
Going Glocal: Innovating Sense of Place in International Destination Dining





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Concessions

DFW International Airport

Start first with the Customer DFW Customer Segments



Indulgent
Explorers



All Business
Road Warriors



Value Voyagers



Frugal
Vacationers



Foreign Fun
Seekers





Indulgent Explorers

All Biz Road Warriors

Value Voyagers

Frugal Vacationers

Foreign Fun-Seekers

Size

22%

7%

28%

41%

2%

Average Spend

\$65

\$21

\$32

\$17

\$34

Key Attributes

Young & diverse group. Frequent traveler, often with kids

Likes **high-quality**, and **healthy dining** options.

Shops for variety of **items & brands at airport**.

Heaviest traveler, mostly for business

Focused on working in terminals

Prefers **casual dining** and may purchase **electronic accessories** or **jewelry**

Travels more for leisure

Prefers **casual** and **healthy dining**, doesn't think luxury brands are worth every penny.

Oldest segment, skewing to 55+

Bargains, **inexpensive dining options**, and **basic retail** are preferred

Non-U.S. traveler

Interested in **high-quality dining** and **experiences**.

May purchase items such as **books** and **electronics**.



Defining sense of place

Design, cuisine and a balance of price points are key elements of the experience

Create an overall experience that is multi-sensory

Great tasting and great looking food

Memory souvenir that's picture perfect



BAR Flying Saucer LIVE



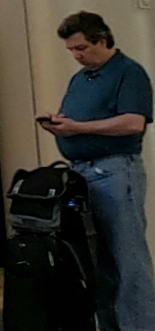
EDA

JO MALONE
LONDON

NEVER DRINK GOOD BEER FROM
FROSTED MUG

Flying Saucer

NEWEST HAN





Defining great sense of place

Design and Cuisine

Create an overall experience that is multi-sensory

Great tasting and great looking food

Memory souvenir that's picture perfect



EAT
DRINK
GATHER
BREWED

TEXAS CUISINE

BREWED

CRÚ
OOD & WINE BAR





THE ITALIAN KITCHEN

BY WOLFGANG PUCK





Cousin's

— BARBECUE —

WOOD. FIRE. SMOKE.

All **NATURAL** Only
BEEF & PORK



HEAD
BLADE
SHOULDER
ARM
SHOULDER
HOCK
LOIN
SPARE
RIB
SIDE
HOCK

Established
1983

B COUSIN'S

GET IT WHILE
IT'S **HOT!**



Menu board 1: Includes sections for 'SPECIALS', 'BEEF & PORK', and 'SIDE DISHES'. Items include 'PORK RIBS', 'BEEF BRISKET', and 'COUNTRY BBQ'. Prices range from \$11 to \$24.



Menu board 2: Includes sections for 'SPECIALS', 'BEEF & PORK', and 'SIDE DISHES'. Items include 'PORK RIBS', 'BEEF BRISKET', and 'COUNTRY BBQ'. Prices range from \$11 to \$24.

