
Concessions Customer Insights

September 2023



OVERVIEW



RESEARCH OBJECTIVE

Concessions is interested in understanding the question: “What are today’s customers looking for as it pertains to Dining and Shopping or Retail at DFW?”



METHODOLOGY:

Intercept surveys with departing (connecting and originating) passengers throughout the airport.



Field Date:

9/1/23 – 9/21/23



Terminal Distribution:

A: 20% | B: 17% | C: 22% | D: 22% | E: 19%

PHASE 1 | FOOD & BEVERAGE

Sample Profile: n = 299

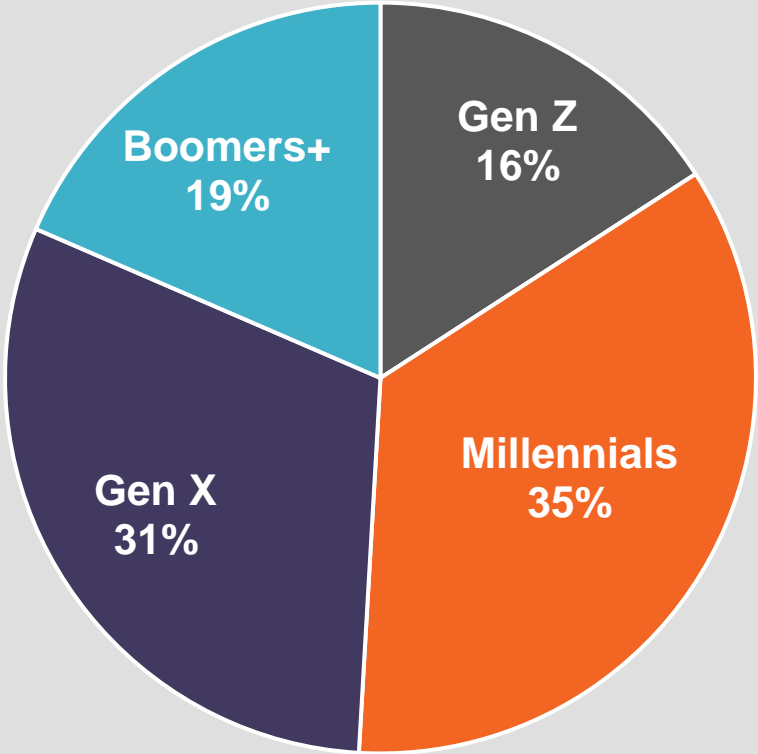
- Passenger Type: Connecting 60%; Originator 40%.
- Type of Flight: Domestic 91%; International 9%.
- 70% Non-business; 30% Business
- Male 43%; Female 57%

PHASE 2 | RETAIL

Sample Profile: n = 154

- Passenger Type: Connecting 68%; Originator 32%.
- Type of Flight: Domestic 88%; International 12%.
- 81% Non-business; 19% Business
- Male 29%; Female 71%

Passenger Population by Generation



In FY23, Millennials and Gen Z make up 51% of the population at DFW. These two groups of travelers will continue to grow in the foreseeable future.



Executive Summary

When it comes to dining and shopping at DFW Airport, passengers are typically in a hurry. They seek dining options that can cater to their fast-paced needs while providing a variety of distinctive flavors. On average, they are willing to spend between \$11 and \$19 per person on food and beverage combined.

Airport retail customers are looking for a convenient shopping experience coupled with excellent customer service. For those who didn't engage in retail activities, their reasons included the absence of enticing products and limited available time for exploring the Airport's offerings.

Food and Beverage Insights



When passengers choose where to purchase food and beverage, cleanliness, food quality, and speed of service are key factors of their decision.

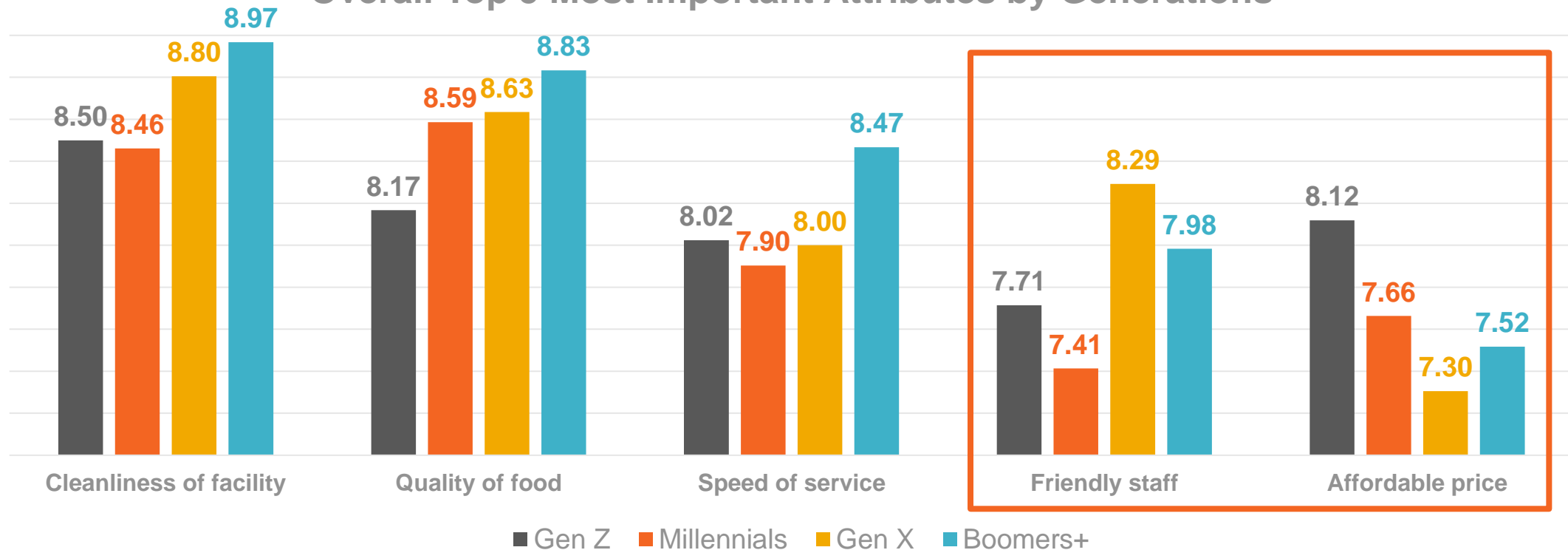
<i>Food and Beverage Attributes</i> Importance Score	Average Passenger Rating
<i>Cleanliness of facility</i>	8.70
<i>Quality of food</i>	8.61
<i>Speed of service</i>	8.10
<i>Friendly staff</i>	7.84
<i>Affordable price</i>	7.60
<i>Close to departing gate</i>	7.49
<i>Comfortable seating</i>	6.64
<i>Quantity of food (portion sizes)</i>	6.62
<i>Local cuisine</i>	5.55
<i>Positive online reviews</i>	5.22

