

**mind-set**  
expert in travel market research

#1 in Travel Retail Research & Consulting



DALLAS, JUNE 27<sup>TH</sup> 2019

# GLOBAL INSIGHTS: FOOD & BEVERAGE SUCCESSES AND FAILURES

# About m1nd-set....

m1nd-set is a worldwide leading agency in travel research, based in Switzerland. Our key sector of activity is **travel research & consulting**.

m1nd-set has conducted over 1.000 qualitative and quantitative research studies around the world over the last decade, and has successfully provided marketing intelligence to various Fortune 500 companies.



m1nd-set is the leading research agency in the area of travel, providing their clients with tailor-made research, analysis, actionable results and recommendations.



With airside access to over 60 airports worldwide, m1nd-set can easily reach international air travelers.



We have conducted more than 2 Mio interviews over the last 10 years with travelers around the globe.



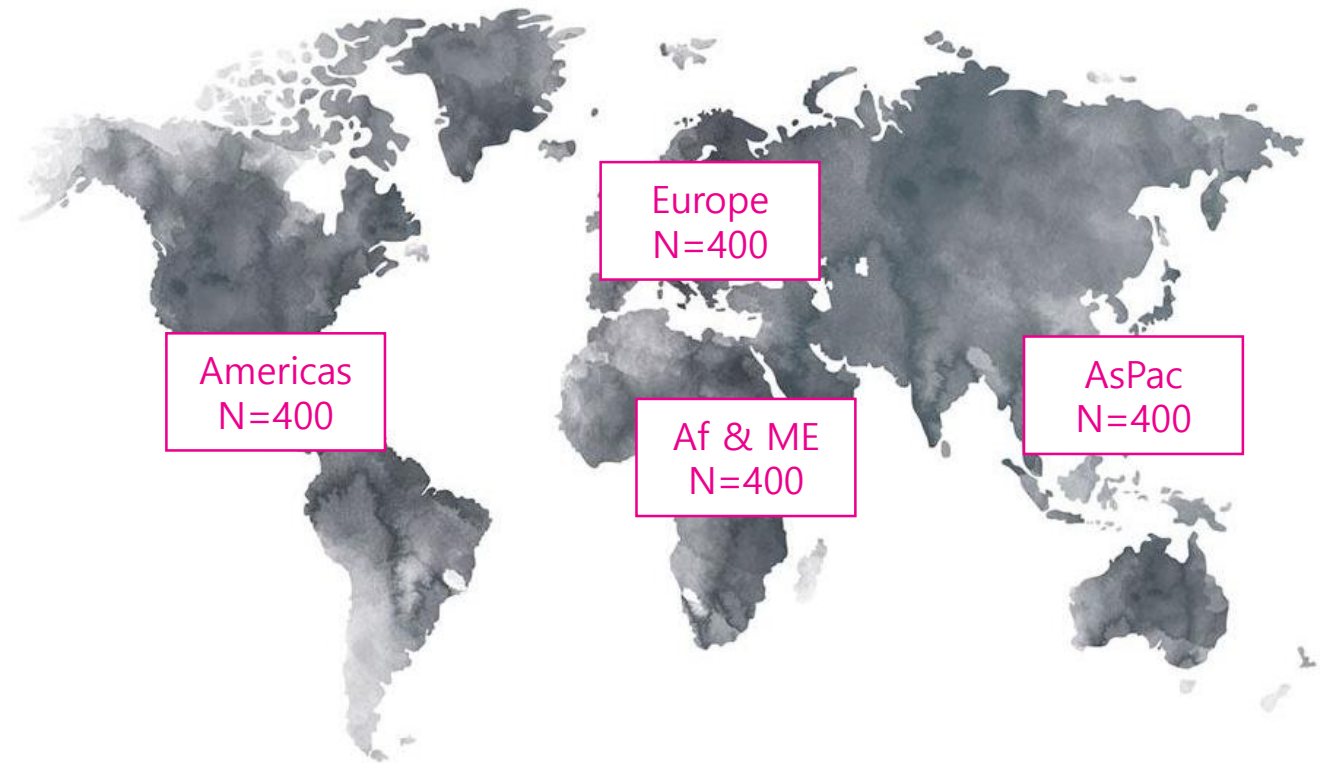
Additionally, m1nd-set runs the Airs@t survey (in partnership with IATA) which is recognized as the industry benchmark of air passengers satisfaction.