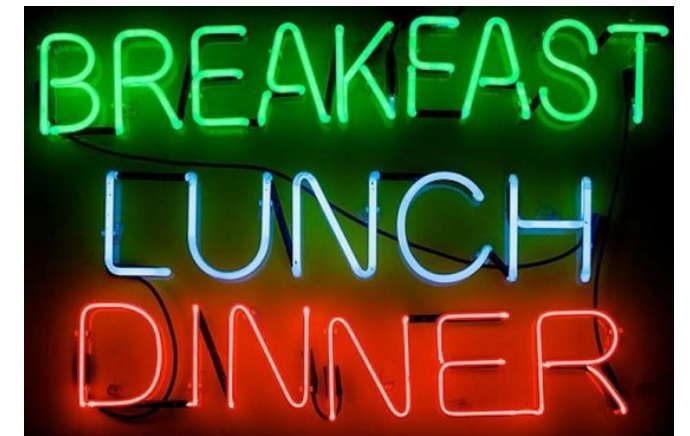
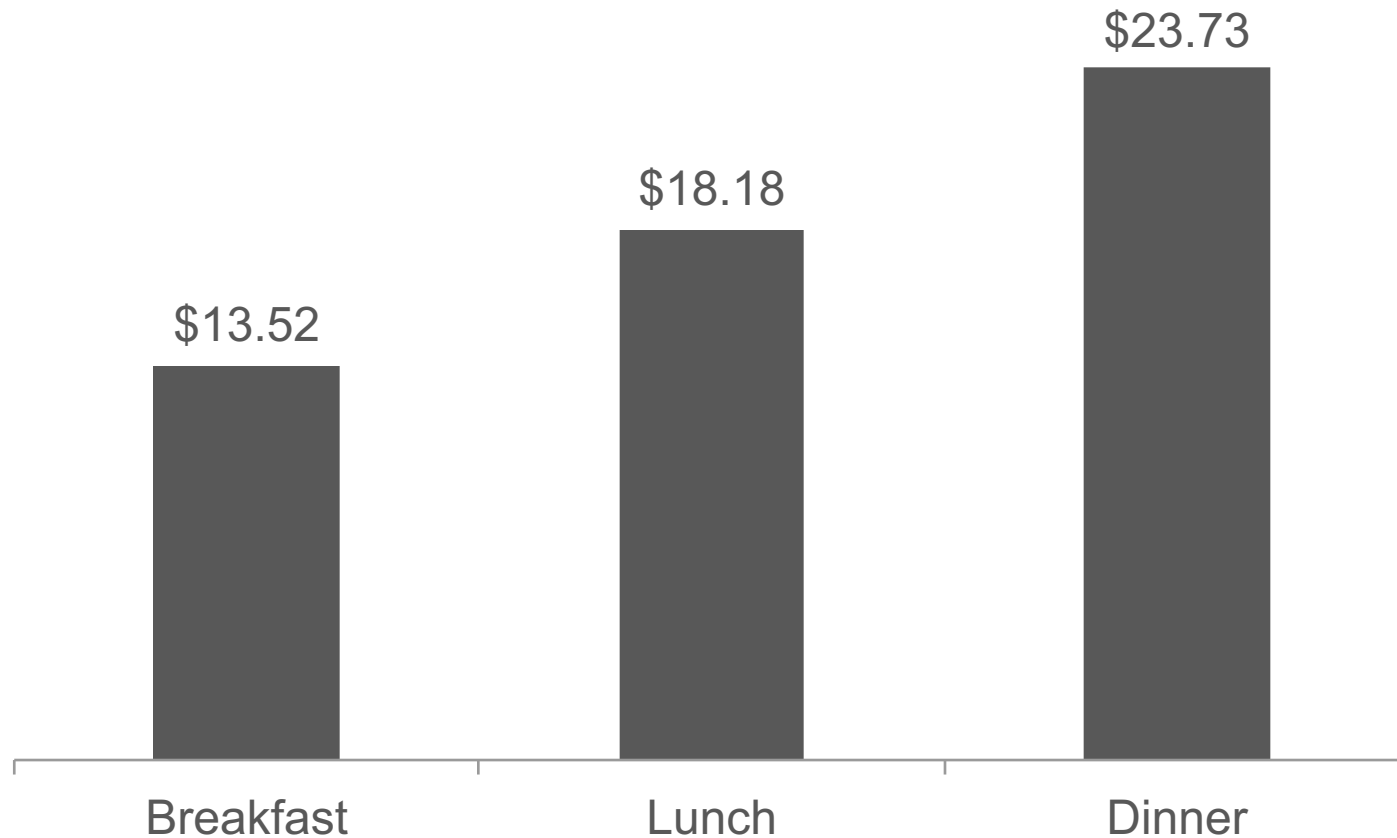
BBQ





Price Tolerance

In general, what is the most, in dollars, you will spend on a meal for yourself at an airport for...?





