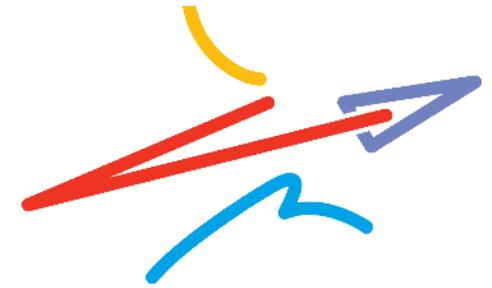




2019 DFW Segmentation

Presented by M/A/R/C®

November 2019



About Segmentation Research

1

Segmentation research is commissioned to discover the different consumer/customer segments that exist in the market place.

2

Understanding how their behaviors, attitudes, and needs vary allows an organization to create specific plans that reach and address each of these segments.

3

Identifying the different demographic profiles of these segments provides key information to more effectively target the segments.

4

Depending on the dynamics of the organization's category, segmentation research should be conducted or updated about every five years.

Methodology

- An online survey of both domestic and non-U.S. customers was conducted. Completed Interviews: n=2,195
 - Total US: n=1,196
 - Total Non-US: n=999
- Data was weighted to properly represent the share of Domestic and International travelers at DFW
- Passengers participating in the online survey met the following criteria:
 - Age 21+,
 - U.S. travelers: 2+ trips in the past year with at least one into, out of, or through DFW International Airport
 - *Non-U.S. travelers*: 2+ trips to the United States in the past year
- Based on behavioral, psychographic, and demographic information, commonalities across all travelers allowed us to group the participants. Unique customer segments were then created based on differences in desired activity and service levels in the terminals.



Airport Basics



Frugal Vacationers



All Biz Road Warriors



Value Voyagers



Indulgent Explorers

High Activity in Terminal

Low Activity in Terminal

Amenities/ Services

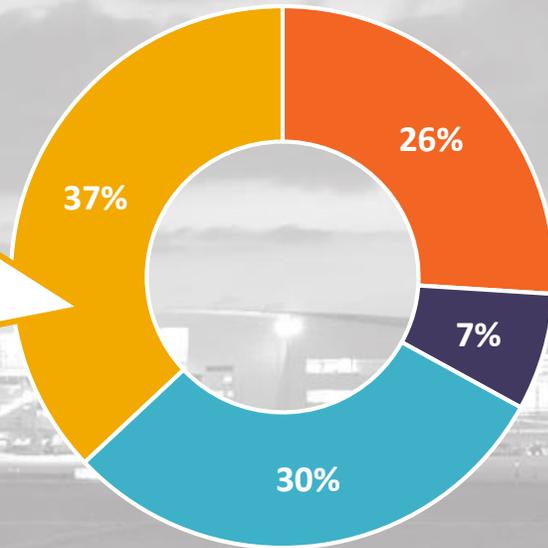


Size & Spend of Segments

Size



37%
of DFW Customers are
Frugal Vacationers



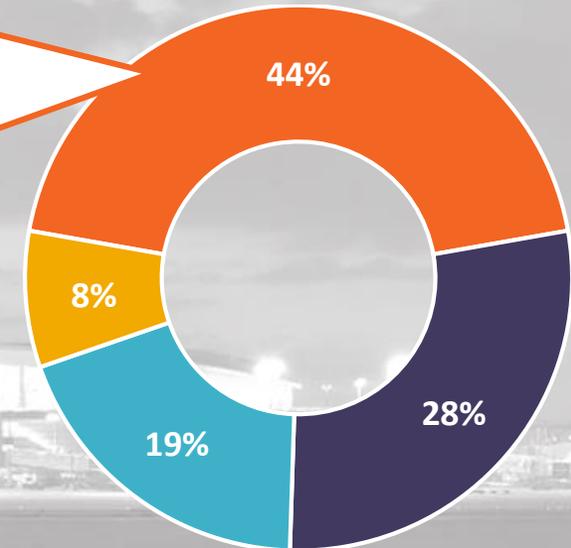
■ Indulgent Explorers

■ All Business Road Warriors

Spend



44%
of Concession
purchases are made by
Indulgent Explorers



■ Value Voyagers

■ Frugal Vacationers



Overview of Segments



Segment Snapshots

Size
26%



Spend
44%

Indulgent Explorers

WHO THEY ARE

- Average trips per year: 11
- Young and travels slightly more than the average traveler, both for business and leisure
- Average income, but spends more at the airport than other segments – most likely to take advantage of airport amenities
- Likely to travel with kids
- Skew high on media consumption – high engagement with social media

Outlook on Life



**Relaxation/
self-care mindset**

Size
7%



Spend
28%

All Biz Road Warriors

WHO THEY ARE

- Average trips per year: 44
- Heaviest traveler, primarily for business
- Average spend in terminal, despite highest income
- Focused on working in terminal – looks for Wi-Fi, charging stations, areas to work
- Likely to take advantage of business amenities
- Average media consumption

Outlook on Life



**Time-saving/
on-the-go mindset**

Size
30%



Spend
19%

Value Voyagers

WHO THEY ARE

- Average trips per year: 8
- Light travelers, primarily for leisure; some business travel
- Average spend in terminal
- Conducts some work in terminal – looks for Wi-Fi, charging stations
- May travel with kids
- Average media consumption
- Most similar to the “average” DFW passenger

Outlook on Life



**Knowledge/
options mindset**

Size
37%



Spend
8%

Frugal Vacationers

WHO THEY ARE

- Average trips per year: 6
- Skews higher for ages 55+
- Lightest traveler, primarily for leisure travel
- Most cost-conscious segment – bargains, inexpensive dining options, and basic retail are preferred
- Skews low on media consumption – high on email usage, low on social media

Outlook on Life



**Cost-saving/
no frills mindset**

Indulgent Explorers

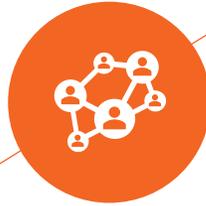
Relaxation & self-care mindset



33%
belong to an ethnic minority group



68%
post on social media weekly or more often



\$55
average spend in terminals – higher than all other segments



Seek a variety of dining options at the airport, including casual and upscale

46%
under 35 years old – youngest segment



66%
travel with children under 12



Key Attitudes



"I like to try new and different things"

"I'm comfortable with technology"

"Spending time with my family is my top priority"

Sentiment at the Airport



Enjoys traveling. More likely to be **"happy"**, **"satisfied"** or **"excited"** than other travelers at the airport.



