
Transforming Food & Beverage at DFW Airport





Ken Buchanan

Executive Vice President
Customer Experience and
Revenue Management
DFW International Airport

Transforming Food & Beverage at DFW Airport



Historical
Context

&

A Focus on
the Future





Historical Context & A Focus on the Future

Knowing Your Environment

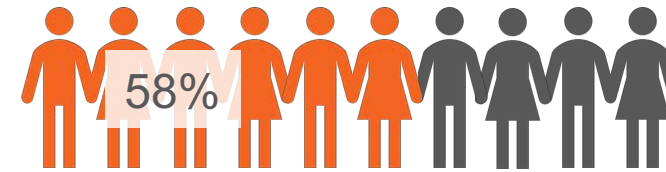
Data Driven Insights

Keeping Pace With A Changing Business Model



YOUNGER PASSENGERS

Age: Under 50yo



VALUE CONSCIOUS

Income: Under \$100K



SHORTER DWELL TIMES

Dwell Time: Over 1hr



MORE CONNECTING

Passenger Type: Connecting



Trends in food, retail, technology, and customer expectations do not easily fit in existing lease structure or airport model.



Identifying and responding to changing business environment causes potential disruptions to normal operations.

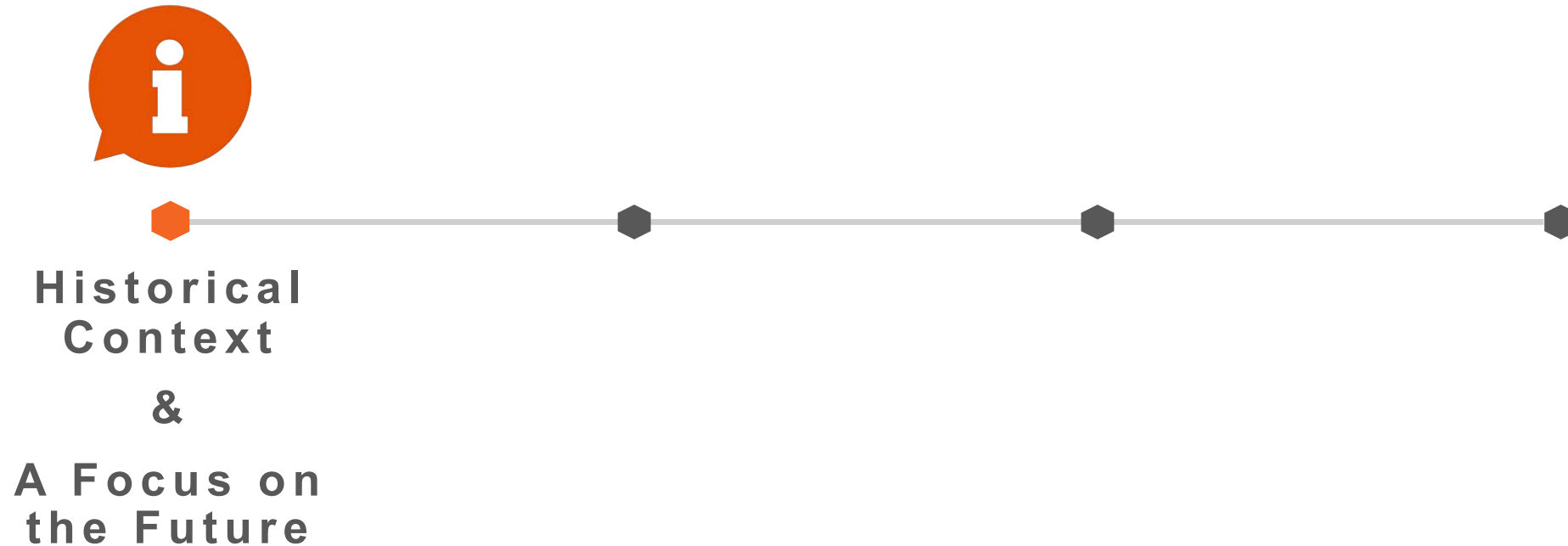


Shrinking dwell time due to flight banking and gate utilization increase complexity of meeting passenger expectations where they are.