Price Variety Matters

Provide prices for all of demographic

Design

A mixture of local and Global favorites

Food variety



REFRESHING SMOOTHIE
RELAX
TASTY CHILL
BE HAPPY

DALLAS
PARIS
MEXICO CITY
CHILE SYDNEY

McDonald's

Gate D33





Chick-fil-A

MAC



Employee

Employee

Customer



SUBWAY

SUBWAY

J.M. HARRIS



Pizza Hut

DRAFTS

WINE

COCKTAILS



SHAKE
SHACK

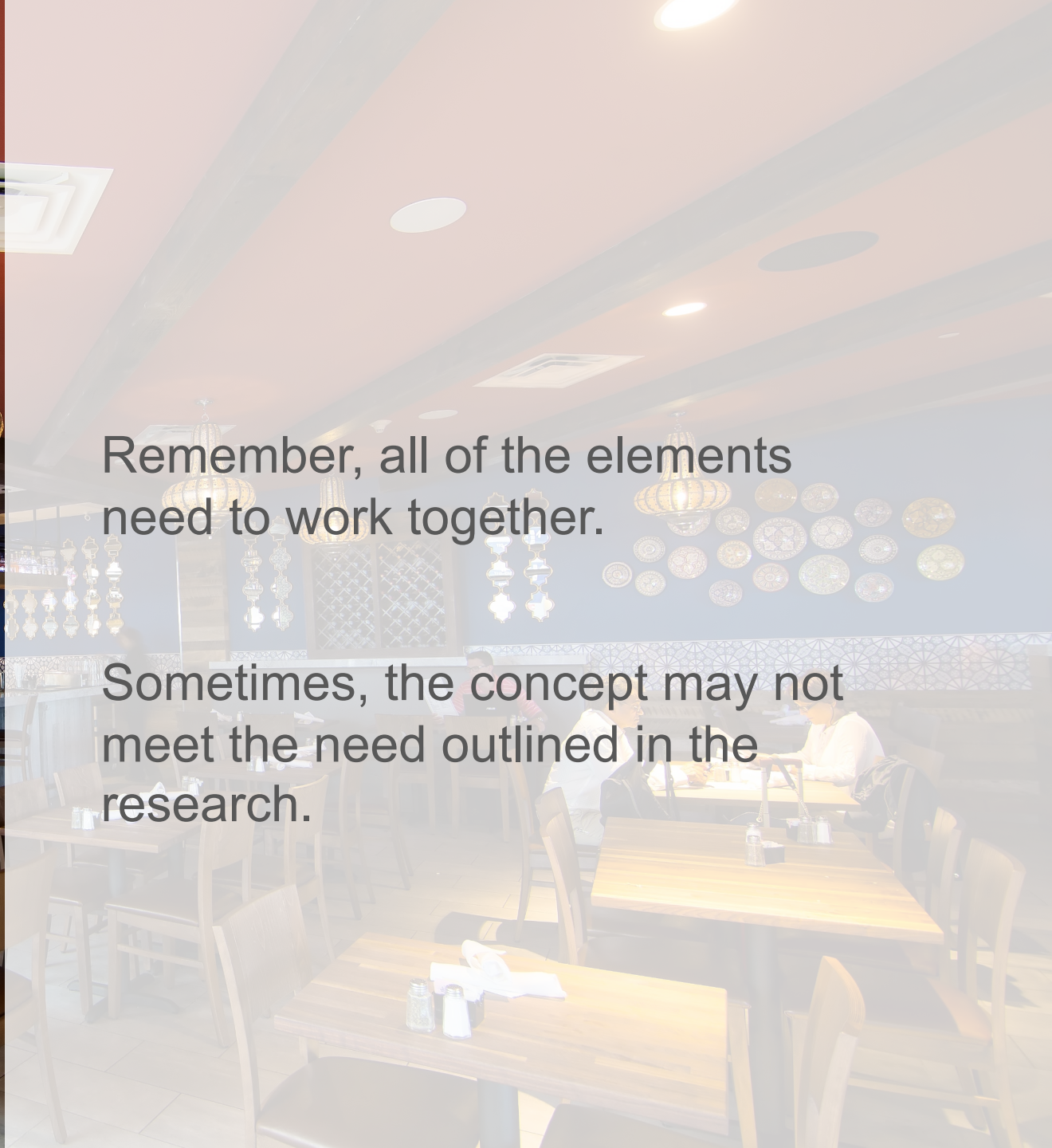
