Es mucho más

Aldeasa brings ‘much more’ to Barajas Airport’s new T4

The Moodie Report was privileged to be the first industry media to view Aldeasa’s impressive retail offer at Madrid Barajas Airport’s stunning new T4 which opened in February. We toured the facility with Lorenzo de Benito, Aldeasa’s National Commercial Sales Manager and twice, independently, since. He believes that T4 represents a new pinnacle of achievement for Aldeasa, and we think he’s right. By Martin Moodie.

This project has transformed Aldeasa and will continue to transform Aldeasa,” says Aldeasa National Commercial Sales Manager Lorenzo de Benito proudly.

He’s talking about the Spanish travel retailer’s elegantly impressive offer at Madrid Barajas’ New Airport Terminal Four, a facility that has revolutionised the look, capacity and performance of the Spanish capital’s hitherto overcrowded gateway.

It’s a stunning new building, bright, open and airy. Sunlight is an integral element, a natural feature reinforced by the canary yellow colours that dominate the airport – and which are mirrored in Aldeasa’s vibrant new logo.

Glass walls open the terminal to the runways outside, offering splendid views of the waiting aircraft and the hills beyond. High above the passenger walkways the undersides of the roofs are lined spectacularly with bamboo slats – a beautiful and wholly unexpected touch.

The €6.2 billion project will allow Barajas to become Europe’s second-busiest airport after London Heathrow and the tenth busiest in the world. Having faced chronic capacity pressures for years, T4 doubles the passenger volume that can be handled at Barajas from 35 million to 70 million, with aircraft able to operate from any of the four runways. It features 470,261sq m of space divided into six levels – three above ground and three below.
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Aldeasa T4 at a glance

- Total space: 8,000sq m
- €20 million investment
- Over 200 new employees hired
- 1,200sq m dedicated to luxury brands
- Largest shopping area of all Spanish airports
- Price range: €1 to €24,000
- 19 Aldeasa stores in Main and Satellite terminals

Note: Across all Barajas terminals Aldeasa will feature almost 16,000sq m of retail space, 57 stores, over 1,500 brands and close to 200,000 different products

For Aldeasa, Barajas’ duty free and travel retailer for the past 30 years, the new terminal offers vastly expanded shopping space. This has allowed the company to develop what it claims to be “the widest and most competitive offer amongst all Spanish airports”. So let’s examine that claim in detail.

Aldeasa’s long-term tenure at Barajas

Founded in 1974, Aldeasa beganretailing at Madrid Barajas Airport in 1976 with two stores in the International Terminal. It has operated there ever since.

The retailer has 42 stores in the existing T1, T2 and T3 but is entering a whole new league with T4, where it is managing close to 8,000sq m of additional space. Here it is incorporating a range of new business concepts integrated within a pioneering new structure and a complete new shop design.

That has involved an investment of around €20 million and, to optimise the offer, a survey of 1,000 Barajas passengers across eight nationalities. Aldeasa concluded from this landmark survey that different business concepts were necessary within the retail complex in order to maximise penetration across all consumer groups.

The seeds of T4 were sown ten years ago, says De Benito, as airport authority AENA debated how to respond to Barajas’ capacity constraints. A new airport, an extension of existing terminals or the building of a complementary terminal were all debated – the latter ultimately being the option chosen.

This set in motion a decade-long project that culminated in the inauguration on 4 February this year of a terminal that De Benito describes as “a monument to Spain and to Madrid”. In passenger terms, AENA has released the steam from a pressure cooker that was ready to burst. Now it should be able to cope adequately with growth for the next 25 years at least.

“They didn’t simply want an airport,” says De Benito, “they wanted something that was new, modern and functional as well as being a good experience for the travellers right from the beginning.” And, crucially, AENA also decided that retail and other non-aeronautical activities would play an integral role, from concept through to execution.

Convenience was the watchword for
The Mona Lisa, Vitruvian Man, helicopters and a thousand more inventions that left their mark on history are the accomplishments of a man who used time wisely to create and challenge the future, surpassing all that was known before him. Like Leonardo, we join forces with time to age for more than twenty years in the Solera System, the best Rum in the world.