Source: Concessions Customer Insights. N=299. Q: Thinking of how you decide where to purchase Food and Beverage at DFW Airport, please rate the following items on a scale of 1-10, where 1 is least important and 10 most important.



Gen Z is slightly more focused on affordable prices while more mature audiences have a higher preference for friendly staff. Additionally, Boomers have a higher preference for the speed of service.

Overall Top 5 Most Important Attributes by Generations



Source: Concessions Customer Insights. N=299. Q:Thinking of how you decide where to purchase Food and Beverage at DFW Airport, please rate the following items on a scale of 1-10, where 1 is least important and 10 most important. | Q: What is your age?








Most travelers look for something that will be quick and convenient to purchase. They also want a range of choices and laid-back environment.

Interest of Food and Beverage Venue

29%	<i>Quick and convenient options for travelers on the go</i>
25%	<i>Diverse food court with a range of choices</i>
22%	<i>Laid-back and inviting atmosphere with a focus on familiar food</i>
13%	<i>Local or regional establishments showcasing unique flavors</i>
6%	<i>Trendy and modern eateries for a unique dining experience</i>
4%	<i>Family-friendly settings for travelers with children</i>

Source: Concessions Customer Insights. N=299. Q: For your trip today at DFW, which type of Food and Beverage venue would you most prefer to visit? Select one.

When presented potential food concepts, passengers expressed interest in offerings such as craft tacos, salad/veggie wraps, elote, breakfast and chicken sandwiches

<i>TOP 5 Food Concepts</i>		% of Passengers Interested
Craft Tacos		55%
Salad/Veggie Wraps		51%
Breakfast Sandwiches		51%
Fried Chicken Sandwiches		48%
Mediterranean Bowls		45%

Other Food Concepts	Preference
Flatbread Sandwiches	45%
Pho / Vietnamese	43%
Thai	41%
Smoothie Bowls	39%
Elote	34%
Poke Bowls	30%
Grain Bowls	29%
Pressed Juices	29%
Plant-Based Food	26%
Charcuterie Boards	24%

*Additional insights:
Of those who knew what Elote was, 52% were interested.*

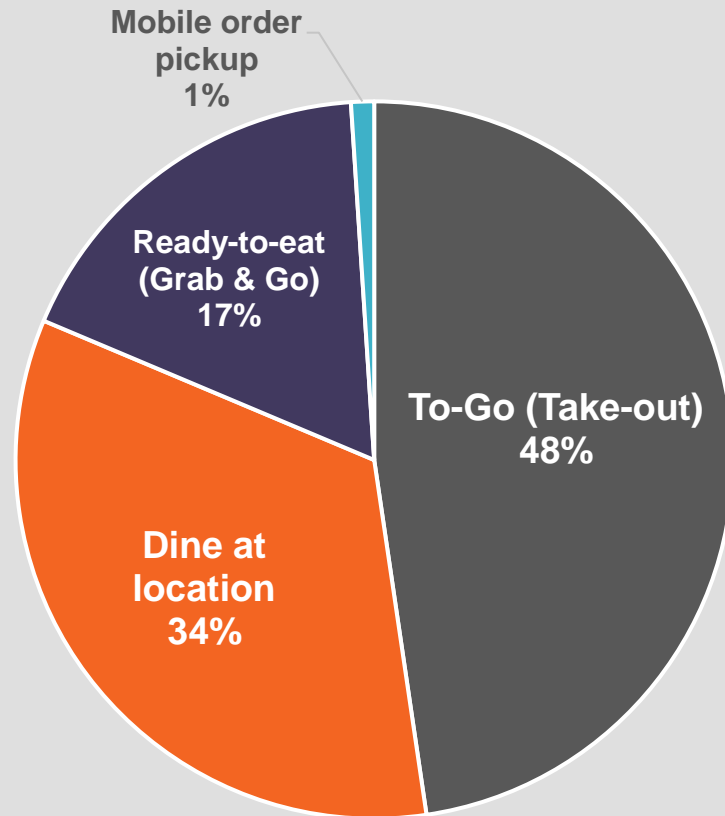
Breakfast Sandwiches, Craft Tacos and Salad/Veggie Wraps are commonly shared interests among younger and mature travelers.