Food Trends





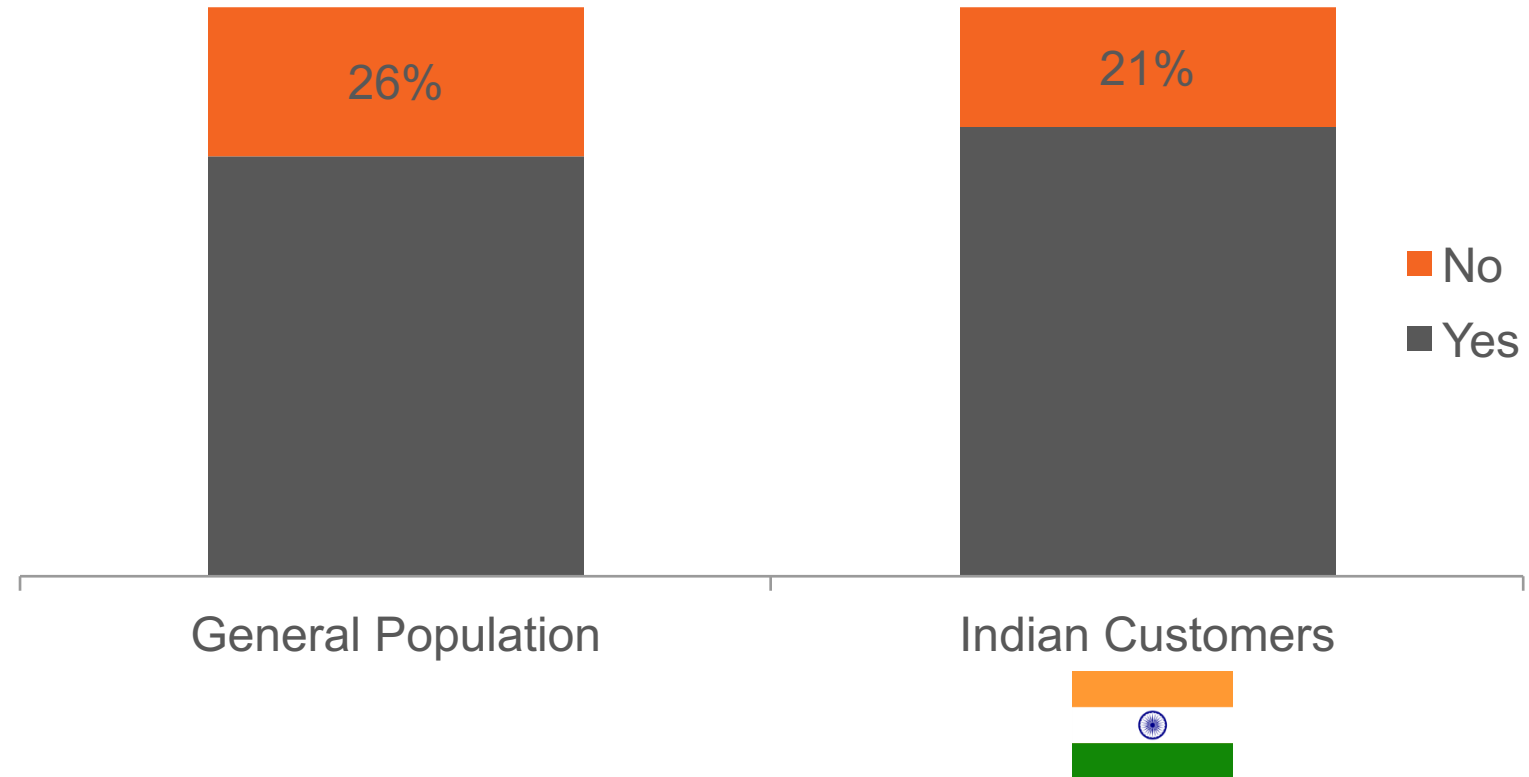
Remember, all of the elements need to work together.

Sometimes, the concept may not meet the need outlined in the research.



Most of the participants, including Indian travelers, would eat at Cafe Izmir if they had time.

Please review this menu from Cafe Izmir at D11.
Would you eat a meal at this restaurant, if you had the time?