# Methodology & Sample



## Understand what consumers want from airport food & beverage

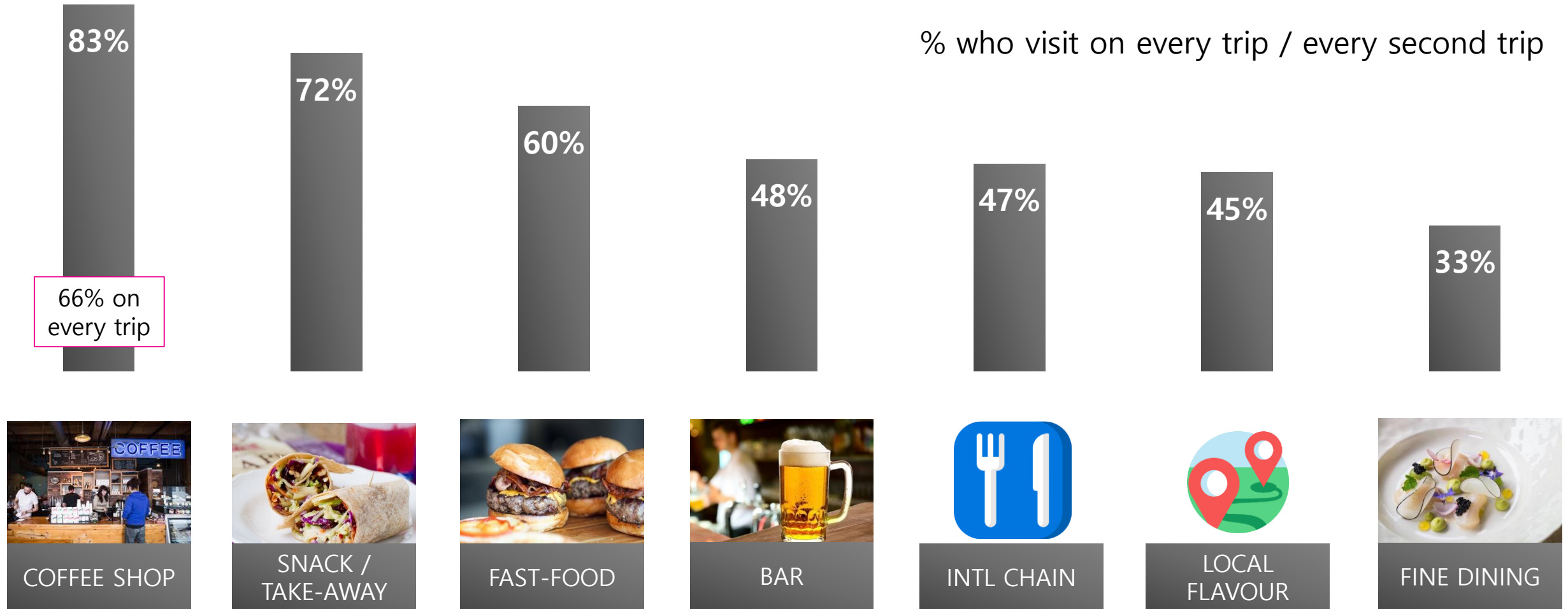
- N=1600 interviews with international travellers
- Online interviews conducted using m1nd-set's data base of international travelers
- Fieldwork in May 2019