<i>TOP 5 Food Concepts</i>	% of Passengers Interested Gen Z & Millennials
Breakfast Sandwiches	57%
Fried Chicken Sandwiches	56%
Craft Tacos	51%
Pho / Vietnamese	50%
Salad/Veggie Wraps	48%

<i>TOP 5 Food Concepts</i>	% of Passengers Interested Gen X & Boomers+
Craft Tacos	60%
Salad/Veggie Wraps	54%
Mediterranean Bowls	52%
Breakfast Sandwiches	47%
Flatbread Sandwiches	43%

¹⁰ Source: Concessions Customer Insights. N=299. Q: Please rate your interest in these potential concepts on a scale of 1 to 5, with 1 being 'not interested at all' and 5 being 'very interested'. Please base your rating on your experience at the airport today. | Q: What is your age?

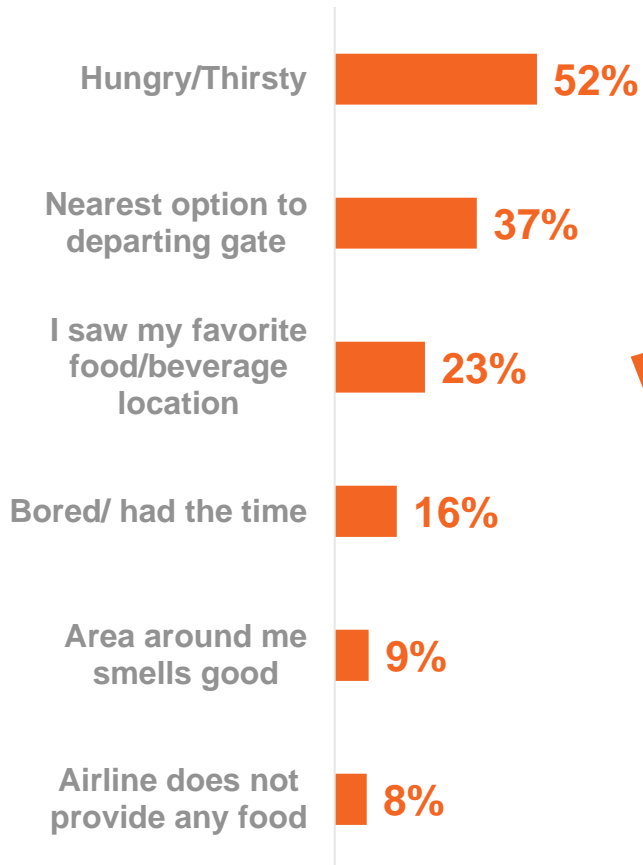
How did you order your Food & Beverage?



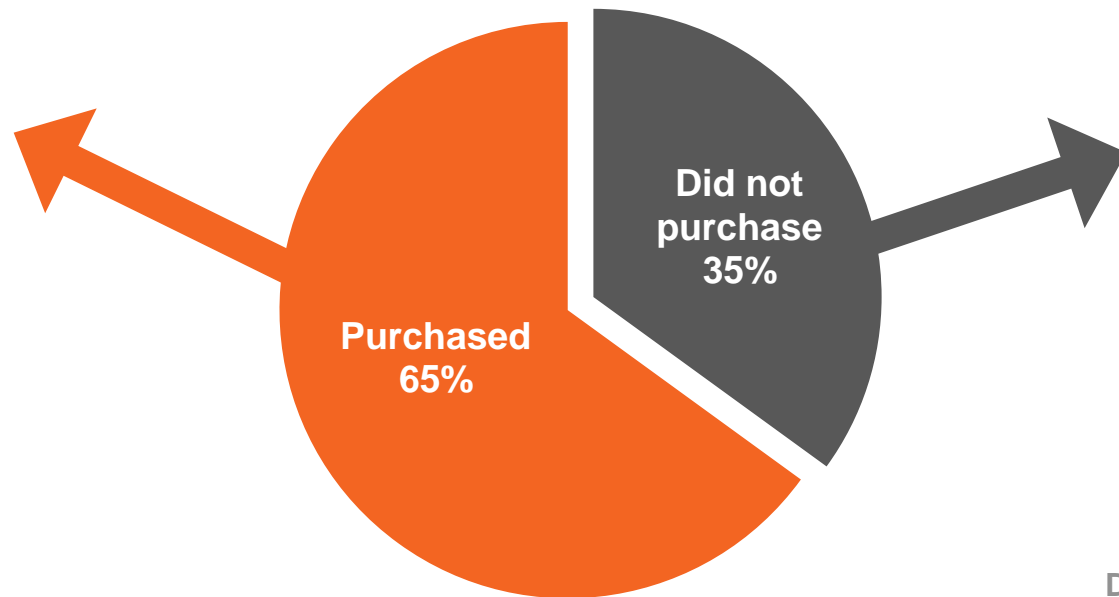
Of the 65% that made a purchase, two-thirds of passengers take their food & beverage to-go, whether by take-out or Grab & Go.

