MUNICH AIRPORT

A strategic blueprint for

Airport Wellness:

Transforming airport commercial strategy for the conscious consumer era

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published in

Journal of Airport Management

Vol. 20, No. 4



Abstract

Airports are undergoing a transformation as evolving passenger expectations reshape commercial development. No longer viewed solely as transit infrastructure or retail platforms, they are increasingly expected to function as integrated wellness ecosystems supporting traveller well-being, sustainability, and meaningful experiences alongside commercial performance.

This paper examines how the rise of the conscious consumer — driven by health, sustainability, transparency, and purpose — is redefining airport commercial strategy. Drawing on cross-industry evidence, it explores how trends such as neurowellness, biophilic design, personalised food and beverage (F&B), the growth of no- and low-alcohol (NoLo) offerings, and technology-enabled experiences are moving from niche innovations to core drivers. It highlights how aircraft-level wellness innovations are raising expectations across the journey and outlines implications for airports.

Beyond concept design, the paper emphasises enabling frameworks, particularly commercial models and concession structures, that allow innovation to scale. A structured implementation roadmap addresses infrastructure, partnerships, operations, data optimisation, and compliance. It provides airport leaders and policy makers with a practical blueprint for translating wellness into a measurable, commercially viable strategy.

This article is published in Journal of Airport Management, Volume 20, Number 4.

This article is also included in The Business & Management Collection which can be accessed at https://hstalks.com/business/.

Introduction

Wellness-oriented commercial ecosystems may represent an important avenue for future airport growth (see Figure 1), aligning with evolving traveller values moving beyond traditional retail and seizing a massive market opportunity. Leading airports increasingly realise that ntegrated wellness, smarter retail, and elevated dining are becoming increasingly important expectations among some passenger segments.

Recent market analyses now distinguish between 'core airport retail' (duty-free and speciality stores only) and the broader 'airport commercial ecosystem', which includes food and beverage (F&B), lounges, services, and experience-based spend.[1'2] Under the narrow definition, the global airport retail market was valued at approximately US$43bn in 2023 and is projected to reach around US$68–70bn by 2030, reflecting a compound annual growth rate (CAGR) of approximately 6.8–7.0 per cent.[3],[4] When assessed through the broader commercial lens increasingly used by airport operators and investors, however, the global airport retail market, encompassing retail, F&B, and service-based commercial revenues, was valued at approximately US$106bn in 2025, is estimated at US$111bn in 2026, and is forecast to grow to nearly US$175bn by 2034, at a CAGR of approximately 5.9 per cent.[5] This broader framing aligns with Airports Council International's (ACI) definition of commercial and non-aeronautical revenues, which includes retail concessions, catering, lounges, and other passenger-facing services.[6]

Today's travellers are no longer passive passengers moving through airports; they increasingly seek experiences that align with their personal values, well-being priorities, and sense of purpose. Millennials, Gen Z, and high-spending women are particularly driving the demand for wellness, sustainability, and purpose-driven brands. With over 75 per cent of travellers wanting sustainable options and the global wellness sector booming to US$1.8tn in 2024,[7] airports that fail to respond to evolving consumer preferences may risk losing competitiveness over time.

Within travel, two consumer-driven shifts are increasingly evident. The first is the rise of neurowellness, with growing recognition that travel environments, particularly airports, can either amplify stress or actively support nervous system regulation amid chronic overstimulation and time pressure. The second is a measurable backlash against hyper-optimisation and constant self-tracking, as consumers place greater value on meaning, emotional repair, and genuine human connection over performance metrics and dashboards, especially in high-friction environments such as terminals and transit hubs.

Simply adding a meditation room is not sufficient innovation. Integrated wellness, smarter retail, and enhanced F&B experiences are becoming increasingly important differentiators in airport commercial strategy. Those who act now have a real chance to redefine the travel experience and lead in this next phase of airport business.

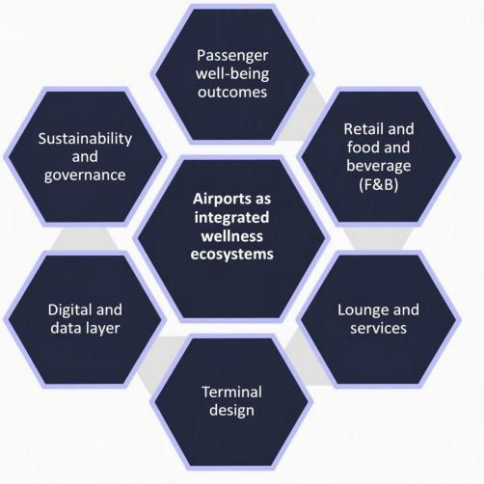


Figure 1 Airports as integrated wellness ecosystems

The conscious consumer revolution: moving beyond traditional travel motivations

Travellers now prioritise values such as **sustainability and personal well-being**, redefining what makes a journey valuable. The old ways of competing in the travel industry — focusing mainly on price or a few flashy perks — are no longer effective. These days, travellers are evaluating their choices through a much broader lens (see Tables 1 and 2). They are looking beyond the ticket price, carefully considering everything from an airline's carbon emissions to how their spending affects local communities and their own personal well-being.