# AIRPORT F&B HABITS AND PERCEPTION



# Coffee shops and Snacks / Take-aways are the most frequently visited F&B establishments.










# Different types of F&B establishments seem to appeal more to different profiles of travellers.



## BUSINESS TRAVELLERS

## FREQUENT TRAVELLERS

## MILLENNIALS TRAVELLERS

	<p>COFFEE SHOP</p> <p>83%</p>		<p>SNACK / TAKE-AWAY</p> <p>72%</p>		<p>FAST-FOOD</p> <p>60%</p>		<p>BAR</p> <p>48%</p>
<ul style="list-style-type: none"> <li>+ Africa &amp; M. East: 89%</li> <li>+ <b>Business: 88%</b></li> <li>+ Frequent Trav: 88%</li> </ul>		<ul style="list-style-type: none"> <li>+ Americas: 79%</li> <li>+ <b>Millennials: 77%</b></li> <li>+ <b>Business: 77%</b></li> <li>+ Frequent Trav: 77%</li> </ul>		<ul style="list-style-type: none"> <li>+ <b>Millennials: 69%</b></li> <li>+ <b>Business: 68%</b></li> <li>+ Frequent Trav: 67%</li> <li>+ AsPac: 67%</li> </ul>		<ul style="list-style-type: none"> <li>+ <b>Business: 61%</b></li> <li>+ Europe: 60%</li> <li>+ Frequent Trav: 57%</li> </ul>	
	<p>INTL CHAIN</p> <p>47%</p>		<p>LOCAL FLAVOUR</p> <p>45%</p>		<p>FINE DINING</p> <p>33%</p>		
<ul style="list-style-type: none"> <li>+ Africa &amp; M. East: 61%</li> <li>+ <b>Business: 58%</b></li> <li>+ Frequent Trav: 55%</li> <li>+ AsPac: 52%</li> </ul>		<ul style="list-style-type: none"> <li>+ <b>Business: 53%</b></li> <li>+ Frequent Trav: 53%</li> <li>+ <b>Millennials: 50%</b></li> </ul>		<ul style="list-style-type: none"> <li>+ Africa &amp; M. East: 44%</li> <li>+ <b>Business: 44%</b></li> <li>+ Frequent Trav: 43%</li> <li>+ <b>Millennials: 38%</b></li> </ul>			

# Killing time, a wider choice than in-flight and the access to comfortable seating / Wi-Fi are the main advantages of airport F&B

#1 Good way to kill time



Africa & Middle East

Infrequent Travellers

36 y.o. +

#2 More choice than in-flight



Africa & Middle East

#3 Comfortable seat or Wi-Fi



Africa & Middle East

# Convenience, the offer / variety and the possibility to try local flavours are also relevant

#4 Convenient



**Americas**

#5 Like the offer / variety



**Africa & Middle East**

**Business Travellers**

#6 Try local flavours



**Africa & Middle East**



# Finally, about 3 in 10 mention the fact that it is more quiet / relaxing than other places at the airport, better prices vs in-flight and good value for money