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Aldeasa describes its objective for the New Airport Terminal Four as delivering a service which provides “an easier, faster and more convenient purchase”. The shops have wide visibility and easy access. And Aldeasa pledges to satisfy travellers’ needs, from the most basic to the most sophisticated, with a broad variety of offers and prices. The company also promises one of the most extensive and diverse shopping offers of any European airport.

T4 handles domestic and Schengen travellers, who use the main terminal, and non-EU international passengers, who are transported to the satellite after the common check-in and security clearance. A ‘people mover’ provides a service every two minutes for the four-minute journey to the satellite.

Despite the passenger traffic imbalance between the main terminal and the satellite, sales are not vastly dissimilar. Because of the much higher [non-EU] spend of the satellite, over 40% of sales are generated there, driven by a much higher spend per passenger.

The consumer base involves “a very European and Latin profile”, De Benito points out. Spanish passengers dom-

### Les Boutiques: The largest area for luxury brands in any Spanish airport represents a qualitative leap for Aldeasa

all commercial services from retail to F&B. Aldeasa was involved in a particularly close collaboration with AENA from around 2002 to create a ‘retail experience’ at T4. Over the past 18 months alone the project has involved more than 50 people from Aldeasa as well as many external companies and consultants, De Benito says.

### New design for a new terminal

Aldeasa says it is committed to a new design concept: one which provides a rapid and easy purchase for the passenger in each shopping area – all characterised by wide visibility, easy physical access and the simple location of the product and the offer.

Key elements include:

- Avoidance of ‘monochromatic’ stores, playing with colour and redesigning the furnishings which are personalised by family. For example with fragrances the exterior look has been updated so that pastel colours are predominant. The display of products and brands has also been reorganised in order to offer better service to the traveller

- The yellow porticos identify the entrances to the stores. Once inside travellers can guide themselves to each shopping area thanks to access directories and sets of colours and shapes designed to facilitate a quicker purchase

- The ceilings and floors for each category have also been redesigned.

### Aldeasa Spanish airport sales 2000–2004

<table>
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<th>Year</th>
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<td>323</td>
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</tr>
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Note: *Including Canary Island sales under a special fiscal regime

Source: Aldeasa
inate, representing around 60% of total numbers, followed by British, German and French. Asian nationalities such as Japanese, South Koreans and Taiwanese are not significant in total passenger terms, though their spends are high. Spain now has Approved Destination Status for Chinese travellers and Aldeasa is hopeful that this may result in a vibrant new consumer base in the future.

Once through security passengers gather in a central plaza area, which features the main commercial services – Aldeasa’s shops, F&B services and non-Aldeasa specialist stores such as a Relay news and bookshop, and Puma and Mango boutiques. Additionally Aldeasa offers Last Minute stores called ‘The Express Shop’ at the extremities of both the main terminal and the satellite.

De Benito says that Aldeasa had certain key principles in mind when it developed its retail programme. One was to be in the right locations; another was to create “big commercial concepts” based on a diverse offer and clear well-ordered themes. “This is the result of a concerted team effort in which AENA’s participation has been a key factor,” he says.

“We decided to simplify things,” he adds, “so we created the core business offer ‘The Shop’, which is the traditional duty free – this is the main builder of the business. We also wanted to create something more in line with a commercial centre, which we called ‘Fashion & Fun’. And we acknowledged the need for a special environment for luxury in ‘Les Boutiques’. Those are the three basic concepts in both the principle terminal and the satellite.”

A triangular approach
The Shop, Fashion & Fun and Les Boutiques offer complementary categories, together representing what Aldeasa describes as the “purchasing triangle”.

Here’s a snapshot of the three:

**The Shop:** This groups the traditional duty free products: perfumes and cosmetics, wines and spirits, foodstuffs, tobacco and some accessories. There are three shops with an overall area of 3,100sq m.

Here the key category is fragrances – and it shows. With the sector representing nearly 50% of sales Aldeasa had to get it right, and the resultant 650sq m of space in the main terminal store (more in the satellite) does exactly that.

The new concept is designed to be light, modern and innovative. The big brands are the drawcards and are all subtly personalised within bright pastel (pink, white and blue to differentiate areas) stores – buoyed by natural light from outside.

“We have created our own personality here,” says De Benito enthusiastically. “The premium brands are to the front and the rest of the brands are on the back walls. We
have taken Aldeasa’s generic fixtures and had them personalised to the brands."

