

Consuming Food and Beverage at the airport: analogies and differences among business and leisure tourists.

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Abstract

Objectives – Over the past few years, the food and beverage services in transit area (train station, airport, etc.) has been representing an important business area with significant perspective of further development. Despite this, research on consumers behaviours and choices toward food and beverage services in transit area is still poor. Only a handful of papers have addressed this issue, and they are confined largely to literature reporting opinions, anecdotes and the collective experience of those working in the sector. Further, in our best knowledge, there has been no published paper aim at investigating the topic of “on the go” food and beverage consumption in the specific context of airport area. The present study aims to investigate this somewhat neglected area of marketing research. Specifically, it analyzes a) which are the food and beverage formats (bar, fast food restaurant, restaurant, retail shop and vending machine) that consumers use the most when being in airport area, based also on the occasion of consumption (breakfast, lunch, break, dinner, and aperitif b) whether the way consumers use the different catering formats and assess the importance of each attribute of food and beverage services, can be differentiated based on the reason of their travelling (leisure versus business) and their country of origin (Italian versus international tourists)

Methods – This study uses a convenience sample of 551 tourists (both leisure and business). Data were collected with questionnaires administered face-to-face in the Olbia-Costa Smeralda airport (Sardinia Region) from June to October 2011.

Results – Findings reveal that consumers do prefer to use certain catering formats (e.g. bars and fast food more than restaurants) when being in airport area. Further, they show that significant differences do exist in the way consumers use and asses food and beverage services based on their reason of travelling, with business tourists tending to consume food and beverage in bars and restaurants more often than leisure tourists do. On the contrary, differences do not exist based on the country of origin.

Conclusions – In recent years, fluctuation in airports’ air traffic-based income have resulted in new ways being sought to raise revenue. In this context commercial activities and food and beverage services are becoming a relevant source of profitability of many airports. That said,

passengers have become an important market to be investigated, targeted and satisfied. Findings of this paper help airport managers to understand and cater the specific needs of leisure and business tourists as regard to their consumption behavior of food and beverage services, thus supporting their marketing decision making and positioning strategy.

Key words: non–aeronautical revenues, passenger’s behaviour, food and beverage, business and leisure tourists, country of origin.

1. Introduction

Over the past few decades, globalization has played a major role in modifying eating out habits, especially in Europe and USA, if compared to the previous century, thus determining a consistent rise in the number of people eating outside of their home.

According to some authors, this specific trend is due to a number of reasons, such as the destructuring of meals, the changing in lifestyles and in the family structures (Binkley, 2006; Warde et al., 2007; Warde & Martens, 2000; Fornari, 2006) and, finally, an increasing mobility of people, especially owing to the rise of tourism. Changes in lifestyles, which have affected eating out habits, are strictly connected to the fragmentation of family life, with longer working hours that influence the daily lives of a large number of workers, an increase in the number of divorced couples and, consequently, single parents. Among other factors influencing eating out behaviors, some scholars (Warde, 2007) maintain that socio-demographic characteristics of household members such as age, sex and gender are not always determinant in influencing food consumption away from home. On the contrary, according to Martens (1997) women still have an important role within the family with regards to taking decisions as to whether, where, when, and with whom one should eat out. In the same decade, Cullen (1994) studied the phenomenon of eating out in the light of variables that affect food consumption, and suggested that eating out occurs across all income levels, with higher income households spending proportionately more than lower income households. Nevertheless, single person and single parent households dine out more than others, as do families with fewer children. The habit of eating out is therefore affected by variables besides income such as household structure (Cullen, 1994). Similarly, Warde (2007) states that differences of condition (i.e. being unemployed or retired, or belonging to a different social class) have little impact, while the educational level, which stands as a proxy for cultural capital, income or social class, was the most significant indicator with respect to

eating out habits. The study conducted by Warde (2007) also showed that a variation among different countries could be observed. More specifically, eating in/ eating out patterns in the USA are homogeneous, and there is no evidence of their fast replication in Europe, where time devoted to cooking is still significant. Among European countries, Norway is the most homogeneous of societies with respect to eating at home and eating out, while France will continue to allocate most time to domestic eating (Warde, 2007).

The consumption outside the home, especially in the food and beverage market, shows the biggest growth trend of the last forty years and the greatest potential for growth in the near future (Capano, 2011; Fipe, 2012). According to the Family Expenditure Survey, the proportion of food expenditure devoted to food eaten away from home increased from about 10 per cent to about 21 per cent between 1960 and 1993, equivalent to between 3 and 4 per cent of all household expenditure (Warde, 1997). According to Fipe (2012), 12 million of Italian people in the last 15 years were reported consuming their lunch outdoor (namely in restaurants, bars, canteens or simply buying their meal in a vending machine), while more than 3 millions generally go out for dinner. Hence, it may be assessed that eating out has increased and there can be little doubt that demand will continue to rise. Not only does the majority of the population say they would like to eat out more, many of the factors predisposing people to eat out are likely to become more prevalent in the future.

The aforementioned trends are relevant also for company managing Food & Beverage services in airport area. Every year, more than 900 million people including businessmen, commuters, tradesmen, occasional travellers and tourists travel across the world. Their transit through Italy results in the use of local services including 250 service areas, 2,700 railway stations, 37 airports and 27 commercial ports (Busacca & Associati, 2004). Non-aeronautical revenues worldwide made up 46.5 percent of industry revenue in 2010, however this category includes non-operating income of USD 6.9 billion. ACI World General Director Angela Gittens, while announcing the release of the airport Economics Survey 2011, on January 2012, commented, “Non-aeronautical revenues are a vital component in the economics of airports. During the downturn the diversification of airport revenues cushioned the impact of lower passenger and freight volumes and safeguarded operating profits. Non-aeronautical revenues critically determine the financial viability of an airport as they tend to generate higher profit margins than aeronautical activities, the latter frequently representing a zero sum game or producing a deficit.”