#7 More quiet / relaxing



**Business Travellers**

**Males**

#8 Prices better than in-flight



**Business Travellers**

**Males**

**36 y.o. +**

#9 Good value for money



**Business Travellers**

**Males**

# The perception that airport F&B is over-priced is clearly perceived as the main disadvantage



# In addition to prices, other important disadvantages are the lack of time and the limited choice

#1

Over-priced



Americas

Europe

Females

#2

Takes too much time



#3

Limited choice



Frequent Travellers

Males

Millennials

# Some travellers are dissatisfied with the atmosphere, the healthy options available and the originality of the offer

#4 Atmosphere not pleasant / quiet



Africa & Middle East

#5 Lack of healthy options



Millennials

#6 Nothing original / new



Millennials

Frequent Travellers

# Finally, the lack of local specialties and dissatisfactory service are also among the disadvantages mentioned

#7 Lack of local specialties



#8 Service not good enough



**Business Travellers**

**Males**

# A fast service is clearly the most important aspect of the airport dining experience

## MOST IMPORTANT ASPECTS OF AIRPORT DINING

**Healthy / light options**

#2

+ Business  
Frequent Trav.  
Millennials

**Fast service**

#1

More important at airport than in home country & destination

+ Americas

**Try local flavors**

#3

But less important at airport than at destination

+ Business  
Frequent Trav.  
Males

## OTHERS

Discovering **new / innovative flavours** #4

**Kids menus** #5

Products from **well-known international brands** #6

**Vegetarian / vegan options** #7

**Celebrity chef restaurants** #8

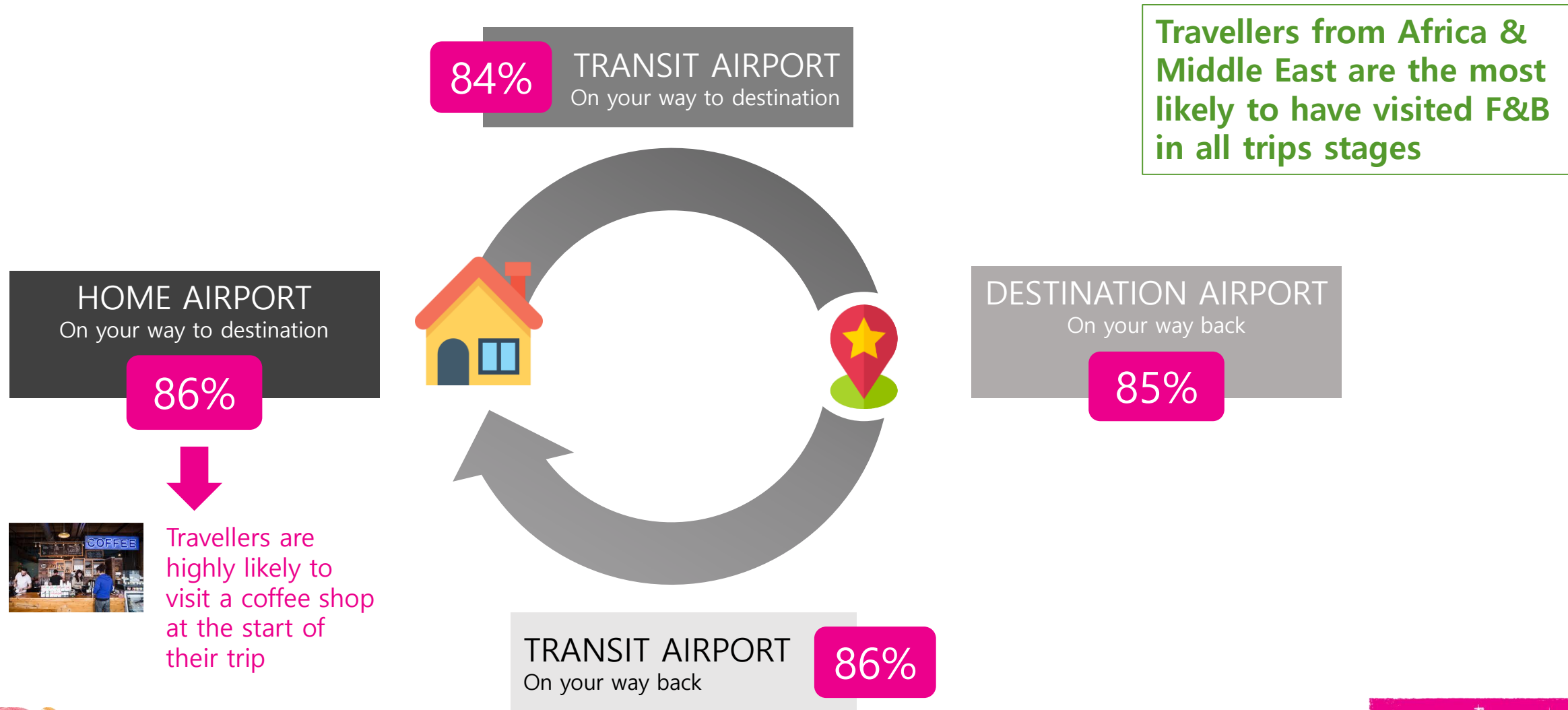
+ Business  
Frequent Trav.  
Males  
Millennials



