

How are airports transforming their retail and food and beverage offerings to create a sense of place and leave a lasting impression on the passenger? Passenger Terminal World finds out

# acting local

■ As recently as the 1990s, few airport planners used the phrase 'sense of place'. Over the past decade, however, the concept has exploded into life, influencing every aspect of the airport, especially in retail. Now all airports think carefully about what a sense of place means to their passengers.

"If we wind the clock back 10 years, sense of place in airport retail was a spot on the horizon," says Robbie Gill, managing director of the Design Studio, which plans commercial areas for airports and four of the top 20 duty-free operators. "Every airport looked the same with the same tenants. Duty-free operations were boxes full of cheaper booze, perfumes and confectionery. The character of the overall store wasn't tied together, and differentiation didn't go further than making the décor a bit woodier to sell whiskeys."

That has all changed now, with an increasing number of airports developing retail and food and beverage (F&B) options that reflect the local geography, culture and ambience. Creating a sense of place is helping airports entice passengers into the shops and F&B outlets, increase revenues and leave a lasting impression on the traveler.

#### Dos and don'ts

Before attempting to define sense of place, it's important to understand what to avoid. Both Robbie Gill and Ben Green, non-aero director at Stansted Airport in the UK, use the phrase 'Disneyfication'. "Disneyfication means putting in red phone boxes and red buses just because they're associated with London. You shouldn't impose clichéd versions of local culture. Airports should avoid homogenization," says Green, who is responsible for the commercial side of Stansted's current upgrade.

Research suggests passenger preferences have driven change. More than 60% of international flyers ranked sense of place as vital, according to m1nd-set's 2017 Business Intelligence Service report. The research assessed attitudes at more than 100 airports and found passengers sought a 'different', 'unique', 'local' and 'authentic' shopping experience.

Using colors and materials local to the area can create a sense of place for passengers



When Design Studio plans commercial areas, it divides airport space into four categories. The largest is duty free, with 40-60% of revenues. Next comes retail, then food and beverage. Finally, services such as car rental and hotel bookings account for only 5% of space and don't facilitate a sense of place. But the first three categories provide opportunities. In terms of duty free, for example, the Design Studio installed a tequilería in Mexico's Cancun Airport, in a large duty-free shop with a double-height space. The design was influenced by the Mexican Day of the Dead, famous for its skull designs.

"It was theatrical and unique. Depending on the country, there's usually a local product to flag up," says Gill. Similarly, there are striking displays of Irish whiskeys in Dublin Airport's terminals. In T2, a large, hand-forged, 50m-long (164ft) copper ribbon floats above the collection of 365 whiskeys. It was inspired by the hammered copper stills synonymous with Irish whiskey. Such local displays are part of a trend for promoting edible gifting.

### Food and beverage

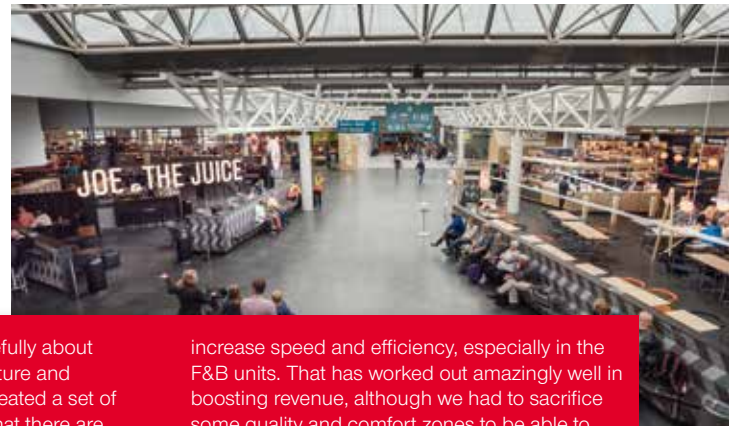
Sense of place is easier to achieve in F&B than retail, according to Gill. For example, at Nice Airport in France, a large area of restaurants and bars called *La Plage* mirrors the relaxed feel of the Mediterranean city's seafront with its palm trees and wicker seating. Some places, too, have more distinctive cuisines. Singapore's Changi Airport has taken advantage of the international reputation of Asian cuisine and more than half its 140 F&B operators are local brands. This summer Changi announced nine new F&B outlets with a local flavor.

