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# Sea-Tac Airport Concessions: Focus Group Summary

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Port of Seattle –  
Sea-Tac Airport

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PRR

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# Introduction

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This report contains a summary of findings from three focus groups conducted on September 19, 21 and 22, 2011 as part of the Port of Seattle's Sea-Tac Airport Concessions Principles and Practices stakeholder process. Sea-Tac Airport is at the midpoint between renewing major concessions contracts (90% of units will turn over in a two-year timeframe from 2015-17) and is developing policies and principles that will help the Port develop a clearly articulated philosophy for how to manage and develop the concessions program. These focus groups were intended to gather input from the traveling public to help inform concessions policy development. The focus groups were held as part of a larger stakeholder engagement process that included input from current and prospective tenants, labor representatives, the airlines and prime concessionaires.

One focus group (Sept. 19) was made up of business travelers and the other two groups (Sept. 21 and 22) included people who travel primarily for leisure. All three focus groups were held at PRR's office in downtown Seattle from 6:30 to 8:30 p.m. See Appendix A for participant profiles and Appendix B for a copy of the moderator guide.

## Key Findings

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### Airport Experience

Right after passing through the security checkpoint, participants in all groups had a similar range of thoughts. Some look for a place to eat or get some water or coffee and others go straight to their gate. The following are a few quotes from participant responses when asked what they are thinking about immediately after they pass through security:

- "I orient myself, update myself on my gate information and get coffee"
- "Where's the nearest power outlet?"
- "I go to the Central terminal atrium"
- "I go to my gate, then go to the bar"
- "I usually bring a book and find a place to sit at my gate"

### *How do participants find things at the airport?*

When asked where they would go to get information, participants in all groups said that they look at the signage; they just know the airport; or have favorite locations that they always go to. One participant said that she went online to find out where the play area was for her kids. Several participants said they locate their gate first and then go to shops or restaurants near that location.

*Would participants be interested in a mobile application to find information about Sea-Tac restaurants and shops?*

Most participants had experience with mobile apps. A few had never downloaded an app before because they do not have phones with that capability. Participants expressed an interest in a mobile app for airports in general, but mixed interest in an app that covers only Sea-Tac Airport as most participants noted that they know Sea-Tac well enough or they don't spend much time in their "home" airport. Participants would be more inclined to be interested if the app included other features such as:

- Information about other airports
- Store hours (whether shops or restaurants are open or not)
- Flight status, delays, etc
- Parking information
- Transit info (buses, light rail, etc)
- Map showing restaurants and shops in each concourse

In general, business travelers were more enthusiastic about the mobile app than leisure travelers.

*What would participants do if they are hungry or want a magazine before their flight that leaves in one hour?*

Most participants would focus on restaurants or shops that are near or on the way to their gate. For some an hour is not a long time, so they would grab some fast food. Several participants noted again that they would go to the gate first to check the status of their flight and then go somewhere nearby to get food or a magazine. Other than a few "favorites" that participants said they always seek out if they have time (i.e. Dish D'Lish, Qdoba, Anthony's), most said they stop at whatever is most convenient.

The business travelers do not mind spending money when they are on expense accounts. Those who find the airport too expensive report they bring their food along with them or have already eaten before arriving at the airport. One participant from the leisure travelers said that he plans ahead and eats dinner at the airport, "I plan ahead and have dinner at Anthony's. It's really nice and the cost is the same as I would pay locally."

### **Mix of Airport Offerings**

During this phase of the discussion, the moderator used boards and handouts to spark a comparison between different retail and food/beverage concepts (i.e. local, national and airport concepts).

*Which restaurant concepts are most appealing?*

Many in the business travelers group liked the concept depicting a national brand-name, Wolfgang Puck Express, citing that location's ease and convenience as top reasons:

- "It's easy"
- "I don't need to wait for a waitress"
- "It's quicker"

The leisure travelers who liked Wolfgang Puck cited the fact that it was “express” and that they liked the fast service. The second leisure travelers group did not like Wolfgang Puck at all. Some indicated that it seemed over priced and they felt that they wouldn’t get value for their money. Other participants noted that it looked like a cafeteria.