# AIRPORT F&B BEHAVIOUR ON THE LAST TRIP



# Visits to F&B establishments are equally frequent across the different trip stages





# Visits to F&B establishments are equally frequent across the different trip stages.



**HOME AIRPORT**  
ON YOUR WAY TO  
DESTINATION

**TRANSIT AIRPORT - ON YOUR**  
WAY TO DESTINATION

**DESTINATION AIRPORT - ON**  
YOUR WAY BACK HOME

**TRANSIT AIRPORT - ON**  
YOUR WAY BACK HOME

Coffee shop



Snack / take-away



Fast-food restaurant



Bar



Local flavour restaurant



International chain



High end fine dining



# Non-Alcoholic Drinks and Snacks are the most consumed at airports overall

68%

Non-Alcoholic Drinks



63%

Snack / meal-bridge



39%

Full meal



23%

Alcoholic Drinks



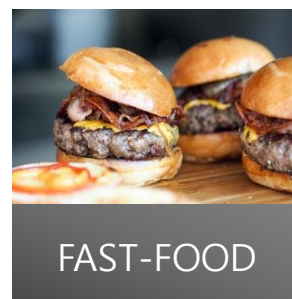
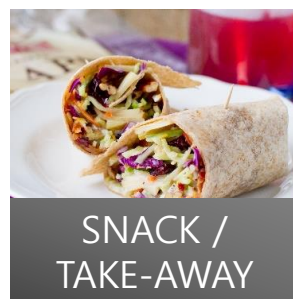
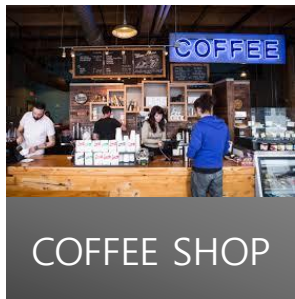
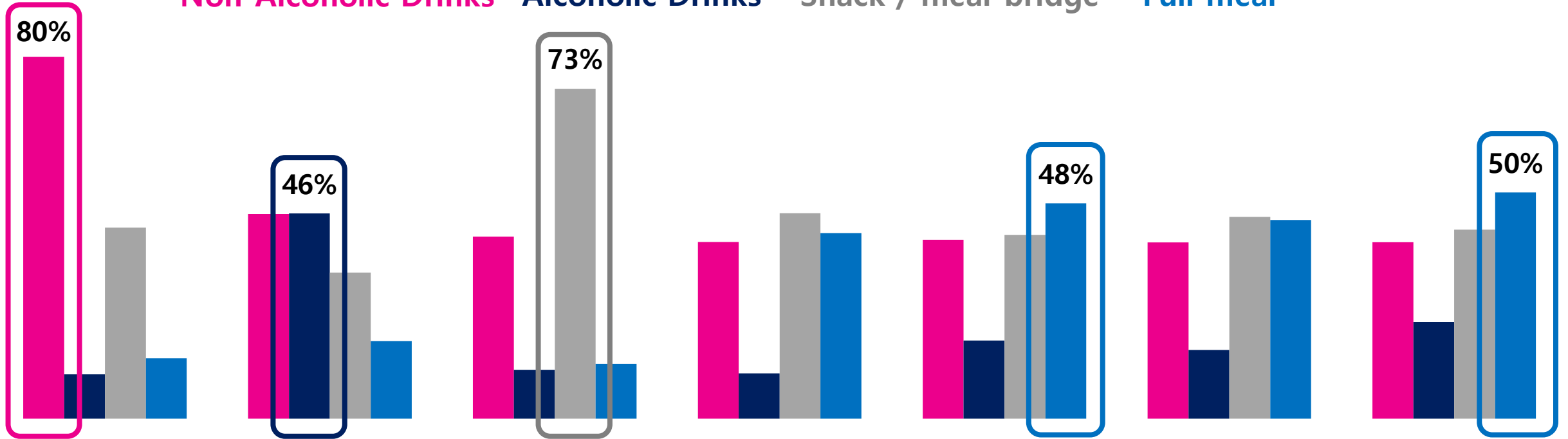
# The type of food & beverage consumed varies according to the type of establishment

Non-Alcoholic Drinks

Alcoholic Drinks

Snack / meal-bridge

Full meal



# The largest amounts were spent on Full Meals which account for 36% of the total budget.

Spent on entire trip: outbound + inbound

Total



27  
\$

Full meal(s)



[36%]

18  
\$

Non-Alcoholic Drinks



[24%]

18  
\$

Snack(s) / meal-bridge



[25%]