Transparency has become a key differentiator. Companies that share clear data about their environmental impact are gaining ground. Aviation currently accounts for approximately 2.5 per cent of global CO_2 emissions, despite serving a relatively small share of the world's population.[8] Multiple analyses, however, warn that without deep decarbonisation, aviation's share of global emissions could rise dramatically as other sectors decarbonise and air travel demand continues to grow, with estimates indicating aviation could account for up to ~20 per cent of global emissions by 2050 in a no-action scenario.[9]

This trajectory places mounting pressure on airlines, airports, and operators to embed sustainability and credible transition pathways or risk losing legitimacy and relevance in a carbon-constrained world. In response, the aviation sector has set ambitious targets: over 300 airports in Europe have already published **Net Zero 2050 roadmaps**, aligning with global commitments to achieve net zero carbon by 2050.[10]

Research confirms this shift. Consumers are increasingly choosing brands that show a genuine commitment to sustainable practices, not just talking about them. This focus is not limited to airlines; travellers are now paying attention to every detail of their journey, from what is sold in airport shops to how F&B outlets source their ingredients. The conscious consumer movement influences every step of their decision-making process. Destinations are being judged not just on their scenery or attractions, but on their carbon footprint, their support for local communities, their efforts in wildlife conservation, and their dedication to cultural preservation. We are seeing a notable shift away from crowded tourist spots towards destinations that embrace **regenerative tourism**; places where travellers know their presence has a positive impact on both people and the environment.

Table 1 How conscious consumer values are reshaping travel

	Sustainability	Community impact	Transparency	Well-being
Tour operators	✓	✓	✓	✓
Destinations	✓	✓	✓	✓
Cruise/luxury travel	✓	✓	✓	✓
Accommodation	✓	✓	✓	✓
Airports	✓			✓

Cross-industry validation of wellness-centered strategies

A growing body of evidence suggests wellness-focused strategies can contribute to commercial success across multiple sectors, proving they are a fundamental market shift. These strategies are not just a passing fad, they are driving real commercial success across various sectors. Consider the clothing brand Patagonia, for example: their bold 'Don't Buy This Jacket' campaign boosted sales by **30 per cent**.[11] This authentic, purpose-led approach not only sold products but also built an incredibly loyal customer base.

Trends extend beyond retail. Financial services are fully embracing it, with environment, social, and governance (ESG)-focused investment funds expected to surge to over **US$40tn by 2030**.[12] This surge, up ~84 per cent from US$18tn in 2021, signals that conscious consumption is not a niche trend, it is a fundamental market shift influencing capital flows and corporate strategy.[13] For airport retail, or any sector aiming to remain competitive, a wellness-driven approach is no longer optional, it is where genuine growth is happening.

Table 2 How brands are affected by consumer values

Category	Brand/entity	Key initiative	Impact on consumer decision
Tour operator	G Adventures	Community-based tourism via the Planeterra Foundation	Support local communities through curated ethical itineraries
	Intrepid Travel	Climate-positive trips with carbon offsetting and low-impact travel	Carbon-conscious trips with transparent emissions data
Destination marketing	Visit Iceland	Sustainability campaigns and tourism dispersion (eg The Icelandic Pledge)	Responsible timing and location of visits
Cruise/luxury travel	Explora Journeys (MSC)	Hybrid-powered ships and regenerative excursions	Luxury consumers align travel with eco-conscious values
Accommodation platform	Fairbnb. coop	50% of booking fees go to local community projects	Lodging that directly supports local initiatives
Cultural tourism	!Khwa ttu, South Africa	San-run cultural centre promoting indigenous knowledge	Engage in culturally respectful experiences that preserve heritage
Industry collective	The Conscious Travel Foundation	Network promoting regenerative travel and equity	Tour operators commit to ethical practices and net zero goals

Aircraft innovation as wellness infrastructure catalyst

Wellness technology

Airlines are heavily investing in **wellness technology**, with pilot projects such as the Emirates' meditation platforms [14] and Air New Zealand's upcoming smart sleep pods in 2026. [15] This presents both a challenge and a significant opportunity for airports. There is solid data to back this up. Research shows that wellness features reduce jet lag, improve mood, and enhance cognitive performance.