It is estimated that today airport shopping accounts for USD 35 billion, while *Food&Beverage (F&B)* businesses amount to a market value of USD 10 billion (The Foodie

Report, 2011), generated by 4.4 billion airport customers (FAB, 2011). This business sector is clearly going to develop further both in domestic and International airports (The Foodie Report, 2011). With an estimate increase of airport passengers to 7.3 billion by the year 2017, the *F&B* sector may be worth up to USD 18 billion in seven years' time – provided airport transit remains on the increase, and considering an average increase of +3% inflation rate per annum. According to ACI (FAB, 2011), this market may even double in size by 2027, reaching up to 11 billion passengers with an annual revenue of USD 35 billion.

Despite such promising prospects, this particular business sector has received little academic attention thus far. Research concerning the *F&B* services in aeronautical areas is considered to be still in its infancy and at an early stage especially that one investigating the “on the go” food and beverage consumers' consumption and choices.

The present study explores this somewhat neglected area of consumer behavior research by presenting and discussing the findings of an empirical investigation carried out on a sample of 551 tourists, travelling both for business and leisure. In particular, the study is based upon the following research questions:

Research question 1:

Do significant differences exist in the way consumers rely on diverse catering formats (bar, fast food restaurant, restaurant, retail shop and vending machine) when consuming F&B in airport area, based on the occasion of consumption (breakfast, lunch, break, dinner, and aperitif)?

Research question 2:

Do tourists differently rely on the diverse catering formats based on the reason of their travelling (leisure versus business) and their nationality (Italian versus international tourists)?

Research question 3:

Do tourists differently assess the importance of each attribute of food and beverage services, based on the reason of their travelling (leisure versus business) and their nationality (Italian versus international tourists)?

This article is structured as follow: section 2 presents a literature review on the topic, section 3 explains the methodology and research adopted, and section 4 illustrates the findings. Sections 5, 6, 7 and 8 discuss the findings and limitations of the study, thereby setting out the direction of future research and highlighting the implications for management.

2. Literature review

Non-aeronautical activities in general, and terminal retail in particular, have been part of airport management for six decades. These activities have grown significantly from the nineteen-nineties on (Francis *et al.*, 2003; Francis *et al.*, 2004; Graham, 2009; Morrison, 2009), to the point that they are essential to many airports' profitability (Torres *et al.*, 2005). The percentage of total airport revenues represented by non-aeronautical or commercial revenues has not stopped growing, and may reach 90 percent (Zhang & Zhang, 1997). Nowadays, transit areas (bus and train stations, airports, ports, etc) from being plain and often uncomfortable border areas for travellers' transit and haul, have become shopping sites proper, where people can spend their time in a pleasant way and access a number of different services. The change has been brought about by the need to enhance the quality of time that travellers have to spend in transit sites before they can board an aircraft or while they wait for (often delayed) public transport (Busacca & Associati, 2004). Moreover, terminals are seen as gateways that should appropriately represent their regions to visitors, especially by symbolizing the distinctive character of the region through food and specialty retail offerings (Appold, 2006).

Studies of the factors that lead to the maximization of non-aeronautical revenues are becoming increasingly important for airport management (Huang & Kuai, 2006), even though until the middle of this decade they remained “an under researched and poorly illustrated area of study” (Geuens *et al.*, 2004: 615).

Prior research suggested that airport shopping may be explained in terms of distraction for passengers needing to exorcise their fear for flying (Martinelli, 2011). These type of consumers in transit, the so called *transumers* (Newman & Lloyd Jones, 1999), appear to be caught between anxiety and heightened emotions resulting in awkward behaviours. Airport buildings are now larger sites, so that the distance between check-in desks and boarding areas contributes to higher levels of anxiety for travellers whose primary aim is to reach their departure gates in as little time as possible. Retailers thus need to create a quiet atmosphere where travellers are encouraged to do their shopping with less stress and more tranquillity. Thomas (1997) has studied impulsive shopping behaviour in airports and highlighted two different emotional states relating to shopping (Martinelli, 2011; Volkova, 2009). The first is characterised by altered stress levels, due to consumers being far from their daily routines; the second shows evident alterations of excitement levels. In addition, it has been shown that stress levels are lower after passengers have received their boarding card, while excitement

levels remain high. There is, in fact, a phase called 'happy hour', which refers to the moment when the excitement level is high while the stress level decreases, that is the moment of transition between immigration and pre-flight security checks. The travel stress curve suggested by Scholvinck (2000) helps understand how, during this specific phase of transition between check-in and boarding operations, stress levels decrease remarkably. This seems to be the perfect moment to pursue travellers to do their shopping (Martinelli, 2011; Volkova 2009).

According to Torres et al. (2005) vacationers spend more than business travellers. Further, they demonstrated that a clear relationship exists between consumption in the commercial area of the airport and the length of stay prior to boarding. However, the level of consumption is independent of the waiting time. Specifically, if the boarding time is less than 45 minutes, business travellers tend to consume more than vacation travellers, while in the range 45–170 minutes, those going on vacation consume more, although their expenditure stabilizes a 2-h wait. In stays longer than 170 minutes, consumption is clearly greater by business travellers.

Clearly, shopping behavior in transit sites is determined by relevant factors (Crawford & Melewar, 2003), as opposed to shopping in traditional retail areas. Consumers in transit sites are usually influenced by the length of waiting time (Torres *et al.*, 2005), at times feeling anxious, especially when unaccustomed to being in travelling contexts. These factors may have a positive outcome in commercial terms, given that these people tend to reach their gate well ahead of their boarding time, and thus they are likely to notice the shopping opportunities available in the waiting area (Torres et al., 2005; Castillo-Manzano, 2010). Another significant aspect to be considered is the difficulty of deferring shopping, since it is not possible to go back to the shopping area once the gate has been reached. All these factors are beneficial to retailers whose businesses are located in transit areas, and this is so despite the fact that waiting times have now been considerably reduced for security reasons. In addition, travellers have different shopping needs (Graham, 2008) and their shopping expectations appear to be higher. Shopping experience and services thus have to adjust to the increasingly complex demands of this type of consumers (Martinelli, 2011).

