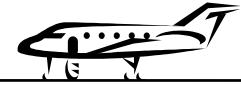


Denver International Airport Travel Passenger Study Results

February 2009





In January of 2009, 463 intercept interviews were conducted among Denver International Airport passengers, who completed a 5 to 7 minute self-administered survey while waiting at the airport.

- Surveying was completed on Thursday (1/8), Friday (1/9) and Saturday (1/10) to capture responses from both weekday and weekend travel passengers during the hours of 8 a.m. and 10 p.m.
- As an incentive, respondents who completed the survey were included in a drawing for \$500 at each of the three concourses, with approximately a 1 in 150 chance of winning per concourse.

Respondents had to be at least 18 years of age and a passenger on a flight that day.

Interviews were divided equally between the three DIA concourses. Approximately two-thirds of interviews were conducted among passengers who were waiting at their gates and the remaining one-third were administered to passengers walking around the concourses.

The maximum margin of sampling error on 463 surveys is +/- 4.6 points.

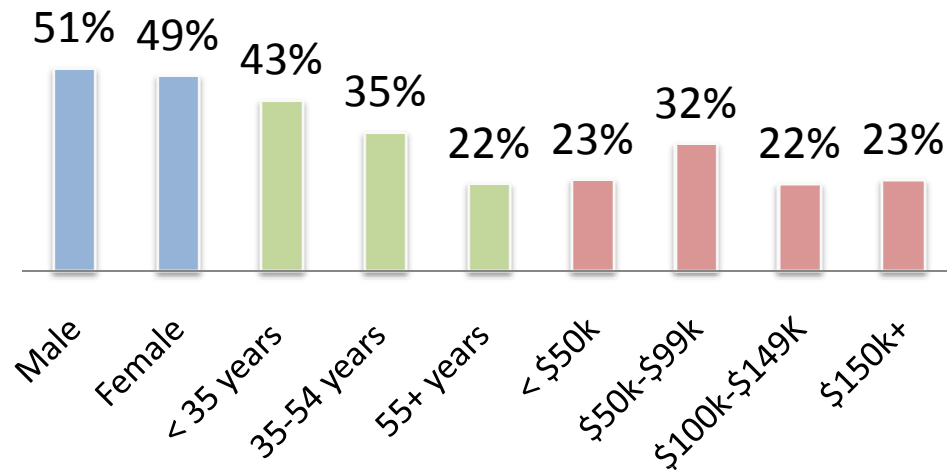
DIA Passenger Demographics



DIA passengers in total are equally divided between male and female passengers (51% versus 49%), and does not vary significantly at any of the three concourses.

In total, four-out-of-ten passengers (43%) are under 35 years of age, one-third (35%) are between 35 and 54 years of age and the remaining 22% are 55 years of age or older. Average passenger age is statistically identical across the three concourses, between 39 and 41 years of age.

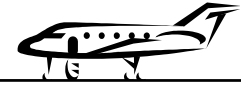
Passengers' median household income is between \$50-\$99K. Concourse B has a higher percentage of passengers earning under \$50,000, and concourse C had the lowest percentage earning \$150,000. Concourse A passengers were not significantly different in terms of any of the income categories, although directionally have the highest percentage of passengers in the \$150K+ range (26%).



	All	Concourse A	Concourse B	Concourse C
Male	51%	49%	48%	55%
Female	49%	51%	52%	45%
< 35 years	43%	45%	41%	41%
35-54 years	35%	31%	35%	39%
55+ years	22%	24%	24%	20%
Mean Age	40.0	39.6	40.5	40.0
< \$50k	23%	22%	27%	21%
\$50k-\$99k	32%	30%	31%	36%
\$100k-\$149k	22%	22%	20%	24%
\$150k+	23%	26%	22%	19%

↑↓ represent significant difference from passenger average

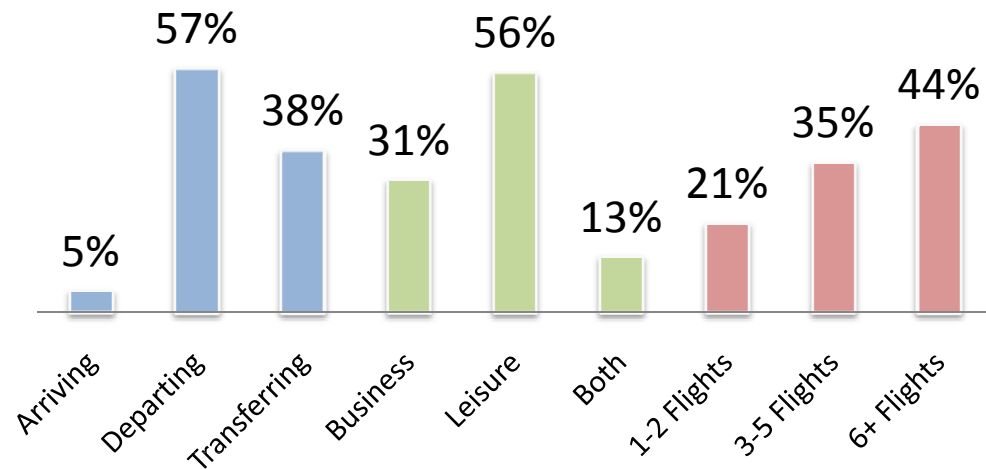
DIA Passenger Demographics



More than half of DIA's surveyed passengers had flights that were originating from DIA (57%), while four-out-of-ten (38%) were transferring through DIA. Concourse B had a significantly higher percentage of transferring passengers, while Concourse C had the highest percentage of departing passengers.

Additionally, Concourse C has the highest percentage of business-only passengers (35%), and half (47%) made at least six commercial flights in the past year.

Conversely, Concourse B has the highest percentage of passengers who have made only one or two commercial flights in the past year (25%), although half of this concourses' passengers are also making six or more commercial flights a year (47%).



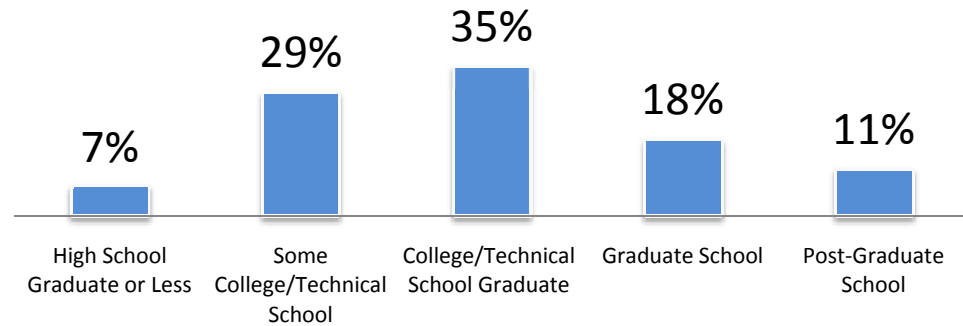
	All	Concourse A	Concourse B	Concourse C
Arriving	5%	6%	6%	4%
Departing	57%	51%	34%	81%
Transferring	38%	43%	60%	15%
Business	31%	28%	30%	35%
Leisure	56%	55%	61%	52%
Both	13%	17%	9%	13%
1-2 Flights	21%	19%	25%	19%
3-5 Flights	35%	42%	29%	34%
6+ Flights	44%	39%	46%	47%

↑↓ represent significant difference from passenger average

DIA Passenger Demographics



About one-out-of-ten DIA passengers (7%) have some high school education or a high school degree, about three-out-of-ten (29%) have received some college or technical school education, another one-third (35%) have a college or technical school degree and the remaining three-out-of-ten (29%) have a graduate school degree or higher.

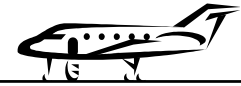


At the concourse-level, we find only one statistical difference, with Concourse A having a higher percentage of passengers with post-graduate degrees.

	All	Concourse A	Concourse B	Concourse C
High School Graduate or Less	7%	7%	9%	5%
Some College/Technical School	29%	29%	31%	28%
College/Technical School Graduate	35%	32%	35%	40%
Graduate School	18%	17%	17%	19%
Post-Graduate School	11%	15%	8%	9%

↑↓ represent significant difference from passenger average

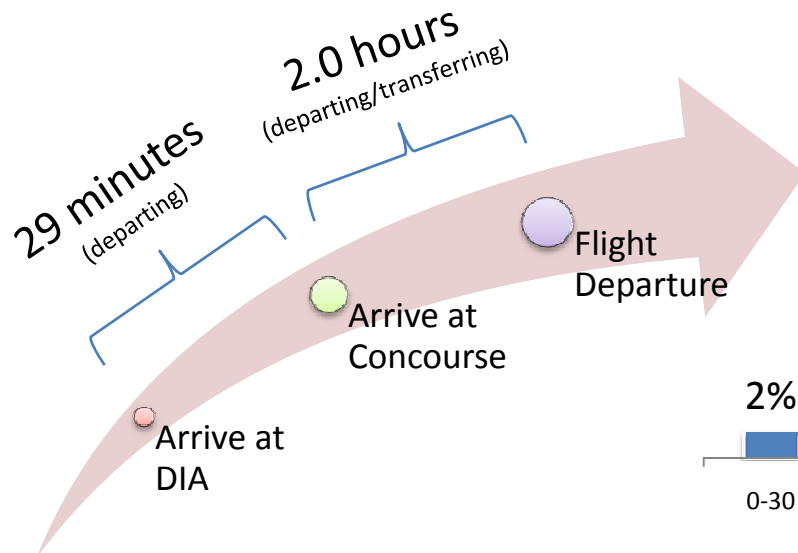
Total Passenger Waiting Times at Denver International Airport



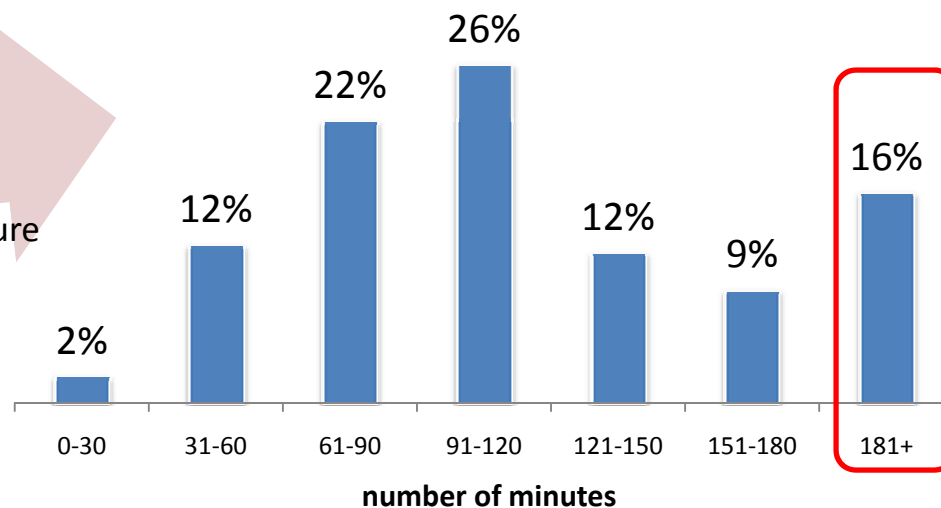
Passengers reported the time they arrived at the airport main terminal (for departing passengers), arrived at their concourse, and when their flight was scheduled to depart. From this, we can determine the length of wait (and potential shopping time) both departing and transferring passengers have before their flights leave DIA.

Departing passengers report spending an average of half-an-hour getting through the main terminal, past security and to their concourse. In total (both departing and transferring passengers), passengers report having about two hours of wait time on their concourses before their flights leave, with 16% having more than three hours of waiting time.

- Passengers with more than three hours of wait time are younger (40% between the ages of 18 and 24, versus 22% of other passengers), are more likely to be college students (27% versus 12% of other passengers), and more likely to be traveling internationally (18% versus 9% of other passengers). They are also more likely to both stop and look (68% versus 43% of other passengers) and purchase something (47% versus 17% of other passengers) at a **sit-down, dine-in restaurant**. And while they are also more likely to *stop and look* at a newsstand or bookstore (70% versus 48%), they are not significantly more likely to purchase something from one of these concessionaires compared to other passengers (20% versus 17%). These passengers are also more likely to purchase something in the main terminal compared to other passengers (25% versus 9% of other passengers).
- Passengers with 3+ hour waits also express more interest in seeing stores offering **local Colorado merchandise** (44% versus 33% of other passengers), **music stores** (43% versus 27%), **clothing/apparel stores** (30% versus 19%), **day spas or massage services** (30% versus 20%) and **movie rentals** (22% versus 13%).