Biophilic cabin design

Design also plays a crucial role. Incorporating **biophilic elements** such as real greenery and natural materials helps passengers de-stress. **Circadian lighting** helps keep travellers' body clocks on track, and advanced air purification ensures better air quality throughout their journey. Collectively, these features do more than just meet expectations, they deliver measurable improvement opportunities in passenger experience and boost loyalty.

Sustainable materials

Airlines and manufacturers are considering integrating **eco-friendly biophilic materials** and energy-efficient systems. Airbus is testing bio-composites made of raw materials of biological origin to improve the environmental performance of future aircraft. Such initiatives ensure passenger comfort does not come at the planet's expense.

Operational value

This approach not only meets the expectations of today's environmentally conscious traveller but also helps control **long-term operational costs**. In short, it is a win–win for both business and brand reputation.

Airport technology and wellness environments



Technology and seamless journeys

Leveraging **artificial intelligence (AI)**, wearable tech, and modular wellness spaces enhances comfort and operational efficiency, while sustainable materials align with conscious consumer values. If travellers have just experienced a flight with circadian lighting and excellent air quality, they will not be satisfied with less when they arrive at the terminal. Airports that align their offerings with what is happening onboard can provide a seamless, high-quality wellness journey. This means offering not just isolated perks but an **integrated experience** from boarding to baggage claim. AI-powered ambient lighting is rapidly becoming a scalable solution. This allows for customisable light settings that adapt to everyone, from older travellers to families, neurodiverse guests, and those with mobility challenges. It is all about providing comfort while keeping operations efficient. Forward-thinking airports and airlines have begun transforming lounges and terminal spaces into wellness-oriented environments. Post-security outdoor terraces and open-air relaxation zones are increasingly being introduced, allowing passengers to access fresh air and airfield views during transit, an experience that was traditionally unavailable beyond security controls.



Wellness spaces and healthy dining

Some premium lounges now incorporate outdoor leisure features, including runway-adjacent pools, enabling travellers to relax or even swim during long layovers.[16] Wellness offerings inside terminals are also expanding. Transit-accessible airport hotels and lounges are introducing large indoor swimming pools, hydrotherapy facilities, and spa services that can be used by passengers without leaving the secure area. Across major international hubs, yoga rooms, meditation spaces, and quiet zones have become common amenities, helping travellers manage stress, fatigue, and jet lag during long-haul journeys. Culinary concepts are evolving in parallel. Airports are increasingly hosting health-focused dining formats offering plant-based meals, nutrient-dense bowls, 'superfood' beverages, and menus based on organic or locally sourced ingredients. Premium lounges, particularly across Asia and the Middle East, now regularly feature vegetarian and wellness-aligned fine dining options, alongside dedicated rest areas, nap pods, spa treatments, and in-lounge massage services. Together, these developments signal a broader shift from purely functional transit spaces towards holistic, experience-driven airport environments that prioritise **passenger well-being** alongside efficiency.

Retail and personalised F&B

Embracing sustainable retail, dynamic infrastructure, and digital transparency are crucial for airport retail to thrive in the conscious consumer era.

Sustainable retail integration and circular economy implementation

The demand for sustainable options is growing. Sticking to the old ways means leaving money on the table. **High-end second-hand boutiques**, for example, attract travellers who value sustainability but still desire luxury, offering a smart way to modernise the retail mix while meeting green expectations. The **'Made Here'** concept is another powerful move. Airports are at the intersection of regions, making them ideal places to highlight local artisans and products. This is an opportunity to stand out, support the local economy, and reduce carbon emissions from long-distance shipping.

Plus, travellers appreciate authentic experiences, not just generic retail. Consumers are prioritising products that support both physical and mental health, and airports can capture more spending by offering wellness-focused retail. On the tech side, **electronics trade-in programmes** are an obvious choice.

Travellers carry more gadgets than ever, and e-waste is a genuine concern. Implementing trade-in options provides airports with a new revenue stream and adds value to customers. Furthermore, **product refill stations and repair cafés** reduce single-use packaging and extend the life of belongings, respectively (see Figure 2).

F&B evolution: From convenience to personalised wellness

Airport F&B must evolve through biometric integration, operational innovation, and nutritional science to offer personalised wellness experiences (see Figure 3).

Biometric integration and advanced personalisation technologies: Airports have an opportunity to team up with health-focused brands to offer everything from functional drinks packed with adaptogens to nootropic snacks, and tech integration is another gamechanger. Passengers' devices can sync up to provide real-time health advice and nutrition recommendations, all based on biometric data, travel plans, and even destination requirements. This is a massive leap in personalisation and generates valuable data for future product adjustments and new concepts.

For those truly ahead of the curve, microbiome-based meal recommendations are a possibility. The era of generic airport food is coming to an end. Forward-thinking airports are using technology, partnerships, and data to revolutionise the passenger experience, and they are seeing tangible business results.