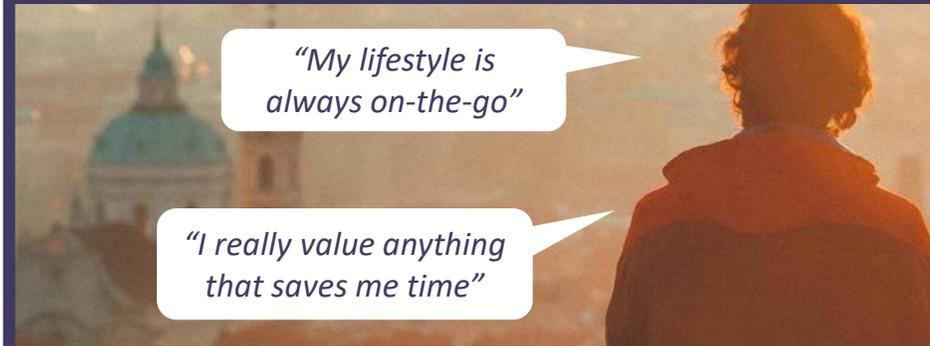
Concessions Behaviors

Category	Behavior	Percentage	Trend
Food & Beverage	Purchase from a coffee shop	82%	
	Eat at a fast food restaurant	75%	↑
	Eat at a casual dining restaurant	74%	↑
	Visit a shop or restaurant unique to the area	74%	↑
	Visit a bar	61%	↑
	Eat at an upscale restaurant	60%	↑
Retail & Amenities	Shop at a duty-free shop	67%	↑
	Purchase a souvenir	62%	↑
	Visit the VIP lounge	59%	↑
	Shop at a clothing store	54%	↑
	Visit the business center	48%	↑
	Visit a game room	45%	↑
	Get a massage	42%	↑
	Visit the kid's play area	41%	↑

All Biz Road Warriors



Key Attitudes



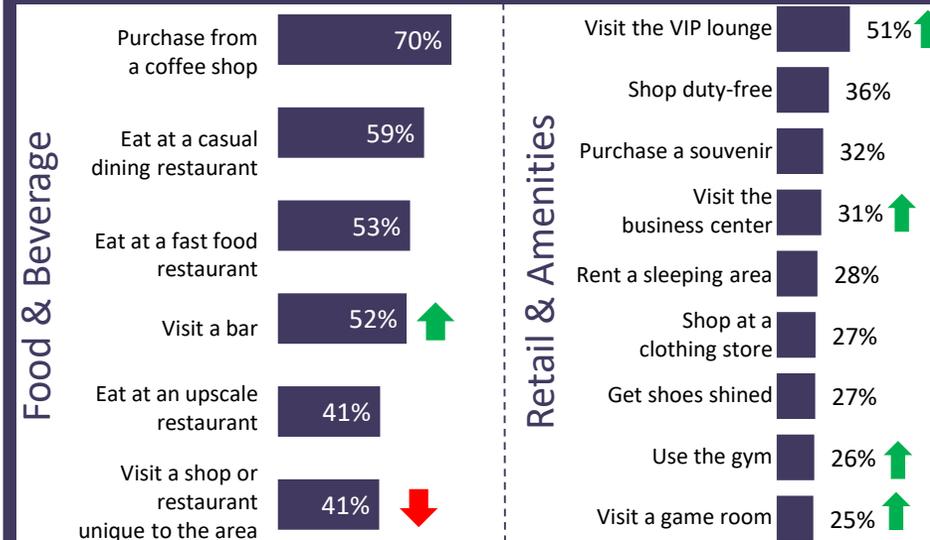
Sentiment at the Airport



Tolerates travel. Likely to be **"confident"** but **"annoyed"** while at the Airport.