Length of wait at Concourse (Dwell Time)

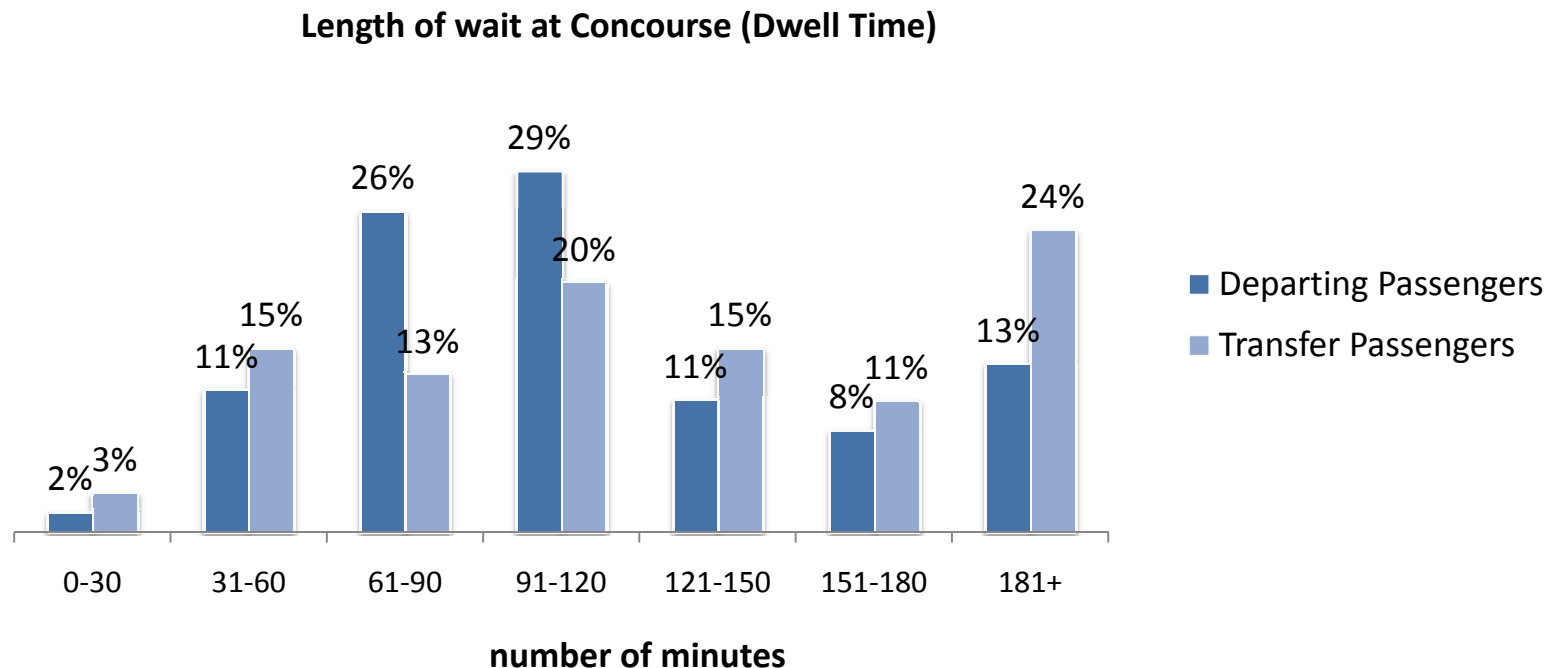


Passenger Waiting Times at Denver International Airport



Passengers who are transferring through DIA spend slightly more time waiting on the concourse than those whose flights are originating from DIA although the differences are fairly slight.

- From the time departing passengers arrive at their concourse until their flights leave, they have 1 hour and 57 minutes of wait time on average, 13% of whom have more than three hours to wait.
- Passengers transferring through DIA wait an average of 2 hours and 16 minutes from the time they arrive at their concourses until their connecting flights leave, and 24% have more than three hours of wait time.

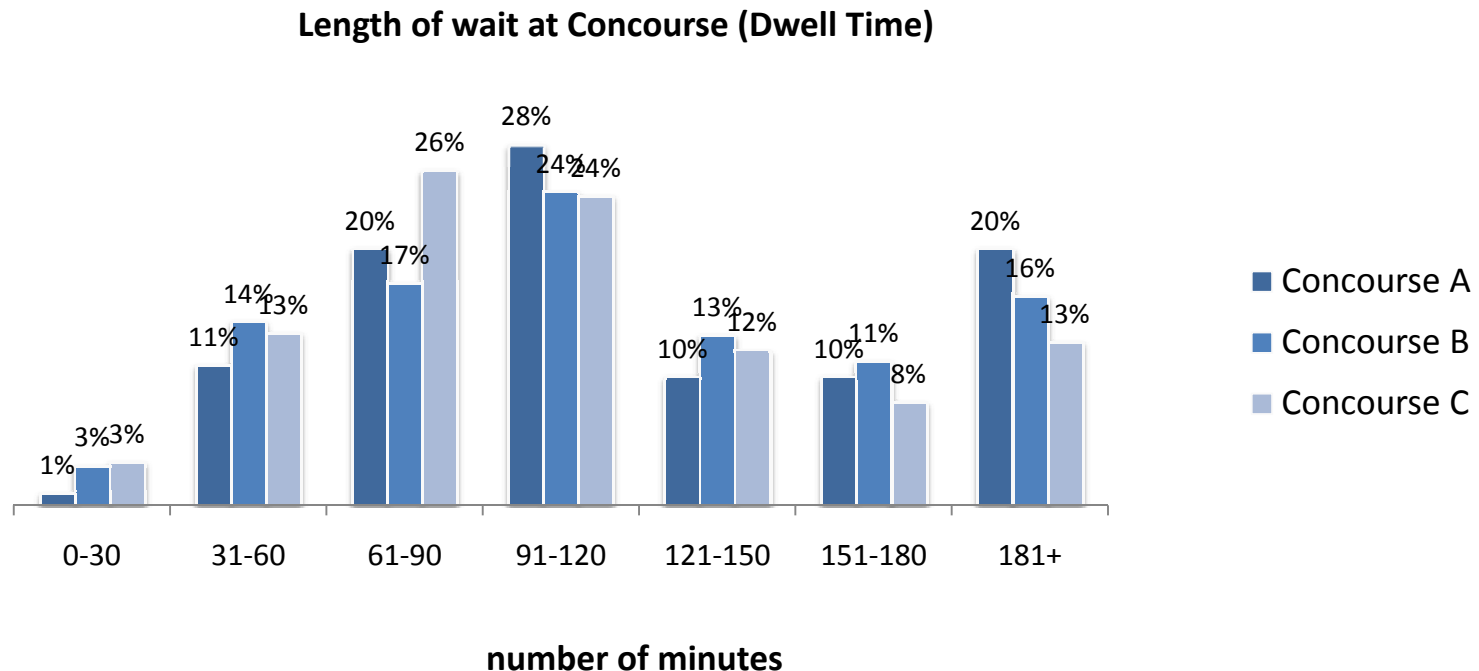


Passenger Waiting Times at Denver International Airport



Looking at dwell times by concourse reveals that passengers on Concourse A have the longest average waits while passengers on Concourse C have the shortest average waits.

- From the time passengers arrive at Concourse A until their flights leave, they have 2 hours and 15 minutes of wait time, including 20% who have more than 3 hours of wait time.
- Passengers on Concourse B have an average of 2 hours of wait time, including 16% with more than 3 hours of wait time.
- Passengers on Concourse C have an average of 1 hour and 52 minutes of wait time, including 13% who have more than 3 hours of wait time.



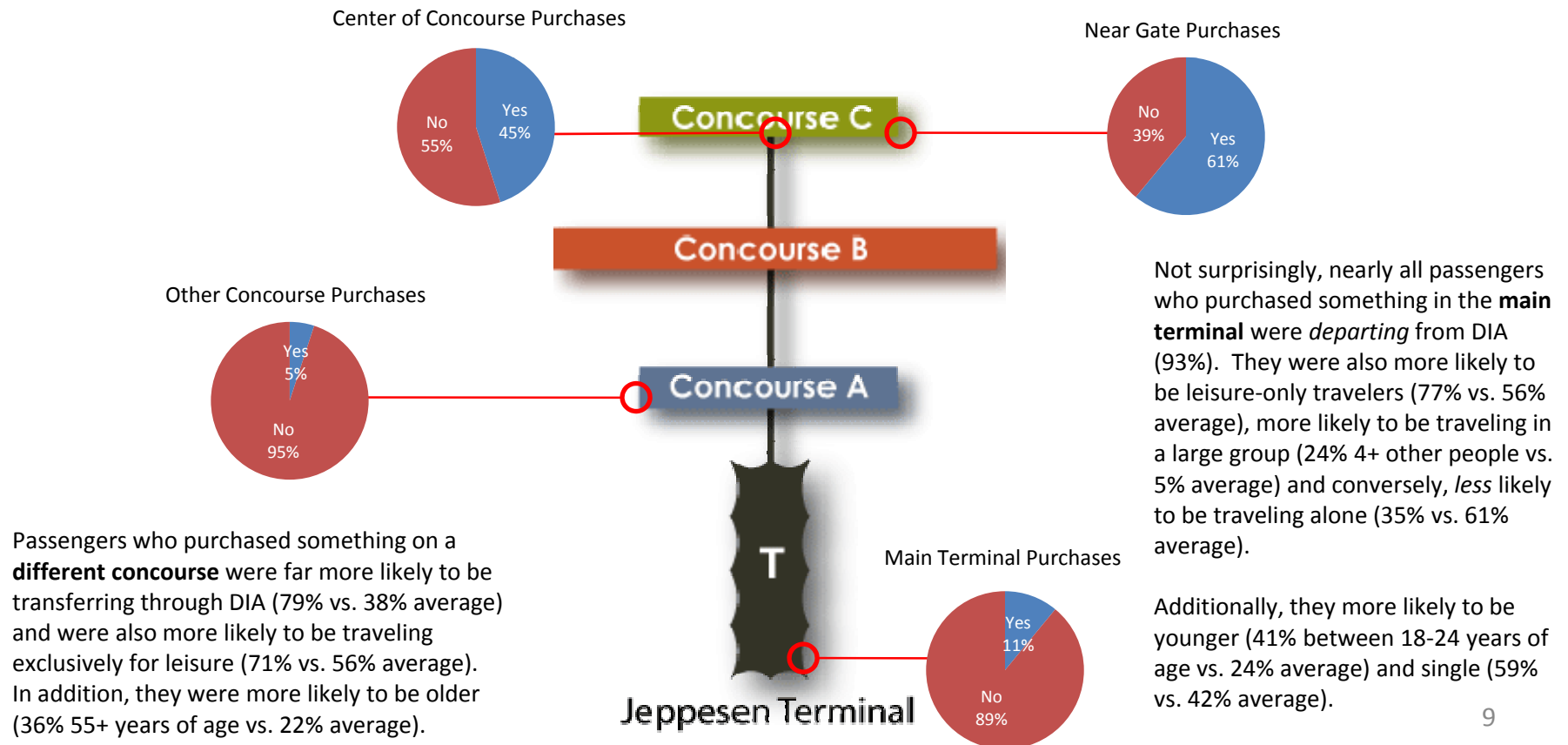
Passenger Demographics by Shopping Location



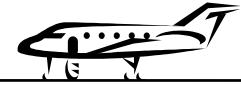
Overall, passengers are more likely to shop in closer proximity to their gates. Of those who made purchases while at DIA, 61% made a purchase near their departing gate, 45% made a purchase near the center part of the concourse, 11% made a purchase in the main terminal, and only 5% made a purchase on a different concourse. However, some differences exist in the *types* of passengers who are shopping at each location within DIA.

Passengers who purchased something in the **center area of their concourse** are more likely to be transferring passengers (46% vs. 38% average), and are more likely to be traveling with one other person (30% vs. 22% average).

Passengers who made purchases **near their gate** are also more likely to be transferring (43% vs. 38% average), more likely to be traveling with two other people (11% vs. 7% average), are more likely to be female (54% vs. 49% average) and *less* likely to be single (37% vs. 42% average).