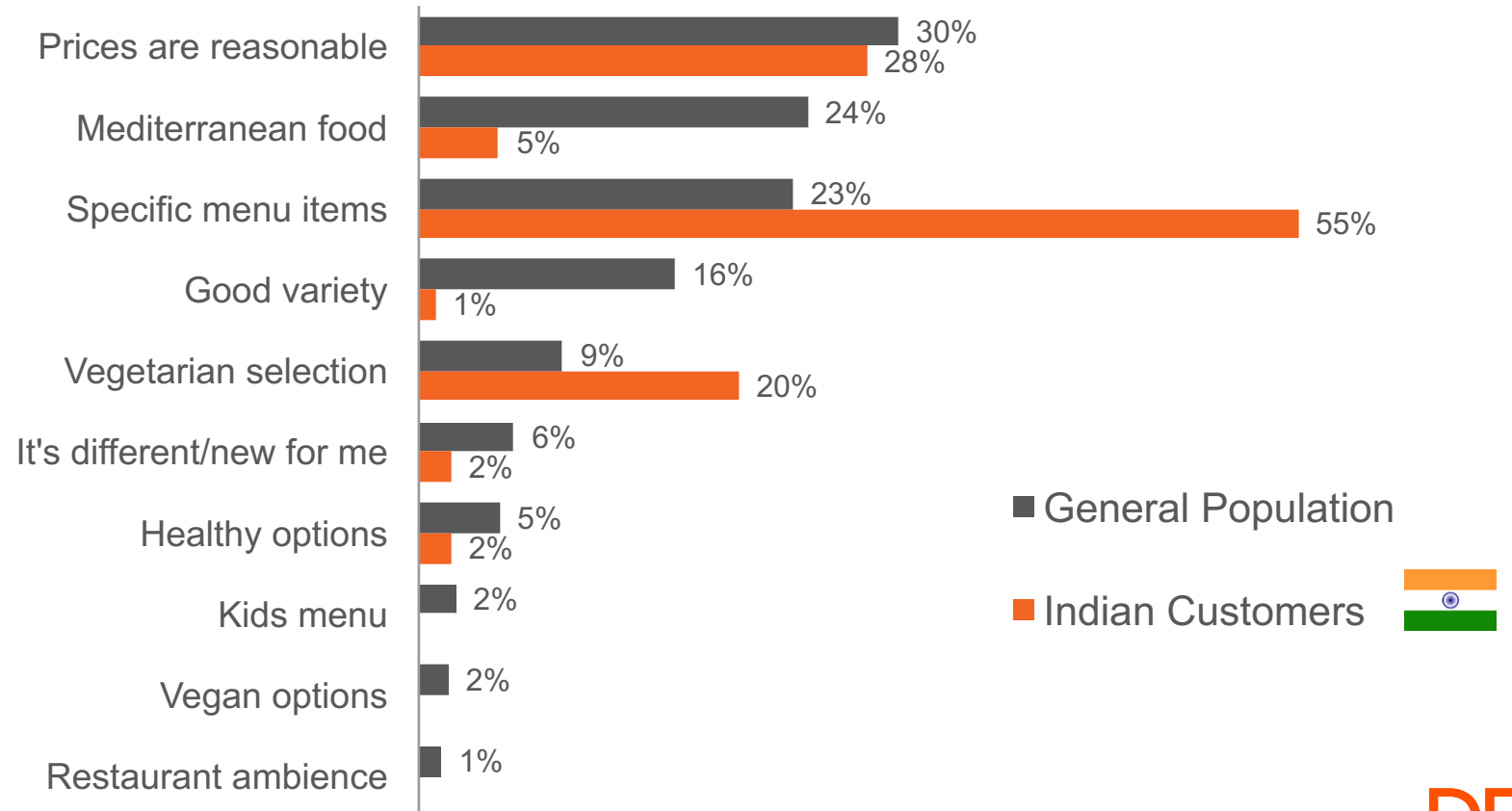


Those who would eat at Cafe Izmir liked the food selection and thought the prices were reasonable.



What do you like about the menu? Cafe Izmir

(Top responses. Multiple responses accepted)