These factors clearly have a significant impact upon shopping trends, and they clearly contribute to alter the phases of traditional shopping processes (Busacca & Associati, 2004). For consumers in transit, in fact, the last three phases of traditional shopping are effaced, due to limited shopping times, limited choice, distorted perception of prices (tax-free shopping and special offers), and, of equal importance, due to the need to buy gifts for family and

friends (Busacca & Associati, 2004). Consequently, the combination of quasi-rational shopping with emotional and impulsive shopping results in consumers in transit.

If we draw our attention onto the context of *F&B* services at the airport, and specifically around the consumers' value experience and perceptions toward the service provided, very little research was conducted until now. Prior research, pointed out the importance of *F&B* as a relevant attribute of service quality in the hospitality sector (Almanza *et al.*, 1994; Baek, 2006; Pettijohn *et al.*, 1997; Qu, 1997; Soriano, 2002). Recently, Han *et al.* (2012) examined the influence of service quality on overall satisfaction and revisit intentions to airline lounges. The authors stated that what passengers really expect is not an attractively appearing airline lounge but a comfortable and practical space to work and relax, which is the reason why *F&B* was the strongest predictor of satisfaction and revisit intentions. According to Echevarne (2008), *F&B* is confirmed to be one of the most important drivers of revenue when considering non aeronautical activities: more than the 60% of passengers plan to use shops and/or cafes and tend to arrive earlier at the airport in order to shop. In terms of willingness to shop, namely food & beverage services at the airport (especially 'grab and go' outlets), Graham (2009) claims that low cost carrier (LCC) are more important in airports which have a very high proportion of flights that do not offer free in-flight catering, as it is in the case of Stansted airport. Appold and Kasarda (2006) noted that the 87% of departing passengers had a relevant impact on *F&B* sales and that medium- long distance flights did have a positive effect on *F&B* sales. Further, Castillo-Manzano (2010) showed that there is a high correlation between prior time to embark and purchasing behaviors. In fact, the more passengers wait at the terminal before embarking the greater becomes the physiological necessity to satisfy the need to consume food and beverage products.

3. Methodology

The present study was carried out to investigate the travellers' choices related to the consumption of food and beverage in several retail formats inside an airport area, that is: bars, fast food restaurant, traditional restaurants, retail shops, vending machines. For this purpose, the study targeted exclusively passengers travelling for both leisure and business reason and at least 18 years old. The questionnaire included items selected on the basis of an in-depth review of literature and was divided into three sections. The first one focused on socio-demographic information from the interviewees (gender, age, occupation, level of education, nationality, reason of their travelling). The second section included questions aimed at investigating how frequently respondents use the several retail formats considered in the

present study in their daily life to consume food and beverage, using a 5-point Likert scale (1 = never, 2 = almost never, 3 = sometimes, 4 = almost always and 5 = always). Further, it included a list of 13 attributes that consumers consider when choosing food and beverage services and respondents were asked to assess the importance they give to each of them when selecting a specific retail format. This process was carried out for each of the five types retail format we investigated, as identified above, and a 7-point Likert scale was used (1 = not at all important; 7 = very important). Finally, the third section included the same question than the second but was contextualized in the specific context of airport areas.

The questionnaire was then pilot tested with a sample of 30 tourists. This was done to verify the validity of its content, the comprehensibility of the questions and the scale used to make the assessments. No concerns were reported in the pilot-tests.

Data was collected through face-to-face interviews conducted by two trained interviewers directly supervised by one of the authors. Interviewees were approached among people in the terminal building, and especially in the boarding and check-in areas of the Olbia-Costa Smeralda Airport. All airport staff were deliberately left out, as the nature of their daily food and drink consumption outside their homes clearly coincides with food and drink consumption at in the airport. The data collection lasted from April to September 2011. In all, we obtained 551 complete questionnaires.

Data were coded and analyzed using SPSS (version 17.0). A series descriptive statistics and t-tests were conducted, when appropriate, to indicate whether any significant differences exist in tourists' attitudes and behaviors toward F&B services at the airport, based on the reason of their travelling and their socio-demographic characteristics, namely nationality.

4. Findings

Table 1 presents the general profile of the sample population. Interviewees were mainly women (64.2%). Interviewees are aged between 25 and 35 (36.1%), 36 and 45 (17.1%), with a significant number of young travellers (16.3%). Finally, 72.6% of the people interviewed are Italian, of which 46.5% are resident in Sardinia. Concerning the level of education, the majority of people interviewed (46.5%) reported having a high school diploma, whereas 28.9% had a university degree, 5.1% a postgraduate degree. Finally, 19.6% of them reported holding a mid-low/low level of education (below secondary school). Types of respondents' occupation were: administrative workers (32.1%), executive manager (4.7%), freelance (12.3%), retired (12.2), unemployed (9.1%), students (15.1%), and other jobs (14.5%).

Tab. 1. Socio-demographic characteristics of the interviewees (%)

Gender		Retired	12.2
Male	35.8	Unemployed	9.1
Female	64.2	Student	15.1
Age		Other	14.5
16-24 years	16.3	Resident in Sardinia	
25-35 years	36.1	Yes	46.5
36-45 years	17.1	No	53.5
46-55 years	9.4	Nationality	
56-65 years	11.8	Italian	72.6
Over 65	9.3	Foreign	27.4
Level of education		Reason for travelling	
Below secondary school	3.3	Leisure	69.3
Secondary school	16.3	Work	14.3
High school	46.5	Other	16.3
University degree	28.9	Journeys per year	
Postgraduate degree (Master, PhD)	5.1	1-2 times	29.7
Occupation		2-4 times	35.2
Administrative worker	32.1	5-7 times	20.4
Executive manager	4.7	7-12 times	10.7
Freelance	12.3	12-15 times	1.3

Regarding the reasons for travelling, 69.3% of respondents were leisure, 14.3% business and 16.3% other purposes. The target includes people who travel by plane on average 2-4 times (35.2%), 1-2 times (29.7%), 5-7 times (20.4%), and 7-12 times (10.7%) per year.