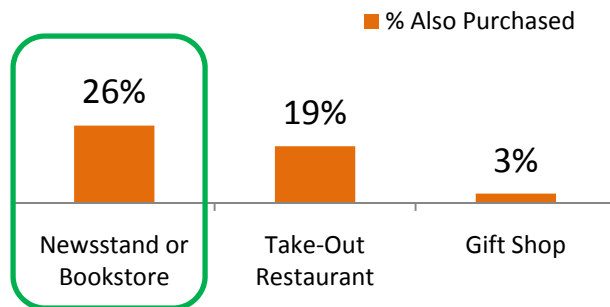


Passenger Crossover Purchasing by Product

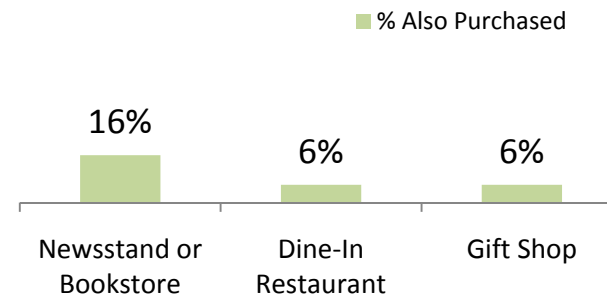


Nearly nine-out-of-ten passengers (86%) who purchased something from a gift shop also purchased something at one of DIA's take-out restaurants or coffee shops. Additionally, three-out-of-four passengers (76%) who purchased something at a newsstand or bookstore also purchased something from one of DIA's take-out restaurants. One-out-of-four passengers (26%) who ate at one of DIA's dine-in restaurants also purchased something from a newsstand or bookstore, compared to 16% of those who ordered something from one of DIA's take-out restaurants.

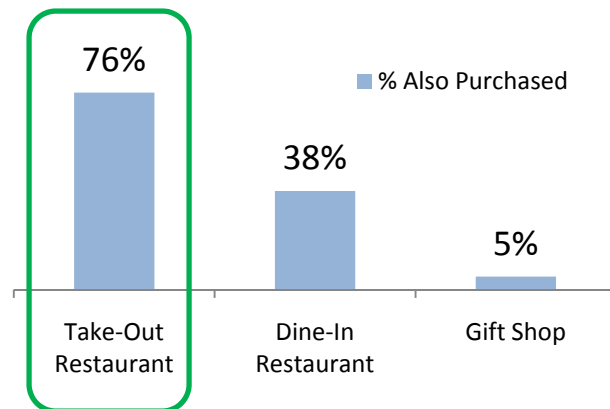
Dine-In Restaurant



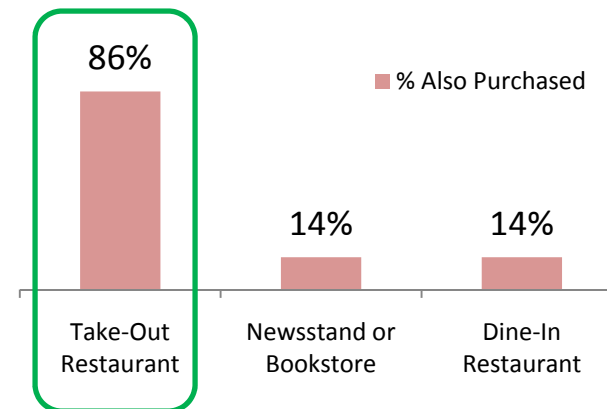
Take-Out Restaurant



Newsstand or Bookstore



Gift Shop

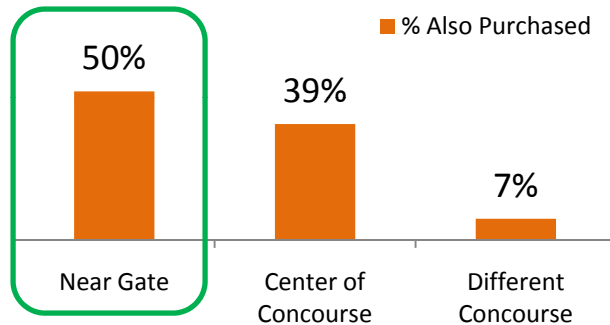


Passenger Crossover Purchasing by Location

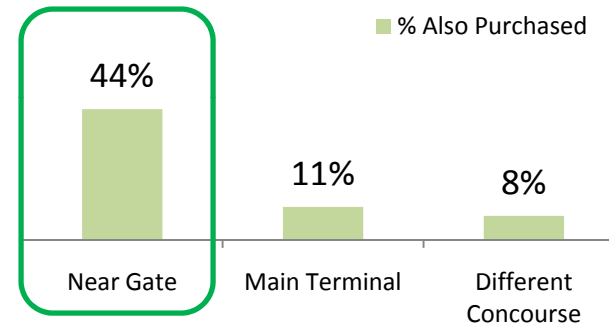


Half of those who purchased something in the main terminal also purchased something near their gate. Those who purchased something in the center area of their concourse are slightly less likely to purchase something near their gate. Those who purchased something near their gate were the least likely to purchase someplace else. Conversely, those who purchased something on a different concourse were the most likely to purchase someplace else, which was most often in the center area of their own concourse.

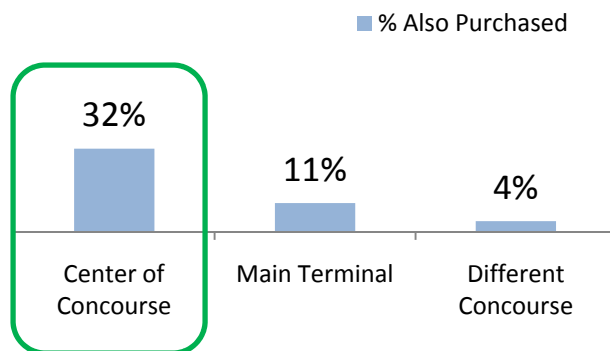
Passengers Purchasing in Main Terminal



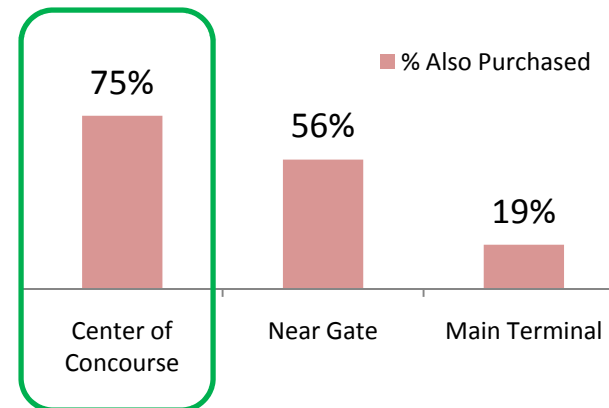
Passengers Purchasing in Center of Concourse



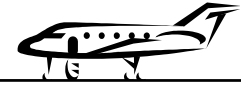
Passengers Purchasing Near Gate



Passengers Purchasing on Different Concourse



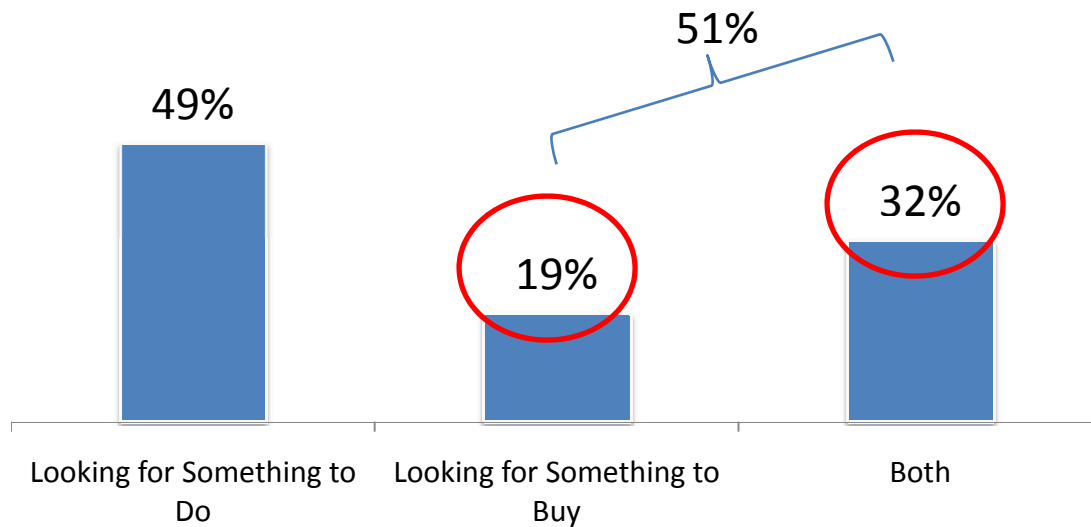
Reasons For Passengers' Shopping



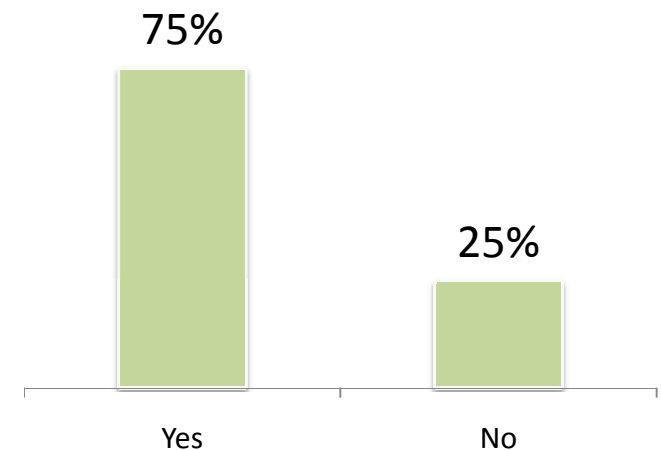
With approximately two hours of free time before their flights leave, nearly half of those who are visiting DIA's shops (49%) are there because they are "looking for something to do." Another one-third of passengers (32%) are also looking to pass the time but are also looking for something in particular. By contrast, only two-out-of-ten passengers (19%) went to a DIA shop because they were *specifically* looking to purchase something rather than doing so to occupy their time.

Overall, about three-quarters of those passengers who were looking for something to buy were able to find what they wanted – but one-quarter (25%) left empty-handed.

"Did you visit the shops you went to because you were looking for something in particular to buy or because you just wanted something to do?"



"Were you able to find what it is you were looking to purchase?"



Spending Patterns Among DIA Passengers



Nine-out-of-ten DIA passengers in total (90%) stopped and looked at one or more concession types (food and beverage, newsstands, gift shops, etc.) and of those, 80% purchased something (which represents 72% of all passengers), spending an average of \$13.03. Applying this dollar figure to all passengers shows that DIA generates about \$9.38 per passenger through DIA shopping.



When looking at specific types of concessions, we find that restaurants generate the highest revenue per passenger. Two-thirds of DIA's passengers (67%) reported at least stopping to look at one of DIA's take-out restaurants and nearly half (48%) purchased something to eat at one of these restaurants, spending an average of \$9.70. About half of DIA's passengers (46%) stopped and looked at DIA's dine-in restaurant offerings and 25% decided to eat at one of these establishments, spending an average of twenty dollars (\$20.60).

Although half of DIA's passengers stopped and looked at newsstands/bookstores (51%), less than two-out-of-ten (17%) actually made a purchase. Additionally, slightly under half of passengers stopped and looked at a gift shop (41%) but less than one-out-of-ten actually purchased something (7%).

	Total % of Passengers Who Stopped & Looked	Total % of Passengers Who Purchased Something	Average \$ Spent	Average\$ per passenger
All	90%	72%	\$13.03	\$9.38
Take-Out Restaurant	67%	48%	\$9.70	\$4.66
Newsstand/Bookstore	51%	17%	\$9.00	\$1.53
Dine-In Restaurant	46%	21%	\$20.60	\$4.33
Gift Shop	41%	7%	\$23.80	\$1.66
Other	16%	2%	\$7.40	\$0.15

Spending Patterns Among DIA Passengers by Concourse



Concourse A	Total % of Passengers Who Stopped & Looked	Total % of Passengers Who Purchased Something	Average \$ Spent	Average \$ per passenger
All	86%	69%	\$16.50	\$11.39
Take-Out Restaurant	62%	42%	\$9.40	\$3.95
Newsstand/Bookstore	46%	14%	\$10.60	\$1.48
Dine-In Restaurant	52%	25%	\$28.60	\$7.15
Gift Shop	41%	10%	\$25.50	\$2.55
Other	13%	1%	\$5.00	\$0.05

Concourse B	Total % of Passengers Who Stopped & Looked	Total % of Passengers Who Purchased Something	Average \$ Spent	Average \$ per passenger
All	92%	73%	\$13.08	\$9.55
Take-Out Restaurant	65%	49%	\$11.00	\$5.39
Newsstand/Bookstore	54%	21%	\$8.00	\$1.68
Dine-In Restaurant	48%	25%	\$16.20	\$4.05
Gift Shop	43%	6%	\$32.00	\$1.92
Other	17%	1%	\$30.00	\$0.30

Concourse C	Total % of Passengers Who Stopped & Looked	Total % of Passengers Who Purchased Something	Average \$ Spent	Average \$ per passenger
All	93%	73%	\$10.26	\$7.49
Take-Out Restaurant	72%	55%	\$9.10	\$5.01
Newsstand/Bookstore	52%	16%	\$9.00	\$1.44
Dine-In Restaurant	40%	14%	\$15.90	\$2.23
Gift Shop	41%	6%	\$14.70	\$0.88
Other	17%	4%	\$4.80	\$0.19

Shopping and Spending Patterns Among DIA Passengers



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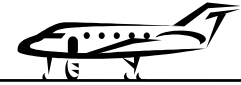
Comparing departing and transferring passenger spending patterns reveals that transferring passengers tend to eat at DIA's **dine-in** restaurants more frequently than departing passengers (28% versus 16%, likely influenced by their longer waits) while departing passengers are more likely to stop at a newsstand or bookstore (55% versus 46%) but no more likely to purchase something once there (18% versus 16%). Overall, transferring passengers generate about one dollar more revenue than departing passengers on average (\$9.95 versus \$8.94).