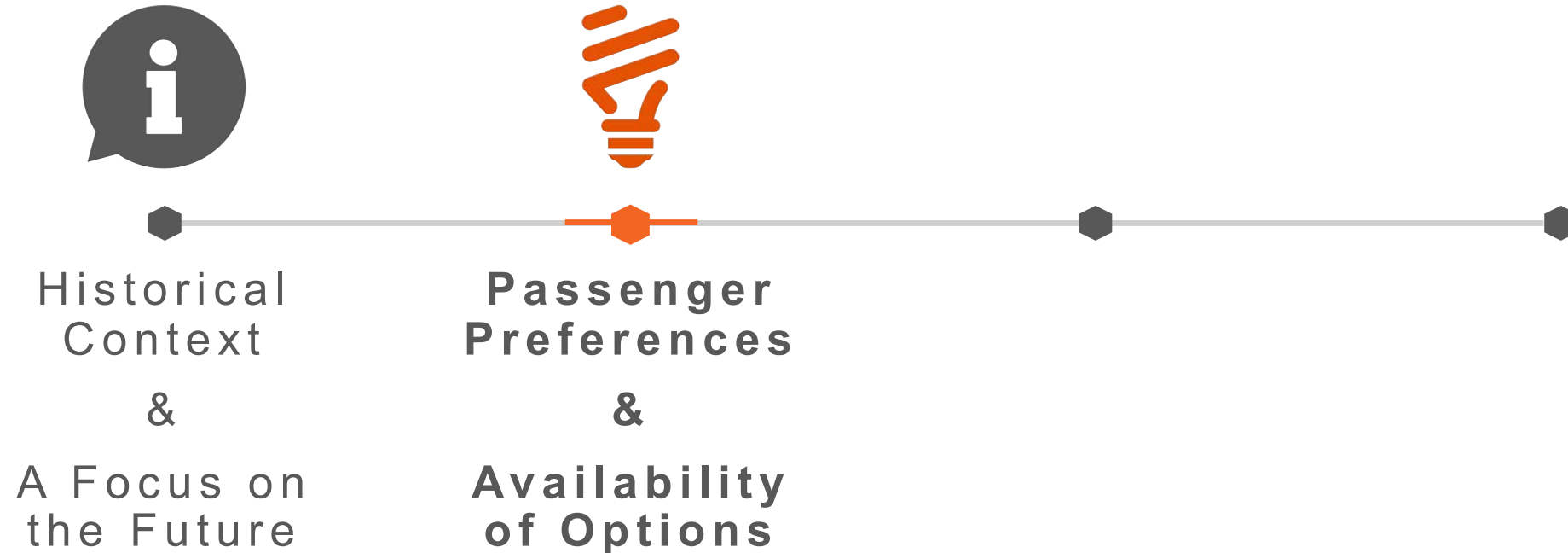


Perception of higher prices despite pricing policy.