Most passengers, understandably, decide to purchase food and beverage due to hunger. However, many passengers also stated that they chose the location based on proximity to the gate and the time they had available.

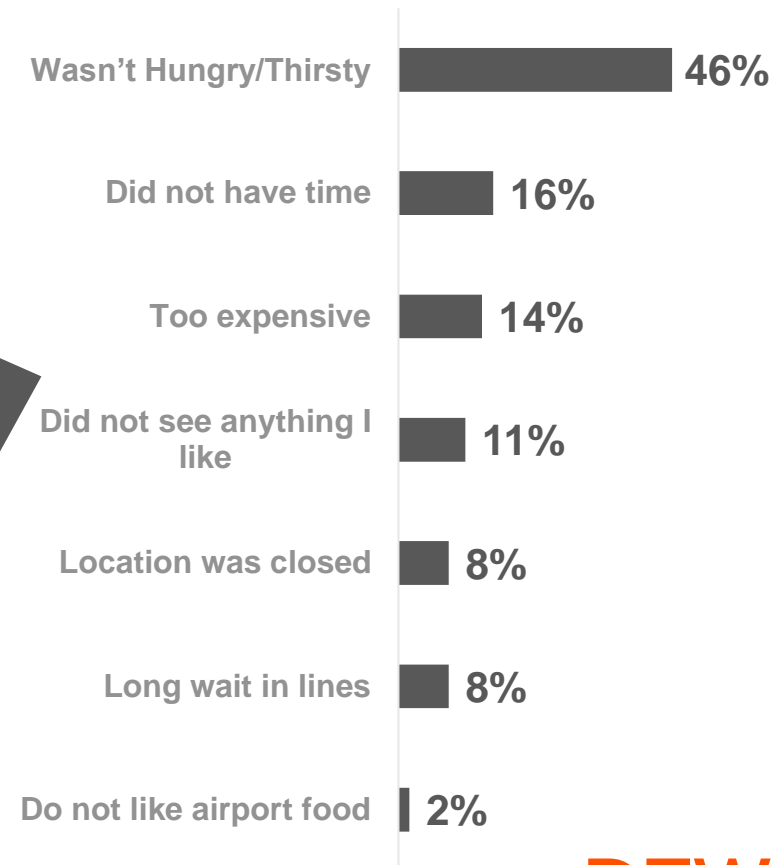
Why did you decide to purchase from this location?



Today, did you purchase Food and Beverage at DFW Airport?



Why did you decide NOT to purchase/visit Food & Beverage?



Average F&B Spend per person

\$16.97

**Average Spend per person
by Passenger Groups**

Connecting	Originating
\$18.29	\$ 15.38

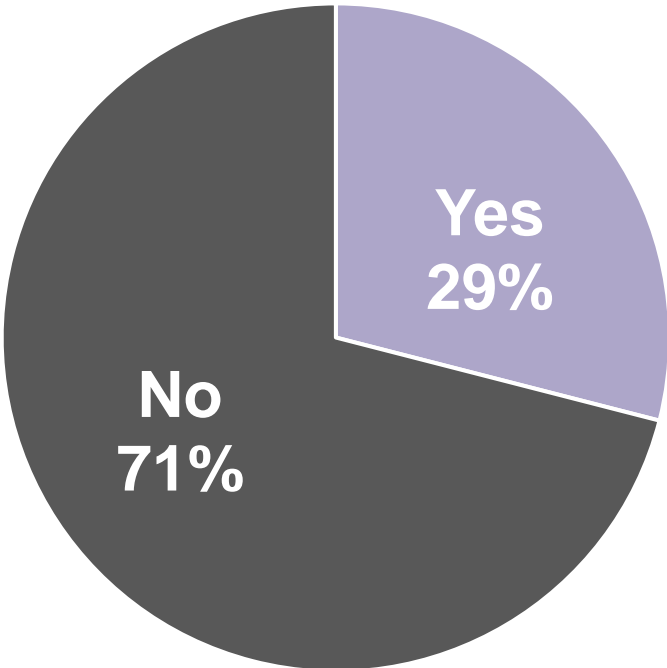
Male	Female
\$19.18	\$15.45

Business	Leisure
\$18.53	\$16.27

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Connectors, Males,
and Business
passengers all tend
to spend more per
person on food and
beverage at DFW.