	Departing Passengers				Transferring Passengers			
	% Stopped and Looked	% Purchasing Something	Average \$ Spent	Average \$ per Passenger	% Stopped and Looked	% Purchasing Something	Average \$ Spent	Average \$ per Passenger
Take-Out Restaurant	68%	48%	\$9.40	\$4.51	67%	48%	\$10.00	\$4.80
Newsstand/Bookstore	55%	18%	\$8.90	\$1.60	46%	16%	\$9.00	\$1.44
Dine-In Restaurant	42%	16%	\$22.10	\$3.53	52%	28%	\$18.60	\$5.21
Gift Shop	44%	8%	\$27.00	\$2.16	39%	7%	\$19.40	\$1.36
All	88%	69%	\$12.96	\$8.94	94%	77%	\$12.92	\$9.95

Comparing business and leisure passengers' spending reveals that leisure passengers are not only more likely to stop and look, but also make a purchase at DIA's take-out restaurants, dine-in restaurants, and newsstands/bookstores compared to business travelers, yielding about three dollars more revenue per passenger on average (\$10.41 versus \$7.55). However, business travelers purchase items from DIA's gift shops more frequently than leisure passengers and tend to spend more in this area than the average.

	Business Passengers				Leisure Passengers			
	% Stopped and Looked	% Purchasing Something	Average \$ Spent	Average \$ per Passenger	% Stopped and Looked	% Purchasing Something	Average \$ Spent	Average \$ per Passenger
Take-Out Restaurant	62%	41%	\$7.40	\$3.03	67%	50%	\$11.20	\$5.60
Newsstand/Bookstore	48%	12%	\$8.00	\$0.96	50%	19%	\$8.80	\$1.67
Dine-In Restaurant	44%	19%	\$17.70	\$3.36	44%	22%	\$22.80	\$5.02
Gift Shop	42%	9%	\$27.90	\$2.51	40%	6%	\$20.10	\$1.20
All	88%	63%	\$11.99	\$7.55	91%	76%	\$13.70	\$10.41

Gate Proximity and the Impact on Purchase Likelihood



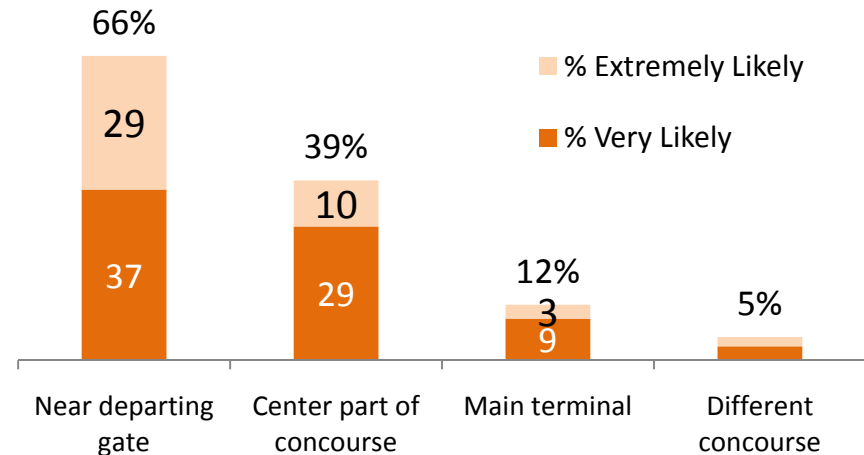
Passengers are more inclined to purchase items closer to their departing gates. Two-thirds (66%) said they would be either “Extremely” or “Very Likely” to purchase something near their departing gate and four-out-of-ten (39%) said they would be likely to purchase something in the center area of their concourse.

Conversely, only one-out-of-ten (12%) said they would be likely to purchase something in the main terminal and only 5% said they would purchase something at a different concourse.

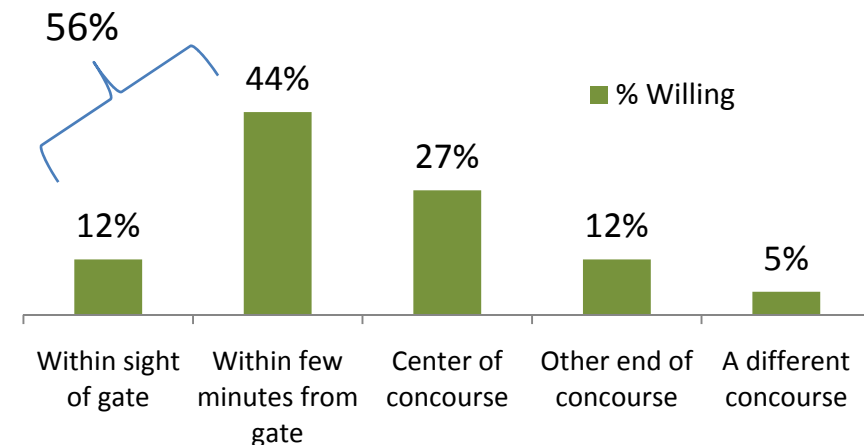
While only one-out-of-ten passengers (12%) said they would only not be willing to venture out of sight of their departing gate to eat or shop, over half (56%) do not wish to go further than a few minutes from their gate. One-out-of-four (27%) are willing to walk to the center area of their concourse.

Very few passengers are willing to go further from their gate than the center of the concourse. Only one-out-of-ten passengers (12%) said they would walk to the other end of their concourse, and only 5% said they would be willing to travel to another concourse to shop or dine.

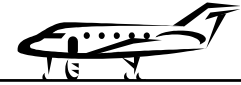
“How likely would you be to purchase something in each part of the airport?”



“How far are you willing to go from your gate to look for a place to shop or dine?”

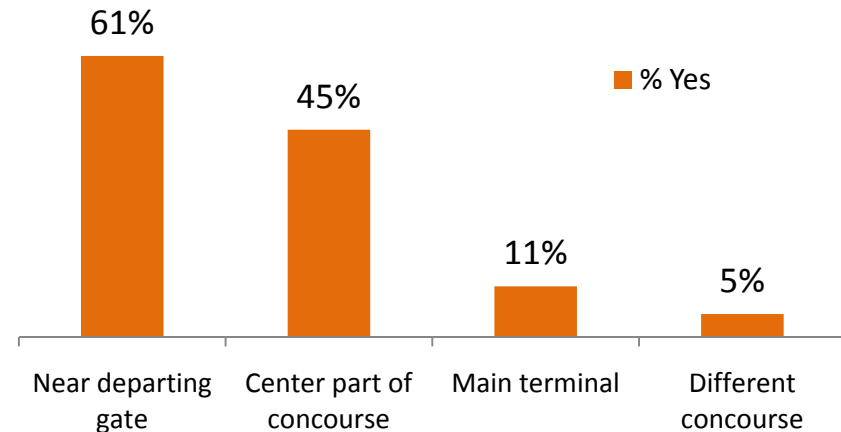


Passengers' Purchase Locations



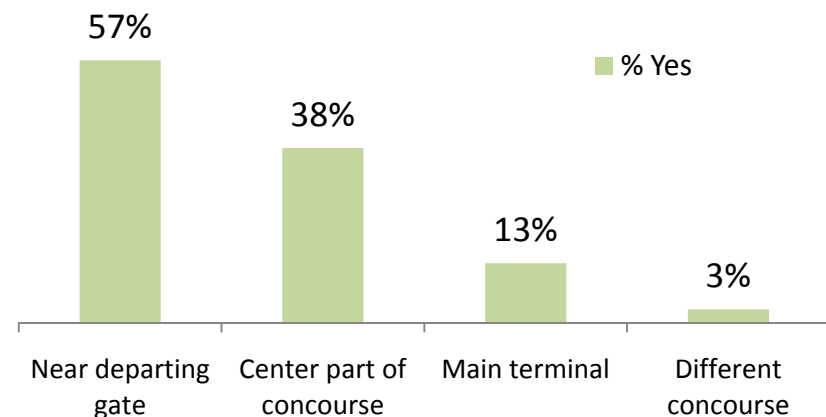
Passengers' *actual* purchase patterns match their stated likelihood. For those who purchased food and/or beverages while at DIA, 61% did so near their departing gate and 45% made a purchase near the center part of their respective concourses (multiple purchase locations were reported). Only one-out-of-ten purchased food or beverage in the main terminal, and only one-out-of-twenty purchased food or beverage on a different concourse.

"If you purchased food or beverage while at DIA today, where in the airport were you when you made that purchase?"

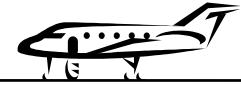


For those passengers who purchased something other than food or beverage while at DIA, similar percentages are reported. Just over half (57%) made their purchase near their departing gate while 38% purchased something near the center part of their concourse. Only 13% purchased an item in the main terminal and a mere 3% went to a different concourse to purchase their items.

"If you purchased an item other than food or beverage, where in the airport were you when you made that purchase?"

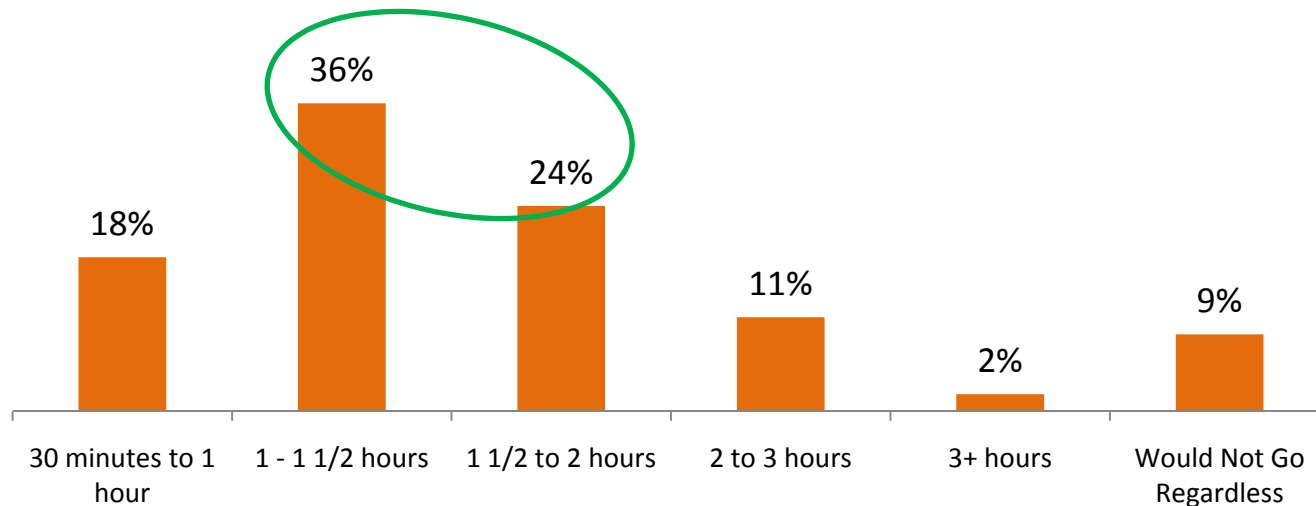


Comfort with Traveling to a Different Concourse



When asked how long of a wait they would need to feel comfortable traveling to a different concourse (with the caveat that it takes approximately ten minutes to travel from concourse to concourse), only two-out-of-ten passengers (18%) said they would be comfortable making this trip if they had less than an hour of wait time. Six-out-of-ten (60%) said they would need between one and two hours, another 13% said they would need at least two hours. Furthermore, one-out-of-ten said they would not go *regardless* of how much time they had before their departing flights.

“How much time would you need to have while waiting for a flight to be comfortable going to a different concourse for something to do?”