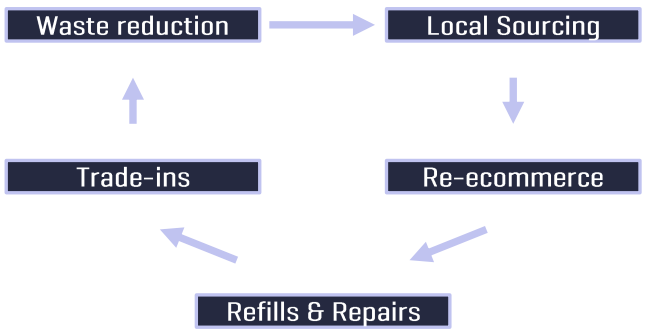


Figure 2 Circular retail models at airport



Figure 3 Personalised airport menu from data to plate

Food systems and operational innovation

Nutritional science integration and functional food development: Designing menus that align with circadian rhythms would be a smart way to help travellers combat jet lag and stay energised. By timing meals and selecting ingredients based on scientific principles, airports are not just feeding people, they are helping them feel better. Integrating **functional ingredients** such as adaptogens, nootropics, and targeted vitamins could offer a clear advantage.

Personalised supplement stations, offering customised vitamins and minerals based on a traveller's destination and trip duration, are also a strong consideration. Finally, growing consumer interest in digestive health may create opportunities for differentiated F&B offerings. Travel can disrupt people's systems, and if your menu helps prevent that, you are adding significant value. · Operational innovation and future-forward food systems: Mobile pre-ordering has been a game-changer, making the process seamless for both guests and staff and helping operations predict demand more accurately. Smart recommendation engines are transforming the food service industry.

They analyse customer preferences, dietary restrictions, and past orders, leading to customised menu suggestions and targeted promotions. This only works if connected to point of sale (POS) and customer relationship management (CRM) systems, but the results appear quickly: happier customers and higher spending per person. On the back end, smart kitchens are becoming the new standard.

Automated prep lines, self-managing inventory platforms, and real-time quality checks not only cut labour costs but also ensure consistent food quality. **Vertical farming**[17] is attracting increasing industry interest, although widespread airport deployment remains limited. Growing fresh produce onsite reduces supply chain complexities, guarantees freshness, and checks the sustainability box, something customers genuinely notice. Pushing the envelope even further, cellular agriculture and three-dimensional (3D) food printing[18] (see Figure 5) offer a genuine advantage in innovation and sustainability through lab-grown meats and custom-printed meals, subject to technological maturity and regulatory development.



Figure 4 Vertical farming concept



Figure 5 3D food printing concept

The NoLo movement

The no- and low-alcohol (NoLo) beverage segment is rapidly expanding with a +7 per cent CAGR predicted for 2024–2028 and expected to deliver US$4bn by 2028. [19] This is not merely a passing trend; it is largely driven by a clear shift in consumer values, especially among Millennials and Gen Z, who prioritise wellness and social responsibility and are moving away from traditional drinking habits. Premium NoLo brands such as Seedlip,[20] Lyre's,[21]and Kin Euphorics [22] are shaking up the status quo (see Table 3).

Their pricing is comparable to established premium spirits, yet they resonate with health-conscious travellers who want a sophisticated drink without the negative health impact. What is particularly interesting is the inclusion of ingredients like adaptogens, nootropics, and botanicals designed to boost mood or cognitive function. These additions allow for premium price points and give customers an extra layer of perceived value, fostering loyalty and increased spending. Consumer research consistently confirms that people are seeking alternatives that allow them to participate socially without compromising their health or values. Moreover, the category's biggest weaknesses — bland flavours and thin mouthfeel — are being addressed.

Thanks to modern production techniques, NoLo drinks now offer complex profiles and a genuine sensory experience. They are no longer just an afterthought or a lesser substitute; they are directly competing with traditional alcoholic options and earning their place on the menu. In parallel, the rapid adoption of GLP-1 medications [23] is reshaping travel-related consumption patterns, with emerging evidence pointing to reduced alcohol consumption, lower alcohol tolerance, and increased demand for high-protein and functional food options, accelerating the shift from traditional alcohol-led offers towards NoLo and wellness-aligned alternatives in public venues, including airports. Looking ahead, the NoLo category is likely to extend well beyond bars and restaurants into core airport retail and duty-free.

As non-alcoholic spirits, functional elixirs, and botanical blends become lifestyle products rather than substitutes, airports have an opportunity to position NoLo as a **premium, giftable retail category**, aligned with moderation, well-being, and modern luxury. Over time, this evolution could mirror the trajectory of premium skincare and wellness supplements, reshaping duty-free assortments and unlocking new commercial value beyond traditional alcohol-led sales.