4.1 The outdoor food and beverage consumption in consumers' daily life

Table 2 show how frequently consumers were reported being consuming food & beverage out of their home in their daily life. Since the values reported are below the average <3, it may be inferred that on a daily basis meals are consumed mainly at home, and that there is not a privileged mode of consumption. Values relating to food consumed in bars are relevant: in this context people tend to have their breakfast (M=2.9, SD=1.28), they have *break* (M=2.12, SD=1.15) or an *aperitif* (M=2.37, SD=1.155), while they prefer using restaurants for lunch (M=2.39, SD=1.097) and dinner (M=2.65, SD=0.976).

Tab. 2 – Mean frequency of outdoor Food & Beverage consumption by occasions (mean value on a 5-point Likert scale with 1=never; 2=hardly ever; 3=sometimes; 4=very often; 5=often)

	Breakfast		Lunch		Break		Dinner		Aperitif	
	Mean	SD	Mean	SD	Mean	S.D	Mean	SD	Mean	SD
Bar	2.9	1.28	1.88	1.057	2.12	1.15	1.59	0.971	2.37	1.155
Fast food restaurant	1.11	0.431	1.93	1.062	1.28	0.702	1.66	0.936	1.10	0.392
Restaurant	1.22	0.666	2.39	1.097	1.18	0.593	2.65	0.976	1.26	0.714
Retail shop	1.36	0.931	1.83	1.188	1.63	1.049	1.60	1.080	1.22	0.717
Vending machine	1.35	0.80	1.18	0.547	1.82	1.045	1.15	0.515	1.12	0.460

Table 3 shows the mean value of the importance that consumers give to a list of 13 attributes, when selecting which type of retail format use to consumer food & beverage. Findings reveal, that customers prioritise cleanliness, comfort, friendly and professional staff, quick service and quality of food and drinks over the place itself. Clean and welcoming premises (M=6.20, SD=1.455), staff courtesy (M=6.04, SD=1.584) and quick service (M=5.84, SD=1.642) were ranked as being the most important criteria when selecting bars with the latter being also a crucial parameter for fast food restaurants (M=5.11, SD=2.304).

Tab. 3 – The importance of food & beverage selection criteria in consumers’ daily life differentiated by type of catering formats

Attributes	Bar		Fast food restaurant		Restaurant		Retail shop		Vending machine	
	Mean	S.D	Mean	S.D	Mean	S.D	Mean	S.D	Mean	S.D
Good price	4.62	1.98	4.23	2.334	5.15	1.952	4.79	2.189	3.53	2.401
Quality	5.46	1.826	4.52	2.331	6.10	1.472	5.29	2.116	3.71	2.467
Food presentation	4.91	1.927	4.08	2.267	5.66	1.702	4.44	2.235	3.17	2.252
Peculiarity of food served	4.55	1.987	3.89	2.234	5.52	1.795	4.32	2.16	3.03	2.214
Choice availability	4.88	1.925	4.26	2.265	5.68	1.697	4.81	2.186	3.35	2.250
Quality/price	5.50	1.813	4.71	2.311	5.89	1.597	5.23	2.167	3.81	2.421
Location/distance	4.50	2.219	3.80	2.298	4.41	2.185	4.21	2.278	3.57	2.402
Overall appearance	5.16	1.802	4.37	2.237	5.49	1.740	4.50	2.139	3.14	2.264
Atmosphere inside	5.43	1.730	4.40	2.248	5.74	1.616	4.59	2.128	2.86	2.298
Staff courtesy	6.04	1.584	4.98	2.353	6.21	1.477	5.27	2.188	2.89	2.448
Quick service	5.84	1.642	5.11	2.304	5.89	1.609	5.17	2.147	3.27	2.513
Clean & comfortable premises	6.20	1.455	5.29	2.267	6.32	1.337	5.53	2.084	3.81	2.619
Entertainment	3.85	2.291	3.25	2.283	3.94	2.266	3.14	2.237	2.31	2.025

Traditional restaurants are chosen especially because they can serve good quality meals (M=6.10, SD=1.472), for the courtesy of their staff (M=6.21, SD=1.477) and for the clean and comfortable premises (M=6.32, SD=1.337), while the overall atmosphere (M=5.74, SD=1.616) and the peculiarity of food served (M=5.52, SD=1.795) also represent important parameters. Retail shops are chosen on the basis of the quality of their goods (M=5.29, SD=2.116), quality/price factors (M=5.23, SD=2.167), as well as staff courtesy (M=5.27, SD=2.188) and clean premises (M=5.53, SD=2.084). Finally, vending machines are chosen because they can offer good price (M=3.53, SD=2.401).

4.1 The food and beverage consumption at airport area

Table 4 shows how frequently respondents were reported using the different type of retail formats when consuming food and beverage in airport areas.

On the whole, findings reveal consumers not using frequently to consume Food & beverage in the airport (mean value < 3 for all the considered retail formats). Passengers interviewed preferred bars to have breakfast (M=2.76, SD=1.152), a *break* (M=2.02, SD=1.075) and lunch (M=1.98, SD=1.028).

Tab. 4 – Mean frequency of *Food & Beverage* consumption by retail format (mean value on a 5-point Likert scale with 1=never; 2=almost never; 3=sometimes; 4=almost always; 5=always)

	Breakfast		Lunch		Break		Dinner		Aperitif	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
Bar	2.76	1.152	1.98	1.028	2.02	1.075	1.57	0.934	1.58	0.967
Fast food restaurant	1.26	0.682	1.85	1.053	1.33	0.743	1.51	0.908	1.16	0.531
Restaurant	1.21	0.640	1.77	1.036	1.20	0.581	1.66	1.013	1.21	0.653
Retail shop	1.33	0.767	1.50	0.891	1.48	0.883	1.38	0.822	1.22	0.649
Vending machine	1.36	0.807	1.31	0.735	1.69	0.987	1.21	0.620	1.19	0.615

Restaurants are more often the preferred choice for lunches (M=1.77, SD=1.036) and dinners (M=1.66, SD=1.013). Fast food restaurants are chosen for lunch (M=1.85, SD=1.053) while vending machines are best for snacks at break time (M=1.69, SD=0.987).

Table 5-9 show in detail how frequently consumers were reported using the different catering formats in all the food & beverage occasion of consumption we considered in the present study (breakfast, lunch, break, dinner and aperitif).