Motivations for Spending Time at a Different Concourse



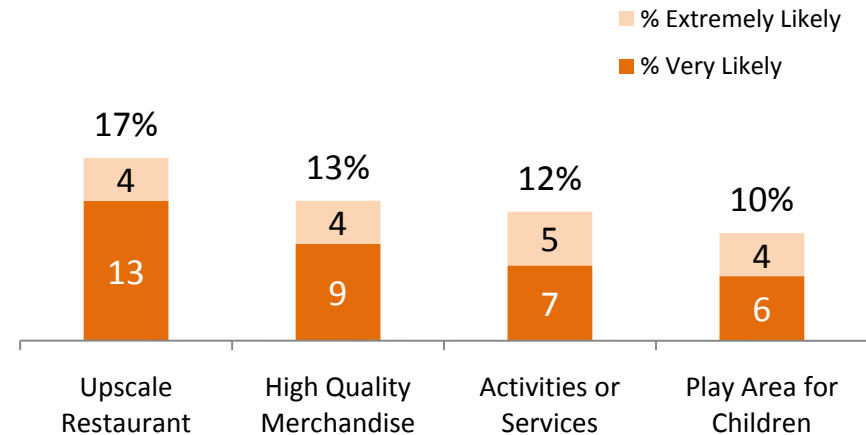
But more importantly, most passengers would not be motivated to go to a different concourse *regardless* of what was offered.

Passengers' greatest motivation to visit a different concourse would be if an upscale restaurant were offered, with 17% of passengers saying they would be "Extremely" or "Very Likely" to do so, but only 4% chose the "Extremely Likely" category.

A play area for children was the least motivating factor for going to a different concourse, with just 10% saying they would be "Extremely" or "Very Likely" to do so. Those traveling with children under ten years of age (which represents only 4% of all passengers interviewed) are of course the most motivated, with 44% of these passengers saying they would make that trek.

Female passengers were more likely to say they would spend time at a different concourse if high quality merchandise were offered, and younger passengers would be significantly more motivated than other passengers if activities or services (such as a spa, salon or business center) were offered.

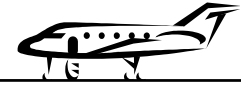
"How much would each of the following motivate you to spend time on a different concourse?"



	Upscale Restaurant	High Quality Merchandise	Activities or Services	Play Area for Children
Business	17%	15%	11%	9%
Leisure	15%	13%	12%	10%
Male	18%	10%	12%	8%
Female	16%	16%	11%	11%
< 35	15%	12%	16%	9%
35+	18%	13%	9%	11%

↑↓ represent significant difference from passenger average

An Area of Opportunity



When asked how they figure out what shops and services are available at DIA, nine-out-of-ten passengers do so “just by walking around.” On the other hand, only four-out-of-ten (42%) mentioned airport signage and/or directories. Given that most people don’t feel comfortable walking too far from their gate, this significantly limits passengers’ abilities to know what other restaurants, shops and services are available even on their own concourse.



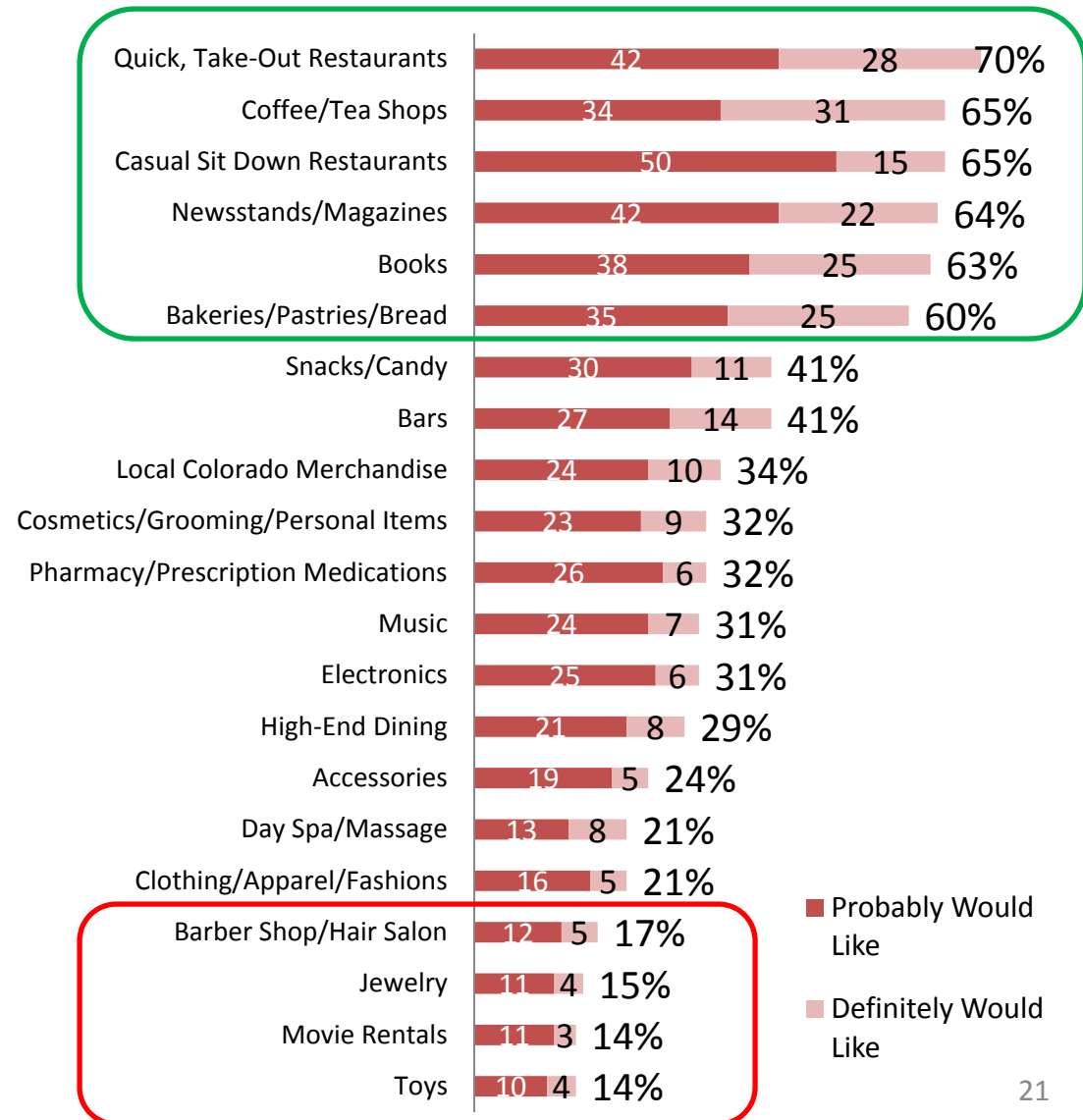
Passengers' Future Shopping Preferences



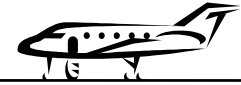
When asked what types of restaurants, stores and services they would like to see more of, most passengers mentioned quick and casual dining options, along with coffee and tea shops, and a greater offering of bookstores and newsstands. They were less inclined to mention *high-end* dining options, electronics or music.

DIA passengers expressed the lowest degree of interest in seeing toy stores, movie rental services, jewelry stores, hair salons, clothing stores, and day spas.

"If DIA were to offer more shopping or dining experiences in the airport, what would you most like to see made available?"

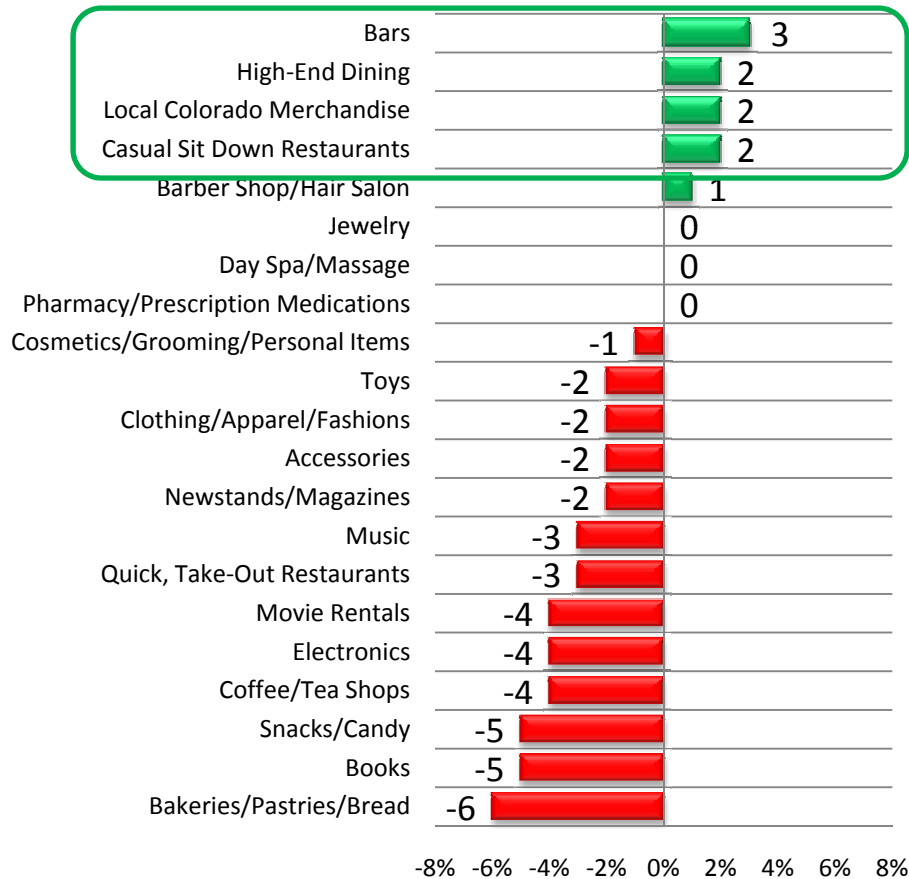


Passengers' Future Shopping Preferences



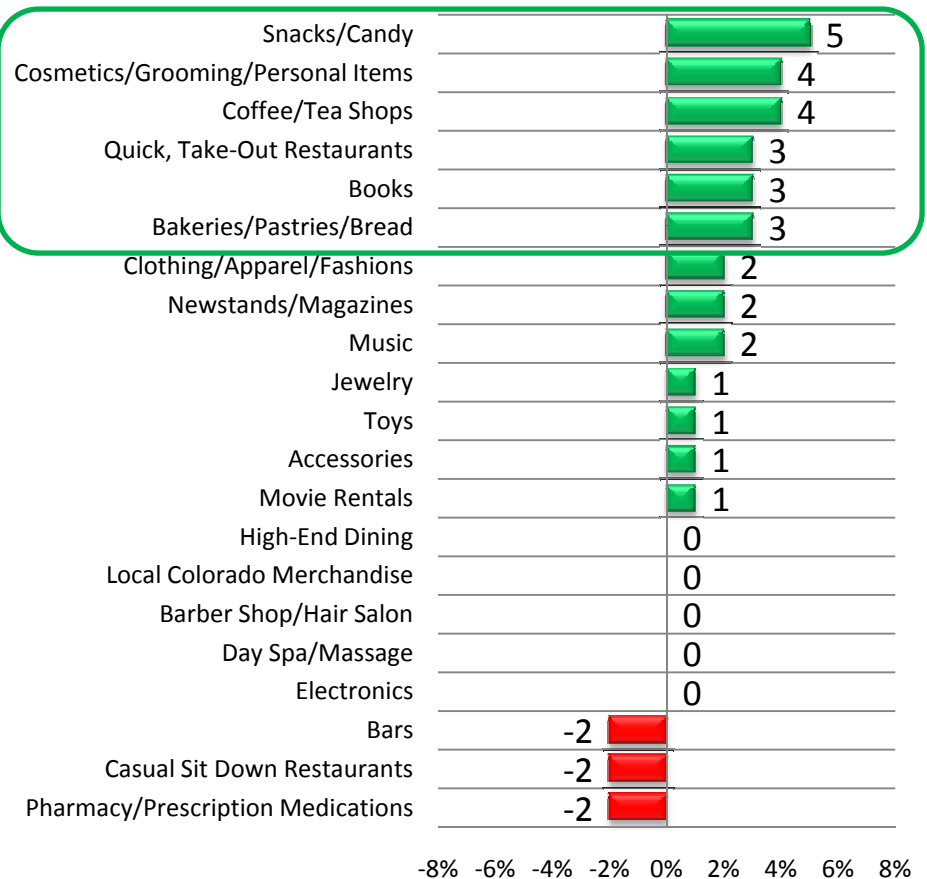
Significant contrasts are evidenced when looking at passengers' future shopping preferences based on their type of travel. Business travelers are more likely to want bars, both high-end and casual sit-down dining and local Colorado merchandise (supporting their greater propensity to purchase items at DIA's gift shops). Conversely, leisure travelers show a greater interest in snacks/candy, personal and grooming items, coffee and tea shops, books, quicker take-out restaurants and bakeries.