11  
\$

Alcoholic Drinks



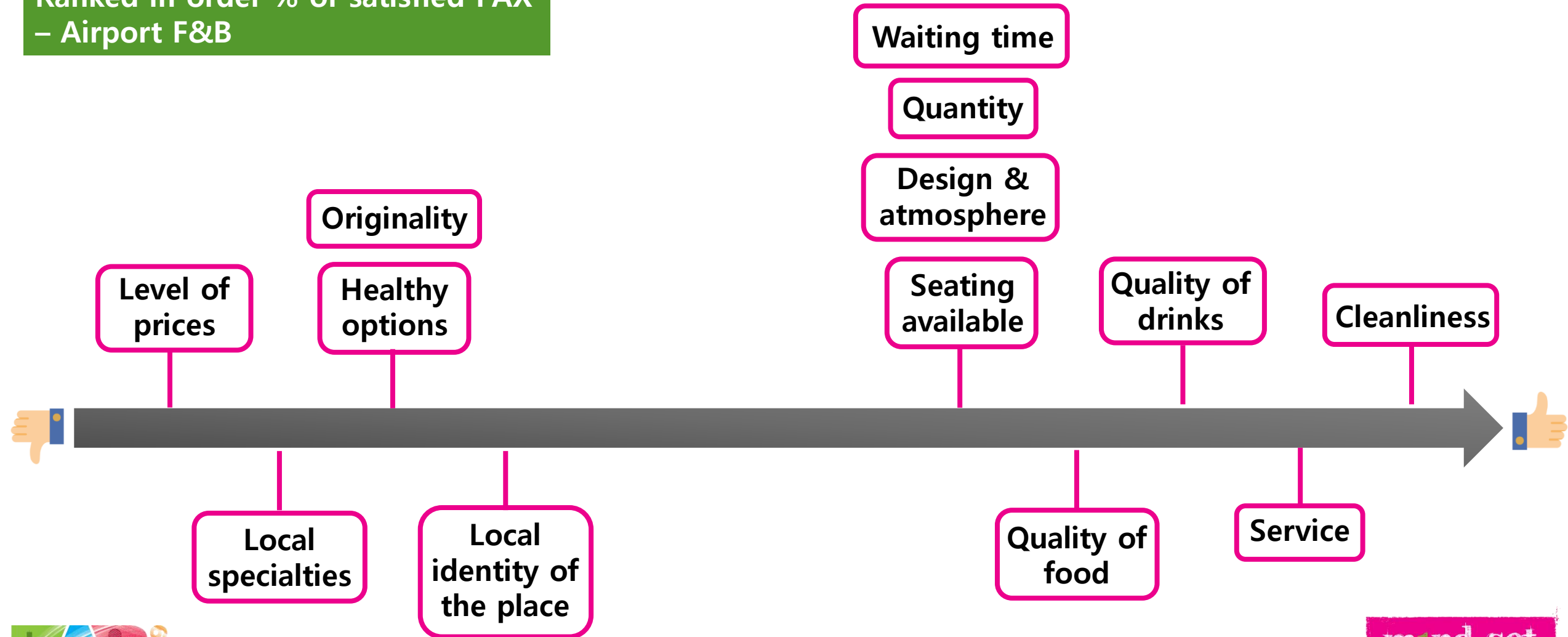
[15%]

# SATISFACTION WITH AIRPORT F&B



Cleanliness, Service and the Quality of Drinks & Food are the most positively aspects of the airport F&B experience. On the contrary, the Level of prices and the Local specialties are the least satisfying.

Ranked in order % of satisfied PAX  
– Airport F&B



# The satisfaction levels vary importantly across type of F&B establishment



LOCAL  
FLAVOUR



INTL CHAIN



FINE DINING

Millennials  
Business  
Males  
Frequent Travellers



**Above the  
average** on  
most indicators



COFFEE SHOP



SNACK /  
TAKE-AWAY

36 y.o. +  
Leisure  
Females  
Infrequent Travellers



**Below the  
average** on  
most indicators

# The ten highest evaluations are all concentrated in the international chain restaurants and the fine-dining restaurants.

## THE 10 HIGHEST SCORES OVERALL



INTL CHAIN

- ✓ Cleanliness
- ✓ Service
- ✓ Quantity of food



FINE DINING

- ✓ Service
- ✓ Quality of food
- ✓ Design / atmosphere
- ✓ Healthy options
- ✓ Quality of drinks
- ✓ Originality
- ✓ Local specialties

## THE 10 LOWEST SCORES OVERALL



COFFEE SHOP

- ✗ Local identity of the place
- ✗ Originality
- ✗ Healthy options
- ✗ Local specialties
- ✗ Prices



SNACK / TAKE-AWAY

- ✗ Availability of seating
- ✗ Originality
- ✗ Healthy options
- ✗ Local specialties
- ✗ Prices