In the UK, however, which arguably has a less distinctive cuisine, London's airports have placed celebrity chefs center



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ABOVE: Upgraded F&B area at Stansted  
CENTER: Copper ribbon above Dublin's whiskey display  
RIGHT: Redesigned retail area at Keflavik



## Creating an Icelandic sense of place

Iceland's Keflavik International Airport is one of the fastest-growing airports in Europe. Passenger numbers have doubled in the past three years following an overhaul of its main commercial areas in 2014 that introduced a new layout, as well as new retail and F&B units. The airport estimates that it is 12 years ahead of where it expected to be back in 2014 in terms of passenger growth and commercial revenue.

An important aspect of the overhaul was to create a sense of place by emphasizing elements of Icelandic culture. Commercial manager Gunnhildur Vilbergisdóttir comments, "Nearly half of our passengers are what we call 'local-touch seekers'. They are often tourists who visit Iceland for its uniqueness. But our many transfer passengers also want to feel they are in Iceland, even if they tend to want to eat and drink familiar products."

The airport has thought carefully about which elements of Icelandic culture and nature to emphasize and has created a set of guidelines. "We are privileged that there are so many different aspects we can bring into a store, or to F&B design. For example, the dark gray lava rocks, the clear glaciers, the green and brown moss and the wool are subtly presented, alongside the northern lights, famous local artists, trolls and other quirky aspects that make Iceland different from other countries."

In redesigning commercial spaces, the airport had to work around the limitations of its small and constrained gate areas. "We have focused more on maximizing what can be offered at the commercial clusters for each gate zone since we don't have the option of bringing more offers to the gates," Vilbergisdóttir says. "We've also worked closely with our commercial operators to

increase speed and efficiency, especially in the F&B units. That has worked out amazingly well in boosting revenue, although we had to sacrifice some quality and comfort zones to be able to feed as many people as possible."

Getting the retailers to cooperate with each other to ensure a good service at all times was another key element in the plan. "This issue seems to be a struggle at every airport. But we have made sure that our contracts focus on customer needs. They require all units in our largest commercial area to be open whenever there are flights. We make sure our retailers realize that if one of them offers a bad service, it affects everyone. Meanwhile, at smaller spaces, we've been more flexible so that not all stores need to have staff at slower times. But we still provide 100% opening of all retail and duty free, to maximize service levels and revenue."



LEFT: Mumbai Airport's architecture takes inspiration from the local Indian art form Rangoli patterns

stage rather than British food. London Heathrow, for example, offers Heston Blumenthal in T2, with his original twist on fish and chips, and T5 has a Gordon Ramsay restaurant. Not to be outdone, Gatwick has a Jamie Oliver restaurant in its North Terminal and Stansted boasts James Martin Kitchen, where the TV chef offers 'quality baking in a laid-back setting'. Other F&B trends include 'hoof to table', meaning local ingredients are used, reflecting wider environmental concerns.

Meanwhile, in the USA, there is a strong trend for working with prestigious local restaurants. "Opening a branch of the mothership attracts locals who know its reputation and helps create a sense of place," adds Gill.

San Francisco International is one airport that has led the way in creating an F&B sense of place. The airport has been contracting with individual vendors since 2005. Once it switched to a food program dominated by local brands, sales went up 55%, accelerating developments across the USA. Now, more than 85% of San Francisco Airport's foodservice offerings are local. Even fast-food outlets provide a local stamp. For example, Auntie Anne's pretzel chain offers popular local flavors at dozens of airports, such as jalapeño pretzels in southwest US markets.