Business Travelers



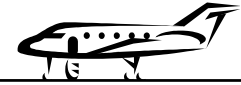
Green/red bars indicate difference from passenger average

Leisure Travelers



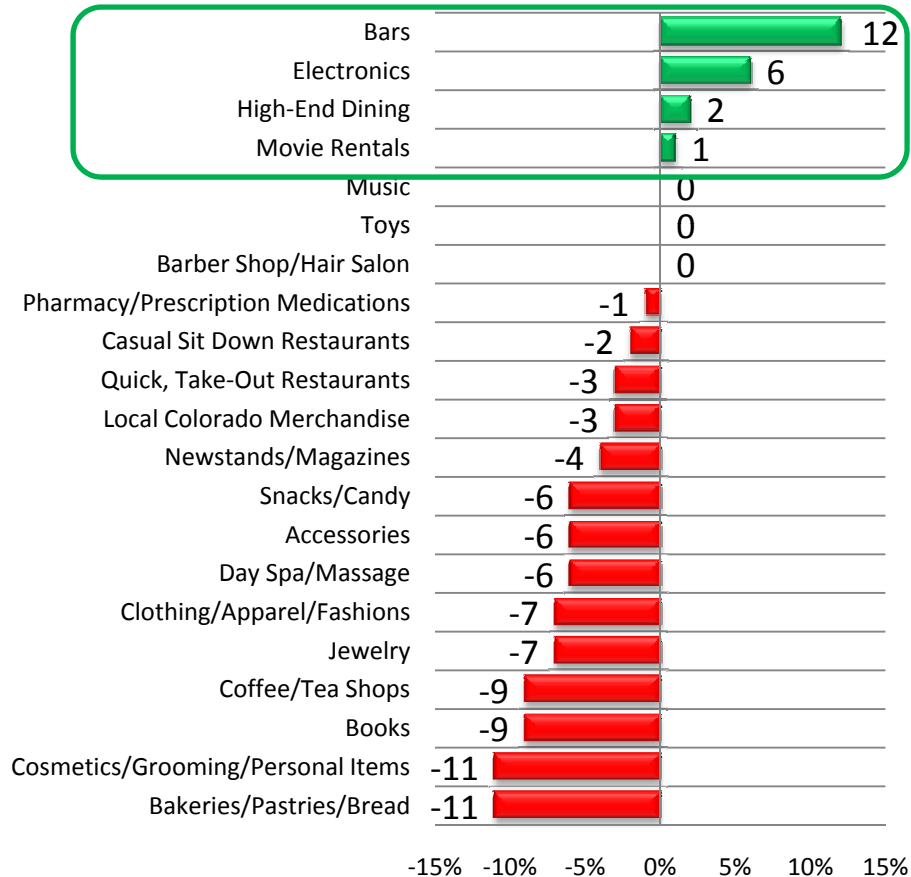
Green/red bars indicate difference from passenger average

Passengers' Future Shopping Preferences



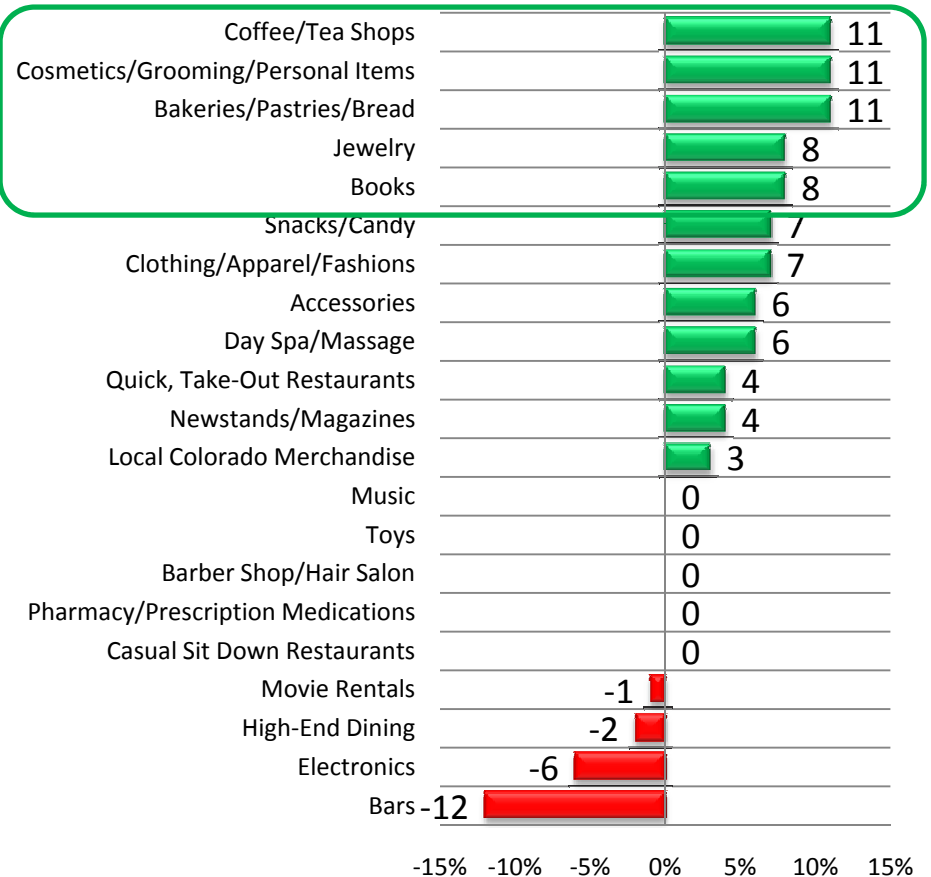
Even greater distinctions are found when looking at preference by passengers' gender. Female travelers have a desire for a greater number of product and service offerings than their male counterparts, and are much more likely to want to see more coffee/tea shops, cosmetic and personal items, and bakeries. Conversely, male travelers are far more likely to want bars and stores offering electronics.

Male Travelers



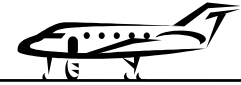
Green/red bars indicate difference from passenger average

Female Travelers



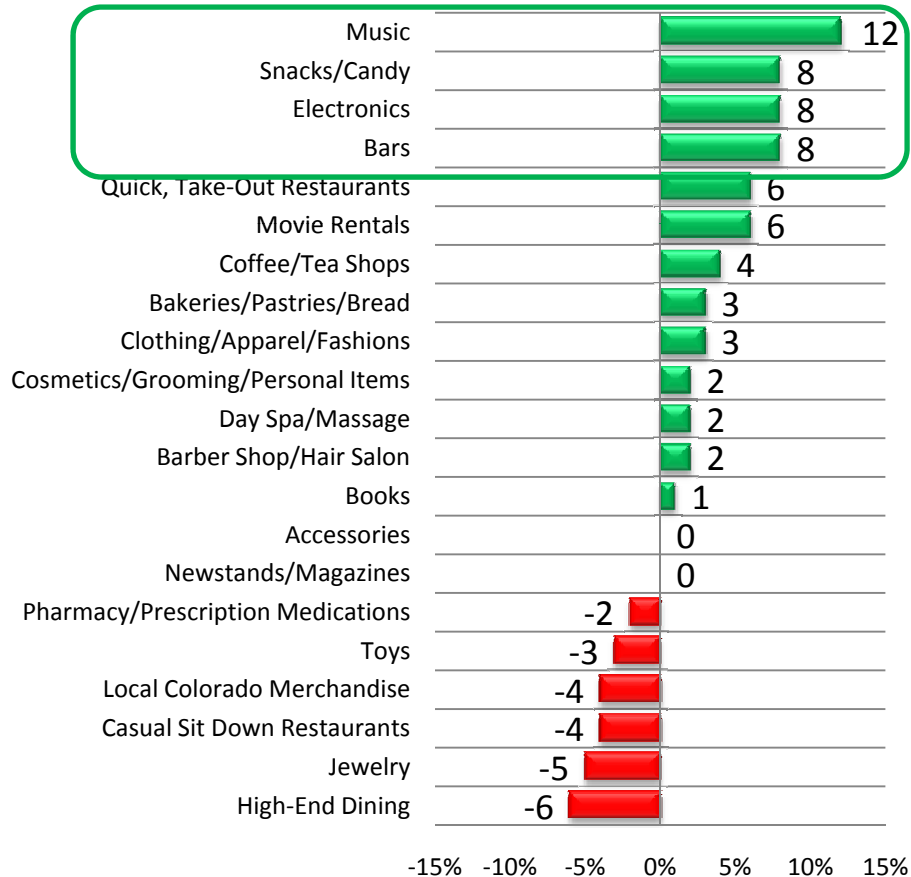
Green/red bars indicate difference from passenger average

Passengers' Future Shopping Preferences



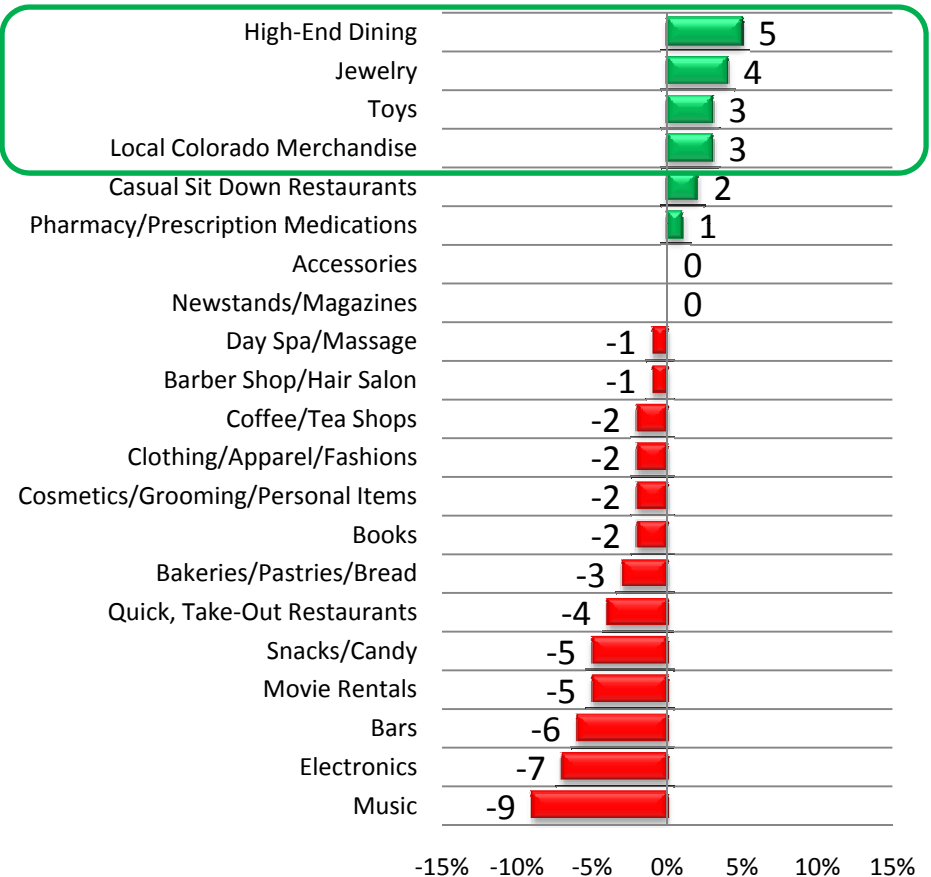
Clear contrasts in future shopping preferences are also evidenced when looking at passengers' age. Younger passengers, those under the age of 35, are far more inclined to want music stores, snacks/candy, electronics and bars. Conversely, older passengers (35+ years of age) are more interested in high-end dining options, jewelry, toys and local Colorado merchandise.