Concessions Behaviors



Value Voyagers



Key Attitudes



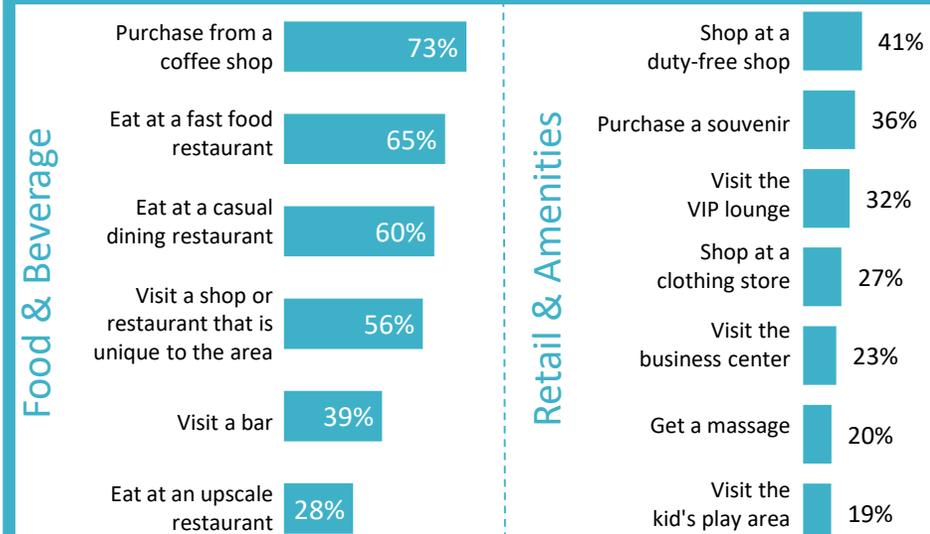
Sentiment at the Airport



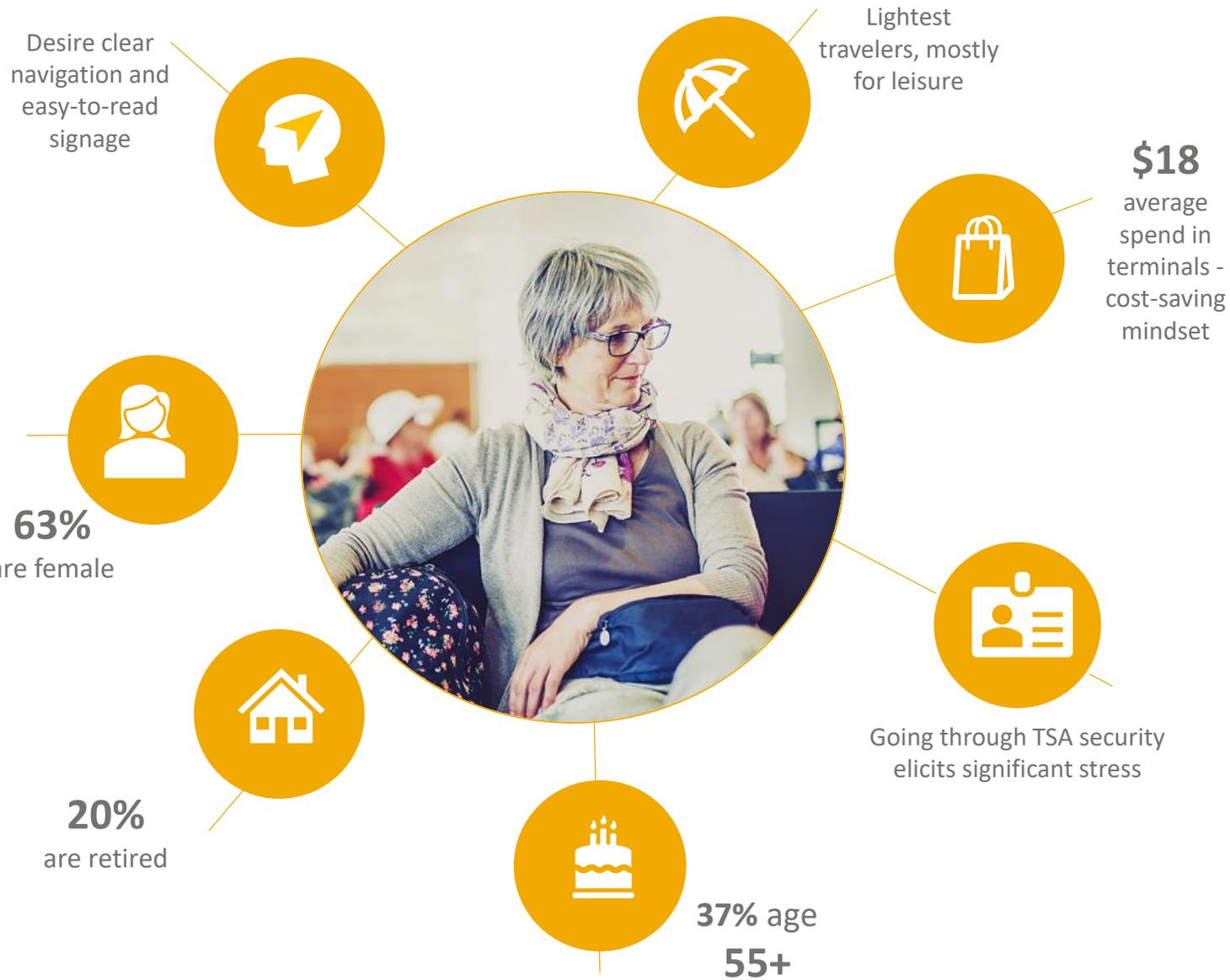
Tolerates travel. **"Excited"** when traveling for leisure and somewhat **"confident"** & **"relieved"** when traveling for business.



Concessions Behaviors



Frugal Vacationers



Key Attitudes

"I'm not the first to try new products or services"

"I need information about processes at the airport"

"I'm becoming more comfortable with technology"

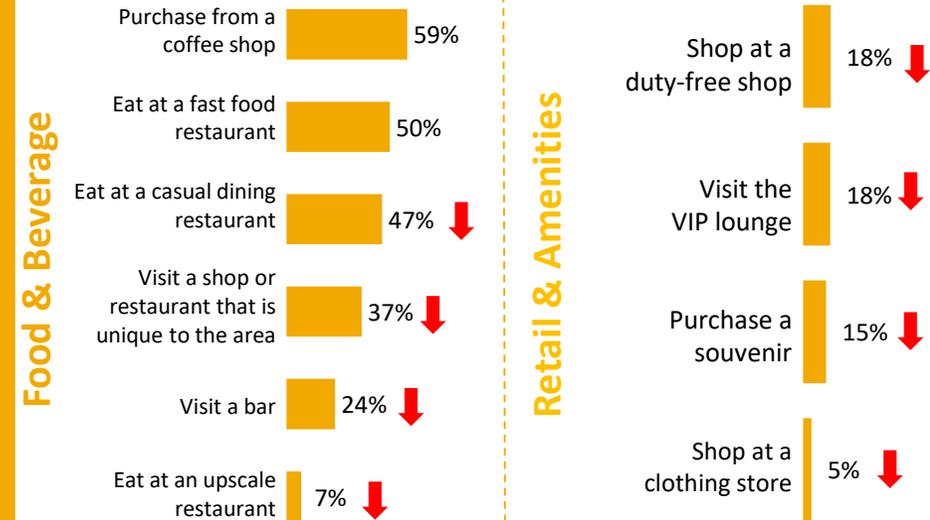
Sentiment at the Airport



Dislikes the travel process. Likely to feel **"anxious"** and **"stressed"** at the airport.



Concessions Behaviors



Summary of Key Differences



Demographics



		Indulgent Explorers	All Biz Road Warriors	Value Voyagers	Frugal Vacationers
Segment Size		26%	7%	30%	37%
Share of Spend		44%	28%	19%	8%
Age		Younger, skew under 35	Middle aged, skew 35-54	Middle aged, skew 35-54	Mature, skew 55+
Gender		55% F 45% M	42% F 58% M	61% F 39% M	63% F 37% M
HH Income > \$150K		16%	40%	19%	22%
Post-graduate school education		17%	20%	13%	14%
Retired		2%	6%	8%	20%
Not married		31%	31%	35%	31%
Ethnic minority		33%	25%	32%	17%
Post on social media weekly or more often		68%	55%	58%	36%



Travel Behavior



		Indulgent Explorers	All Biz Road Warriors	Value Voyagers	Frugal Vacationers
Average number of trips in past year		11	44	8	6
Percentage of business travel		50%	61%	45%	33%
Percentage of travel outside the U.S.		38%	28%	28%	19%
Average spend in Terminal		\$55	\$35	\$32	\$18
Travel with children under 12 on leisure trips		66%	45%	50%	24%
Dining preferences at Airport		<ul style="list-style-type: none"> ✓ Coffee shops ✓ Fast food ✓ Casual dining ✓ Restaurants unique to area ✓ Upscale restaurant 	<ul style="list-style-type: none"> ✓ Coffee shops ✓ Casual dining ✓ Bars 	<ul style="list-style-type: none"> ✓ Coffee shops, ✓ Fast-food ✓ Casual restaurants 	<ul style="list-style-type: none"> ✓ Coffee shops, ✓ Fast-food
Terminal services valued		<ul style="list-style-type: none"> ✓ Variety of dining options ✓ Designer brand retail ✓ Private restroom stalls 	<ul style="list-style-type: none"> ✓ Seating areas for working 	<ul style="list-style-type: none"> ✓ Wi-Fi ✓ Charging stations 	<ul style="list-style-type: none"> ✓ Easy to navigate

Attitudes & Trends



		Indulgent Explorers	All Biz Road Warriors	Value Voyagers	Frugal Vacationers
Sentiment at airport		Happy, satisfied, excited	Confident, annoyed	Excited when traveling for leisure, somewhat confident & relieved when traveling for business	Anxious, stressed
Most stressful steps of air travel		<ul style="list-style-type: none"> ✓ Security ✓ Curb entry 	<ul style="list-style-type: none"> ✓ Security ✓ Gate boarding area 	<ul style="list-style-type: none"> ✓ Security ✓ Parking 	<ul style="list-style-type: none"> ✓ Security ✓ Gate boarding area
Interest in concepts tested		<ul style="list-style-type: none"> ✓ Luggage tracking ✓ Parking promos via app ✓ Mobile promo alerts ✓ Vanity areas in restrooms ✓ Food pre-ordering 	<ul style="list-style-type: none"> ✓ Luggage tracking ✓ Luggage restroom storage 	<ul style="list-style-type: none"> ✓ Luggage tracking ✓ Interactive navigation maps ✓ Kiosks w/ airport services 	<ul style="list-style-type: none"> ✓ Luggage tracking
Mega themes		Experience First The Shoppable Universe	Travel Well	Seamless Journey Experience First Travel Well	Seamless Journey
Travel mindset		Relaxation/self-care	Time-saving/on-the-go	Knowledge/options	Cost saving/no frills
Travel attitude		Enjoys travel	Confident traveler, tolerates experience	Tolerates traveling	Dislike traveling