Bars are undoubtedly the best place to have breakfast: 54.8% of our interviewees have their breakfast in a bar sometimes; 10.3% of them have it always; 12.6% prefers using a vending machine and 11.6% sometimes goes to a retail shop (Tab. 5).

Tab. 5 – Breakfast at the airport: frequency of use of the different catering formats (%)

	Never	Almost ever	Sometimes	Almost always	Always
Bar	20.7	8.7	54.8	5.5	10.3
Fast food restaurant	86.1	3.5	9.2	0.7	0.4
Restaurant	88.9	2.0	8.1	0.6	0.4
Retail shop	82.4	4.4	11.6	0.7	0.7
Vending machine	80.8	4.8	12.6	0.9	0.9

Concerning lunch (Tab. 6), 40.3% of respondents use bars sometimes, 31.8% of them use Fast food restaurants, while 30.3% consume F&B in a traditional restaurant sometimes.

Tab. 6 – Lunch at the airport: frequency of use of the different catering formats (%)

	Never	Almost ever	Sometimes	Almost always	Always
Bar	48.6	8.3	40.3	1.7	1.1
Fast food restaurant	56.2	8.3	31.8	1.7	2.0
Restaurant	61.00	5.7	30.3	1.1	1.8
Retail shop	72.9	6.6	18.8	0.6	1.1
Vending machine	82.6	5.5	10.7	0.4	0.7

Food and drinks consumed at break time (Tab. 7) are usually acquired in bars and at vending machines: in fact, 37.1% of the people interviewed prefer having a break in a bar sometimes, while 25.7% of them prefers using a vending machine sometimes.

Tab. 7 – Break at the airport: frequency of use of the different catering formats (%)

	Never	Almost ever	Sometimes	Almost always	Always
Bar	47.4	10.3	37.1	3.1	2.0
Fast food restaurant	81.1	5.7	12.0	0.7	0.4
Restaurant	88.5	3.3	7.8	0.4	-
Retail shop	74.5	6.1	17.0	1.7	0.7
Vending machine	63.6	8.1	25.7	1.1	1.5

For dinner, people in transit at the airport (Tab. 8) prefer going to a restaurant: 24.4% of our interviewees use restaurants sometimes, while 1.8% of them use restaurants always. Bars are used as an alternative sometimes by 21.3% of the people in transit, and always by 1.3% of them.

Tab. 8 – Dinner at the airport: frequency of use of the different catering formats (%)

	Never	Almost ever	Sometimes	Almost always	Always
Bar	69.9	6.8	21.3	0.7	1.3
Fast food restaurant	73.6	5.5	18.7	1.1	1.1
Restaurant	67.3	5.0	24.4	1.5	1.8
Retail shop	80.4	4.6	13.1	0.7	1.1
Vending machine	88.2	4.3	6.5	0.7	0.4

Airports are not conventional places where to go for an aperitif (Tab. 9); in fact the majority of people interviewed stated to have never had an aperitif in an airport, while only 21.2% do it occasionally.

Tab. 9 – Aperitif at the airport: frequency of use of the different catering formats (%)

	Never	Almost ever	Sometimes	Almost always	Always
Bar	70.3	5.7	21.2	1.1	1.7
Fast food restaurant	90.9	2.8	5.7	0.6	-
Restaurant	89.1	2.4	7.4	0.4	0.7
Retail shop	88.7	2.6	7.6	0.6	0.6
Vending machine	89.6	3.1	6.1	0.6	0.6

Table 10 shows how important consumers assess a list of 13 attributes when selecting a catering format to consume food and drink in the airport at any given occasion. Findings reveal that the most important are: cleanliness, staff courtesy, and quick service.

More specifically, bars are chosen for their clean and welcoming premises (Mean=6.08, SD=1.527), for the quick service provided (Mean=5.89, SD=1.676) and for staff courtesy (Mean=5.85, SD=1.704), whereas customers give little attention to any form of entertainment (Mean=3.60, SD=2.357).

As to restaurants, aside from comfortable and clean premises (Mean=5.93, SD=1.800), customers prioritise staff courtesy (Mean=5.79, SD=1.888) and quick service (Mean=5.75,

SD=1.880). Travellers also value the quality of the food and drinks served (Mean=5.56, SD=1.93).

Fast food restaurants are preferred because of their good food at a good price (Mean=4.85, SD=2.29). Moreover, travellers maintain that none of the characteristics above may influence their resolution to opt for a vending machine.

Tab. 10 – The importance of food & beverage selection criteria of catering formats, in airport areas

	Bar		Fast food restaurant		Restaurant		Retail shop		Vending machine	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
Good price	4.93	1.893	4.35	2.304	5.05	2.091	4.57	2.266	3.60	2.416
Quality	5.50	1.73	4.66	2.305	5.56	1.93	4.89	2.226	3.71	2.454
Food presentation	4.98	1.876	4.21	2.248	5.35	1.941	4.34	2.230	3.17	2.271
Peculiarity of food served	4.78	1.895	4.18	2.236	5.19	1.930	4.31	2.164	3.13	2.195
Variety of choice	5.06	1.822	4.33	2.247	5.41	1.861	4.58	2.185	3.41	2.299
Price/quality ratio	5.58	1.749	4.85	2.290	5.50	1.909	4.98	2.256	3.89	2.496
Location / distance	4.58	2.172	4.03	2.334	4.5	2.206	4.14	2.327	3.58	2.452
Overall appearance	5.09	1.882	4.35	2.234	5.17	2.006	4.46	2.188	3.11	2.281
Atmosphere inside	5.19	1.862	4.40	2.261	5.28	1.949	4.50	2.201	2.92	2.266
Staff courtesy	5.85	1.704	4.93	2.368	5.79	1.888	5.06	2.274	2.97	2.455
Quick service	5.89	1.676	5.15	2.329	5.75	1.880	5.04	2.283	3.44	2.588
Clean and comfortable premises	6.08	1.527	5.22	2.274	5.93	1.800	5.24	2.254	3.74	2.646
Entertainment	3.60	2.357	3.18	2.323	3.61	2.349	3.11	2.256	2.28	2.009

Table 11 shows whether differences exist based on the reason of travelling. Specifically, significant differences were reported in relation to *F&B* consumption in bars for lunch ($t=-2.453$, $p<0.05$) and dinner ($t=-2.154$, $p<0.05$).