Travelers < 35 Years of Age



Green/red bars indicate difference from passenger average

Travelers 35+ Years of Age



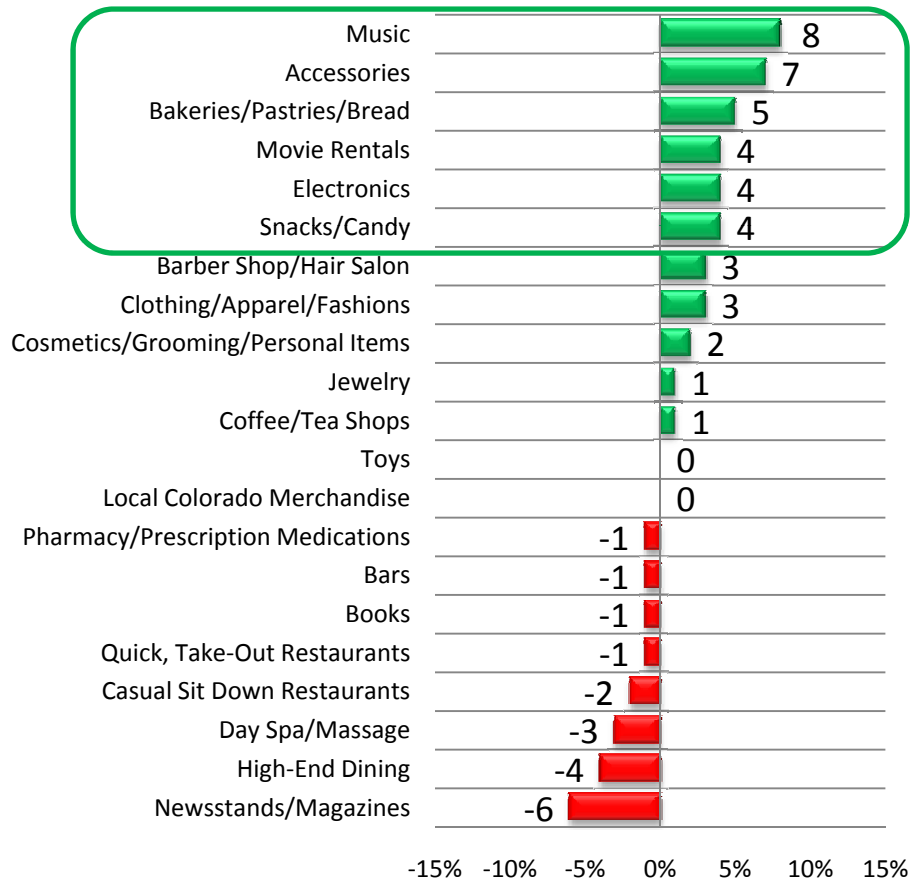
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Passengers' Future Shopping Preferences



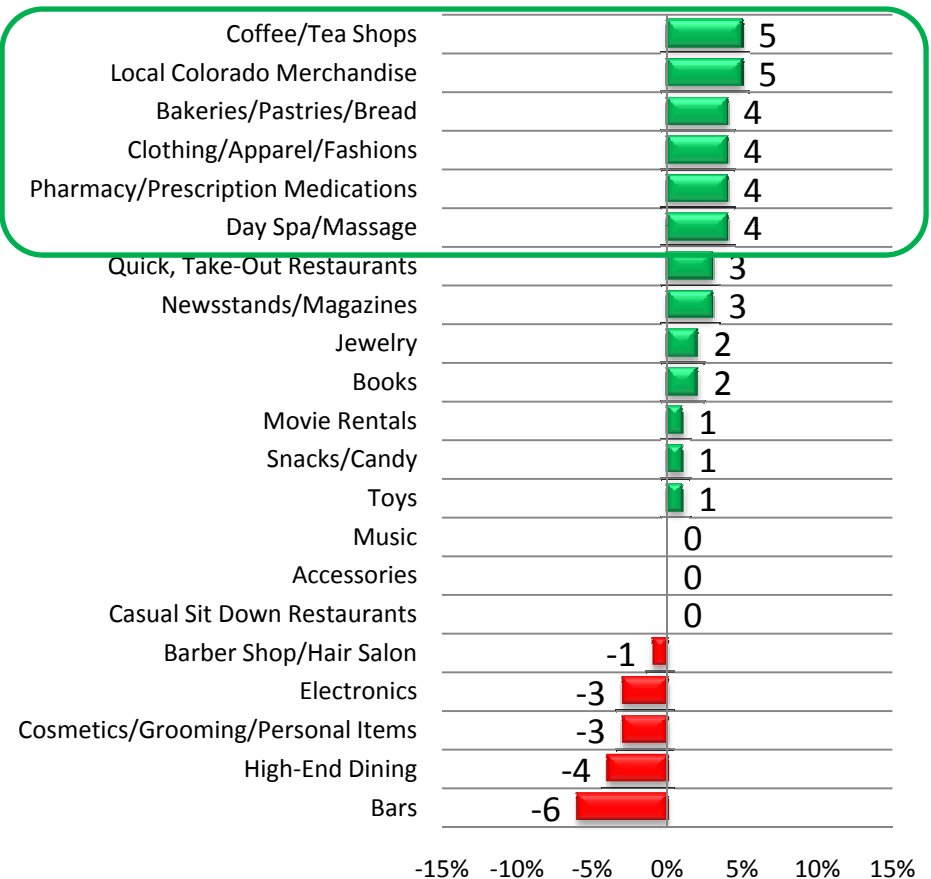
Compared to passenger average, passengers in the lowest household income category (< \$50k) are more likely to want music stores, accessories, bakeries, movie rentals, electronics, and snacks/candy. Those with household incomes between \$50k and \$99k were more inclined to want more coffee/tea shops and stores selling local Colorado merchandise compared to the average.

< \$50k Household Income



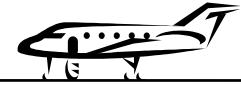
Green/red bars indicate difference from passenger average

\$50k to \$99k Household Income



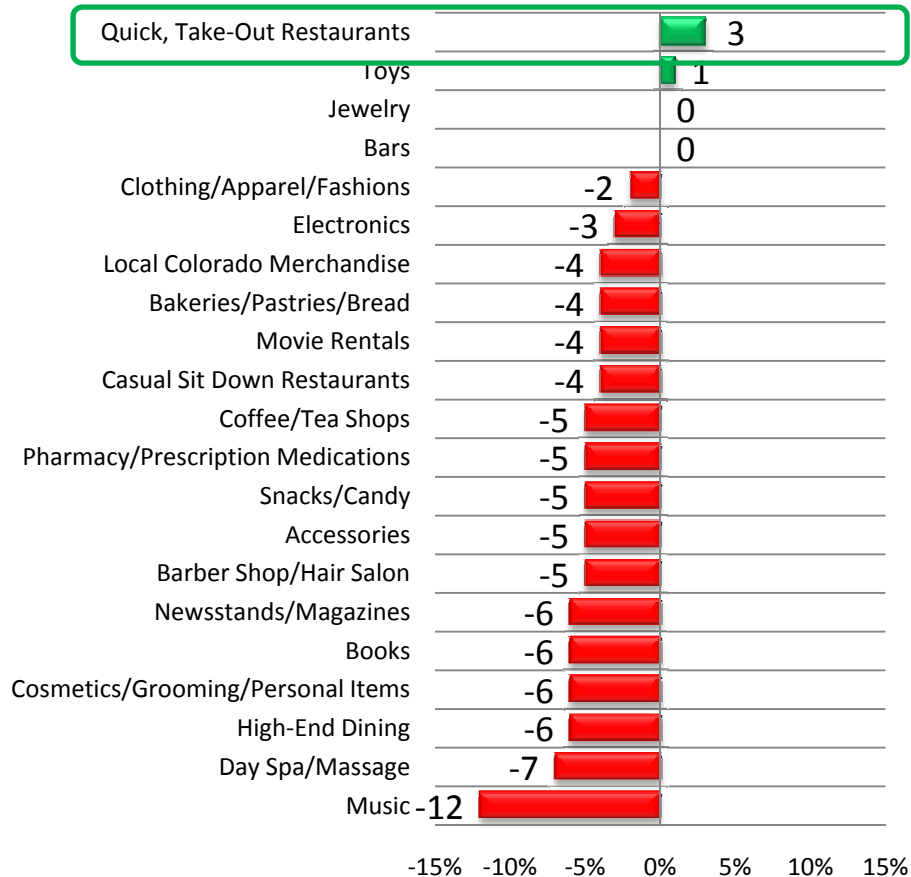
Green/red bars indicate difference from passenger average

Passengers' Future Shopping Preferences



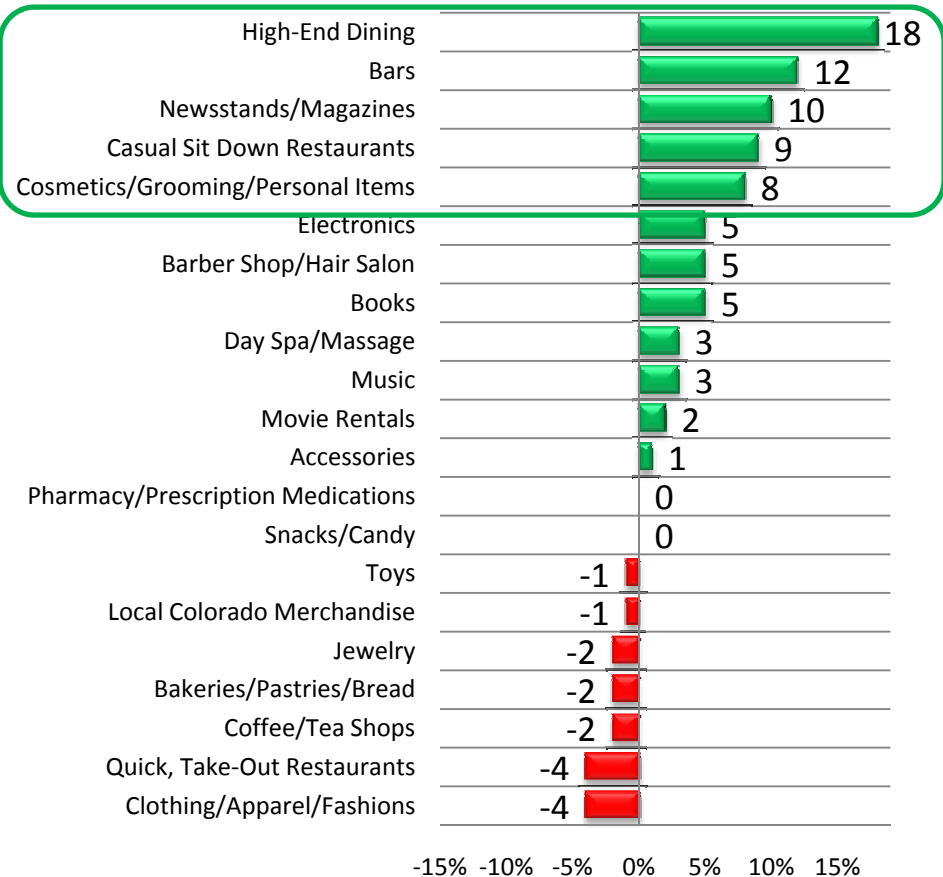
Passenger with household incomes between \$100k and \$149k did not have as much desire to see additional shopping and/or dining options made available at DIA, although were slightly more inclined to want more quick take-out restaurants. However, passengers with the highest household incomes (\$150k or more) were far more likely to want a greater choice of high-end dining, bars, newsstands, casual sit-down restaurants and stores offering cosmetics/grooming/personal items.

\$100k to \$149k Household Income



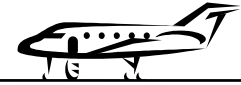
Green/red bars indicate difference from passenger average

\$150k + Household Income



Green/red bars indicate difference from passenger average

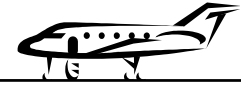
Profile of Passengers Eating at Sit-Down, Dine-In Restaurants



Compared to the average DIA passenger, those who eat at sit-down dine-in restaurants are more likely to be...

- Male (57% versus 51% average)
- Older (55% are 45+ years of age versus 43% average)
- Married (59% versus 48% average)
- More Educated (36% graduate or post-graduate degree versus 28% average)
- Higher Household Incomes (28% with household incomes of \$150k+ versus 23% average)
- Transferring Passengers (52% versus 38% average)
- Traveling with other people (50% versus 39% average)
- More likely to have purchased food/beverage (56% versus 45% average) and other items (55% versus 38% average) near center part of concourse

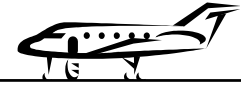
Profile of Passengers Purchasing From Take-Out Restaurants



Compared to the average DIA passenger, those who purchase something at DIA's take-out restaurants are more likely to be...

- Female (54% versus 49% average)
- Younger (48% are under 35 years of age versus 43% average)
- Traveling for leisure (61% versus 56% average)
- More likely to have purchased food/beverage (65% versus 61% average) and other items (65% versus 57% average) near departing gate

Profile of Passengers Purchasing From Newsstands/Bookstores



Compared to the average DIA passenger, those who purchase something from a newsstand or bookstore are more likely to be...