Detailed Findings





Products Purchased At Airports



Indulgent Explorers



All Biz Road Warriors



Value Voyagers



Frugal Vacationers

Books	53%	51%	51%	49%
Electronic accessories	47%	49%	49%	32%
Clothing items	49%	35%	37%	23%
Sunglasses	42%	28%	28%	15%
Perfumes/colognes	41%	22%	27%	9%
Cosmetics	39%	27%	26%	10%
Jewelry	32%	24%	14%	7%
Luggage, briefcase	28%	20%	14%	3%
Electronic items	34%	20%	12%	3%
Purses	22%	15%	10%	4%
Sporting goods	24%	15%	10%	1%





Frequent Concessions Behaviors — F&B



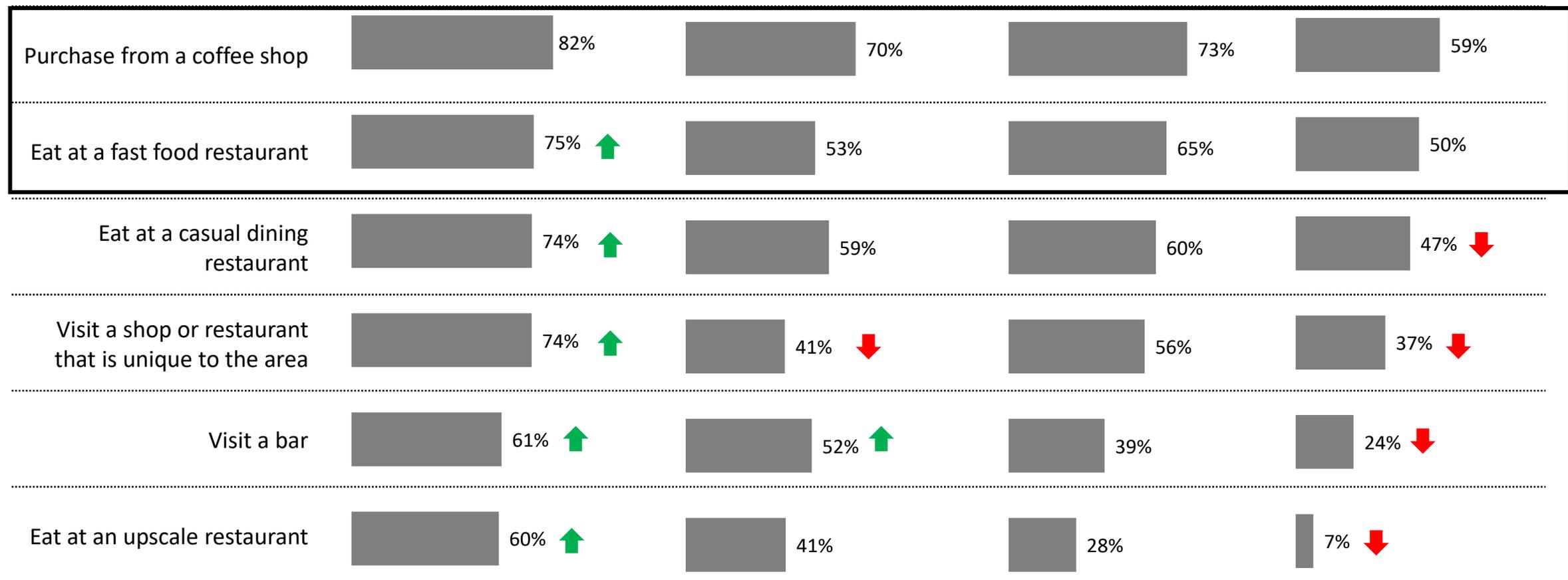
(Always/Often)

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers





Frequent Concessions Behaviors – Retail/Services



(Always/Often)

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers

Shop at a duty-free shop	67% ↑	36%	41%	18% ↓
Visit the VIP/frequent fliers lounge	59% ↑	51% ↑	32%	18% ↓
Purchase a souvenir	62% ↑	32%	36%	15% ↓
Shop at a clothing store	54% ↑	27%	27%	5% ↓
Visit the business center (with access to printers, computers, etc.)	48% ↑	31% ↑	23%	3% ↓
Visit a game room/arcade	45% ↑	25% ↑	19%	2% ↓
Get a massage	42% ↑	22%	20%	3% ↓
Visit the kid's play area	41% ↑	23%	19%	3% ↓
Take a shower	44% ↑	22%	17%	3% ↓
Rent an airport private room/sleeping area	40% ↑	28%	15%	2% ↓
Use the airport gym/workout center	42% ↑	26% ↑	15%	1% ↓
Get shoes shined	39% ↑	27%	13%	2% ↓



Frequent Terminal Experience Activities



Indulgent Explorers



All Biz Road Warriors

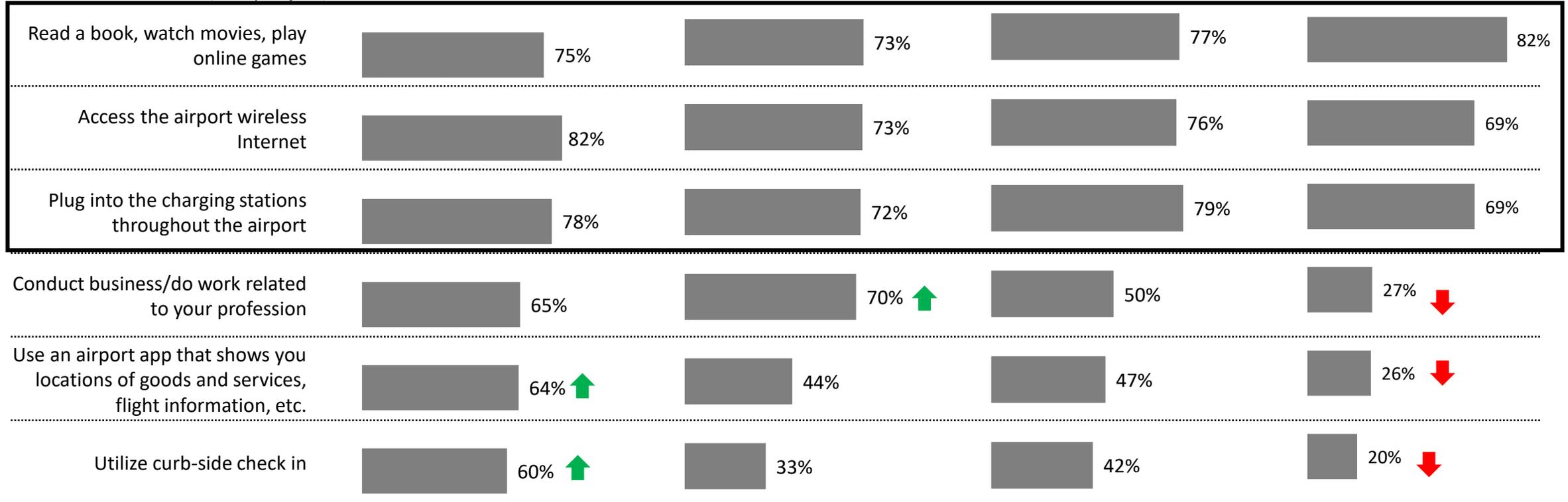


Value Voyagers



Frugal Vacationers

(Always/Often)