Tab. 11 – Frequency of usage of different catering formats by reason for travelling (mean and Independent t-test - *significant at 0.05 level; **significant at 0.01 level)

	Breakfast	Lunch	Break	Dinner	Aperitif
Bar					
Leisure (mean)	2.75	1.92	1.98	1.54	1.55
Business (mean)	2.94	2.23	2.22	1.79	1.81
T-test	- 1.307	- 2.453*	- 1.805	- 2.154*	-1.93
Fast food restaurant					
Leisure (mean)	1.26	1.85	1.33	1.50	1.13
Business (mean)	1.23	1.94	1.38	1.58	1.22
T-test	0.293	- 0.682	- 0.543	- 0.659	- 1.176
Restaurant					
Leisure (mean)	1.18	1.71	1.16	1.60	1.18
Business (mean)	1.38	2.23	1.38	2.00	1.46
T-test	- 2.219*	- 3.741**	- 2.486*	- 3.127**	- 2.496*
Retail shop					
Leisure (mean)	1.33	1.49	1.48	1.37	1.19
Business (mean)	1.28	1.41	1.46	1.32	1.28
T-test	0.48	0.759	0.145	0.446	- 0.906
Vending machine					
Leisure (mean)	1.36	1.26	1.73	1.17	1.18
Business (mean)	1.29	1.33	1.38	1.26	1.18
T-test	0.693	- 0.825	3.169**	1.017	0.025

People travelling for work purposes, in fact, tend to consume lunch (Mean=2.23, SD=1.044) as well as dinner (Mean=1.79, SD=0.972) in bars more often. By contrast, leisure travellers seem to prefer having their meals in bars: lunch (Mean=1.92, SD=1.013); dinner (Mean=1.54, SD=0.952). Important differences between *business* and *leisure* travellers are also evident in restaurant use for all the different occasions of food and drink consumption. The most significant differences concern lunches ($t=-3.741$, $p<0.01$) and dinners ($t=-3.127$, $p<0.01$) consumed in restaurants: business travellers tend to have both meals in restaurants. More specifically, they have lunch (Mean=2.23, SD=1.15) and dinner (Mean=2.00, SD=1.032), as opposed to leisure travellers (lunch: Mean=1.71, SD=1; dinner: Mean=1.60, SD=1.008). In addition, some notable differences are seen in vending machine use for snacks at break time ($t=3.169$, $p<0.01$), given that leisure travellers tend to use such format more frequently (Mean=1.73, SD=1.007) than business travellers (Mean=1.38, SD=0.856). Table 12 shows the way tourists assess a list of 13 attributes when selecting the catering format for food and beverage consumption and if any significant difference do exist in their assessment based on their reason of travelling. Findings reveal that business and leisure travellers differ significantly in the way they assess location/distance when selecting bar ($t=2.230$, $p<0.05$), fast food restaurant ($t=2.008$, $p<0.05$) and the retail shop ($t=2.097$, $p<0.05$).

Tab. 12 – The importance of food & beverage selection criteria in airport areas by reason of travelling (* significant at 0.05 level, ** at 0.01 level) – independent t-test

	Bar	Fast food restaurant	Restaurant	Retail shop	Vending machine
Good price					
Leisure (mean)	4.94	4.43	4.95	4.58	3.56
Business (mean)	4.81	3.88	5.24	4.09	3.27
T-test	0.573	1.909	- 1.136	1.730	0.961
Quality					
Leisure (mean)	5.45	4.66	5.43	4.86	3.71
Business (mean)	5.47	4.17	5.68	4.40	3.29
T-test	-0.061	1.713	-1.129	1.524	1.349
Food presentation					
Leisure (mean)	4.95	4.24	5.25	4.35	3.23
Business (mean)	4.86	3.88	5.41	3.91	2.90
T-test	0.362	1.273	-0.666	1.561	1.174
Peculiarity of food served					
Leisure (mean)	4.78	4.15	5.11	4.36	3.20
Business (mean)	4.73	4.04	5.28	4.00	2.92
T-test	0.183	0.404	-0.689	1.330	0.980
Variety of choice					
Leisure (mean)	5.01	4.33	5.34	4.58	3.39
Business (mean)	4.99	3.92	5.45	4.27	3.27
T-test	0.114	1.462	-0.599	1.118	0.422
Price/quality ratio					
Leisure (mean)	5.54	4.89	5.41	4.96	3.88
Business (mean)	5.23	4.38	5.35	4.51	3.47
T-test	1.360	1.767	0.244	1.571	1.295

Location/distance					
Leisure (mean)	4.56	4.05	4.46	4.10	3.62
Business (mean)	3.95	3.46	3.92	3.49	3.06
T-test	2.230*	2.008*	1.943	2.097*	1.835
Overall appearance					
Leisure (mean)	5.09	4.36	5.08	4.47	3.07
Business (mean)	4.86	4.04	5.10	4.06	3.18
T-test	0.954	1.147	-0.099	1.443	-0.391
Atmosphere inside					
Leisure (mean)	5.18	4.43	5.24	4.51	2.89
Business (mean)	5.06	4.15	5.36	4.10	3.06
T-test	0.509	0.971	-0.501	1.461	0.600
Staff courtesy					
Leisure (mean)	5.73	4.88	5.67	5.01	2.93
Business (mean)	6.03	4.59	6.00	4.86	3.14
T-test	-1.547	0.961	-1.527	0.506	-0.679
Quick service					
Leisure (mean)	5.78	5.05	5.59	4.99	3.38
Business (mean)	5.92	5.08	6.05	4.87	3.40
T-test	-0.664	-0.077	- 2.213*	0.423	-0.064
Clean and comfortable premises					
Leisure (mean)	6.02	5.16	5.79	5.19	3.66
Business (mean)	6.06	5.00	6.05	4.88	3.83
T-test	-0.242	0.547	-1.326	1.072	-0.539
Entertainment					
Leisure (mean)	3.66	3.23	3.56	3.15	2.25
Business (mean)	3.26	3.18	3.44	3.01	2.40
T-test	1.371	0.173	0.411	0.463	-0.573

Specifically, for leisure travellers it is of high importance that shops are located near the boarding gate, whether bars (Mean=4.56, SD=2.18), fast food restaurants (Mean=4.05, SD=2.341) or retail shops (Mean=4.10, SD=2.342). This may be due to the fact that leisure travellers are not very familiar with airport contexts, and so they tend to stay mainly near the boarding gate area for fear of missing their flight.