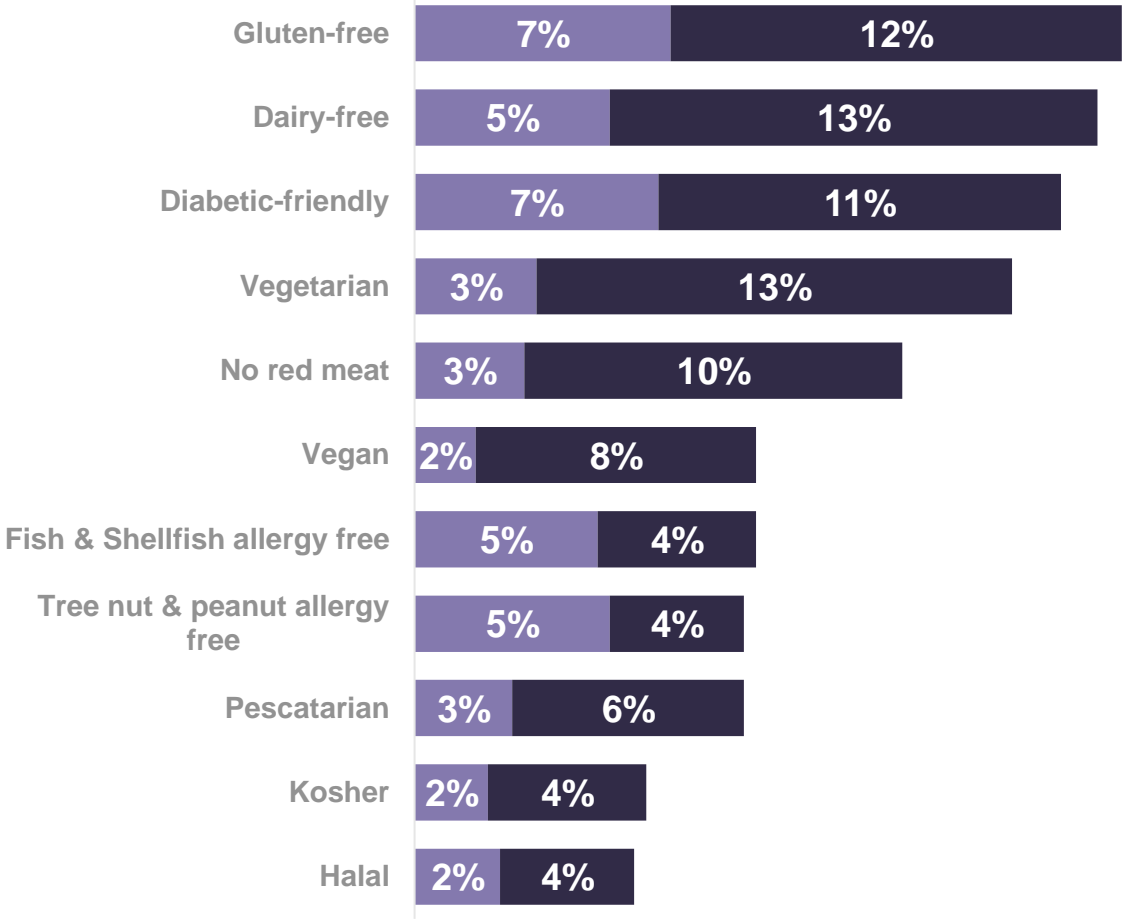
More than a quarter of travelers have a special diet. Most follow their diet by preference but there are some that need to follow their indicated diet.

Dietary Preferences and Needs



Specific Dietary Preferences and Needs

Percentage of all respondents



■ Need this diet ■ Prefer this Diet

What was the last restaurant you visited outside of DFW Airport? – Top 8 responses

Chick-fil-A

McDonald's

Texas Roadhouse

Chipotle

Whataburger

In-N-Out Burger

Pappadeaux Seafood Kitchen

Starbucks

Where did you make your food & beverage purchase at DFW Airport? – Top 8 responses

Starbucks

McDonald's

TGI Friday's

Chick-fil-A

Auntie Anne's.

Dunkin' Donuts

Einstein Bros. Bagels

Whataburger

For both on and off airport, the most commonly mentioned restaurants that passengers visit are fast food locations.

Source: Concessions Customer Insights. N=299.

What was the last restaurant you visited outside of DFW Airport?

Top 4 responses by Generation

Gen Z	Millennials	Gen X	Boomers+
McDonald's	Chick-fil-A	Chick-fil-A	Olive Garden
Starbucks	Chipotle	McDonald's	Chick-fil-A
Texas Roadhouse	McDonald's	Texas Roadhouse	Pappadeaux Seafood Kitchen
Whataburger	Texas Roadhouse	Pappadeaux Seafood Kitchen	Whataburger

Where did you make your food & beverage purchase at DFW Airport?

Top 4 responses by Generation

Gen Z	Millennials	Gen X	Boomers+
Starbucks	Starbucks	Starbucks	McDonald's
Auntie Anne's.	McDonald's	McDonald's	TGI Friday's
McDonald's	Whataburger	Einstein Bros. Bagels	Chick-fil-A
Einstein Bros. Bagels	Chick-fil-A	TGI Friday's	Dunkin' Donuts

Gen X and Boomers tend to visit more sit-down restaurants both on and off airport compared to younger generations.