Terminal Services Valued

Business
Leisure



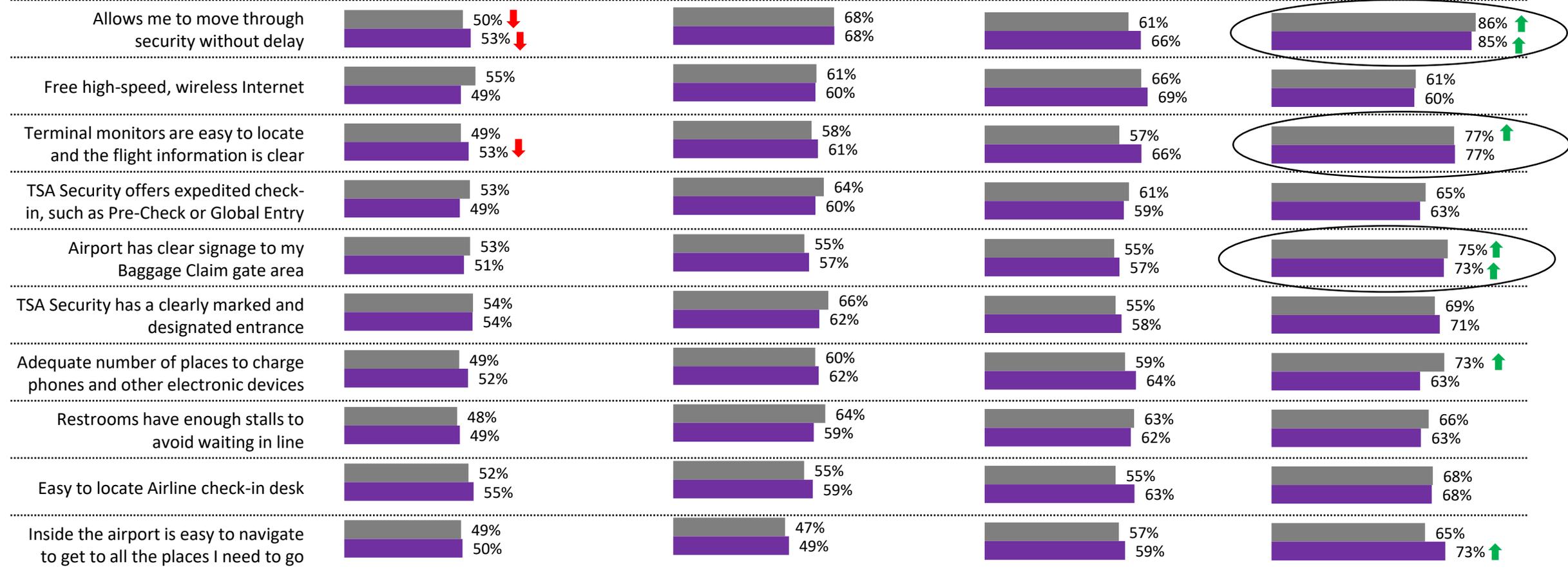
(Extremely/Very Important)

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers





Terminal Services Valued

Business
Leisure



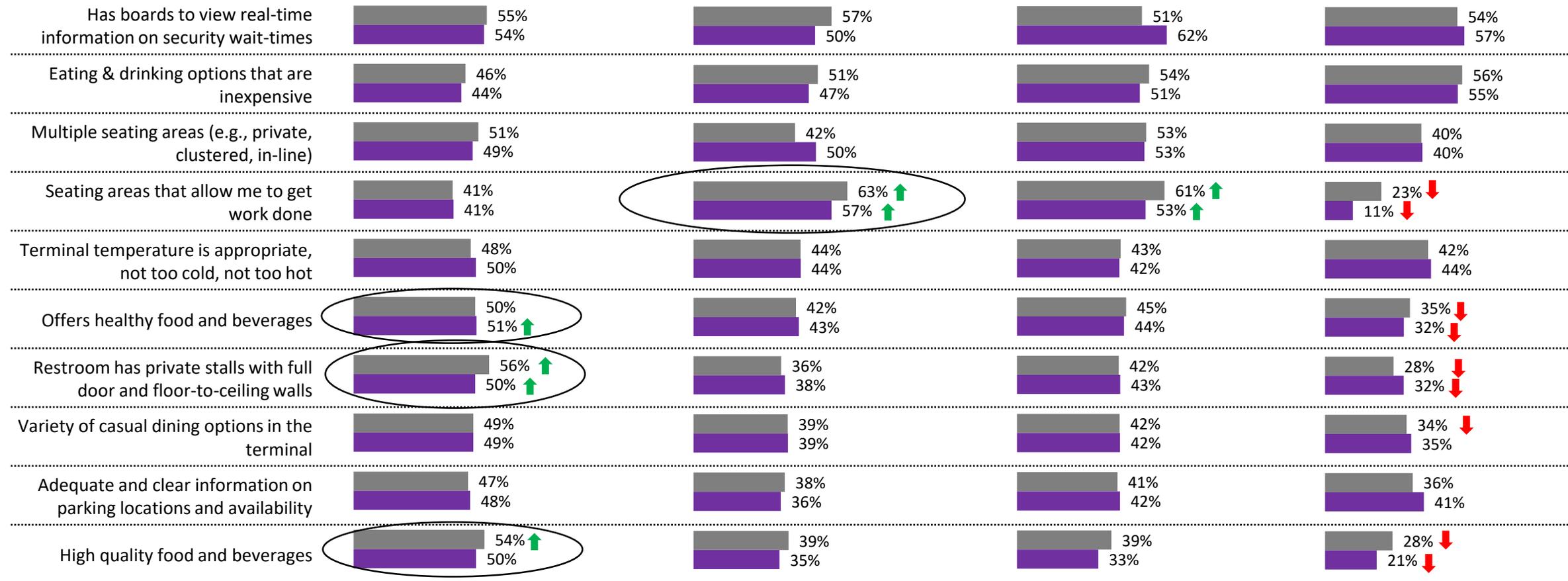
(Extremely/Very Important)