Further, business and leisure travellers show significant differences in the way they assess the importance of “quick service” when consuming F&B at airport ($t=2.008$, $p<0.05$) with business travellers giving a higher assessment ($A=6.05$, $SD=1.677$) than *leisure* travellers do ($A=5.59$, $SD=1.964$).

Tables 13 and 14 show if any significant differences do exist in the way tourists a) use the different catering formats based on their nationality b) assess a list of 13 attributes when selecting the catering format.

Tab. 13 – The frequency of usage of the different catering formats by nationality of travellers (* significant at 0.05 level, ** at 0.01 level)_ independent t-test

	Breakfast	Lunch	Break	Dinner	Aperitif
Bar					
Italian (mean)	2.79	1.92	1.96	1.54	1.51
International (mean)	2.73	2.04	2.08	1.59	1.65
T-test	0.619	-1.389	-1.232	-0.679	-1.655

Fast food restaurant					
Italian (mean)	1.23	1.83	1.30	1.54	1.11
International (mean)	1.28	1.87	1.37	1.48	1.20
T-test	-0.893	-0.353	-1.118	0.737	-1.977*
Restaurant					
Italian (mean)	1.17	1.74	1.15	1.64	1.17
International (mean)	1.26	1.80	1.25	1.67	1.26
T-test	-1.733	-0.602	0.-1.919	-0.330	-1.632
Retail shop					
Italian (mean)	1.33	1.54	1.50	1.40	1.20
International (mean)	1.33	1.47	1.46	1.35	1.24
T-test	0.091	0.963	0.452	0.686	0.703
Vending machine					
Italian (mean)	1.36	1.25	1.74	1.17	1.15
International (mean)	1.37	1.37	1.64	1.25	1.23
T-test	-0.160	-1.798	1.114	-1.583	-1.533

Specifically, table 14 reveals that only one significant difference do exist when considering fast food restaurant as a place to enjoy an aperitif ($t=-1.977$, $p<0.05$), with foreign travellers using this format more often (Mean=1.20, SD=0.580) than Italian travellers (Mean=1.11, SD=0.471).

Tab. 14 – The importance of food & beverage selection criteria in airport areas by nationality (mean and independent t-test - * significant at 0.05 level, ** at 0.01 level)

	Bar	Fast food restaurant	Restaurant	Retail shop	Vending machine
Good price					
National (mean)	4.84	4.36	4.87	4.56	3.54
International (mean)	5.00	4.34	5.22	4.58	3.65
T-test	-0.981	0.130	-1.930	-0.139	-0.537
Quality					
National (mean)	5.40	4.60	5.40	4.88	3.71
International (mean)	5.60	4.71	5.72	4.91	3.72
T-test	-1.307	-0.560	-1.899	-0.152	-0.028
Food presentation					
National (mean)	4.84	4.13	5.28	4.29	3.15
International (mean)	5.11	4.29	5.41	4.40	3.19
T-test	-1.642	-0.821	-0.743	-0.585	-0.176
Peculiarity of food served					
National (mean)	4.62	4.03	5.07	4.27	3.07
International (mean)	4.93	4.32	5.29	4.35	3.18
T-test	-1.928	-1.509	-1.314	-0.454	-0.551
Variety of choice					
National (mean)	4.99	4.33	5.42	4.58	3.39
International (mean)	5.13	4.34	5.40	4.58	3.43
T-test	-0.898	-0.064	0.129	-0.003	-0.226
Good food/good price					
National (mean)	5.57	4.92	5.45	5.02	3.87
International (mean)	5.60	4.79	5.56	4.93	3.92
T-test	-0.214	0.613	-0.675	0.471	-0.203
Location / distance					
National (mean)	4.74	4.19	4.61	4.32	3.78
International (mean)	4.43	3.88	4.39	3.96	3.40
T-test	1.614	1.549	1.186	1.774	1.783

Overall appearance					
National (mean)	5.04	4.33	5.05	4.47	3.13
International (mean)	5.13	4.37	5.28	4.45	3.09
T-test	-0.561	-0.213	-1.365	0.075	0.223
Atmosphere inside					
National (mean)	5.14	4.40	5.20	4.51	2.89
International (mean)	5.24	4.41	5.35	4.49	2.95
T-test	-0.642	-0.041	-0.873	0.128	-0.311
Staff courtesy					
National (mean)	5.72	4.91	5.71	5.08	2.89
International (mean)	5.97	4.95	5.88	5.03	3.05
T-test	-1.701	-0.188	-1.031	0.246	-0.783
Quick service					
National (mean)	5.75	5.04	5.64	5.04	3.41
International (mean)	6.02	5.24	5.85	5.04	3.48
T-test	-1.845	-0.994	-1.303	-0.006	-0.316
Clean and comfortable premises					
National (mean)	6.05	5.22	5.83	5.26	3.75
International (mean)	6.10	5.21	6.03	5.23	3.73
T-test	-0.361	0.070	-1.269	0.156	0.112
Entertainment					
National (mean)	3.61	3.11	3.44	3.04	2.14
International (mean)	3.59	3.25	3.77	3.18	2.41
T-test	0.076	-0.668	-1.602	-0.714	-1.567

5. Discussion

The present study examined passengers' behaviors while consuming food/beverages at the airport. Specifically, it was aimed to analyze whether significant differences exist in the way consumers rely on diverse catering formats when consuming F&B in airport area, based on the occasion of consumption and on the reason of their travelling (leisure versus business) and their nationality (Italian versus international tourists). Further, it was aimed at investigate whether travellers assess differently the importance of each attribute of food and beverage services, based on the reason of their travelling and their nationality.