Transforming Food & Beverage at DFW Airport



Transforming Food & Beverage at DFW Airport





Passenger Preferences & Availability of Options

Knowing Your Customer

Balancing Necessity and Indulgence

Expanding Available Options

Modern Texan Hospitality

MILLENNIALS vs. GENERATION Z



MILLENNIALS

Born between about

1980 & 1996

B MOST WERE RAISED BY **BABY BOOMERS**

GREW UP DURING AN **ECONOMIC BOOM**

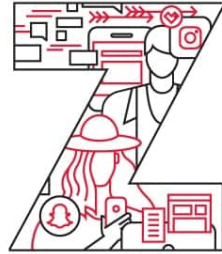
TEND TO BE **IDEALISTIC**

FOCUSED ON HAVING **EXPERIENCES**

MOBILE **PIONEERS**

PREFER BRANDS THAT **SHARE THEIR VALUES**

PREFER **FACEBOOK & INSTAGRAM**



GENERATION Z

Born between about

1997 & 2010s

X MOST WERE RAISED BY **GEN XERS**

GREW UP DURING A **RECESSION**

TEND TO BE **PRAGMATIC**

FOCUSED ON **SAVING MONEY**

MOBILE **NATIVES**

PREFER BRANDS THAT **FEEL AUTHENTIC**

PREFER **SNAPCHAT & INSTAGRAM**

Passenger Preferences & Availability of Options

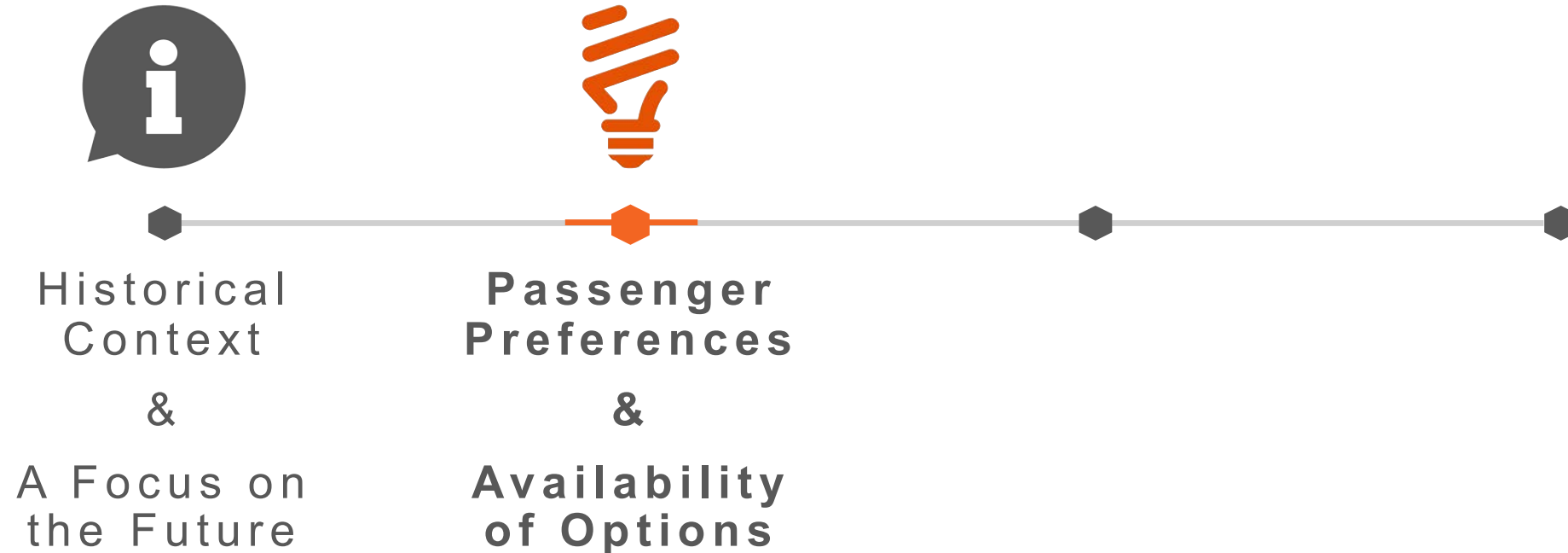
Knowing Your Customer

“Experiences” vs “Saving Money”

“Brands that Share Their Values”

“Brands that Feel Authentic”