Brand	Category	Key features	Geographic reach
Seedlip	Premium non-alcoholic spirit	Botanical, distilled non-alcoholic spirits; elegant branding	Global
Lyre's	Spirits replacements	Non-alcoholic versions of gin, whiskey, rum, etc.	Global (UK, US, AUS)
Heineken 0.0	Mainstream beer	0.0% alcohol by volume (ABV) beer, available in major travel and hospitality venues	Global
Kin Euphorics	Functional/wellness	Adaptogens, nootropics, sparkling euphorics	US, UK
Ceder's	Botanical gin alternative	South African botanicals, Swedish water, low-calorie spirits	Europe, select Asia
BrewDog AF	Craft beer alternative	Punk AF and Nanny State 0.5% beers; sustainable ethos	UK, Europe
Aecorn Aperitifs (by Diageo)	Wine alternative	Complex, wine-like aperitifs made from English grapes and herbs	UK
Three Spirit	Functional elixirs	Alcohol-free 'mood enhancing' drinks using adaptogens and herbs	US, UK, AUS

Table 3 Premium NoLo brands

International regulatory compliance

Navigating complex international regulations, including data privacy and environmental claims, is paramount for airport wellness programmes to avoid costly non-compliance.

Food and health claims

Operating wellness programmes in airports is not just about adding trendy health products to the shelves; it is a complex regulatory challenge that demands serious attention to detail. Every jurisdiction has its own framework, and failing to comply can lead to costly setbacks. In the US, the Food and Drug Administration (FDA) closely monitors functional foods and beverages. Products containing adaptogens, nootropics, or other health-focused ingredients must comply with the Dietary Supplement Health and Education Act (DSHEA) [24] requirements, which means strict labelling, substantiated health claims, and robust manufacturing standards. For structure/ function claims (such as 'supports focus'), pre-market approval is required.

When leveraging biometric data for personalised nutrition, airport operators must be vigilant; crossing into medical advice territory can trigger medical device regulations and far more scrutiny. In the European Union (EU), the European Food Safety Authority (EFSA) [25] sets a high bar for compliance. Health claims on foods and supplements must be pre-approved and backed by solid scientific evidence. Any innovative ingredient falls under 'novel food' [26] rules, demanding comprehensive safety assessments before going to market. On top of that, the General Data Protection Regulation (GDPR) [27] imposes strict requirements for collecting and handling biometric data. **Explicit consent**, strong data protection, and clear privacy policies are mandatory; shortcuts simply are not an option. Asia-Pacific presents its own set of unique challenges.

Local requirements and biometric privacy

Singapore, Japan, and Australia [28] each operate under distinct regulatory bodies, meaning compliance strategies must be localised and tailored. Integrating traditional medicine into wellness programmes requires a sensitive, informed approach; regulatory and cultural nuances are non-negotiable. From a privacy standpoint, GDPR in the EU categorises biometric data as a special category, requiring explicit consent and robust protection measures. If working with third party vendors or transferring data across borders, expect a significant legal workload to ensure every transfer meets regulatory expectations. In the US, varying state laws — led by California's California Consumer Privacy Act (CCPA) [29] — add another layer of complexity. Biometric data collection requires full transparency, including clear disclosures and opt-out options for consumers.

States such as Illinois [30] and Texas [31] are also tightening their regulations, so multistate operations demand careful, ongoing legal oversight.

Environmental claims

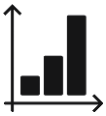
Finally, environmental compliance cannot be an afterthought. Airports must track their carbon footprint, and wellness initiatives can affect sustainability reporting under regulations such as the EU Taxonomy, [32] UK Task Force on Climate-related Financial Disclosures (TCFD), [33] etc. Making environmental claims in marketing requires robust evidence to avoid regulatory penalties for greenwashing. In short, implementing wellness programmes in airports requires more than just strong product offerings: it demands a proactive, strategic approach to regulatory compliance, data privacy, and sustainability. Without a dedicated team focused on these issues, the risk of non-compliance — and the financial and reputational damage that comes with it — is simply too high.

Risk management and competitive positioning



Technology risks and regulatory compliance

Early movers in airport wellness gain significant competitive advantage; proactive management of market, technology, and regulatory risks are key to long-term success. While some might worry that wellness is just a fleeting trend, demographic changes and success stories across other industries largely prove it is here for the long haul. Rolling out new technology brings its own set of risks: think system glitches, cyber security issues, and privacy concerns. Managing these risks means ongoing investments in security and regular staff training, but these are controllable with the right protocols and reliable partners. Regulatory compliance is another piece of the puzzle. Health claims, sustainability certifications, and international regulations all require **proactive legal strategies** and close monitoring.