Yellow ‘cuts’ or dividers are cleverly used in the back walls to highlight areas such as travel retail exclusives and special price offers. The stores also feature Skincare for Men, treatment areas for women and gondolas with large and striking visuals (such as the new David Beckham fragrance Instinct).

Uniquely perhaps, it’s the sales counter that stands out most. This dazzling pink area, lit with theatrical spotlights, is a treat in itself.

The staff look elegant in their peach Aldeasa uniforms while behind them a back wall neatly showcases a collection of fragrance bottles in art-house fashion, the colours subtly setting one another off. It’s a nice touch that lifts the whole store out of the realms of the familiar.

Sight lines are also key. “You have visibility across almost the whole shop,” says De Benito with a sweep of his arm.

From fragrances and cosmetics the traveller walks through to liquor, tobacco and confectionery via a transition area featuring watches and sunglasses. In the main terminal a prominent Swatch personalised unit dominates, followed by what the signs declare as ‘Y mucho más’ – ‘and much more’.

Confectionery features a mix of international and Spanish items. Generic Aldeasa fixtures line the floor while the back walls are personalised with the big names. There is some segmentation by impulse, gift and convenience purchases as well as collections from several of the major brands. Food represents around 11–12% of total sales.

Any aficionado of Spanish food will admire the section dedicated to local foodstuffs. There are some splendid
hams, oils and cheeses on show, beautifully presented and with a price point to suit everyone. Nearby there’s a strong line-up of around 350 Spanish wines ranging from old Riojas to new-generation cava.

The liquor and tobacco area again features a mixture of generic gondolas and dedicated category units, for example for white spirits, with big brand personalisation from companies such as Diageo and the major tobacco houses. Wines and spirits represent around 13–14% of the mix, and tobacco 25%.

The tobacco sections are highlighted by the walk-in humidors. In the main terminal Aldeasa offers its own La Cava del Cigarrro while the satellite shop features a major first with the retailer’s inaugural Casa del Habano in Spain as well as in European airports.

Fashion & Fun: This comprises three concepts:

- **Fashion:** featuring fashion, leathergoods, accessories and footwear, it is the largest dedicated fashion section in a Spanish airport
- **Kids:** A unique area that combines for the first time in an Aldeasa store both clothing and toys for children in an environment alive with vibrant colours and shapes
- **Sport & Music:** Offering sports-related items and clothing, music and electronics, it is described as “the creation of a leisure offer in a modern environment”.

The 882sq m Fashion & Fun store in the main terminal, for example, features Aldeasa kids, Aldeasa sports and music and Aldeasa fashion, including jewellery. It has a generic fashion area, leathergoods, children’s items, fashion, music and electronics, toys, sports-related products and accessories. There’s something here for most tastes and budgets, from entry price-points to mid-range and higher.

Consumer technology items – especially mobile phones, digital cameras, Walkmans and CD players – are already doing very well, De Benito says. Small jewellery items from the likes of Swarovski, Lalique and Majorica all feature elegant personalisation and are also prospering.

Tous occupies a premium position in a nicely-presented display while leathergoods features Lacoste, Samsonite (the company’s impressive new range) and other brands.

It’s a neat, uncomplicated store, and everywhere Aldeasa’s bright new logo is to the fore. “The Aldeasa yellow is common to making key elements of the offer stand out as well as underlining promotions and space,” De Benito points out.

**Les Boutiques:** Described as the largest area for luxury brands in any Spanish airport, this upscale environment has specialist corners and areas for a range of top brands such as Cartier, Loewe, Omega, Bvlgari, Montblanc, Furla, Pedro del Hierro, Ferragamo, Bally and many more.

Two elegant shops – 394sq m in the main terminal, 720sq m in the satellite – bring a classy yet accessible dimension to the retail mix. Essentially the stores are segmented into two main areas: high-end names such as Cartier, Loewe, Omega, Bvlgari, Carrera, all with dedicated space supported by generic Aldeasa furniture featuring a range of other watch and writing instruments brands; then there’s a more fashion-orientated focus with names such as
Sparkling Americans...