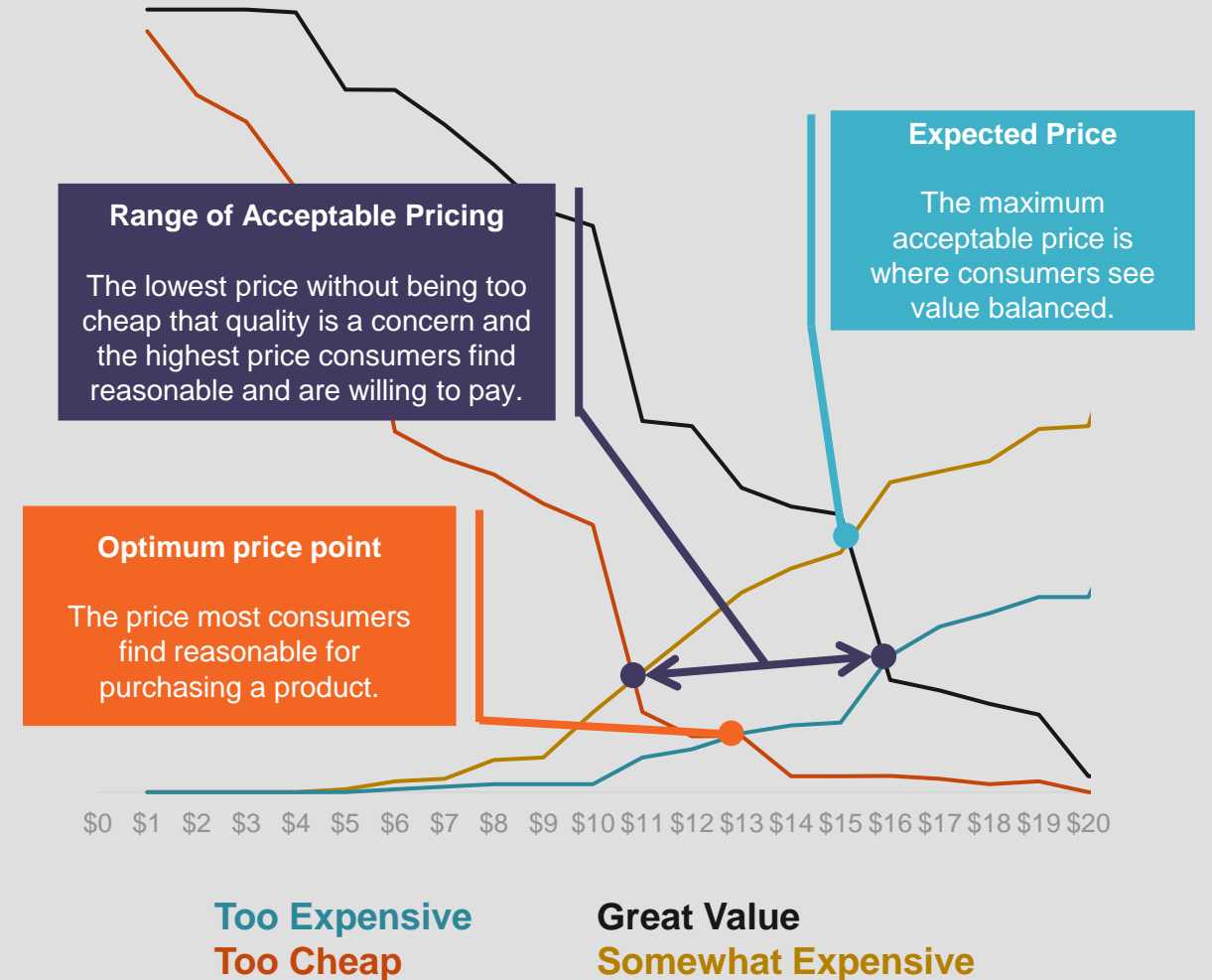
F&B Pricing Analysis

Van Westendorp Pricing Analysis asks 4 questions.

At what price per person would you consider *your preferred venue at the Airport* to be...

- ...**so expensive** that you would not consider trying it?
- ...**priced so low** that you would question the quality of the food and service?
- ...**a great value**—a fantastic experience for the price?
- ...**somewhat expensive**, but you might still consider trying it depending on other factors?

How to Interpret Van Westendorp's Output



Van Westendorp Pricing Analysis indicates that passengers are generally willing to spend between \$11 and \$19 per person for food and beverage combined.

Van Westendorp Pricing Sensitivity Analysis (Food and Beverage Combined)				
	Lowest Accepted Price	Optimum Price	Expected Price	Maximum Accepted Price
Definitions	<i>The lowest price without being too cheap that quality is a concern.</i>	<i>The highest price consumers find reasonable for purchasing a product.</i>	<i>The maximum acceptable price is where consumers see value balanced.</i>	<i>The highest price consumers find reasonable and are willing to pay.</i>
All Passengers	\$11.00	\$14.05	\$15.85	\$19.17

Passengers who prefer on-the-go food & beverage venues have a lower acceptable price range. Conversely, passengers who prefer more leisurely focused food & beverage venues are willing to pay more per person for food and beverage combined.

Van Westendorp Pricing Sensitivity Analysis (Food and Beverage Combined)				
F&B Preferred Venue	Lowest Accepted Price	Optimum Price	Expected Price	Maximum Accepted Price
All Passengers	\$11.00	\$14.05	\$15.85	\$19.17
<i>Quick and convenient options for on the go</i>	\$10.60	\$10.74	\$15.35	\$15.76
<i>Diverse food court with a range of choices</i>	\$10.69	\$10.85	\$15.70	\$18.33
<i>Laid-back and inviting atmosphere with a focus on familiar food</i>	\$15.00	\$15.57	\$21.46	\$23.81

