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Understanding Airport Concessioning: A Literature Review

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Abstract

Concessioning is an old French government innovation that has shown to be efficient since the 1776 water project. It originated from a desire for change, and it may be likened to public-private partnerships (PPPs) and private financing initiatives (PFIs), and/or it may be regarded as an arm of privatization. Privatization of state-owned enterprises (SOEs) has emerged as an essential component of many countries' structural reform and globalization policies. Concessioning is a procedure in which a concession grantor offers a merchant concessionaire the right to run a facility and/or provide a public-interest service in exchange for the concessionaire's commitment to create and manage the concession or manage the delivery of service at the concessionaire's own risk. Airport concessioning is described as a business located in an airport that provides consumer products or services to the general public under an arrangement with the airport, another concessionaire, or the owner or lessee of a terminal.

Keywords: Airport, Concessioning, Airport concessioning, Performance.

1. Introduction

In its original context, airport concession refers to the payment made by the airport authorities to the owner or management of a business to perform commercial operations at the airport, whereas rent or lease refers to the right to occupy particular defined premises or a certain area of realty (Jerome, 2018; Oghojafor *et al*., 2012; Adeniran & Gbadamosi, 2017). In general, concessions grant all commercial operations to sell products and services at the airport, and the terms concession, rent, and lease are frequently used interchangeably (Akinloye, 2024; Kim & Shin, 2016). Airport concessioning is described as a business located in an airport that provides consumer products or services to the general public under an arrangement with the airport, another concessionaire, or the owner or lessee of a terminal (Tsvetkov, 2016).

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Airport concessionaires are airport operators that execute concessions or give concessions to a retail service provider, operate or manage retail activities, and pay a concession fee to the airport, which is often a percentage of commercial income (Czerny, 2013). According to Kim and Shin (2016), presently, most airports all over the world are aiming to create greater concession revenues. As a result, every airport must consider the primary determinants of concession performance. These include the total traffic handled by an airport; total amount of space allocated for retailing and other commercial activities; characteristics of passenger traffic and buying behaviour of those passengers, operations and management of concession; characteristics of contract and rental fees; marketing strategy; and pricing strategy.

Many airports employ concession earnings to cross-subsidize aviation activities. The most commonly accepted explanation for the occurrence is that airports appear to confront a limitation on aeronautical costs, either because of airline opposition to increases in aeronautical charges or because their governments hold back or limit such rises (Zhang & Zhang, 1997). As previously stated, concession income is earned by non-aeronautical linked commercial activities that take place within terminals and on airport property. Concession business involves operating or leasing different types of shopping concessions, vehicle parking and rental, banking, and catering, with terminal concessions and car parking and rental being the most essential. Many airports get a far larger amount of their revenue from concessions than from aviation operations (Akinloye, 2025; Zhang & Zhang, 2013).

Typically, the concessionaire pays the airport a certain rate plus additional money when a predefined profit or turnover criteria is hit. Some agreements, particularly those negotiated by airports to encourage more retail presence, are entirely based on the concession's profit/turnover (Adeniran, Olorunfemi & Njoku, 2022; Adetayo, Njoku & Stephens, 2023; Adetayo, Muraina & Ngonadi, 2023). These agreements can range from one airport outlet to the next depending on the location, type of company, estimated turnover, and whether the outlet is new or not (Francis *et al*. 2020). The availability of alternatives for passengers and the level of contact with the operations of various concessionaires affect the level of competition among airport concessionaires for non-aeronautical services. Concessionaires may choose to work together or serve certain markets exclusively, altering the consumer base (Adler *et al.*, 2013).

2. Literature Review

According to Airport Council International ACI (2016), the following types of concession management in any airport, are

1. Direct leasing

Airport leases individual locations or small groups of locations (no more than 3) directly to the operators.

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2. Developer

The airport has an agreement with a third party to develop/lease and manage the concessions without operating any directly. The developer invests in facilities directly.

3. Prime operator

The airport leases packages of locations to two or more operators, each of which has multiple locations (more than 3) within the airport.

4. Master concessionaire

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

According to Doganis (1992), the process for the successful letting of concessions is summarized as follows: develop portfolio strategy; define market strategy for each concession; determine space and location requirements; proactively market the airport to potential concessionaires; prepare design concepts and specifications for contracts; tender/negotiation/selection process; monitor and review concessionaire performance; and work with concessionaires on improvements and redevelopment.