Financial discipline and phased implementation

The details vary depending on the location and product, but with expert advice and strong compliance systems, these risks can potentially be mitigated through appropriate governance and controls. Finally, there is the financial side: cost overruns, weaker returns, and pricing pressure from competitors are always a threat. The smart move is to implement wellness initiatives in phases, support decisions with thorough market research, and keep **financial projections** on the conservative side. With a disciplined approach, these risks remain within reason. While wellness oriented commercial strategies present significant opportunities, airport operators should recognise that adoption pathways are unlikely to be uniform across passenger segments, geographies, or airport business models. A phased implementation approach supported by pilot programmes, robust performance measurement, and ongoing market evaluation can help airports manage the uncertainties.

Implementation framework: a structured approach to wellness transformation

Successful wellness transformation in the travel sector demands a structured, phased approach that integrates infrastructure, strategic partnerships, **operational excellence**, and continuous optimisation (see Figure 6).

Infrastructure and technology investment (foundation)

- **Strategic capital allocation:**
This involves upfront investment in specialised infrastructure (eg smart kitchens, vertical farms, personalised supplement stations, modular retail units) and cutting-edge technology (eg mobile pre-ordering systems, AI-powered recommendation engines, cellular agriculture capabilities, Internet of Things [IoT] sensors, automated checkouts). This forms the physical and digital backbone of the wellness hub.
- **Digital integration:**
Seamlessly connect all new technologies with existing POS, CRM, and inventory management systems to ensure data flow, accurate demand prediction, and personalised customer experiences.

Strategic partnerships and supply chain innovation (leverage)

- **Vendor management and quality control:**
Establish robust processes for vetting and managing vendors for **functional ingredients**, advanced food technologies (eg 3D food printing, cellular agriculture providers), and fresh produce (eg vertical farm operators). Emphasise compliance with health regulations and stringent quality assurance.
- **Onsite sourcing exploration:**
Actively investigate and implement opportunities for onsite produce cultivation (eg airport vertical farming) to reduce supply chain complexities, enhance freshness, and align with sustainability goals.

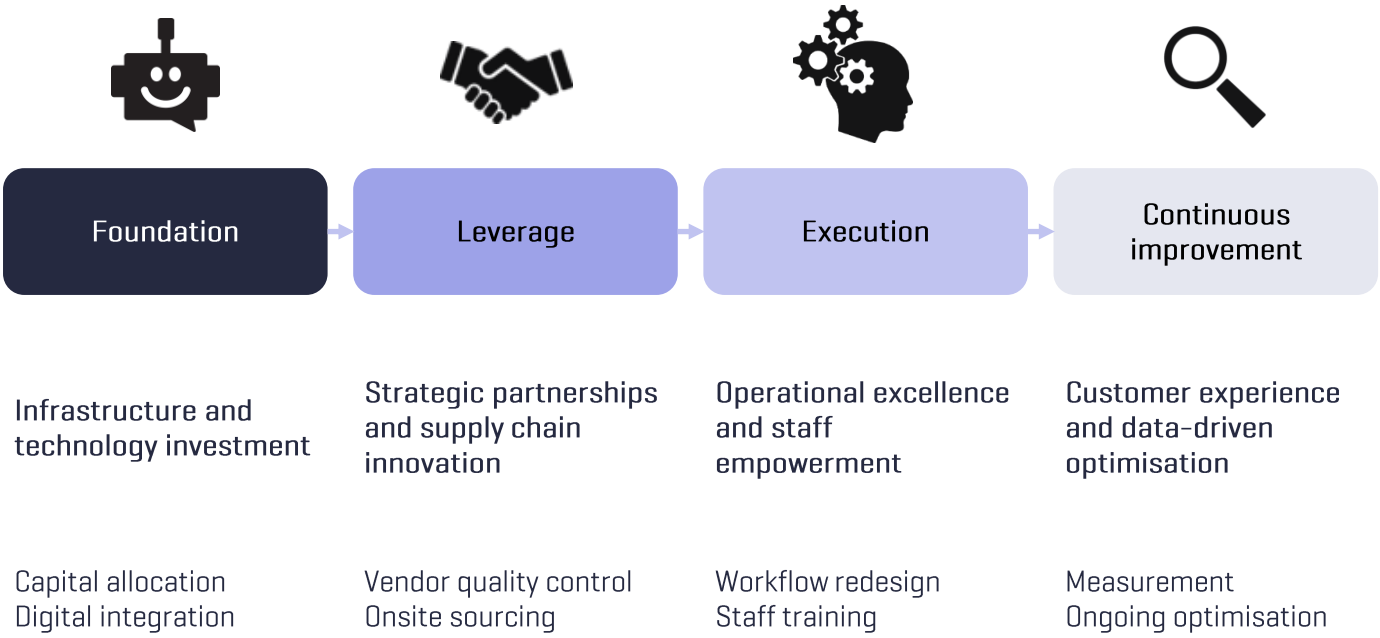


Figure 6 Wellness transformation framework

Regulatory compliance and risk mitigation (strategic oversight)

· **Dedicated compliance team:**
Establish or designate a dedicated team or crossfunctional working group focused on navigating the intricate landscape of international regulations.