Retail Insights



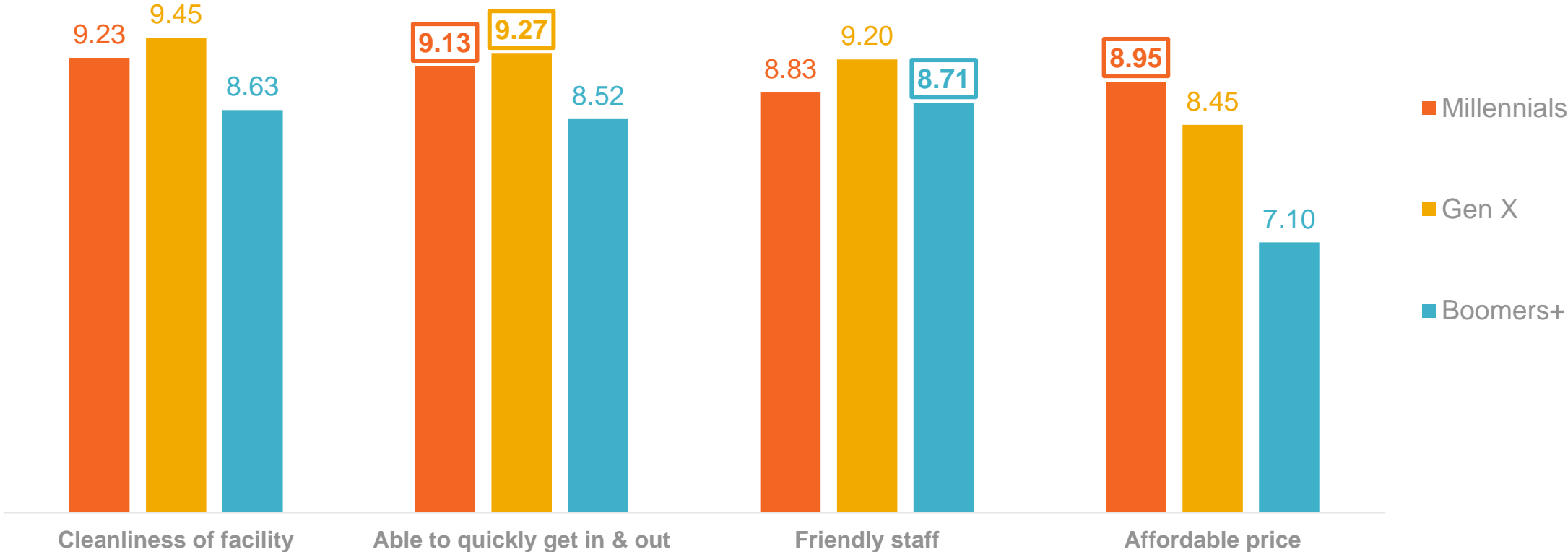
When travelers decide where to shop, the facility’s cleanliness, ease of access, customer service friendliness and the quality of products and services are key factors of their decision.

<i>Retail Attributes</i> Importance Score	Average Passenger Rating
Cleanliness of facility	9.10
Able to quickly get in & out	8.95
Friendly staff	8.86
Quality of products & services	8.70
Variety of products & services at the location	8.18
Close to departing gate	8.17
Affordable price	8.13
Atmosphere	7.42
Selection of products/services unique to the DFW area	6.45
Positive online reviews	5.43

Source: Concessions Customer Insights. N=154. Q: Thinking of how you decide what shops & services to visit at DFW Airport,, please rate the following items on a scale of 1-10, where 1 is least important and 10 most important.

Boomers appreciate a friendly staff when shopping at retail stores, while Millennials and Gen X emphasize efficient shopping. Millennials also place a high value on affordability.

Most Important Attributes by Generations



Source: Concessions Customer Insights. N=154.. Q: Thinking of how you decide what shops & services to visit at DFW Airport,, please rate the following items on a scale of 1-10, where 1 is least important and 10 most important | Q: What is your age?

Gen Z left out due to low sample size



Travelers with lower household income prioritize friendly staff. Those who earn less than \$50K emphasize product affordability. Conversely, those with higher incomes prioritize facility cleanliness.

Income

<i>Among Top 4 Retail Attributes</i> By Income	Less than \$50K	51-100K	More than \$100K
Cleanliness of facility	9.29	9.03	9.11
Able to quickly get in & out	9.17	8.57	9.02
Friendly staff	9.33	9.03	8.76
Quality of products & services	8.67	8.62	9.00
Affordable price	8.71	7.70	8.00

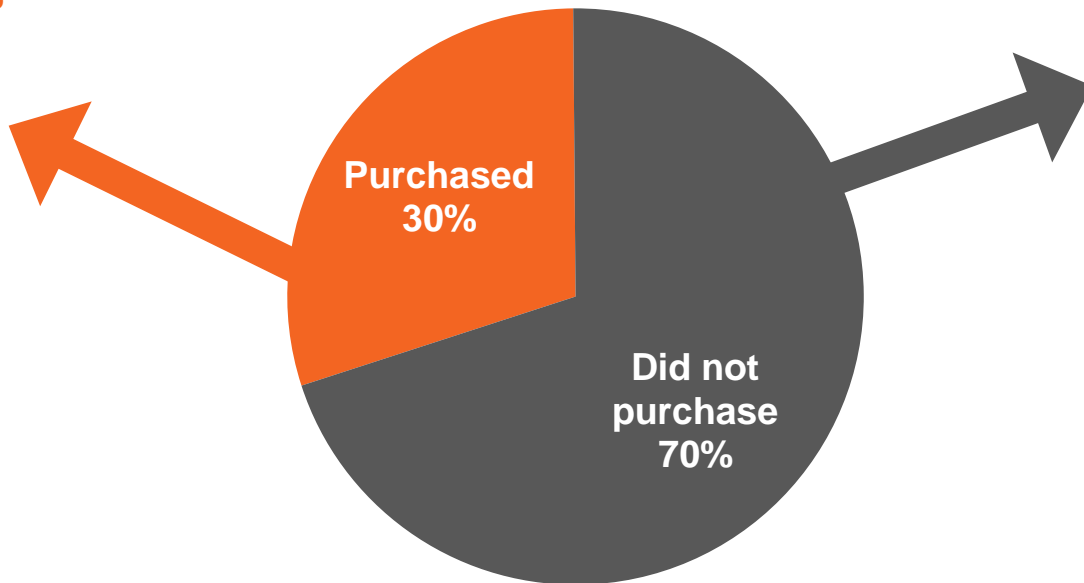
Source: Concessions Customer Insights. N=154. Thinking of how you decide what shops & services to visit at DFW Airport,, please rate the following items on a scale of 1-10, where 1 is least important and 10 most important. | Q: Which of the following groups contain your annual household income, before taxes?