Average concession income per passenger, like average aviation costs, decreases with volume. Concession earnings per departing passenger are lower at hubs, most likely due to a high proportion of connecting passengers who do not utilize rental cars or parking (Adetayo, Olorunfemi, Akinsehinwa & Azrour, 2024; Dare, 2024). More congested airports provide less concession money per passenger, presumably because vertical relationships imply that airlines receive a larger share of such payments (Adeniran & Olorunfemi, 2020; Van, 2007). The period of each concessionaire deal, as well as the financial restrictions tied to it, will differ depending on the airport and store. It is unusual to have set rentals for distinct portions of the terminal, and rent evaluations are infrequent during the length of the contract, in contrast to the bulk of concessionaire contracts in the domestic market.

Many factors influence the length of the contract. One of the most important factors is the amount of investment required from the store. If only a little investment is required, a contract is typically short-term. If the business is required to make a significant investment, a five-year contract is considered the basic minimum (Freathy & Connell, 1999). Gillen (2011) investigated the collaboration of airport operators and concessionaires with airlines and concluded that all three assist each other and meet the transportation and consumer service expectations of consumers. Collaboration inside a relatively monopolistic market structure, such as enclosed airports and embedded service and retail offers, may result in so-called differential pricing due to a stage of demand and supply that is imperfect.

Airport revenue structures

Commercial concerns have traditionally been secondary to the demands of aeronautical operations. The airport administration has made it a priority to handle

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passengers as swiftly and effectively as possible (Freathy and Connell, 1998). However, two distinct approaches must be emphasized: the traditional view of an airport, i.e. that it exists to ensure the efficient movement of passengers from one destination to another, and an alternative approach, which sees airports as part of a broader framework of economic change and commercial opportunity. This shift in emphasis is one of the most significant recent developments to impact the industry (Freathy, 2020).

The "commercial-oriented airport concept" proposes that the airport grows into a more sophisticated market entity known as a "multipoint service-provider business" (Jarac, 2016). The capital required to develop and maintain an airport is generated from two sources which are

1. Aeronautical charges and
2. Non-aeronautical revenues

Airport operators charge airlines aeronautical fees for using their facilities, which include landing and apron fees, as well as passenger fees (Freathy and Connell 2017). Landing fees, passenger fees, aircraft parking fees, handling fees (if handled by the airport operator), and other aeronautical fees (air traffic control, lighting, air bridges, etc.) are examples of aeronautical charges, whereas concessions rents, direct sales (shops, catering, and other services provided by the airport operator), and car park (if provided by the airport operator) are examples of non-aeronautical charges (consultancy, visitor and business services, property development etc.).

Airport retail management

Interactions and activities are two important aspects of the airport retail sector. Both factors are strongly associated with both essential and discretionary activities (Wattanacharoensil *et al*., 2016). Chiappa *et al*. (2016) make a prognosis to expect an increase in revenues produced by the airport retail sector, due to the rising number of passengers and changes linked with sociodemographic factors. The number of passengers served by airports is increasing, which has a direct impact on airport operations management and, in particular, airport retail management. The approach focuses on customer happiness and passenger demands, with the only goal of improving quality service management as one of the most essential factors in airport retail management (Mederiros da Rocha *et al*., 2016).

There is a paradigm that divides the airport retail experience into three components: airport, passenger, and public. There are five forms of airport shopping experience: staged, previous, expected, perceived, and public (Wattanacharoensil *et al*., 2016). Airports have long had a distinct competitive edge in capturing a large number of passengers and viewing them as prospective consumers, which has resulted in increased income. Airports lost their distinctiveness as an ideal place for a large number of consumers offering exceptional pricing as outlet malls established a strong name via discounts and promotions (Fermie, 1995). Furthermore, the majority of airports in the United Kingdom are located outside of cities, giving them a

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competitive edge in offering products and services to travellers who were unable to buy in a metropolis.

Airports are an excellent alternative to big-city retail outlets, offering a wide variety of goods and services. It was a limitation on the selling of certain products and services in the 1990s. Airports were competitive because they were not constrained by such rules and had guaranteed sales because passengers could only purchase those things in airport-free zones (Freathy & O'Connel, 1998). A rising number of visitors throughout the world, and therefore an increasing number of airport consumers, might support a favourable prediction in airport retail management, potentially producing income for the non-aeronautical sector. Airports have the propensity to expand and create additional terminals in response to existing demand to service more people travelling (Fermie, 1995).

Schiphol International Airport sought to enhance the commercialization process or airport retail management by creating a shopping centre in the airport that would appeal to both travellers' and non-travellers interests (Freathy & O'Connel, 1998). Previously, airport operations management did not prioritize commercialization because the primary goal was to process passengers as quickly as possible to optimize efficiency and customer satisfaction (Freathy & O'Connel, 1998).