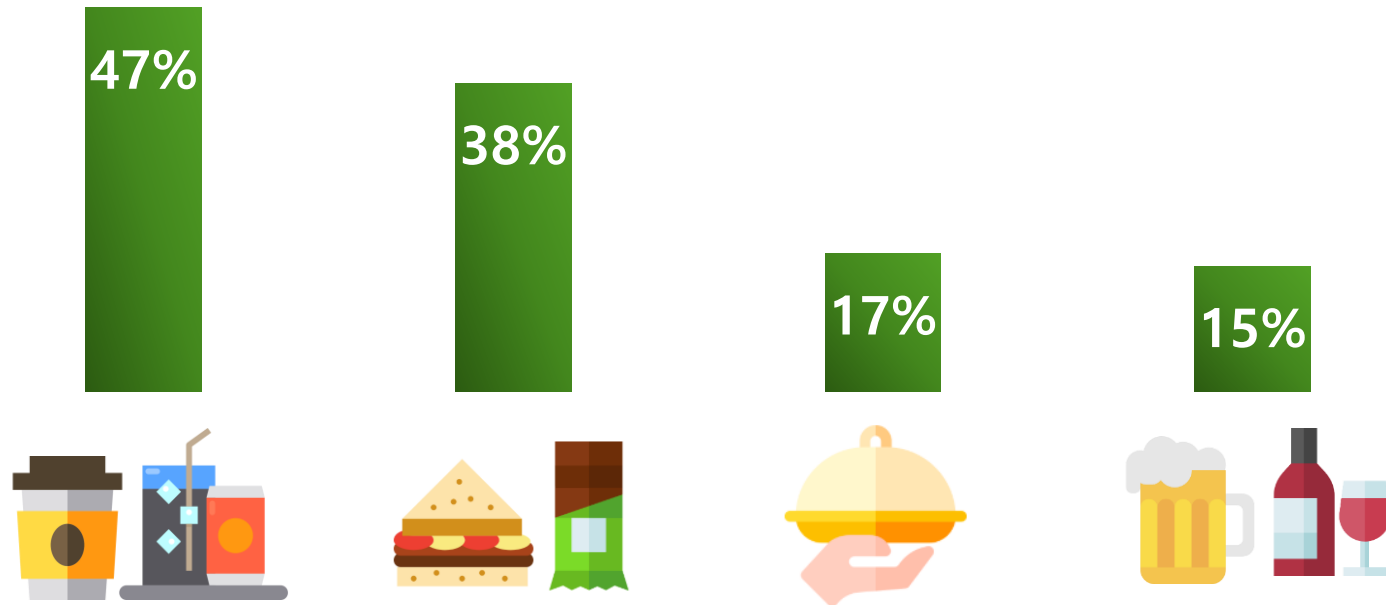
# AIRPORT LOUNGE F&B



# F&B consumption is a major part of the experience in the airline lounge

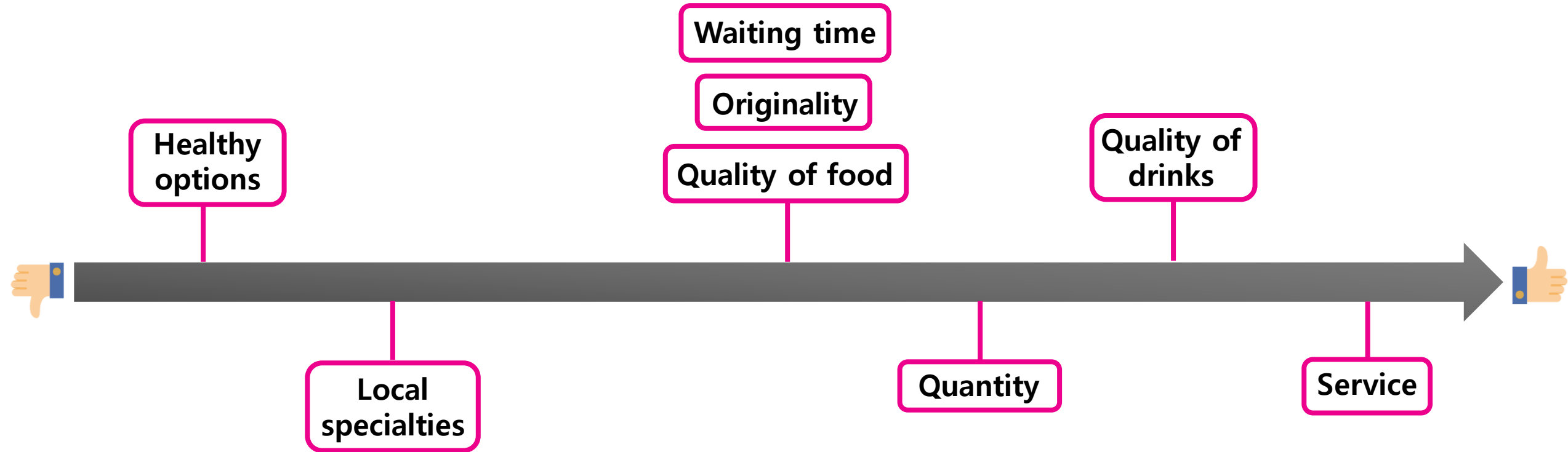
77%

of lounge visitors consumed food / and or drinks there



Service and the Quality of Drinks are the most positively aspects of the lounge F&B experience. On the contrary, the availability of healthy options and local specialties are the least satisfying.