Less than one-third of travelers purchased retail at DFW. Of those that made a purchase, most attributed their decision to ample time in the terminals and appealing options. Whereas non-purchasers stated they did not need anything.

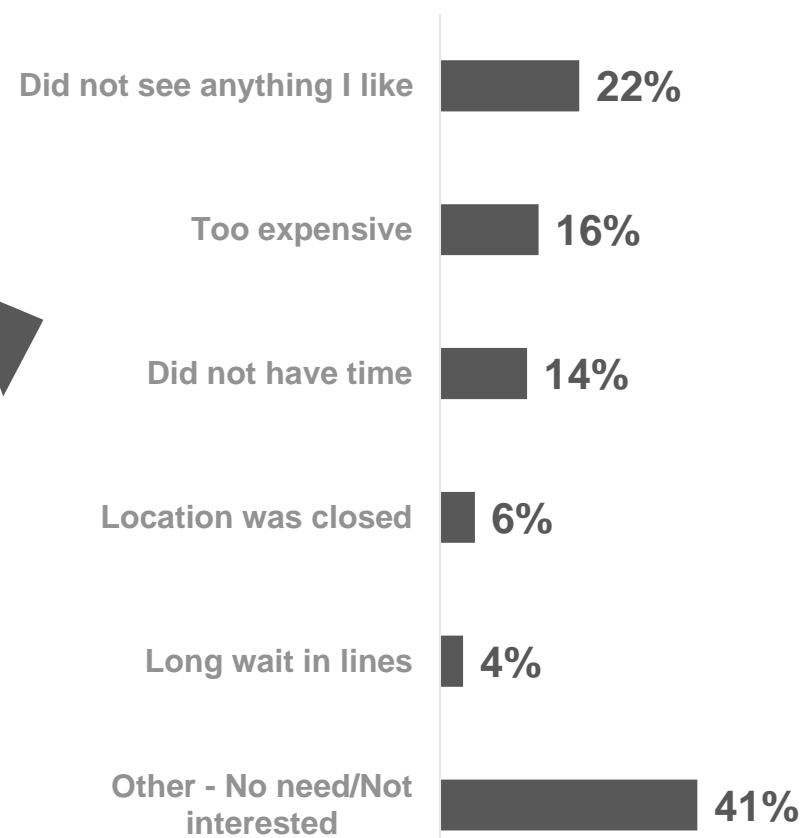
Reasons for Purchasing Retail



Today, did you purchase from a Retail location at DFW Airport?



Reasons for NOT Purchasing/Visiting Retail



25 Source: Concessions Customer Insights. Purchase n=46, Did not purchase n=108. Q: Why did you decide to purchase something at (insert store name)? | Q: Why did you decide NOT to purchase/visit anything?

Average total retail spend

\$28.04

Average Spend per person by Passenger Groups

Connecting	Originating*
\$30.31	\$22.86

Female	Male*
\$24.03	\$37.21

Gen X + Boomers+	Gen Z + Millennials*
\$35.97	\$13.19

Connectors, males and more mature passengers, all tend to spend slightly more on retail at DFW.

Considering the time you had today to shop prior to boarding your flight, what shops/services/products would you purchase as you explored the Airport?

Souvenirs/Gifts	24%
Bookstores	17%
Apparel	15%
Cosmetics	13%
Technology	10%
Medicine/Health	10%
Travel accessories	10%
Toiletries	4%

“I’d love to see a bigger variety of local stores. Tourist items.” Connecting Male Traveler

Passengers shared their interest in seeing more souvenir/gift offerings at DFW.



Recommendations & Suggestions

Many future concepts introduced, should offer something for the on-the-go passenger.

- Consider expanding the cuisine offerings to include trending ideas with more emphasis for on-the-go friendly concepts.

Foundational factors like, cleanliness, quality, and speed, are important but...

- Food and beverage locations should also place a strong emphasis on friendly staff.
- If the concept is targeting younger audiences, additional emphasis should be placed on affordable prices.

Price is still an important factor in deciding where to eat at DFW Airport.

- Average price per person for food and beverage combined should fall between \$11 and \$19.



Retail shopping must be an efficient process for passengers to make a purchase.

- While still a small number, passengers who would consider purchasing from retail would like to see more souvenirs and items they can easily take with them on their trips (i.e.. apparel, cosmetics, medicine, books, etc.)
- In addition to clean and efficient facilities, retail locations should also place a strong emphasis on friendly staff.

Thank You