As a known local concept, Anthony’s was very popular in both leisure groups because it is a hometown restaurant, people were more familiar with it and most felt it offered good value and food. Many who liked Anthony’s also preferred sit down restaurants to take-out/fast food restaurants. Some said they feel Anthony’s is higher class and they worry it would not be the same quality at the airport as at other locations. Some even doubted that it was the “real” Anthony’s. Business travelers felt that Anthony’s was “fine” and said it has a good bar for longer layovers at the airport.

Shown as a “white label” concept<sup>1</sup>, Bigfoot Food & Spirits was less popular with all groups. Those who did like it were primarily men and they cited the novelty aspect of it and the fact that it looks like a good place to get a drink. Leisure travelers said that it looked uninviting (“too walled-in”) and lacked the familiarity of other concepts.

#### *Which retail concepts are most appealing?*

In terms of retail shops, a local concept, Fireworks was the most appealing for all groups. Participants said it was familiar to them, had a wide variety of options. Several men mentioned that it looked like it had “more than just handbags” compared to the photos of the other two concepts (one national mall concept and an airport “white label”). Others liked it because it featured local artists. Some participants do not typically shop at the airport citing various reasons such as “SeaTac is my home airport, not a destination where I’m going” and “I won’t shop at the airport because it’s expensive.”

Participants found Talie and Brighton Collectables less appealing, saying they looked “cold and sparse” or that they seemed focused on only women’s products.

#### *Local vs. National Brands*

When asked whether they preferred local vs. national brands, many supported local because they liked the idea of keeping their money in Seattle and also preferred local restaurants and shops because they are more familiar. Participants felt that supporting local brands helps to better support the local economy. In the business traveler group local brands were also preferred, but participants expressed concern about the quality at the airport not being the same as at the main stores or restaurants.

- “At an airport, nothing seems truly local.”

Some participants said that familiarity of the brand is more important than whether the brand is a local business. In the last leisure group, convenience came up as more important than local vs. national.

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<sup>1</sup> A “white label” concept is one that is created solely for an airport environment, but may “look” local.

*What would participants like to see at the airport that is not there already?*

Business travelers would like to see more duty free shops, locally made liquor, handcrafted goods, phone charger shop, and carts that go around selling sandwiches at the gates. The leisure groups would like to see a good , local brewpub (citing a lack of local beer), a pastry shop (i.e. Essential Baking Company), massage chairs, a place to buy collapsible water bottles, free bottles of water, a nap room, showers and more activities for kids.

## **Pricing**

Overall, all groups expected to pay more at the airport, some considerably more:

- "I feel like I'm a captive audience; I have no choice, but the prices are way too overinflated."
- "Do what you have to do before you get to the airport so that you don't spend a dime there."

When probed further, most people thought the food would be more expensive, but not the magazines and books, and a few others who thought that fast food prices would be the same everywhere.

Participants were asked to price four items:

- Tall Starbucks Latte (standard two shots, regular milk, no syrup) (true cost: \$2.50)
- 20 oz. bottle of water purchased at a news/gift/snack shop (true cost: \$1.79)
- Ivar's 4-piece True Cod and Chips (true cost: \$7.99)
- *People Magazine* (true cost: \$3.99)

Two participants in the last leisure group were familiar with Sea-Tac Airport's street-pricing policy. Most, however, were surprised after the correct prices were revealed. Many had priced the four items at the highest choice price. Even after finding out that the Airport required restaurants and shops to keep prices similar to non-airport locations, several business group participants remained very skeptical that Sea-Tac has a street pricing strategy. The leisure groups were more accepting of the prices, although still surprised. Some still thought that the given price for water was too low as one female leisure traveler recalled recently paying \$3.00 for a bottle of water at the airport.