Mederiros da Rocha *et al*. (2016) evaluated airport terminals to identify activities, goals, and strategies used to manage the airport retail sector. The study provided a summary of key factors related to retail management and service quality in airport terminals, such as service levels at airports assessed against global standards; the amount of data tested and whether it was sufficient for a complete assessment of service quality and operations management in airport terminals; and research into service quality and operations management in developing countries (Mederiros da Rocha *et al*., 2016).

The key areas of Sydney airport, according to Littlechild (2012), are operations and retail management. Retail and commercial facilities are the most important revenue sources among all passenger activities available in airports. According to Littlechild, the airport in Alberta, Canada, conducted research on service quality and retail management to improve and build a selection procedure for future facility introduction (2012). Several factors, such as strategic moves toward commercialization and privatization, have a significant impact on non-aeronautical profit revenue and have a positive impact on the airport retail sector, such as management of aeronautical fees related to airline competition; passenger sophistication and experience based on needs and market competition; and airport completion focused on tourism and hub airports.

Traditionally, airports measured their effectiveness in operations and retail management by comparing performance and budget. Later, success assessment was expanded to include airport comparisons, to learn from rivals' mistakes and adopt features and procedures that ensure success (Francis *et al*., 2002). Freathy and O'Connel (2017) addressed the possibilities for a Single European Market at airports, which would streamline the buying of products and services. This would replace duty-free stores as well as the entire present structure. Proponents of this

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concept emphasize its significance in terms of the following: no border/immigration restrictions for intercommunity passengers; no customs obstacles for intercommunity travellers and traders; and openness in airport accounting with no cross-subsidization; Community-wide procurement strategies; aviation and airport commercial activity competition regulations (Freathy & O'Connel, 2017).

Freathy and O'Connel (1998) examine the income split between commercial and aeronautical operations. While airline competition has expanded, aeronautical profit has decreased considerably. Airports began to increase their retail activities to offset the losses associated with airline partnerships (Freathy & O'Connel, 1998). As a result, more airport area has been committed to retail development, with airport retail being one of the primary income producers. According to Freathy and O'Connel (1998), non-aeronautical charges accounted for 52% of British Airways' revenue in March 1998. To develop future success, retail activities began to play a vital part in airport operations management, emphasizing competitiveness, long-term strategy planning, and supply chain management (Freathy & O'Connel, 1998). Francis *et al*. (2002) sought to establish a comparative study to quantify the performance of retail management in different airports, but they encountered a lot of challenges owing to the wide diversity of services and methods provided by airports.

Performance management

According to Cameron (1986), there is a lack of appropriate clarity or precision in defining the term "performance." In the absence of any operational definition of performance on which the majority of relevant experts agree, different interpretations and conclusions would be argued by diverse writers. This discord and lack of uniformity are due in part to the lack of a serious endeavour to theoretically or practically account for a defined idea, which has resulted in the likelihood of any definition arriving at the intended definition being questioned.

Organizations take on a range of activities to attain their objectives. These repetitive actions that employ processes for the organization's success must be quantified to establish the degree of performance and for management to make informed decisions on where, if required, to take steps to enhance performance within the processes. As a result, there is a strong link between organizational objectives and organizational performance.

Thompson (1967); Friedlander and Pickle (1968) defined performance as the evaluation of constituents that strive to analyze a company's skill and ability in meeting the constituents' ambition levels utilizing efficiency, effectiveness, or social referent criteria, which are briefly outlined below. Effectiveness refers to the extent to which production operations can complete and meet the needs and requirements of the client. Efficiency is concerned with examining and evaluating how an organization's resources are economically employed via the execution of functions to achieve its goals.

Measuring company performance and requesting performance statistics is one of the primary obligations and needs of various managers in various firms, as it is said to be a vital and necessary condition for success (Lebas, 1995). He goes on to say

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that performance is made up of two parts: the first deals with previous successes and accomplishments as a result of past activities, and the second deals with predictions or inferences of future performance based on present actions.

Given this, Adler *et al*. (2013) claimed that most airport operators and concessionaires in Europe do not function optimally, needing deeper investigation and the deployment of adaptive solutions to boost profitability from aeronautical and commercial operations. Economic inefficiencies, such as financial losses or the need for communal subsidies by public and private airport operators, generate capacity challenges and gaps in the effective utilization of an aerodrome's infrastructure and retail space (Marian, 2012).

Furthermore, Kwakkel *et al*. (2012) investigated the efficiency and growth of airport operations, as well as the oscillations in airport handling performance, as part of traditional strategic frameworks such as airport master planning (AMP). They concluded that the need for enhanced and adaptable conceptions enhances the relevance of management tools and the implementation of sustainable plans by business leaders of privatized enterprises.