In Germany, catering specialist casualfood has developed 12 catering concepts for airports, tailoring them to requirements. According to the company, it's important to assess passenger demographics before adapting the offer. At Frankfurt Airport, for example, there is a largely international audience, so casualfood concepts, such as Italo-American deli Goodman & Filippo, offer global best-sellers. But some concepts include typical German cuisine.

"Hermann's has a wide range of regional sausages, sauces and local beer on draft. We also pay close attention to sustainability – an aspect growing in relevance in Germany and elsewhere," says Stefan Weber, managing partner at casualfood. "But the emphasis on sense of place is only one major change. Airport planners are thinking about digital transformation, with augmented reality and apps for ordering. Meanwhile, healthy eating, detoxing, slow food and mindfulness are becoming points of focus."

#### Distinctive architecture

A stunning example of sense of place is Mumbai's Chhatrapati Shivaji International Airport. Its new T2, which opened in 2014, was designed as both an international and domestic terminal. The new terminal includes a 3.2km-long (two mile) art wall spanning the terminal's four walls at a height of 60ft (18.2m). Sanjay Reddy, vice chairman of

ABOVE: Frankfurt Airport has an Italo-American deli for its international customers

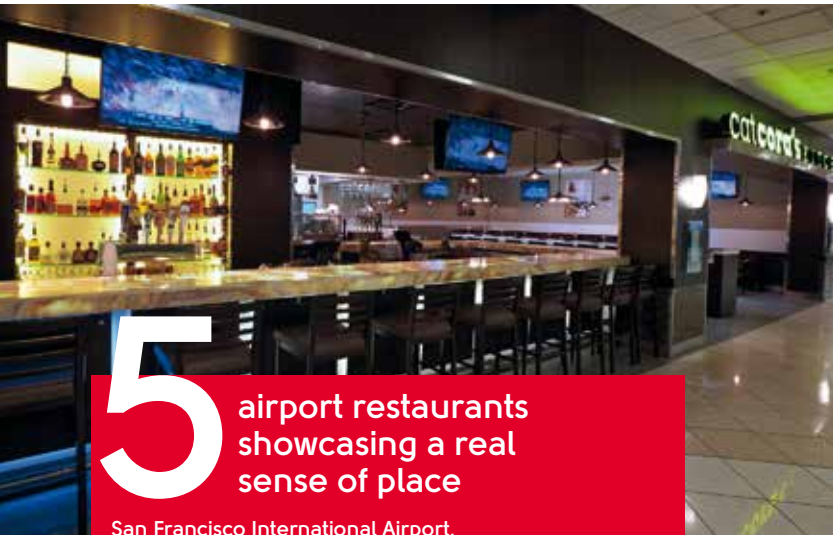
airport operator GVK, reasoned that T2's expected 40 million passengers would make the airport the world's most visited art museum, surpassing the Louvre in Paris, France. The wall offers 2,000 pieces of Indian art, creating a unique sense of place. Meanwhile, the Design Studio worked on giving the interiors an Indian feel. "We were influenced by Rangoli patterns [an Indian art form in which patterns are created on the floor or the ground using materials such as colored rice, dry flour, colored sand or flower petals]. LEDs shine through the bulkheads so you get a filigree of fret-cut metal and a pattern of shadows reminiscent of latticed Jali screens [decorative wooden screens commonly found in Hindu temples]. It subtly creates an atmosphere in commercial areas. It's about the passage of emotions," Gill explains.

Stansted's Green agrees that distinctive architecture is vital for a sense of place, even when it is not influenced by indigenous culture. Stansted is fortunate, he believes, in having an iconic building designed by Norman Foster. Green has spent a lot of time debating the concept of sense of place as he works on Stansted's £600m (US\$781m) expansion program, which will increase annual capacity to 43 million passengers. A new dedicated arrivals building will open in 2020 and the existing terminal will be converted into a departure lounge for summer



ABOVE: Hermann's offers regional German food to passengers at Frankfurt Airport

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# 5 airport restaurants showcasing a real sense of place

## San Francisco International Airport, Cat Cora's Kitchen

TV chef Cat Cora, who also has branches at Salt Lake City and Houston Airports, has a restaurant in Terminal 2. The cuisine reflects California's love of organic, seasonal ingredients, with small plates such as salt roasted beets, lobster mac and cheese, and a seafood slider trio of oyster, shrimp and crab cake.