Make any occasion festive with Zonin’s selection of vivacious and stylish sparkling wines. Enjoy the elegantly fresh and dry Prosecco Special Cuvée Brut, or the rounder, fruitier flavors and aromas of Moscato Spumante and its refined sibling, Asti. For a special treat, allow yourself to be seduced by the floral scented, rose-tinted allure of Baccorosa. Give your party extra sparkle... with Zonin!
Our internationally recognised brands will go down well at any occasion. From the award-winning Kronenbourg 1664 to Newcastle Brown Ale, the fastest growing premium ale in America, our portfolio provides you with the brands people love to drink.
Hackett (making its Aldeasa debut), Ferragamo, Pedro del Hierro, Burberry and Longchamp.

The satellite shop’s increased space allows brands such as Tous and Hugo Boss more breathing space in the form of boutiques rather than shop-in-shops. Other top names are Paul & Shark, Tumi (another making its debut with Aldeasa) while Loewe and Cartier anchor the outlet. There are also a range of classic European brands, including Longchamp, Lamarthe and Furla.

From Destination to Last Minute shopping

Thinking España: Developed by Aldeasa’s Palaces & Museums Division, this concept integrates cultural as well as mainstream souvenirs. “It is a commitment to a destination product which breaks away from traditional tourist selling,” says De Benito, pointing out that Aldeasa has the capacity to create owned products through its specialist division.

The retailer is an ardent champion of the concept of A Sense of Place. The ‘Thinking’ banner will be adapted to other locations such as Kuwait, Jordan, Vancouver and Barcelona, an important expression of Aldeasa’s determination to be a global retailer that understands and reflects local crafts, foodstuffs, wines and cultures.

Thinking España makes a refreshing change from the lacklustre souvenir stores that so often masquerade as ‘destination merchandise’ retailing in this business. The mix of price points and the diversity and authenticity of the offer makes the concept an outstanding foil to the mainstream shops opened a few weeks earlier.

The Express Shop: A concept designed for last-minute purchases in which highlights of the traditional duty free range can be found as well as selected accessories.

There are four variations of The Express Shop with an average size of 130–140sq m. Again fragrances on the back walls draw consumers into the stores, with the familiar yellow dividers from the main shops once more used to highlight special offers.

Basic: This project, another first, is expected to open this March. It will feature an offer specially tailored to the growing numbers of low-cost carrier travellers using Barajas. No further details were available as we went to press.

“The whole Aldeasa organisation has been involved with the creation and the roll-out of this business,” De Benito explains. As a result the company plans to translate the best of what it has done at Barajas onto the international
That sense of ownership merges with considerable pride at the sheer achievement of building some 8,000sq m of retail space in under three months – the time frame from green light to inauguration.

“We have been working on the planning for two years with all the processes involved – shop construction, logistics and so on – but it has been executed in less than three months,” De Benito recalls. “So logistically it was very demanding indeed.

“We agreed with AENA that retail would play a prefer-

ential role in terms of passenger flow and as you can see we have achieved that. The passengers can see the shops before they see anything else, including food service and the gates.”

Indeed such is the visibility of the shops that Aldeasa is expecting very high footfall rates – “potentially 100%” – leading to much improved store penetration rates. “Around 40% [of the stores] are open access,” says De Benito, pointing out that a complete walkthrough operation was impossible due to building restrictions that necessitated back walls.

It may not be walkthrough but there is certainly a lot of ‘see through’ with excellent use of glass walls and multi-entrances to ensure ease of access.

Most importantly, it works. De Benito believes the quality of the stores offers an excellent shop window for Aldeasa’s capabilities internationally. And without giving numbers he says early trading results are comfortably on budget.

So what’s the verdict from a consumer perspective? Only time will tell in spending terms but first impressions are certainly favourable. The shops are spacious, stylish and there’s a surprising diversity of products within the ‘triangle’.

For the first-time visitor to Barajas it makes for a pleasant voyage of discovery, allowing the consumer – in the words of another of the Aldeasa’s shopping slogans – to ‘Mira descubre siente’ – see it, find it, feel it’.

“We’re very proud,” concludes De Benito. “We have been working hard. As a marker [internationally] it’s a transforming product for the company. We have developed new concepts and tested new brands. In the new Aldeasa it’s a key expression of success – for our airport partners, for our suppliers and for our passengers.”

“And,” he concludes with a smile, “you can say what you like about the Spanish – but the fact is we did it.”