Transforming Food & Beverage at DFW Airport



Transforming Food & Beverage at DFW Airport





Hierarchy of Needs & Shorter Dwell Time

Delivering What the Customer Needs

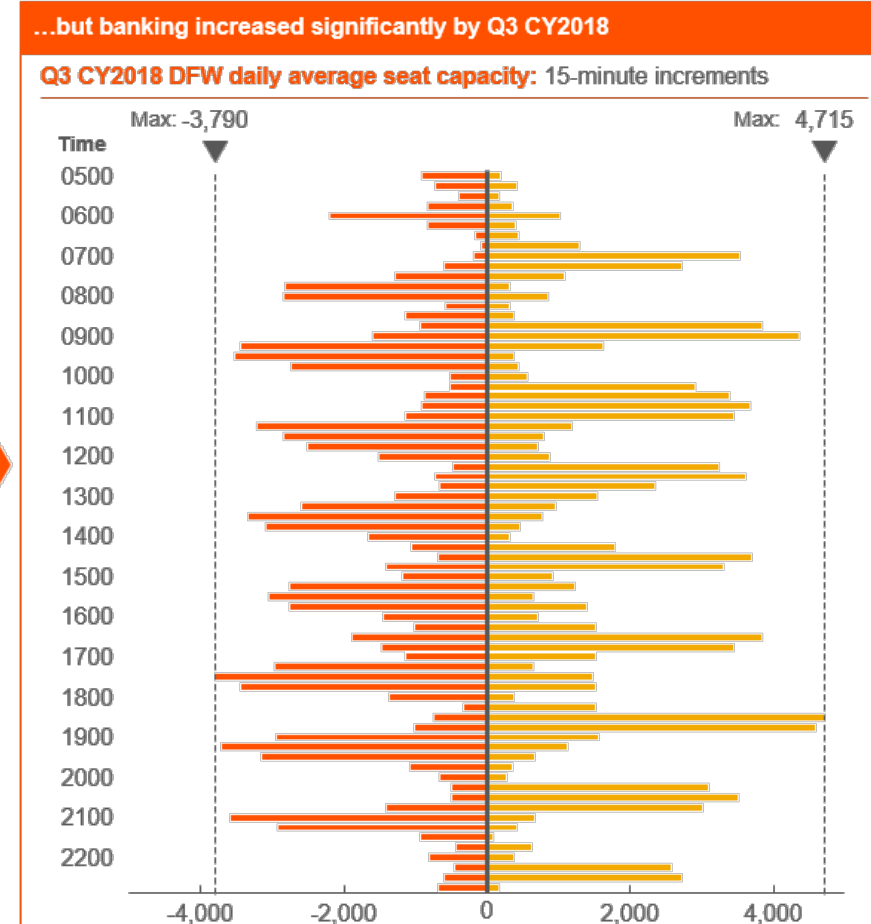
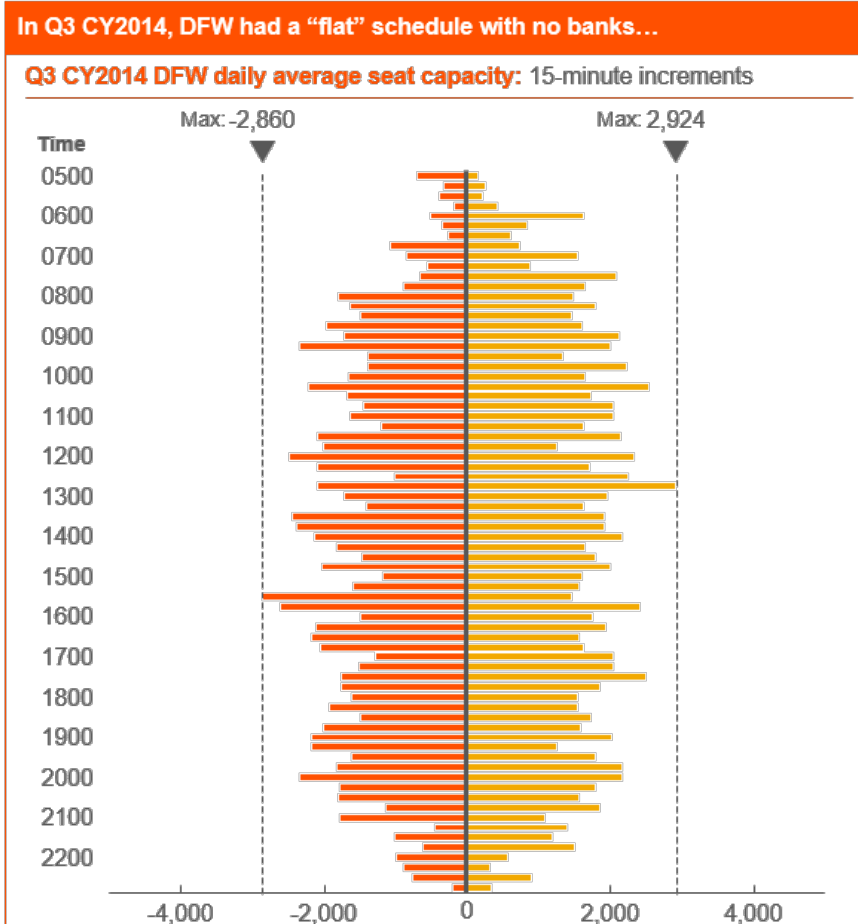
Speed & Efficiency