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers





Terminal Services Valued

Business
Leisure



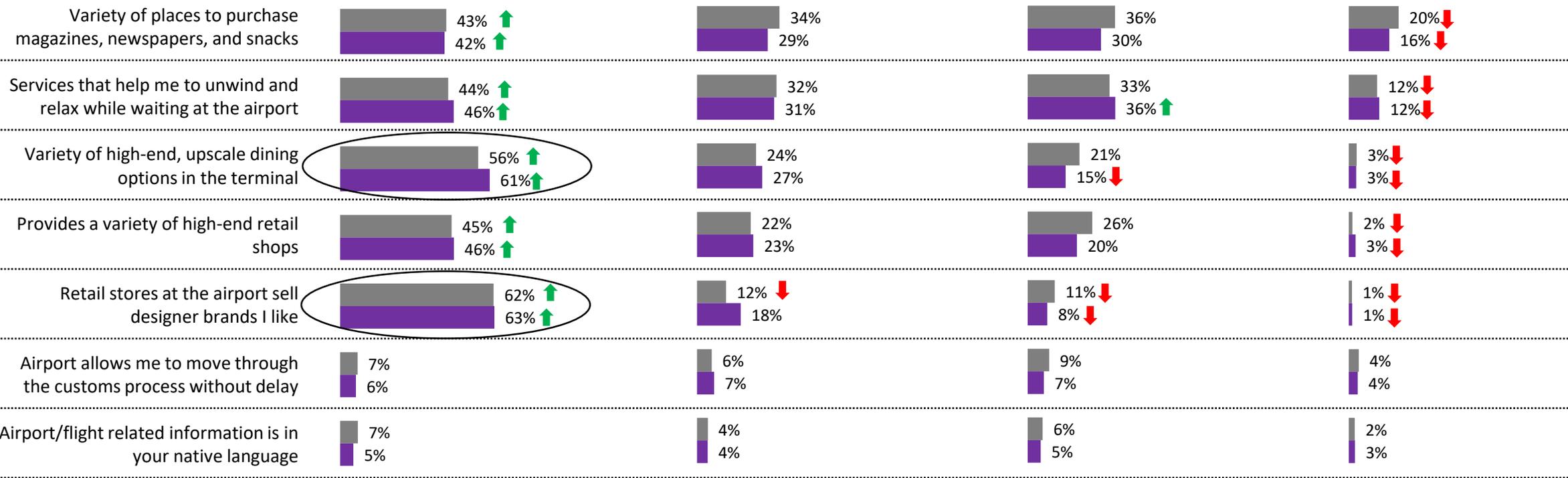
(Extremely/Very Important)