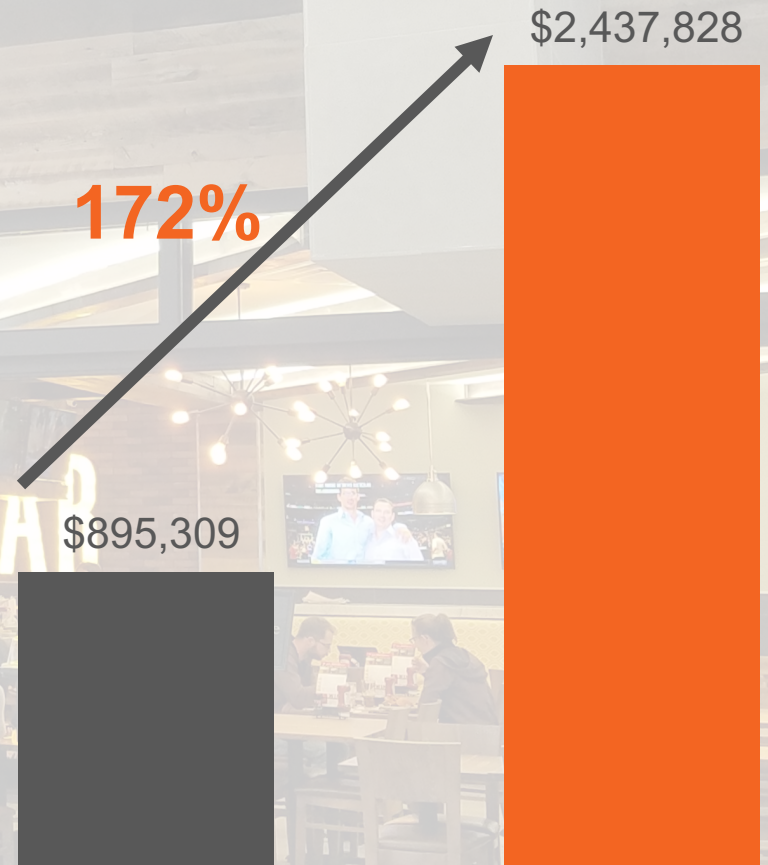
CAFE İZMİR
MEDITERRANEAN TAPAS





ANNUALIZED SALES: CAFÉ IZMIR VS. APPLEBEE'S

■ Café Izmir ■ Applebee's

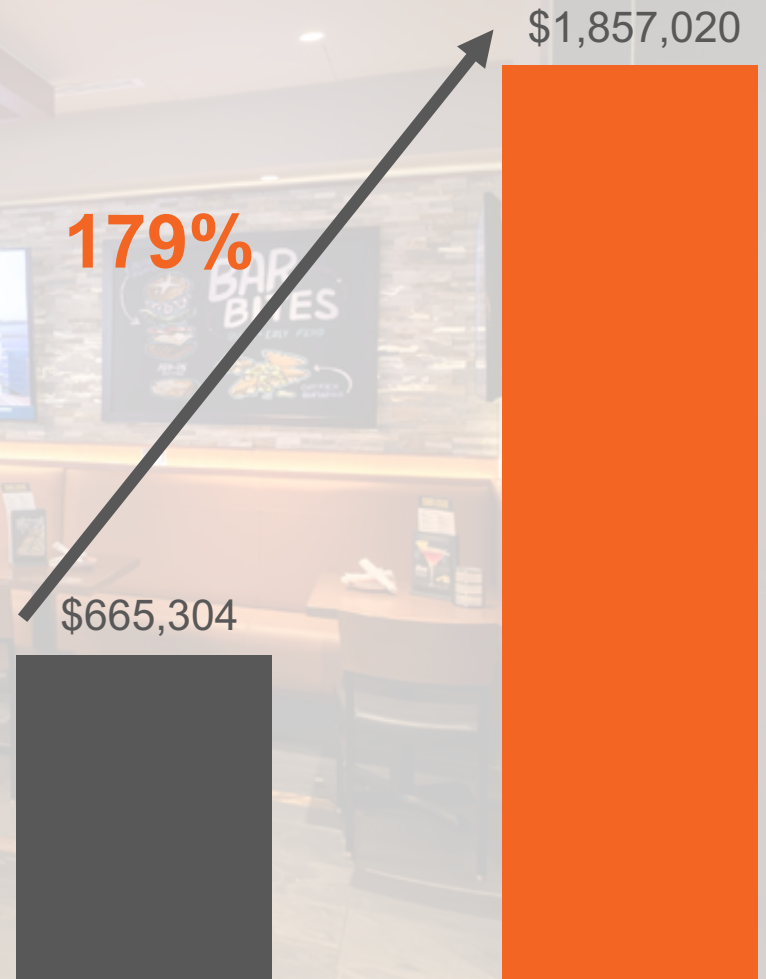


ABACUS BY KENT RATHBUN



ANNUALIZED SALES: ABACUS VS. BAR LOUIE

■ Abacus ■ Bar Louie



Successes



Maggiano's Little Italy

Previously Chili's To Go & DFW Barbershop

Average Transaction Value increased to \$26.68 from \$18.24 and \$13.66.