Mastering the Basics



Impact of Flight Banking on Dwell Time

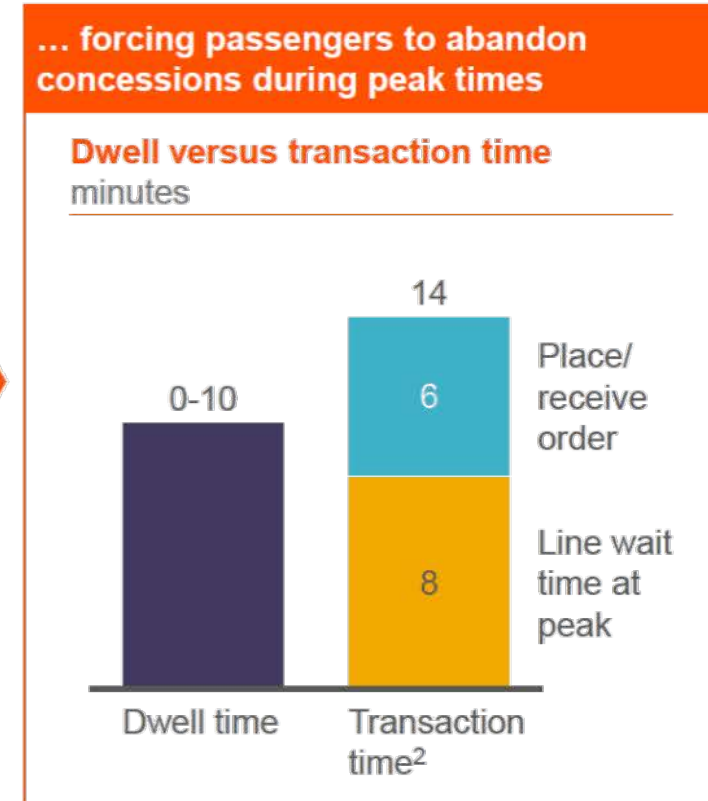
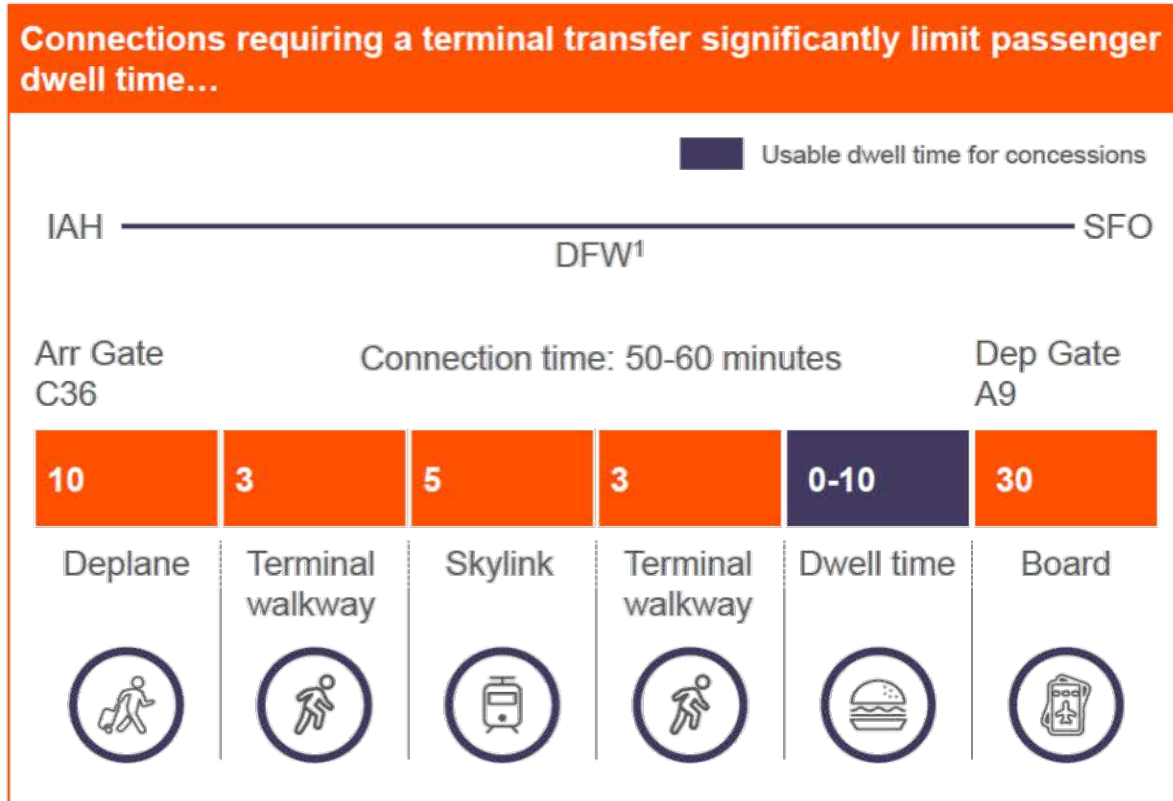
Arrivals Departures



