concessionaires has shifted due to the pandemic, exploring alternative business models that are more flexible and resilient.
- 7.2.1.1.7. **Path to Recovery – The Airport Retail Perspective, White Paper:** This white paper focuses on the post-pandemic recovery of airport retail, discussing trends in passenger spending behavior, new retail technologies, and strategies for boosting revenues in the post-COVID landscape.
- 7.2.1.1.8. **Sustainability Guidelines for Non-Aeronautical Concessionaires:** These guidelines offer sustainability best practices for non-aeronautical concessionaires, helping airport commercial operators reduce their environmental footprint while maintaining profitability.
- 7.2.1.2. **ACI Flash Reports on airport traffic:** These reports provide timely updates on airport passenger and cargo traffic, offering insights into recent trends and changes in the aviation industry.
- 7.2.1.3. **ACI World Annual Traffic Report (WATR) and dataset:** The WATR offers a comprehensive overview of global airport traffic, including key statistics and analysis. The accompanying dataset provides detailed traffic figures for individual airports worldwide.
- 7.2.1.4. **ACI Airport Economics Report and Key Performance Indicators (KPIs):** This report offers a comprehensive analysis of airport economics, covering aspects such as revenue, costs, investment, and financial performance. The KPIs provide benchmarking data for various operational and financial metrics.

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- 7.2.1.5. **ACI World Annual Traffic Forecasts (WATF):** These forecasts provide projections for future airport passenger and cargo traffic, helping to anticipate trends and plan for future developments in the industry.
- 7.2.1.6. **ACI Advisory Bulletins:** These assessments examine the economic impact of the recent COVID-19 pandemic on airports and the aviation industry in terms of traffic as well as industry revenues.
- 7.2.1.7. **Airport Service Quality (ASQ) reports:** The ASQ program measures and benchmarks passenger satisfaction and service quality at airports worldwide. The reports provide valuable insights into passenger experiences and can be used to assess airport performance.
- 7.2.1.8. **ACI Asia-Pacific and Middle East Study on Airport Connectivity:** The study represents a comprehensive examination and analysis of the connectivity landscape of airports in the Asia-Pacific and Middle East regions. The study focuses on the significance of air connectivity in driving economic and social development, identifies key factors influencing changes in airport connectivity, and proposes recommendations to enhance airport connectivity and advocate for greater liberalization.
- 7.2.2. This access will complement the consultant's independent data collection efforts, which may include gathering proprietary data from stakeholders such as airports, travel retailers, and industry associations. The consultant must ensure the data sources utilized are credible, up-to-date, and representative of the industry landscape to support robust and actionable findings.
- 7.3. ACI APAC & MID acknowledges that data collection for certain markets may pose challenges or be subject to confidentiality clauses. Therefore, the selected consultant is encouraged to propose appropriate solutions to overcome these challenges and address any data issues that may arise. ACI APAC & MID is open to alternative approaches and suggestions from the consultant to ensure the availability of necessary data. If required, ACI APAC & MID may aid and support in the data collection process to the extent possible.

8. Project Timeline and Delivery [Consistent with Sections 5.1.3 and 6.1.5]

- 8.1. **RFP circulation:** Monday, 7th July 2025
- 8.2. **Proposal preparation time:** Proposals shall be submitted no later than Friday, 1st August 2025
- 8.3. **Proposals evaluation and selection process:** 4th to 15th August 2025
- 8.4. **Project kickoff:** Monday, 1st September
- 8.5. **Preliminary findings:**
 - 8.5.1. The prospective consultant may be invited to present the **preliminary architecture of the project at the ACI Asia-Pacific & Middle East Board Meeting, to be held in Busan, Republic of Korea, in November 2025.** This presentation will serve as an opportunity to

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align the study's design and direction with the strategic priorities of the region's leading airports.

8.5.2. In addition to presenting the findings, the consultant may be invited to **chair or moderate a panel discussion** at the Trinity Conference in February 2026, facilitating an industry-wide dialogue on actionable strategies for improving airport retail performance and passenger engagement. The event will also offer opportunities for targeted meetings, including the **ACI APAC & MID Board Meeting**, which is scheduled to take place prior to the assembly. This will allow for in-depth discussions with senior airport executives and policymakers, ensuring that the study's final insights are aligned with the strategic goals of ACI and its members.

8.5.3. These engagements will provide critical feedback to refine the final report, which will be ready for release ahead of the **Trinity Forum 2026**.

8.6. **Interim Report:** November 2025

8.7. **Finalization:** January 2026

9. Intellectual Property Rights:

9.1. **Ownership:** The legal and beneficial ownership of all intellectual property prepared or developed by the selected consultant during the study shall be vested in ACI APAC & MID. This includes any reports, analyses, data, methodologies, models, or other intellectual property created or derived from the study.

9.2. **License grant:** In addition to ownership, the selected consultant shall grant ACI APAC & MID an irrevocable, royalty-free, non-exclusive license to use all rights, titles, and interest in the intellectual property developed for the study. This license enables ACI APAC & MID to utilize intellectual property in connection with various activities related to the study, such as construction, completion, maintenance, reinstatement, repair, letting, promotion, and/or advertisement. This license may also be extended to third parties authorized by ACI APAC & MID for the aforementioned purposes.

10. Submission of the Proposals and Clarifications on the RFP:

10.1. All questions about this Request for Proposal (RFP) should be directed to the Economics Team at ACI APAC & MID. Please send any inquiries to the email addresses listed below, and our team will provide prompt responses and clarifications.

10.2. To submit your proposal, please ensure that the electronic copy is sent to ACI APAC & MID by the specified deadline of **Friday, 1st August 2025, 17:00 Hong Kong time (GMT+8)**. Proposals should be emailed to the following addresses:

10.2.1. **Mr. Ilia Lioutov**

Head, Economics and Middle East Office

ACI Asia-Pacific and Middle East

Email: ilioutov@aci-asiapac.aero

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10.2.2. **Mr. Philip Kwok**

Senior Manager, Economics
ACI Asia-Pacific and Middle East
Email: philip@aci-asiapac.aero

- 10.3. Please note that late submissions will not be accepted. Ensure that your proposal is received by the designated deadline to be considered for evaluation. ACI APAC & MID will acknowledge receipt of all submitted proposals via email.
- 10.4. If any additional clarifications or modifications to the RFP are necessary, ACI APAC & MID will provide timely updates to all interested parties.
- 10.5. We appreciate your interest in contributing to this travel retail study focused on airports in the Asia-Pacific and Middle East regions. We look forward to receiving your comprehensive, well-structured proposals by the specified deadline. Your insights will be invaluable in shaping the future of travel retail and passenger engagement as airports continue to recover and innovate in a post-pandemic landscape.

—ENDS—