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers





Sentiment at Airport By Typical Trip



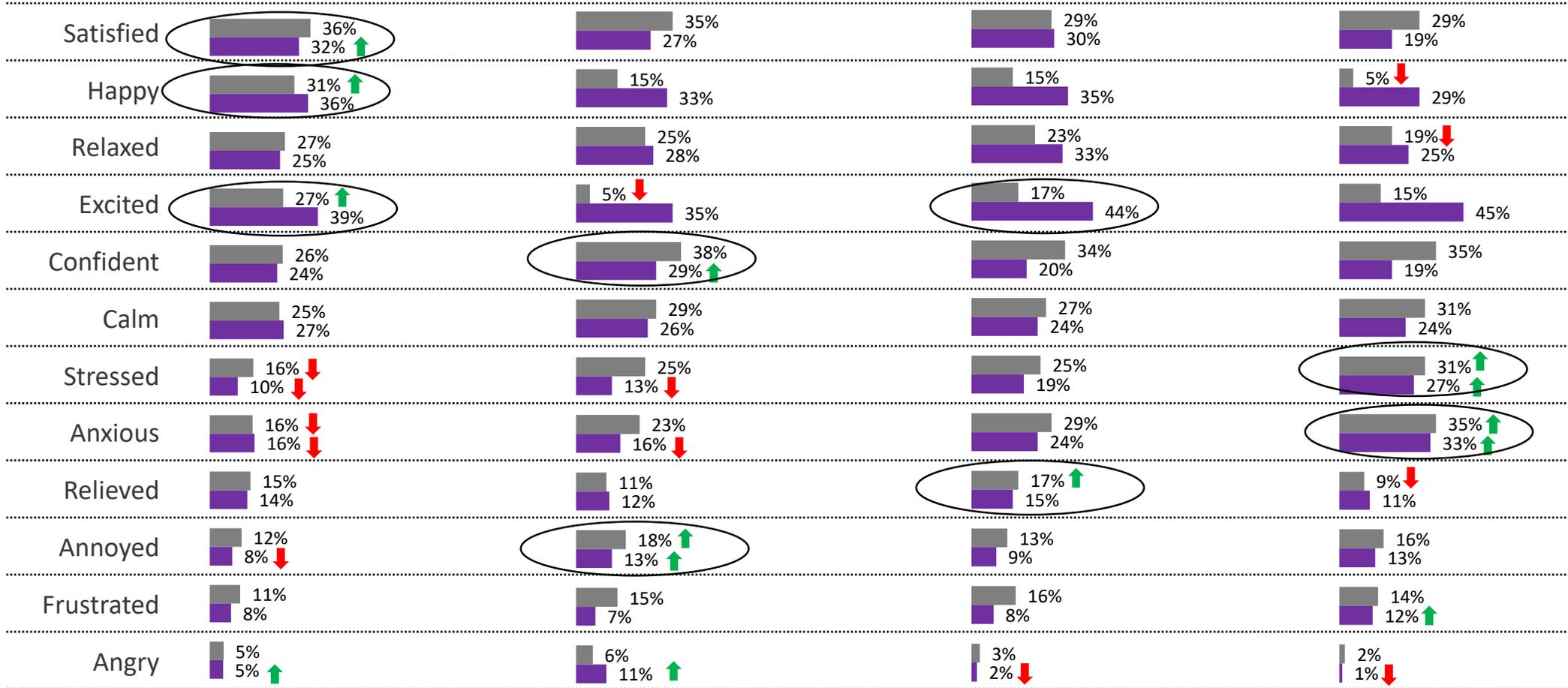
Business
Leisure

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers





Most Happy Step In Typical Trip

Business
Leisure



Indulgent Explorers



All Biz Road Warriors



Value Voyagers



Frugal Vacationers

Step	Indulgent Explorers	All Biz Road Warriors	Value Voyagers	Frugal Vacationers
Curb entry	Business 18% ↑ Leisure 19% ↑	Business 17% ↑ Leisure 19% ↑	Business 9% ↓ Leisure 13%	Business 9% ↓ Leisure 9% ↓
Parking vehicle before entering the airport	Business 18% ↑ Leisure 5%	Business 13% ↑ Leisure 4%	Business 10% Leisure 4%	Business 3% ↓ Leisure 2%
Checking-in at the airline counter	Business 13% ↑ Leisure 12% ↑	Business 7% Leisure 5% ↓	Business 9% Leisure 7%	Business 5% ↓ Leisure 3% ↓
Going through TSA security	Business 10% ↑ Leisure 10% ↑	Business 6% ↓ Leisure 12% ↑	Business 7% Leisure 9%	Business 6% ↓ Leisure 4% ↓
Walking through the terminal	Business 7% ↓ Leisure 9%	Business 15% ↑ Leisure 8% ↓	Business 10% Leisure 10%	Business 9% Leisure 11%
Dining at the airport	Business 15% Leisure 20%	Business 19% Leisure 23% ↑	Business 19% Leisure 18%	Business 22% Leisure 20%
Shopping at the airport	Business 11% ↑ Leisure 13% ↑	Business 2% ↓ Leisure 4% ↓	Business 11% ↑ Leisure 12% ↑	Business 1% ↓ Leisure 5% ↓
Waiting at the gate area before boarding	Business 4% ↓ Leisure 8% ↓	Business 15% ↑ Leisure 14%	Business 11% Leisure 14%	Business 17% ↑ Leisure 23% ↑
Collecting belongings at baggage claim	Business 5% ↓ Leisure 5% ↓	Business 6% ↓ Leisure 11% ↓	Business 14% Leisure 15%	Business 30% ↑ Leisure 24% ↑



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↑ High index vs. Total ↓ Low index vs. Total



Most Stressful Step In Typical Trip



Business
Leisure

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers





Airport Access By Typical Trip

Business
Leisure



Indulgent Explorers



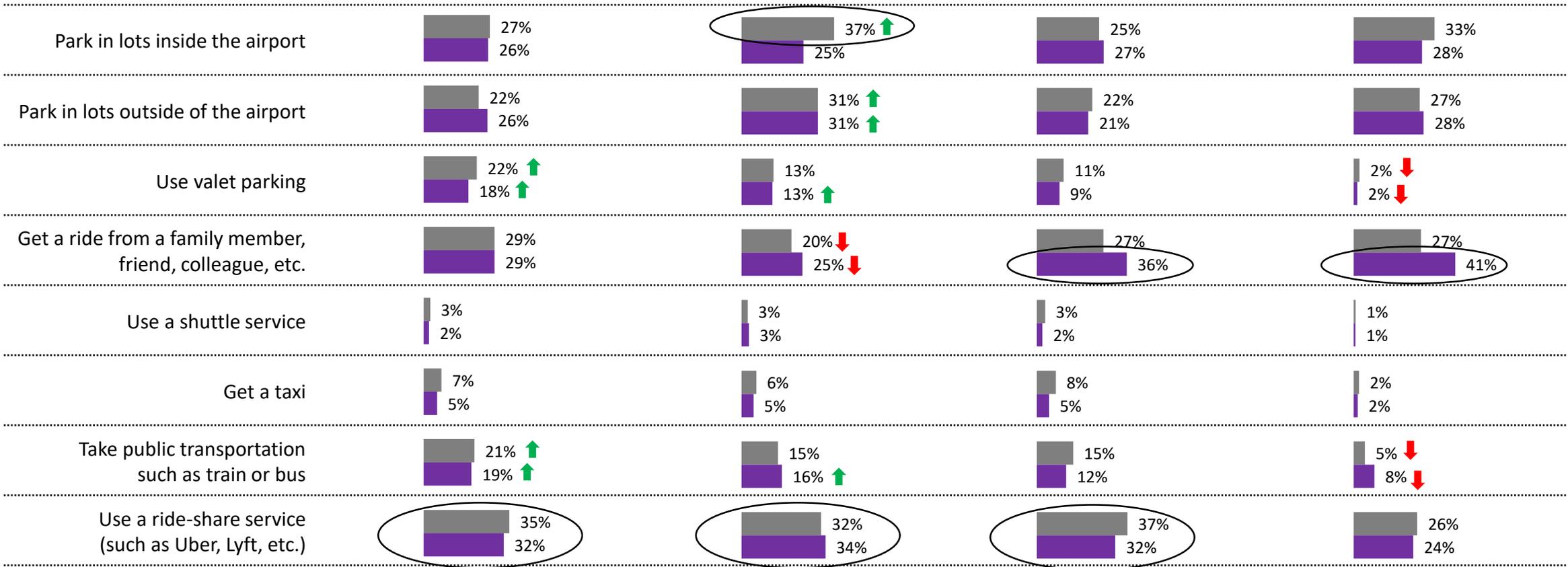
All Biz Road Warriors



Value Voyagers



Frugal Vacationers





Life Outlook



(Describes completely/somewhat)

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers

When I need information, the first place I look is the Internet	76%	70%	82%	81%
Spending time with my family is my top priority	78%	67%	80%	77%
I regularly research my options before making a decision	76%	75%	75%	80%
I'm comfortable with technology	80%	70%	73%	71%
I like to try new and different things	80%	73%	73%	65%
I really value anything that saves me time	77%	74%	74%	65%
Reward/Loyalty programs influence the brands I choose	74%	70%	65%	62%
I'm a bargain hunter	61%	68%	60%	70%
I am willing to pay a premium for a quality item	73%	69%	67%	53%
Eating healthy is a top priority	71%	63%	66%	50%
When I need information, the first place I look is the Internet	69%	59%	63%	48%



Life Outlook



(Describes completely/somewhat)

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers

I deserve to be pampered	74% ↑	55%	62%	38% ↓
I buy myself something as a reward for a job well done	74% ↑	48%	60%	39% ↓
My lifestyle is always on-the-go	70% ↑	68% ↑	56%	36% ↓
I consider myself to be a "foodie"	66% ↑	50%	53%	36% ↓
I'm concerned about the kind of impression I make to others	65% ↑	46%	49%	38% ↓
I have more than my share of things to worry about	64% ↑	50%	50%	37% ↓
I am usually the first to try new products or services	72% ↑	43%	48%	23% ↓
There is a lot of stress in my life	52% ↑	44%	41%	30% ↓
I am a "spender" rather than a "saver"	57% ↑	40%	35%	22% ↓
Luxury designer brands are worth every penny	68% ↑	35%	36%	10% ↓