SOURCE: Historical flight data provided by DFW Experience Hub (CY2014 – CY2018)

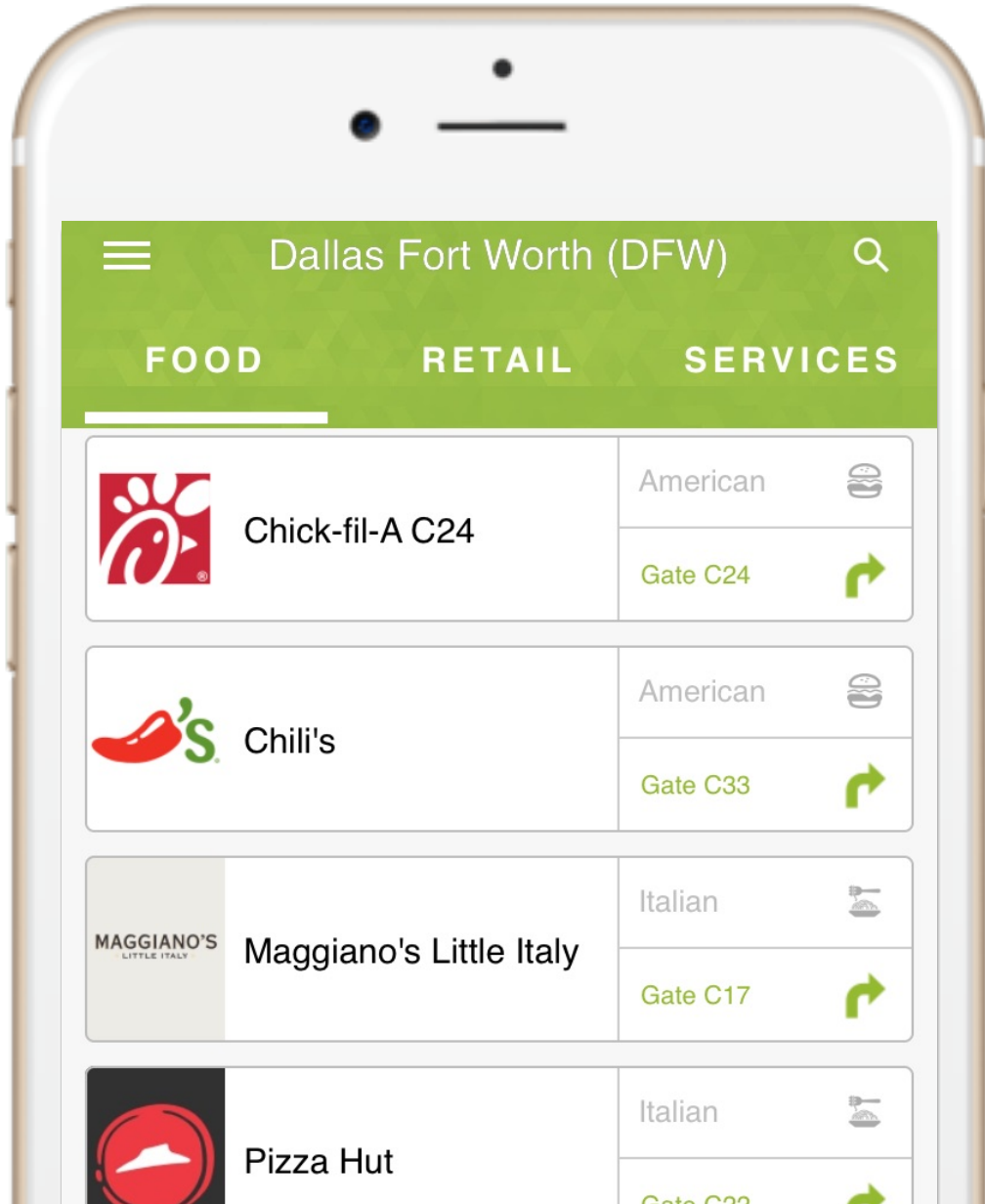
Impact of Dwell Time on Passenger Behavior