When asked if they would be willing to pay higher prices, a few were willing to do so, but most were not. Those that were willing to pay more acknowledged that the rents of the shops and restaurants may be higher at the airport than at other places so they are willing to pay more. Others said they do not mind paying more because they recognize it is just part of traveling ("travel is a chore, so I treat myself"). One leisure traveler cited an experience paying high prices at LAX, which prompted her to avoid purchasing things at any airport.

## **Customer Service**

Most participants reported that the customer service at Sea-Tac shops and restaurants is good. Participants generally felt that they get better service from sit down places than from fast food or "grab-n-go" places. There was a mix of experiences. Several people had not had good service from the newsstands but some reported good service; some reported poor service from the Starbucks ("doesn't seem like a 'real' Starbucks"), and some reported good service from there. Some cited poor English as a

problem with some employees. Other participants also reported that during busy times and holidays, customer service is poor especially in the takeout places. Some participants reported that the customer service at restaurants and shops at the S-gates was poor. Leisure travelers in Group #2 said they felt that customer service was below average at the "institutional" restaurants because the employees did not seem invested in their job. One leisure traveler referred to "the Aramark employees" and another commented, "you know that they aren't real Starbucks employees because they don't seem to care about the brand."

There was general consensus that the customer service at the airport was similar to that of non-airport locations, but better than customer service at other airports. Some participants noted that local restaurants and shops seem to have better customer service because they are more invested in the community compared to national brands.

### **Sense of the Place**

When asked about what stands out about the atmosphere at Sea-Tac, participants listed the following elements:

- The Central Terminal atrium
- The airport being "open and accessible"
- Gurgling fountains
- Art (i.e. "fish in the floor" was mentioned by several people)
- Easy to navigate
- Glass, metal, and other materials
- Clean floors and clean restrooms

Participants did not spontaneously mention the Airport's Northwest atmosphere. When probed about it specifically, participants said that the salmon on the floors and walls and other art give them a sense that they are in the Northwest, but many did not report getting the impression of being in the Northwest. Participants in all groups said that it is a good idea for Sea-Tac restaurants and shops to have a Northwest character because services should be indicative of the area they are in and it gives travelers who are not from Washington a sense of what the region is like.

Participants also thought that it is important for the airport to have locally-owned shops and restaurants because it helps the local economy. Several participants mentioned that there should be a balance of national and local brands. Some participants thought Sea-Tac should advertise which businesses are local. Comments included:

- "It is important for tourists to have the opportunity to experience local flavor."
- "You need both local flavor and national chains because sometimes people just want what they know."
- "Shops and restaurants should represent what the city is about."

## Location

When asked to name restaurants and shops available in the Central Terminal, many in all three groups could quickly name various shops. Participants could think of fewer specific names for shops and restaurants located in the concourses. Group #3 (leisure travelers) could name more shops and restaurants in the concourses than other groups.

When asked to compare the shops and restaurants in the Central Terminal to those in the concourses, many reported that the Central Terminal has better selections with more variety. The South Satellite was singled out as being particularly unappealing.

- "The Central Terminal is very appealing, but the concourses are mixed and not as appealing."

## Wrap-up

In closing, the moderator asked participants what they would like to see at Sea-Tac Airport that is not there now. Suggestions included:

- More restaurant options and more variety (e.g., a noodle restaurant)
- More international-friendly service (i.e. signs in multiple languages)
- Locally-made products (microbrews, food, liquor, arts and crafts)
- More entertainment (besides shopping)
- Authentic restaurants and shops ("Bigfoot is a phony concept")
- More play areas and activities for kids
- Keep the cell phone lot, and consider installing additional electronic signage there about flight arrival times
- Healthier food choices (especially for kids)
- Skylights in the gate areas
- Advertise the street pricing policy
- More power outlets and laptop plug-in stations