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Online Behaviors



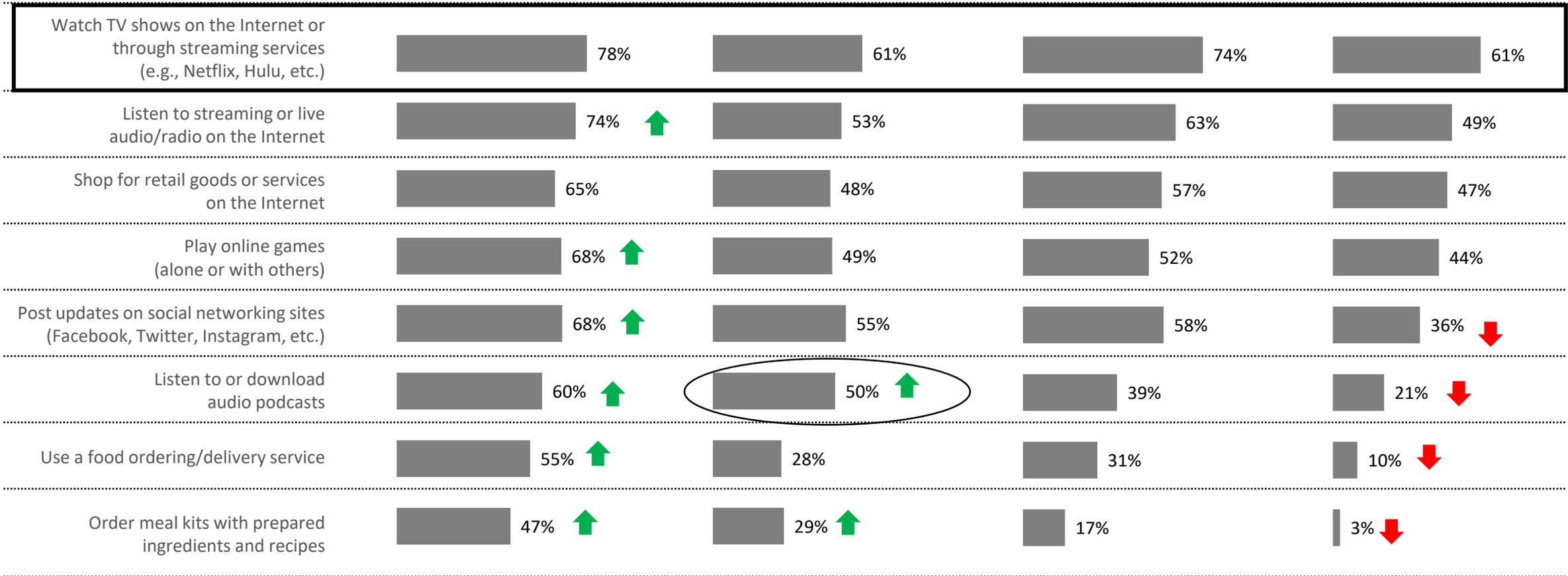
(Weekly or More Often)

Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers



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↑ High index vs. Total ↓ Low index vs. Total



Interest In Tested Concepts



(Top 2 Box)

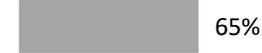
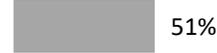
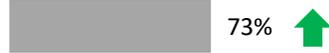
Indulgent Explorers

All Biz Road Warriors

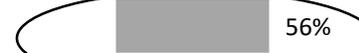
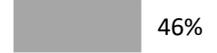
Value Voyagers

Frugal Vacationers

Ability to track your luggage's location and arrival at the luggage belt



Provide interactive and user-friendly navigation maps to guide you across the airport



Provide parking options and promotions via an airport app



Provide a secure storage place for luggage when you go to the restroom



Provide interactive kiosks or screens to find on-airport services such as restaurants, shops, and restrooms



Ability to prepay for discounted parking when you book your flight



Provide vanity areas for grooming in restrooms, separate from the sinks



Provide mobile alerts about the latest promotions as you walk past retail shops and restaurants



Ability to pre-order food & beverages for pick-up when you arrive at the airport



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↑ High index vs. Total

↓ Low index vs. Total



Mega Themes



Indulgent Explorers



All Biz Road Warriors

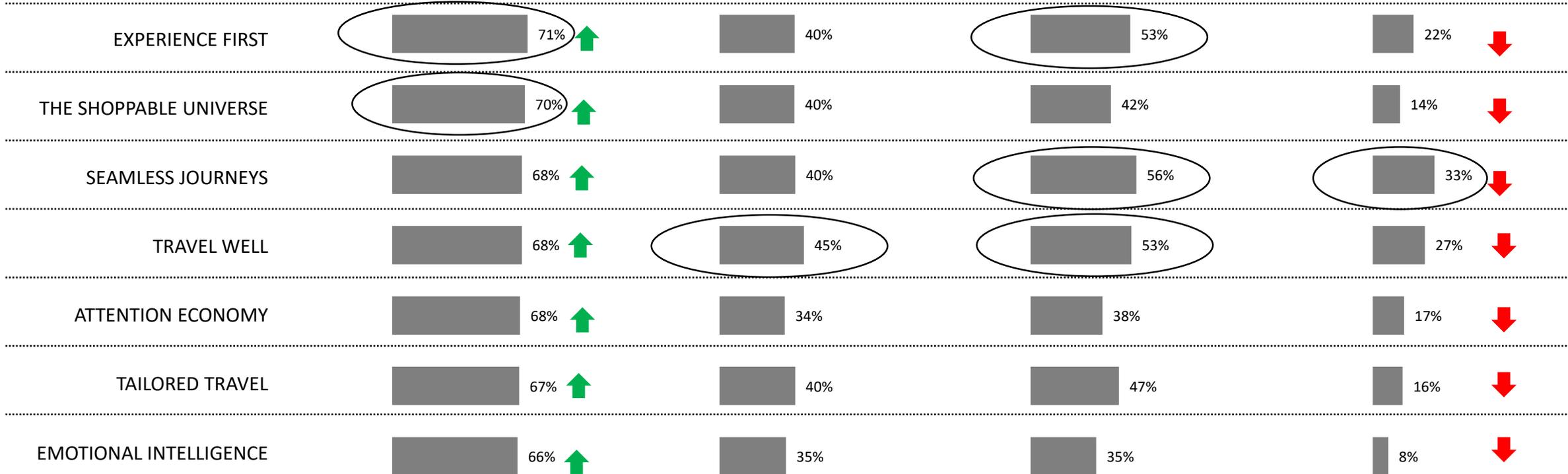


Value Voyagers



Frugal Vacationers

(Top 2 Box)



Appendix





Descriptions For Key Mega Themes

EXPERIENCE FIRST

Satisfying desire to spend time and resources on different experiences, by providing opportunities to experience, within the airport, local culture, cuisine, music, art, etc.

TRAVEL WELL

Maintaining your overall wellbeing, including physical, mental, and emotional health (i.e., sleep, exercise, meditation, diet, environment, etc.) by taking advantage of services, spaces, and products in the airport to allow you focus on your wellbeing.

SEAMLESS JOURNEY

Ensuring a seamless journey by utilizing technology and biometric readers to enable greater control over preferences where possible (e.g., being able to check-in online, pay via ApplePay or GooglePay, utilize apps to arrange for services, etc.).

THE SHOPPABLE UNIVERSE

Having options to shop how you want, both online and in-store; for example, the ability to shop while in the terminal and have purchases shipped home, or order online to have the items delivered to the gate when you return from your trip

Indulgent Explorers



All Business Road Warriors



Frugal Vacationers



Indulgent Explorers



Value Voyagers



Value Voyagers



Value Voyagers