Short dwell times for connecting passengers leaves little time for concession purchases (particularly when there are line waits)



¹ IAH-SFO city-pair is top 5 for daily volume of connecting passengers through DFW
² Observations at McDonald's and Chick-fil-A in Terminals A & C during midday banks

SOURCE: DB1B for 2QCY2018 / American Airlines flight schedule, observations (November 1, 2018)



GRAB Mobile Ordering

Pre-Order and Skip the Line

Created a cohesive ordering experience across web and mobile platforms to shorten queuing and increase the number of options available to each customer.



GRAB Kiosks & Delivery At The Gate

Pre-Order for Pickup or Delivery

Kiosks in high-traffic areas offer passengers the choice of picking up their mobile order or having it delivered to them.



Hierarchy of Needs & Shorter Dwell Time

Delivering What the Customer Wants

Personalized Experiences

Moments of Wow

DFW
DFW

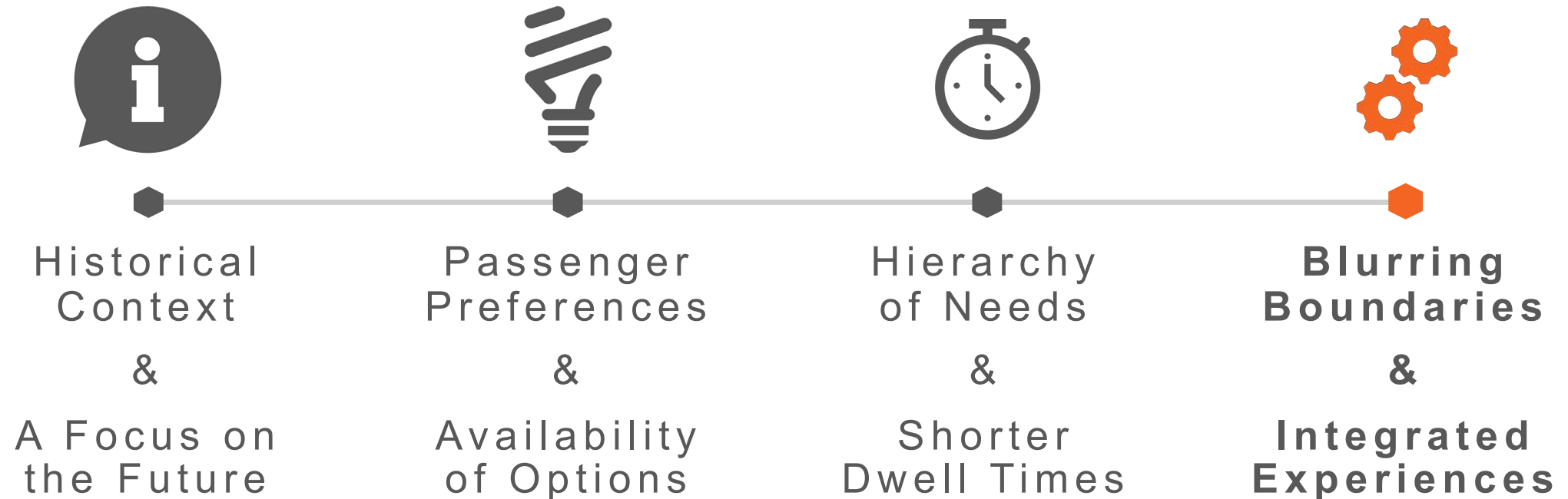
EXIT



Transforming Food & Beverage at DFW Airport



Transforming Food & Beverage at DFW Airport





Blurring Boundaries & Integrated Experiences

Delivering More Than the Expectation

Emerging Trends

Shifting Business Models



Blurring Boundaries & Integrated Experiences

Delivering More Than the Expectation

The airport business model continues to blur boundaries at an accelerating pace with no signs of slowing down...



Thank You