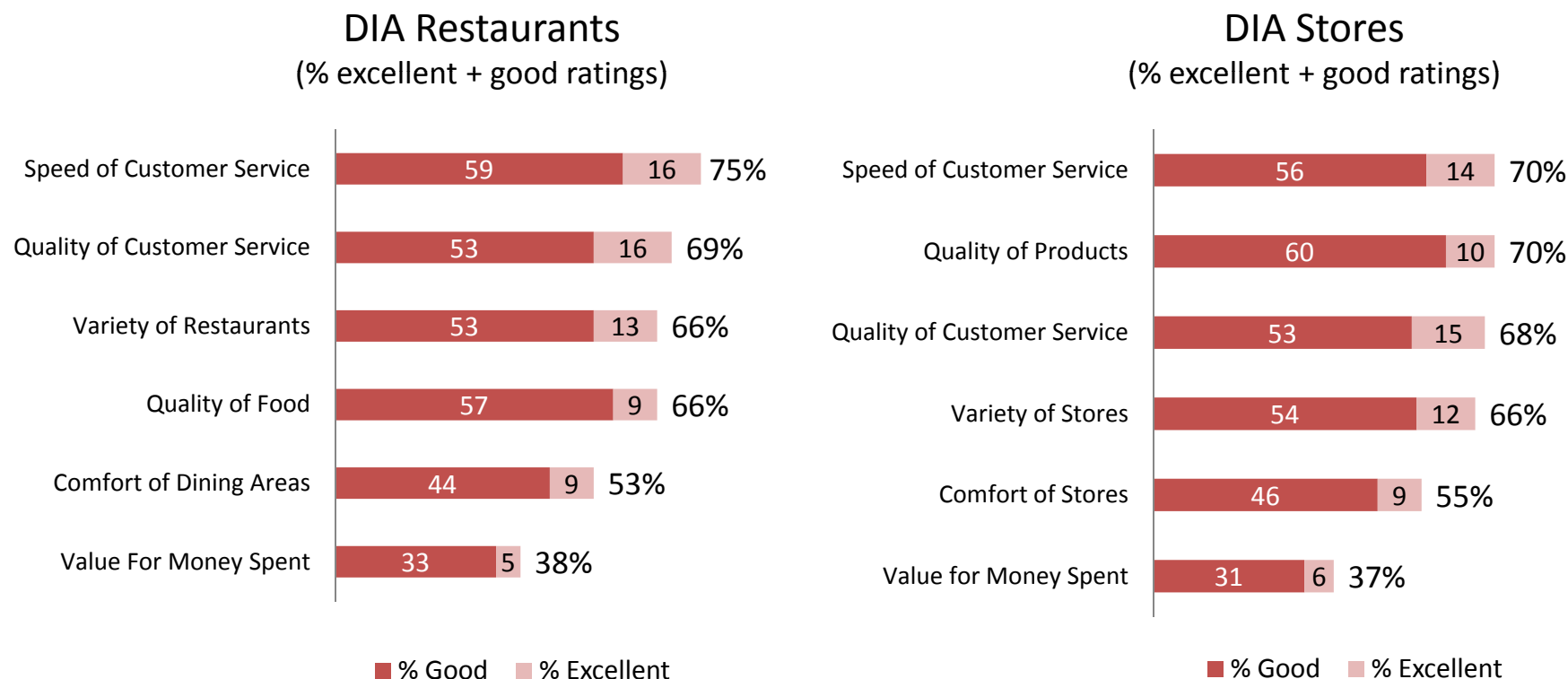
- Married (58% versus 48% average)
- Higher Household Incomes (27% with household incomes of \$150k+ versus 23% average)
- Impulse buyers (60% versus 49% average)
- Departing Passengers (60% versus 57% average)
- Traveling for leisure (62% versus 56% average) or both business and leisure (17% versus 13%)

Satisfaction with DIA's Current Restaurant and Store Offerings

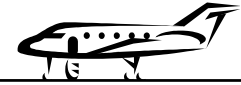


When evaluating DIA's restaurants and stores, the speed of the customer service stood as the highest-rated attribute for both restaurants and stores. Conversely, passengers were less satisfied with the value for the money they spent and the spaciousness and comfort of the restaurants and stores they visited.

Additionally, passengers rated the quality of the products at DIA's stores slightly higher than the quality of the food currently offered at DIA.

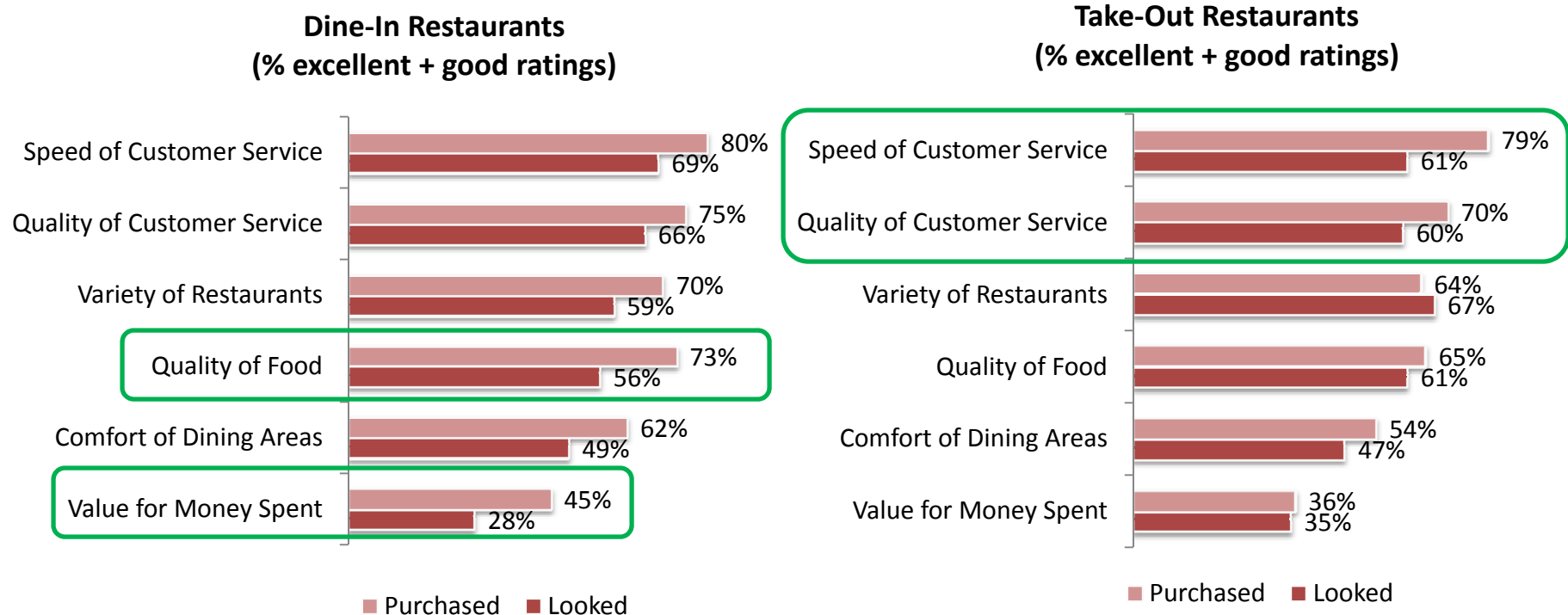


Passenger Perceptions of DIA's Restaurants

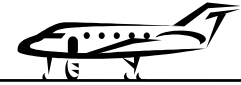


However, it is even more revealing to look at the differences in satisfaction between those who looked at one of DIA's restaurant but did not buy anything and those who did make a purchase. The largest gaps between these two groups is on the attributes of "value" and "quality of food," with those who did not purchase anything rating these attributes 17 points lower than those who did.

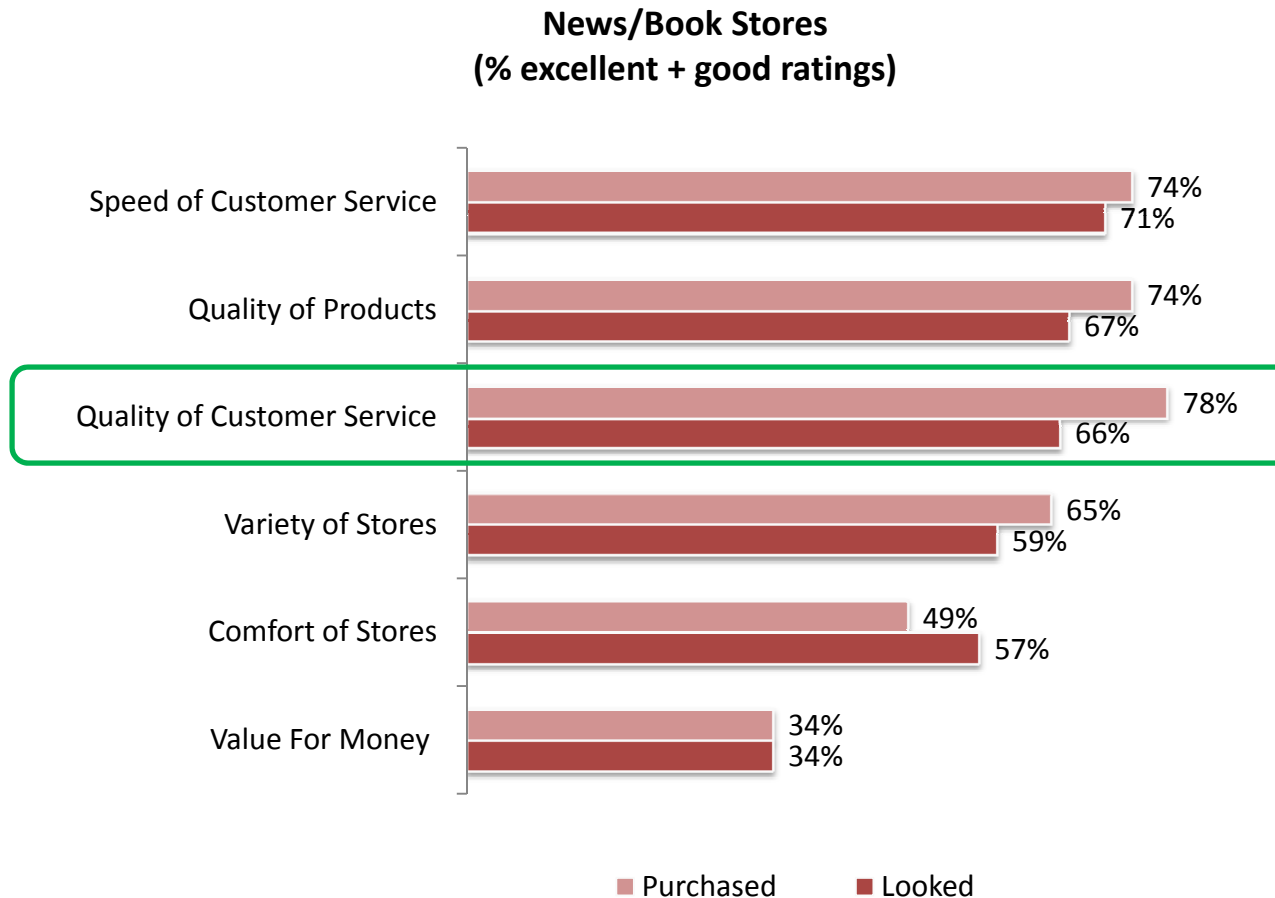
For DIA's take-out restaurants, the greatest gaps in satisfaction between those who just looked and those who purchased are on "speed of customer service" (an 18-point gap) and "quality of customer service" (a 10-point gap).



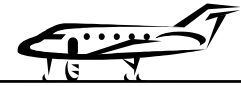
Passenger Perceptions of DIA's Shops



Comparing satisfaction with DIA's news and bookstores between lookers and buyers reveals the greatest gap on "quality of customer service" (12 points).



Conclusions



DIA passengers, departing and transferring alike, have a significant amount of time to wait once they arrive at their concourse, and eight-out-of-ten who wandered into a shop or restaurant did so at least partly because they were “looking for something to do.” Of these, 72% purchased something, most often at a take-out restaurant.

What is largely limiting passengers’ purchase behavior is their reluctance to venture far from their gates. DIA passengers are much more inclined to shop close to their gates and secondarily, around the center area of their concourses, with very few willing to wander as far as the other end of their concourse, a different concourse or the main terminal.

- However, two-out-of-ten passengers would be at least “Very Likely” to travel to a different concourse if there were a high-end restaurant offered and four-out-of-ten with young children would consider going to another concourse if there was a children’s play area, although this is a fairly small percentage of all DIA passengers.

Three-fourths of passengers who were looking to make a purchase found what they wanted, with passengers giving only moderate satisfaction evaluations to DIA’s restaurants and stores.

When asked what types of stores they would like to see more of in the future, passengers most frequently mention restaurants (particularly the quick take-out or casual sit-down variety), coffee/tea shops and bakeries, and more newspaper, magazine and book stores, especially ones that would be close to their gates.

Passengers are largely figuring out what stores and services are available at the airport by “walking around,” and considering that most don’t want to go further than a few minutes from their gates, their knowledge of DIA’s offerings is significantly limited.