# Appendix A: Participant Profiles

Group #1: Monday, September 19, 2011

	Frequency of travel via Sea-Tac Airport	Primary purpose of travel (business or leisure)	Age	Approximate household income in 2010	Ethnic/racial background	Gender
1	At least once a month	Business	40-49	\$100,000 or more	Asian/Pacific Islander	M
2	At least once a month	Business	40-49	\$75,000-99,999	White/Caucasian (not Hispanic/Latino background)	F
3	At least once every 3 months	Business	40-49	\$50,000-74,999	White/Caucasian (not Hispanic/Latino background)	M
4	At least once every 3 months	Business	20-29	\$20,000-49,999	Black/African American	M
5	At least once every 3 months	Business	30-39	\$50,000-74,999	White/Caucasian (not Hispanic/Latino background)	M
6	at least once every 6 months	Business	60-65	\$100,000 or more	White/Caucasian (not Hispanic/Latino background)	M
7	At least once every 3 months	Both	30-39	\$100,000 or more	Asian Indian	F
8	At least once every 3 months	Both	40-49	\$75,000 to less than \$100,000	White/Caucasian (not Hispanic/Latino background)	M



Group #2: Wednesday, September 21, 2011

	Frequency of travel via Sea-Tac Airport	Primary purpose of travel (business or leisure)	Age	Approximate household income in 2010	Do you have children currently living with you?	Children's ages	Ethnic/racial background	Gender
1	At least once every 6 months	Leisure	60-65	\$75,000-99,999	No		White/Caucasian (not Hispanic/Latino background)	M
2	At least once every 3 months	Leisure	66+	\$50,000-74,999	No		White/Caucasian (not Hispanic/Latino background)	M
3	At least once every 3 months	Leisure	66+	\$100,000 or more	No		White/Caucasian (not Hispanic/Latino background)	M
4	At least once a year	Leisure	40-49	\$75,000-99,999	Yes	5-10 years old, older than 10 years old	White/Caucasian (not Hispanic/Latino background)	F
5	At least once a year	Leisure	40-49	\$75,000-99,999	Yes	Older than 10 years old	White/Caucasian (not Hispanic/Latino background)	F
6	At least once every 3 months	Leisure	30-39	\$20,000-49,999	Yes	0-2 years old	White/Caucasian (not Hispanic/Latino background)	M
7	at least once a month	Leisure	50-59	\$100,000 or more	Yes	Older than 10 years old	White/Caucasian (not Hispanic/Latino background)	F
8	At least once every 6 months	Leisure	30-39	\$20,000-49,999	No		Black/African American	F

Group #3: Thursday, September 22, 2011

	Frequency of travel via Sea-Tac Airport	Primary purpose of travel (business or leisure)	Age	Approximate household income in 2010	Do you have children currently living with you?	Children's ages	Ethnic/racial background	Gender
1	At least once every 6 months	Leisure	50-59	\$20,000-49,999	No		White/Caucasian (not Hispanic/Latino background)	F
2	At least once a month	Leisure	60-65	\$100,000 or more	No		White/Caucasian (not Hispanic/Latino background)	F
3	At least once every 6 months	Leisure	50-59	\$20,000-49,999	Yes	5-10 years old, older than 10 years old	White/Caucasian (not Hispanic/Latino background)	F
4	At least once every 3 months	Leisure	66+	\$50,000-74,999	No		White/Caucasian (Hispanic/Latino background)	M
5	At least once every 3 months	Leisure	50-59	\$75,000-99,999	No		White/Caucasian (not Hispanic/Latino background)	M
6	At least once a year	Leisure	18-29	\$75,000-99,999	No		White/Caucasian (not Hispanic/Latino background)	M
7	At least once a year	Leisure	66 and older	\$20,000-49,999	No		White/Caucasian (not Hispanic/Latino background)	M
8	At least once a year	Leisure	60-65	\$75,000-99,999	No		Black/African American	F
9	At least once every 3 months	Leisure	30-39	\$75,000-99,999	Yes	0-2 years old, 2-5 years old	White/Caucasian (not Hispanic/Latino background)	F