Ranked in order of satisfied PAX –  
Airport Lounge

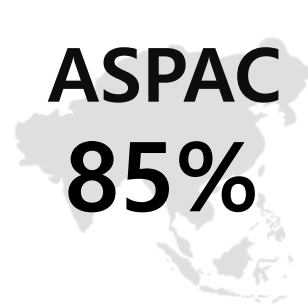
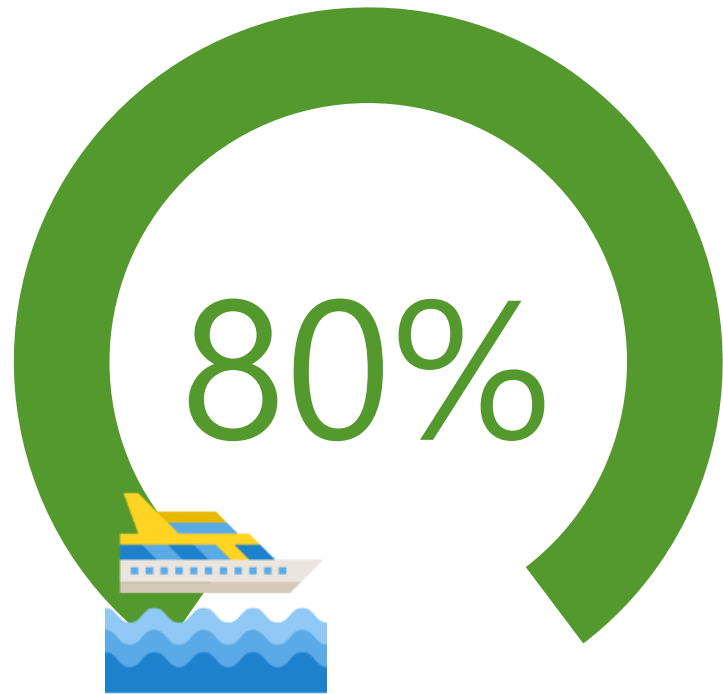


# CRUISE F&B



# The clear majority of Cruise travelers consider the offer of Food & Beverage a very important element when choosing a cruise line

**% WHO CONSIDER THAT THE OFFER OF FOOD & BEVERAGE IS IMPORTANT IN THEIR CHOICE OF CRUISE:**



The majority of Cruise travelers had an all-inclusive food & beverage package. However, they still tend to consume F&B not covered in the package. Ferry travelers are also very likely to consume during the trip. Satisfaction with food & beverage is high in both channels.

**86%** of cruise pax have an **all-inclusive package**

↳ **51%** also consumed **food & beverage not covered** in the all-inclusive package

↳ **Very high satisfaction (92%)**

AVERAGE SPENDING IN FOOD & BEVERAGE PER DAY (PER PERSON):



Cruise travelers are very likely to consume alcoholic drinks and small snacks outside the all-inclusive package. Ferry travelers tend to purchase both non-alcoholic drinks and alcoholic.

CONSUMPTION OF  
FOOD & BEVERAGE  
NOT COVERED IN  
THE ALL-INCLUSIVE  
PACKAGE

62%

Alcoholic Drinks



49%

Snack / meal-bridge



34%

Non-Alcoholic Drinks



25%

Full meal



Cruise travelers having an all-inclusive package often consume F&B not covered in the package because they want to enjoy a different meal/drink, due to the wider variety of drinks or because eat à la carte.

## TOP REASONS FOR CONSUMING FOOD & BEVERAGES NOT COVERED IN THE ALL-INCLUSIVE PACKAGE:

#1

The **food/beverage I wanted** was **not included** in the all-inclusive package



37%

#2

There was a **wider variety of options** to **drink** outside the all-inclusive package



31%

#3

I wanted to **eat à la carte** instead of in the buffet which was included



26%

#4

There was a **wider variety of options** to **eat** outside the all-inclusive package



25%

#5

The **quality** was **better** for the food/beverage not covered



23%

#6

The **service** was **better** when ordering food/beverage not covered



20%



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**HAB** 2019

DALLAS, JUNE 27<sup>TH</sup> 2019

# Thank you!

A full report with more details is also available for purchase.  
For more information please get in touch!

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