Profitability

Airports, according to Davies (1995), are major retail centres. According to Perng *et al*. (2016), airport profit is divided into two categories: aeronautical and non-aeronautical. The non-aeronautical segment of the airport industry is generating an increasing amount of money (Dare, 2024; Olorunfemi, Adeniran & Amoako Sakyi, 2024; Olaniyi, Adeniran, Ogieva & Ogwuche, 2026; Olaniyi, Ilugbami, Olorunfemi & Ojo, 2024). Airports have evolved into more than just a transportation hub; they are also regarded as entertainment venues due to their tight link with tourism and shopping. Any waiting time is viewed as a potential time to optimize the profit of airports, in particular considering departure zones at airports (Geuensa *et al*., 2020). According to Omar and Kent (2016), 60% of traditional retail purchases are planned, meaning buyers know what they want to buy and how much money they are ready to pay ahead of time.

While passengers have a completely different buying technique than regular retail consumers. To reach a high degree of profit maximization, airports must evaluate a wide range of products and services to meet the requirements and expectations of their clients (Perng *et al*., 2016). A retail and duty-free shop allocation plan should be designed to optimize profit earned from the non-aeronautical sector. The most appealing shopping environment was discovered to be connected with terminal departure sectors (Perng *et al*., 2016).

Profit maximization is directly tied to customer incentive to buy in airports, where passengers are classified into four buying reasons: utilitarian motivations, social motivations, experiential/ hedonic motivations, and travel-related motivations (Chung *et al*., 2013). A comprehensive and concentrated examination of passenger shopping behaviour is part of the profit maximization approach. Outbound shopping is in high demand among travellers due to particular physiological situations, such as boarding tickets and being eager about a trip. It is also called 'happy hour' when

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passengers are most likely to shop while waiting for a flight and spend money during that particular period (Perng *et al*., 2016).

Airports offer an edge in terms of profit maximization over regular retail businesses since passengers are more likely to make a purchase owing to time constraints and the unique situation of being in a specific area, such as a terminal. Travellers may have a clear understanding of the purchase they intend to make, but due to time constraints and anxiety that they are likely to experience while waiting to board, they are more likely to switch to alternatives offered within the airport (Chung *et al*., 2013). Similarly, airports have a competitive edge in terms of product availability, which saves travellers time and effort (Chung *et al*., 2013). According to Geuensa *et al*. (2020), there are three categories of incentives that drive travellers to buy items or services at airports: functional motivation, social motivation, experiential motivation, and travel-related. motives. Profit maximization in the airport retail sector is achieved through knowledge of those motivations (Olorunfemi, & Adeniran, 2024; Olorunfemi & Adeniran, 2020).

It is worth noting that airport retail enterprises such as in-store browsing and product allocation are not comparable to standard retail marketing approaches. Most items from various brands aiming for different purposes are generally arranged adjacent to one another, which is unusual in traditional stores. The variety of items accessible in one location may be classed as exotic and is one of the motivators to buy more, leading to profit maximization (Adeniran, Olorunfemi & Akanmu, 2025; Geuensa *et al*., 2020). According to Perng *et al*. (2016), men and women have distinct purchasing habits, and profit is created in different ways based on gender.

Women prefer to buy books and fragrances, whereas men prefer to buy electronic and photographic products. Another link was discovered among business travellers, who are more inclined to buy in airports while travelling with coworkers. According to the study, women are more prone to shop near departure gates, and they also feel more encouraged to spend money in major stores, making them more active shoppers than males, who are more indifferent when compared to female travellers (Perng *et al*., 2016).

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3. Conclusion

Airport marketing is becoming more innovative and strategic, to increase profit and create a competitive environment through the development of customer loyalty services offered at certain airports. Passengers at Amsterdam's Schiphol Airport have access to casinos and golf courses. Singapore's Changi Airport competes for consumer happiness and possible customer loyalty by providing karaoke, a swimming pool, and bathing facilities. There are a large variety of tactics researched, tested, and adopted by various researchers and airport operation managers as part of a marketing approach centered on airport retail sector income.

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This study was conducted by shedding more light on the effectiveness and the need to adopt airport concession based on the performance in terms of passenger throughputs, retail activities, and amount remitted to the government by the concessionaire of airport. It will also explore the history of airport concession and concession strategies adopted over the years.

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Conflicts of Interest

The author declare no conflict of interest.

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Author Responsibility Statement

OA: Conceptualization, Writing - original draft, Introduction, Literature, Conclusion. The author read and approved the final manuscript.