# Appendix B: Moderator Guide

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## Introduction (10 minutes)

- Moderator introduces herself/himself.
- [Explain:] A focus group is a group discussion where we can learn more in-depth about peoples' ideas and opinions (compared to telephone or written surveys).
- My job is to facilitate the discussion and make sure that everyone has an opportunity to speak **and to make sure that no one dominates the conversation.**
- Mention observers in separate room.
- Housekeeping – Bathrooms and refreshments.
- Mention ground rules:
  - There is no right or wrong answer; we're interested in your honest and candid opinions and ideas.
  - Our discussion is totally confidential. We will not use your contact information in any report.
  - Our discussion today is being recorded. These recordings allow us to write a more complete report, and to make sure we accurately reflect your opinions. However, please only speak one at a time, so that the recorder can pick up all your comments.
  - It is important to tell YOUR thoughts, not what you think others will think, or what you think others want to hear.
  - Please turn off cell phones.
  - Your stipend will be provided as you leave.
  - Relax and enjoy!
- We're going to spend our time today talking about the restaurants and shops at Sea-Tac Airport. Any questions about the purpose of our focus group or the ground rules before we begin?

I'd like you each to introduce yourselves. Please tell us:

- Your first name
- On average, how often do you travel through Sea-Tac Airport each year?
- When was your last trip?
- What is the primary purpose for your travel – leisure, business, both?

## Airport Experience (13 minutes)

To begin our discussion, I would like to ask you to place yourself at the Airport. Imagine that you are departing from Sea-Tac on the most common type of trip you take. Perhaps you've checked a bag at

check-in, or perhaps you've gone straight to the checkpoint. You have just passed through security, collected your items, and "re-dressed" yourself.

What kinds of things are you are thinking about at this point? Feel free to take a minute to think or recollect. **[Give participants a few minutes to think and then probe on their thoughts at this point.]**

Say you need to find something at the airport – perhaps your departure gate, or a place to eat – how would you typically figure out where to go? (Ask someone, stop and look at a directory, technology?)

Have you ever downloaded and used a mobile phone app? Would you ever be interested in a mobile app to help you find your way at the airport? What about to find shops and restaurants at the airport?

Assume for a moment that you are at the checkpoint and your flight is boarding in a little more than an hour and you are feeling a little hungry. What would you do at this point?

Assuming again that your flight is boarding in a little more than an hour but this time you've already found your gate and taken a seat in the waiting area. You are either hungry or you want to grab a magazine for the flight. What would you do?

#### **Mix of Airport Offerings – Local vs. National Brands (40 minutes)**

*(During the next phase of the discussion, the moderator will use boards and handouts that will spark a comparison between different retail and food/beverage concepts (i.e. local, national and airport concepts)*

We would like to take some time to talk about the mix of offerings that you may encounter at Sea-Tac Airport, either currently or at some time in the future.

**[Distribute food/beverage handout and place food/beverage boards out for display]**

Let's look at these images of different types of airport restaurants. Let's say you're hungry and thirsty and have time before your flight. On your **form** please put a number 1 next to the one that would most likely attract your business, and a 2 by the one that would next most attract your business. Put an X next to the one that would be least likely to attract your business.

**[Go through likes and dislikes about each].**

#### **PROBE QUESTIONS:**

- a. Which of these concepts do you like the best (why)?
- b. Which of these concepts do you like the least (why)?
- c. Which would be most likely to attract your business?
- d. Do you favor local concepts or national brands? (probe on local vs. national here)

**[Distribute retail handout and place retail boards out for display.]**

Let's look at these images of different types of airport retail shops. Let's say you have time before your flight to shop. On your **form** please put a number 1 next to the one that would most likely attract your business, and a 2 by the one that would next most attract your business. Put an X next to the one that would be least likely to attract your business.