Findings reveal that major distinctions exist between the catering format (bar, fast food, restaurant, retail shop, vending machine) chosen by respondents on the basis of the occasion for food and drink consumption (breakfast, lunch, break, dinner and aperitif). Specifically, bars are considered the best place to have breakfast, lunch and at break time (some of the interviewees prefer using vending machine at this occasion). It could be argued that consumers tend to prefer bars and fast food restaurants to traditional restaurants because of the short time availability that they face when in airport. On the contrary, respondents were reported preferring restaurants when having dinner. On the whole, factors influencing the consumption of food/beverages at bars are connected to clean and welcoming premises, quick service provided and for staff courtesy, whereas customers give little attention to any form of entertainment. As to restaurants, aside from comfortable and clean premises customers

prioritise staff courtesy and quick service, while fast food restaurants are preferred because of their good food at a good price offers.

When the reason of travelling and the nationality of respondents were considered, the present study showed some significant differences in the way they consume food & beverage in airport areas. Specifically, people travelling for work purposes tend to consume lunch as well as dinner in bars more often than leisure travellers. Further, *business* and *leisure* travellers differ significantly in the way they use restaurants. This happens for all the occasions of food and drink consumption we considered in the study. The most significant differences concern lunches and dinners consumed in restaurants: business travellers tend to have both meals in restaurants more often than leisure tourists. It could be argued that this has occurred because business travellers have more chances to consume their meals (working breakfast, lunch, and dinners) and/or because their expenses are, very often, paid by their employers, whereas leisure travellers have to pay for their meals. Additional notable differences are seen in vending machine use for snacks at break time, given that leisure travellers tend to use such format more frequently than business travellers. Further, findings revealed that business and leisure travellers differ significantly in the way they assess the attributes of food & beverage services when selecting a specific catering format. In particular, leisure travellers were reported giving a significant higher ranking to location when selecting bar, fast food restaurant and retail shops than business travellers. On the contrary, business travellers were reported giving a significant higher importance to quick service.

Finally, the study didn't show relevant and numerous significant differences in food & beverage consumption based on the nationality of travellers. In particular, just one significant difference was found with foreign travellers using fast food restaurant to have an aperitif, more often than Italian travellers.

6. Managerial implications

Findings highlight some interesting managerial implications and suggestions for the hospitality sector. On the whole, it could be argued that airport manager aiming at maximizing business returns from non-aeronautical activities should reduce at the minimum level the time passengers spend in checking-in and security checks, thus increasing as much as possible the time they can be involved in shopping activities. In order to pursue the same goal, manager should facilitate airport environments for leisure travellers so that they can simply reach shops and restaurants. On the other hand, they should try to periodically modify the aesthetics of the terminal in order to make it more appealing and alleviate the boredom of

waiting in a familiar environment (both for business and leisure travellers familiar with the airport). Further, findings suggest ways in which airport managers should focus their financial and human resources and efforts in order to improve the quality of their catering facilities and related food and beverage services, based also on the type of passengers/travellers (leisure and/or business) that they target the most. For example, our findings highlighted that business travellers consider of high importance the “quick service” variable, whereas leisure travellers are more concerned with the location of the catering format within the airport area. Furthermore, people travelling for work purposes tend to consume lunch as well as dinner in bars and restaurant more often than leisure travellers, thus expressing different expenditure patterns and price sensitivity. As noted above, it could be argued that occurs because their expenditure is usually refunded by the firm they work for. As a consequence, airport managers could/should personalize their marketing strategy to take advantage of these differences.

7. Limitations

Although this study helps to fill a gap in existing knowledge in literature, limitations still remain. Firstly, we used a convenience sample from and its size is quite small. Further, the data collection was carried out in just one airport which has its own specific characteristics (dimensions, insularity and seasonality), these might have self-selected the type of respondents we reached. As a consequence findings cannot be generalized and the authors would therefore caution the readers evaluating the findings of the present study. Finally, we run basic statistics (descriptive statistics, Anova and t-test) in order to investigate a) which catering format consumers use the most when in airport area based on the occasion of consumption b) whether the way they use the different catering formats and assess the importance of each attribute of food and beverage services can be differentiated according to their reason for travelling (leisure vs business) and their country of origin. Furthermore, when nationality was considered, we analyzed Italians vs International travellers but did not differentiate among nationalities (French, British, Germans, etc). As a consequence, it could be argued that we analysed just two of the other several characteristics/factors (gender, income, length of flights, etc) that can influence the consumption of food and beverage services and the way they assess the importance of the different attributes of F&B services. Given the aims of the present study, we did not run any cluster analysis to identify different segments of travellers and describe their different priorities and preferences with regard to the consumption of food and beverages services in airport areas.

8. Future research

Aside from the limitations just discussed, the present study does highlight several possible future research paths.

On the one hand, future research should investigate more in depth the characteristics and factors that can influence the importance assigned by consumers to the different attributes of F&B services. On the other hand, it could also be interesting to carry out a cluster analysis by using the same sample we used in the present study to identify different segments of travellers and describe their different priorities and preferences with regard to the consumption of food and beverages services in airport areas, thus contributing to deepen the investigation of the attitudes and behaviours of leisure and business travellers when consuming F&B services in airports.

Furthermore, the study could be repeated in other airports in order to verify if its findings can be generalized and/or if they change because of some endogenous factors related to the research site (i.e., the typology of the airport based on the characteristics of its passengers the seasonality of tourism). It would also be interesting to collect data from tourists belonging to different nationalities in order to investigate whether differences based on the cultural background do exist and should be investigated via cross-cultural comparison.

Finally, seen that in recent years airports have been starting to target a broader range of consumers, namely passengers, visitors, passengers' relatives, resident, workers at the airport and in the surrounding areas (Halpern et al., 2012), future research could/should be carried out to investigate the food & beverage consumption behavior of all the aforementioned type of target. Indeed, according to Echevarne (2008), in order for an airport to be able to develop a successful retailing strategy, it therefore needs to know what use the different groups of passengers make of the airport's commercial offerings.

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