· **Legal and regulatory due diligence:**
Proactively conduct thorough legal reviews to ensure compliance with relevant food and supplement regulations (eg US FDA DSHEA, EU EFSA, Novel Food rules), data privacy laws (eg GDPR, CCPA, state-specific biometric data laws), and environmental reporting requirements (eg EU Taxonomy, UK TCFD, US Securities and Exchange Commission [SEC] climate disclosure rules).

· **Localised compliance strategies:**
Develop and implement tailored compliance strategies for each operating jurisdiction, especially within complex regions such as Asia-Pacific, accounting for local regulatory bodies and cultural nuances (eg traditional medicine integration).

· **Transparency and claim substantiation:**
Ensure all marketing claims, particularly health and environmental claims, are robustly substantiated with scientific evidence to avoid penalties for misrepresentation or greenwashing.

· **Data privacy protocols:**
Implement stringent data protection measures for all collected personal and biometric data, ensuring explicit consent, secure handling, and compliance with crossborder data transfer regulations. Regularly review and update privacy policies.

Commercial enablers: Economics and RFP design



Traditional concessions

Static RFPs

High rent/fees

Fixed contracts

Figure 8 Traditional concessions



Partnership-led models

Innovative RFPs

Flexible economics

Shared risks and upside

Figure 9 Partnership-led models

Beyond concept design, airports must actively enable wellness and nextgeneration retail through commercial frameworks that encourage innovation. This includes **adapting rental models**, introducing phased or performancebased economics, and issuing requests for proposal (RFP) that explicitly invite wellness-led, NoLo, and experiencedriven operators. By shifting from purely transactional concession models towards **partnership-oriented structures**, airports can **de-risk innovation**, attract differentiated brands, and accelerate the evolution of their commercial ecosystems (see Figures 8 and 9).

Operational excellence and staff empowerment (execution)

· **Workflow re-engineering**:
Adapt kitchen operations to incorporate automated prep lines, self-managing inventory, and real-time quality checks, ensuring consistent food quality and optimised labour costs.

· **Menu and product development:**
Develop circadian-aligned menus, functional beverages, and personalised supplement offerings. For functional beverages, implement clear, benefitdriven labelling categories ('calm', 'focus', 'recharge') to aid customer decision making and build trust.

· **Staff training and education:**
Provide comprehensive training for staff on new technologies, specialised ingredients, wellness concepts, and personalised service protocols to ensure smooth adoption and effective execution.

Customer experience and datadriven optimisation (continuous improvement)

· **Enhanced digital platforms:**
Fully embrace and optimise digital platforms for mobile pre-ordering, smart menus, and personalised recommendations.

· **Data collection and analytics:**
Leverage the 'goldmine of data' from digital platforms to understand customer preferences, optimise inventory, and tailor future offerings. This includes data from IoT sensors and AI-driven inventory systems.

· **Measurement and iteration:**
Implement continuous measurement of key performance indicators (KPIs) related to customer satisfaction, spending per person, operational efficiency, emotional conversion, and wellness outcomes (see Figure 7). Use these insights for ongoing optimisation and to justify further investment.

· **Transparency and communication:**
Clearly communicate the benefits of wellnessfocused offerings and the innovative technologies used, building customer loyalty and perceived value. This includes leveraging quick response (QR) codes, standardised sustainability labels, and blockchain verification to provide complete transparency on product origin, carbon footprint, and sourcing ethics, reinforcing trust and justifying premium pricing.