**Go through likes and dislikes about each.**

PROBE QUESTIONS:

- a. Which of these concepts do you like the best (why)?
- b. Which of these concepts do you like the least (why)?
- c. Which would be most likely to attract your business?
- d. Do you favor local concepts or national brands? (probe on local vs. national here)

What kinds of things would you like to see at Sea-Tac Airport that aren't there now? Are there specific local or national brands that you would like to see? Are there types of restaurants or shops that you would be more likely to frequent than some of the ones there now?

### **Pricing (20 minutes)**

We would like to talk a little bit about what you pay for items you purchase at the airport. How would you compare airport prices to the prices you would expect to pay at stores or restaurants outside of the airport? More? Less? About the same? If more, how much more?

How do you think prices compare between Sea-Tac and other airports you have visited? Would you say things are comparable or more expensive or less expensive?

Now I'm going show you some typical items sold at Sea-Tac, and ask you to estimate what you would EXPECT to pay at the airport. On your **handout**, for each image check the box next to the price you would expect to pay for each.

- Tall Starbucks Latte (standard two shots, regular milk, no syrup) true cost: \$2.50
- 20 oz. bottle of water (if asked, purchased at a news/gift/snack shop) true cost: \$1.79
- Ivar's 4-piece True Cod and Chips true cost: \$7.99
- *People* Magazine true cost: \$3.99

I'll now tell you what the actual price is for these items at the airport **[run through list]**. What are your reactions? Are the actual prices higher or lower than what you chose?

Did you know that the Airport requires restaurants and shops to charge prices that are comparable to those you'd see in other non-airport locations? Would you be willing to pay a little more for items at the airport?

### **Customer Service Experience (10 minutes)**

Now I'd like to ask you about your perceptions of the level of customer service that you receive at the airport, specifically from employees in the **airport's restaurants or shops**. Keep in mind, this kind of service is separate and distinct from your interactions with security or airline personnel.

If you made a purchase at a restaurant during one of your most recent trips, how would you describe the service? If you made a purchase at a shop during one of your most recent trips, how would you describe the service?

In general, do you feel that the quality of customer service from an airport restaurant or shop is better, the same or worse than what you would expect outside of the airport, in the general community? How?

Can you describe a time when you've had great customer service at the airport?

What about an example of poor customer service?

Are there any differences in the quality of customer service you receive between restaurants vs. retail shops, or between different parts of the airport?

What about between local businesses vs. national chains?

### **Sense of Place (12 minutes)**

How would you describe the atmosphere at Sea-Tac Airport? What specific elements stand out?

Do you think you would have a sense, just by being at Sea-Tac airport that you were in the Northwest?

When people talk about a Northwest character, what kinds of things do you think of?

PROBE:

- a. Do you think it is a good idea for Sea-Tac restaurants to have a Northwest character?
- b. Do you think that it is important for Sea-Tac Airport to include locally-owned shops and restaurants? Why do you feel this way?

### **Location (10 minutes)**

We'd like to conclude our group this evening with some discussion about the locations of airport shops and restaurants. Currently, the airport has both retail shops and restaurants in all of the terminals near gates, as well as a number of locations at the center of the airport, in the Central Terminal atrium area (the area with the big glass wall).

First, can you describe what restaurants and shops are available in the Central Terminal? What about restaurants or shops on the concourses?

How would you compare the restaurants and shops at the Central Terminal compared to those at the concourses?

Do you typically make your purchases at shops and restaurants in the Central Terminal or in the concourses? Why?

**Wrap Up (5 minutes)**

**(IF TIME)** Now that we've completed our discussion, is there anything that particularly stands out for you? Any other thoughts or comments?

**Ask client if they have any other questions they want asked.**

Thank you for your time. Please see the host on the way out to collect your