Pappasito's Cantina

Previously Pizza Hut Express

Annualized Gross Receipts increased 440%.

Average Transaction Value increased from \$7.51 to \$20.25.





Pappadeaux Seafood Kitchen

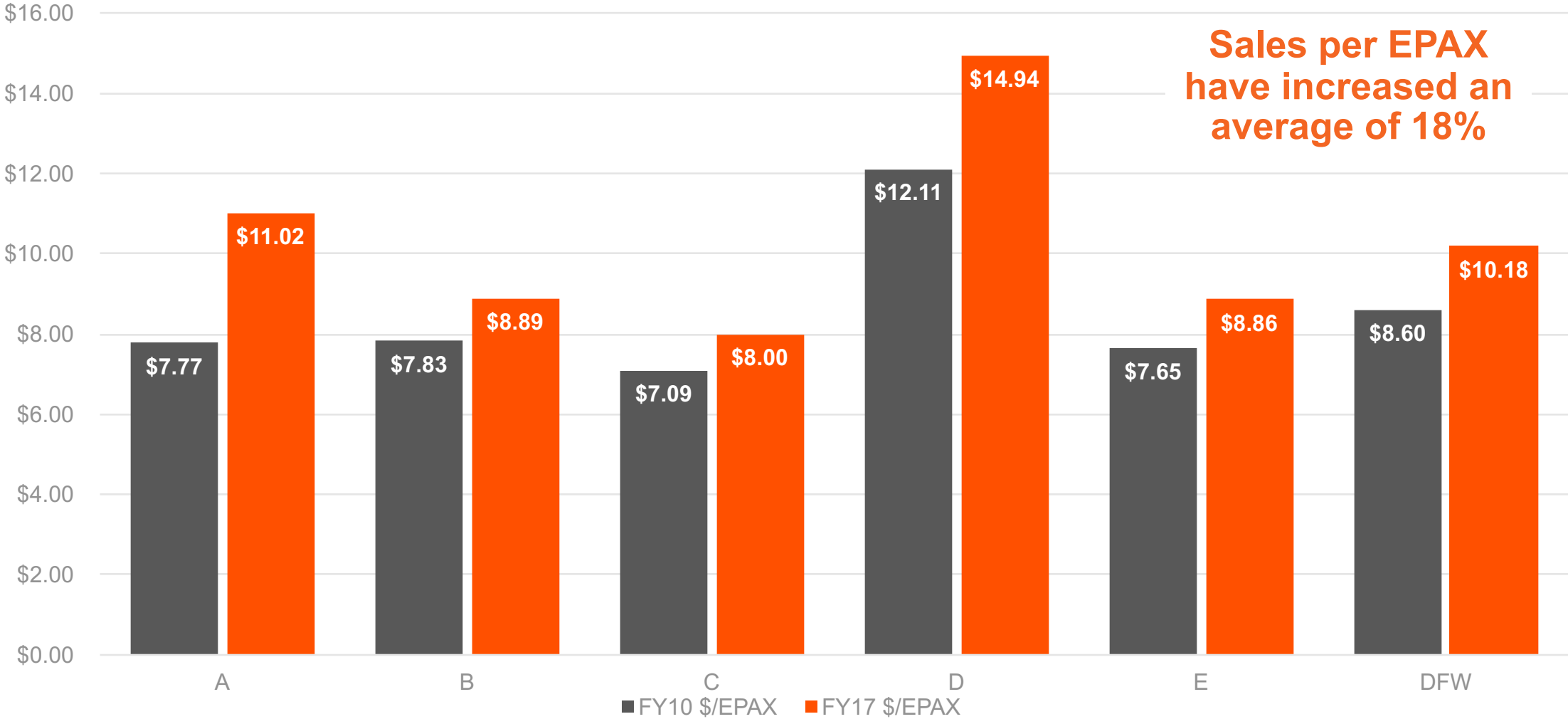
Previously Wendy's, Taco Bell Express, The Grove

Annualized Gross Receipts increased 142%.

Average Transaction Value increased to \$33.10 from \$7.08, \$5.87, and \$6.31



Our customers noticed the enhanced selection: Value scores and sales have increased



Source: 2018 AX Fact Book (2017 Data)
Note: Terminal B & E reflect ongoing construction impacts



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Value for Money of Restaurants at DFW, 2012 - YTD



Thank You