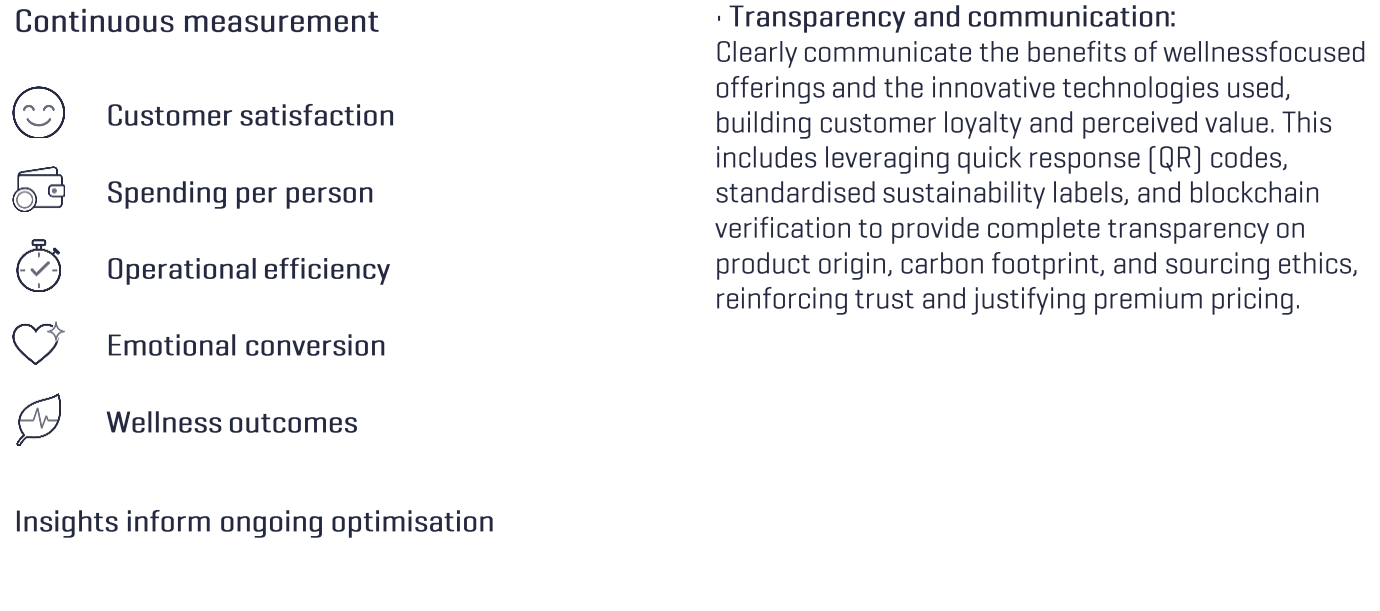


Figure 7 Wellness KPIs across passenger journey

Conclusion
The imperative for immediate strategic action



Airports must lead the wellness transformation now to secure future relevance and profitability, aligning with evolving traveller values and leveraging strategic investments. Airports are evolving into integrated wellness hubs and failing to adapt means falling behind. This shift is not just trend-chasing; it is an urgent play for relevance and profit. Travellers' expectations have changed rapidly. Airports that align with these values stand to win big. Those clinging to the old retail model — convenience, impulse buys, and generic experiences — simply will not suffice going forward. Integrating wellness is not just a 'nice-to-have', it is a core business evolution. This means implementing sustainable retail concepts, tailored F&B options, NoLo beverage programmes, and smart technology that genuinely improves the passenger experience. This requires strategic vision, investment, and a willingness to overhaul old ways of working.



Ultimately, integrating wellness into the airport experience is not just about adding a smoothie bar or meditation pod for travellers, it starts with seriously considering the people who make it all happen. If airport staff are not supported, that entire 'wellness ecosystem' is just an empty buzzword; but the upside is significant. The era of treating wellness as an add-on is over. Incremental tweaks will not cut it. The market is demanding bold action and **operational excellence** in wellness integration. Airports face a clear choice: lead the wellness transformation, or fall behind as competitors capture the evolving, value-driven traveller. In short, the strategic imperative is clear. Airports must become wellnessfocused ecosystems, **supporting traveller well-being**, environmental sustainability, and authentic cultural experiences. This transformation is the industry's biggest challenge, but also its greatest opportunity for long-term growth and competitive advantage. The future belongs to those who seize it with commitment and focus.

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With nearly two decades of experience in the aviation sector, Swapnal has supported major airport projects across Europe, Asia, the Middle East, and the Americas, advising on commercial master planning, retail and food and beverage (F&B) development, stakeholder governance, and implementation of future-ready customer experience models.

Swapnal's work spans large-scale development programmes — including greenfield airport design, commercial business cases, operational transformation — where she blends data-driven insights with emerging consumer trends to shape commercially robust and experience-centric airport ecosystems.

She is a member of the Airports Council International (ACI) World Airport Non-Aeronautical Revenues and Activities (ANARA) Committee and has contributed to industry white papers, expert forums, and global best practice initiatives. Her leadership emphasises sustainability, wellnessdriven commercial strategies, and the integration of local culture into airport design and programming.

A frequent speaker at international aviation conferences, Swapnal is recognised for her ability to harmonise global market insights with local operational realities, translating complex trends such as conscious consumerism, functional nutrition, no- and low-alcohol (NoLo) beverage evolution, and biophilic design into actionable strategies for airports.

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