## Leonardo Da Vinci-Fiumicino Airport, Rome, Antonello Colonna Open Bistrò

With his Open Bistrò, renowned Roman chef Antonello Colonna has brought affordable gourmet food to passengers. The menu reflects the local region and is similar to Colonna's other Roman restaurants. For example, it includes bucatini cacio e pepe, a traditional pasta dish with Pecorino cheese and black pepper. The main bistro has 70 seats and there's another lounge area next to an open-plan kitchen, which suits the hustle and bustle of airport life.



## Stuttgart Airport, Top Air

Top Air is Europe's only Michelin-starred airport restaurant, an accolade it has held since 1992. Chef Marco Akuzun offers gourmet European-style food with an artistic presentation and lots of German-themed dishes. The window tables offer uninterrupted views of the runway.



## Heathrow Airport, The Gorgeous Kitchen

The Gorgeous Kitchen, which opened in Terminal 2 in 2014, has a menu designed by four female celebrity British chefs. They include Sophie Michell of London's Pont St restaurant, and cookbook author Jo Pratt. All the cuisine is prepared with British-grown ingredients. Typical wholesome fare includes chorizo toad-in-the-hole, and sweetcorn and coriander fritters with king prawns.



## Taoyuan airport, Chun Shui Tang

The Taiwanese airport offers authentic local Taiwanese dishes that are quick to make, but generously spiced and made with fresh ingredients. They include the famous Taiwanese bubble tea, handmade noodles and dumpling soup with pork and shrimp.



ABOVE: The Camden Bar and Kitchen is one of many local F&B outlets coming to Stansted Airport as part of its expansion program

2021. The project involves remodeling and enhancing all commercial areas.

"We are assessing Stansted's unique blend of passengers. Each airport has a different demographic so it's important not to impose a single vision on everyone. Half are under 35 and half are foreign, nearly all from the EU. There's a mix of families and business people wanting different things at different times. We have to think how to use sense of place to meet everyone's needs," he says.

Local elements are an integral part of the mix. Stansted will add more local touches, but it already has the 7,500ft<sup>2</sup> (697m<sup>2</sup>) Camden Bar and Kitchen, which opened this summer. Inspired by the London borough of Camden, it serves street foods like Thai and Indian-influenced dishes. Even when the food is not British, the atmosphere is quintessential London. Like most British airports, Stansted has a classic British pub. Called The Windmill, it features a replica of a windmill, echoing the local landscapes of East Anglia.

## Creating authenticity

Although local elements are vital, Green believes that it's important not to overdo them. "I'm against the idea of having a branch of a local restaurant just because there's one in the local town, unless it's engaging for customers. We have a broader view of sense of place that doesn't insist on the local, but on authenticity. We could include a Spanish tapas bar, if that's what passengers want, but it has to be as real as one in Barcelona," he says.

Brands remain an important ingredient. Green says chains like Burger King, McDonald's and Caffè Nero serve families and help passengers to orientate themselves. "Passengers are stressed by security, the unfamiliar environment and time constraints. Many don't speak English. They recognize brands and fascias and use them to find their way around," he says.

In planning Stansted's commercial future, Green's team visited 17 airports looking for outstanding elements. They concluded that the best airports had three qualities – a sense of place, a sense of space, and a sense of calm. "A sense of space reduces anxiety. It comes from spacious interiors, natural light, architecture and views of the planes. A sense of place is whatever makes you know you're here and nowhere else, and includes local elements. These two come together to create a sense of calm, so the airport doesn't feel frenetic and confusing," he says. ■