

Airport Retail Survey & Luxury Trends 2015–2016

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Asia-Pacific: Includes Asia and Australia.

Rest of the World: Includes the Middle East, Africa, and South America.

Retailing: Retailing is the sale of goods and services from individuals or businesses to the end-user.

Airport retail outlets: These outlets are specifically designed within the airport retail space with an intention to sell goods directly to the end-user.

Duty-free shops: These are defined as retail outlets that are exempt from the payment of certain local or national taxes and duties, on goods sold to travelers who will take them out of the country.

Duty paid shops: These are the shops in which travelers need to pay tax on the goods they purchase. Tax may include the custom duty, local taxes, and any other expenses incurred while shipping the product from the retail outlet to traveler's location.



Objectives:

This “Hot Topic” report draws on the expertise of Conlumino’s exclusive panel of global travelers to provide the latest thinking about the prevailing trends in airport retailing and explores how business dynamics are set to change in 2015–2016. This report highlights key factors influencing customer opinion, identifies the main purpose behind air travel, and pin points preferred product categories. In addition, it indicates popular brands likely to be purchased by travelers over the next year and analyzes expenditure on product categories.

Methodology:

This report is the result of an extensive survey drawn from Conlumino’s exclusive panel. These respondents are drawn from the Conlumino Industry Insight Panel, an exclusive panel covering over two million professionals worldwide. Although respondents are all part of the global business community we asked them about their general air travel spending habits to derive general consumer trends in the channel, as they are typical consumers who have a wide variety of lifestyles and incomes.

Comprehensive desk research was also conducted across industry sources, with a focus on examining preferred travel destinations, shopping frequency, purchasing patterns, and median expenditure on products purchased at airport retail stores. In addition, the report examines time spent at airport retail stores. The report also provides access to information categorized by age, gender, income levels, and region.

Sample size:

The research source in this report is based on the surveyed opinions and expectations of 1573 global travelers in February 2015.

Profile of respondents



Travel frequency (International)	%
Never	7%
1–10	68%
11–20	14%
21–30	5%
More than 30	6%

Travel frequency (Domestic)	%
Never	30%
1–10	52%
11–20	10%
21–30	3%
More than 30	5%

Age	%
18–24 years	2%
25–44 years	34%
45–54 years	29%
55–64years	25%
65+ years	10%
Don't want to mention	0%

Gender	%
Male	73%
Female	26%
Don't want to mention	1%

Income	%
Less than US\$20,000	5%
US\$20,000–US\$40,000	11%
US\$40,001–US\$60,000	12%
US\$60,001–US\$80,000	12%
US\$80,001–US\$100,000	14%
US\$100,000–US\$150,000	17%
More than US\$150,000	16%
Don't want to mention	13%

Region	%
North America	19%
Europe	53%
Asia-Pacific	16%
Rest of the World	12%

Key Findings



- Overall, 60% of travelers spend 15 min or less per visit to a duty paid airport retail outlet
- The majority of respondents aged more than 45 years bought magazines and newspapers from airport retail outlets in the last year (2014)
- Respondents incurred significant expenditure on precious jewelry, briefcases, men’s bags, and handbags during their visits to airport retail outlets
- In total, 92% of travelers intend to buy Dior products at an airport departure/duty-free area over the next year (2015)
- Competitive prices and the availability of luxury brands at discounted prices are key factors motivating travelers to purchase at airport retail stores
- The majority of respondents prefer to buy duty-free alcoholic beverages at an airport over the next year
- Airline travelers favored London Heathrow Airport and Dubai International Airport for the presence of global luxury brands across the retail outlets

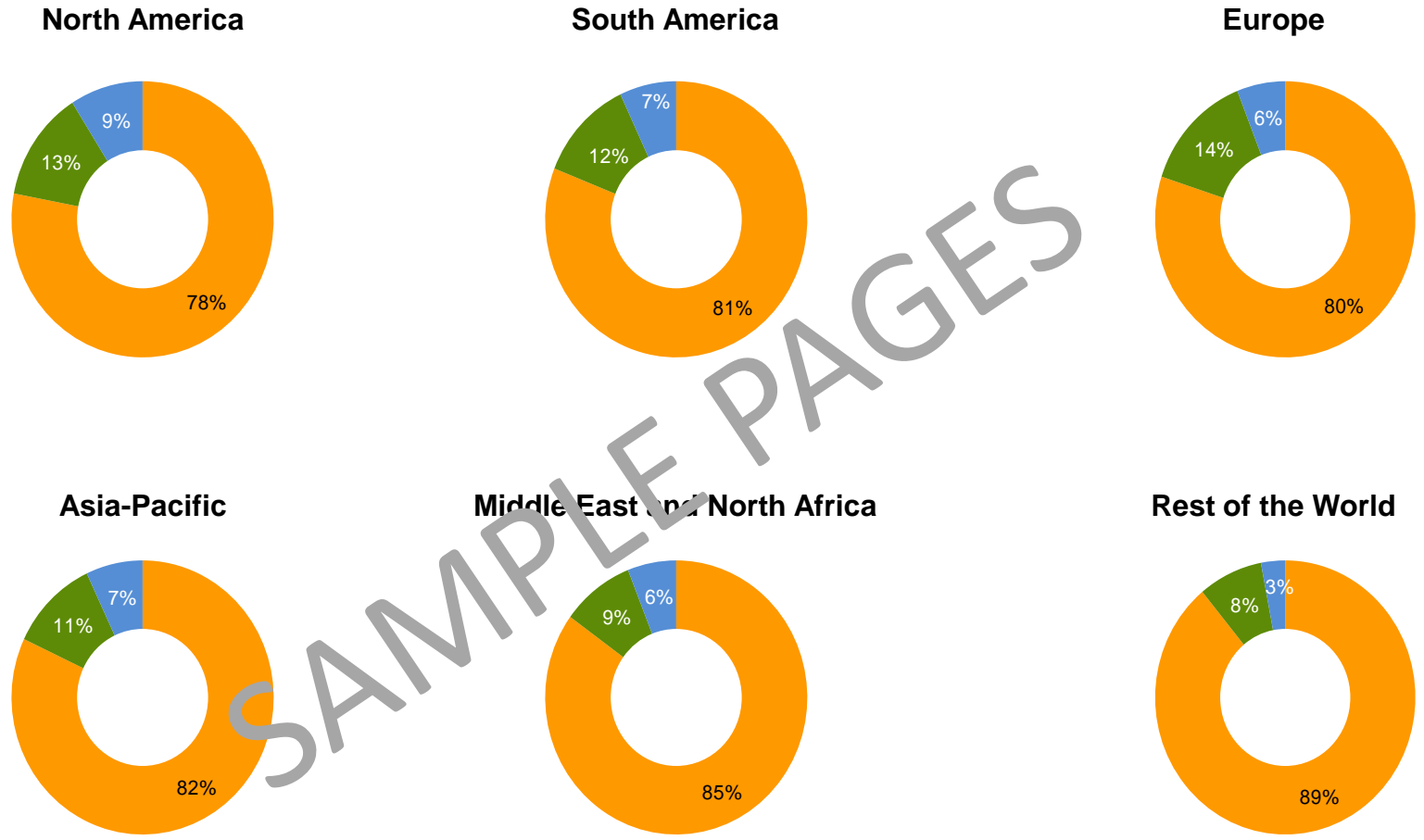
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Highest percentage of respondents have traveled XXXXX to different locations across XXXXX during the last year



In the last year, which of the following locations have you traveled to by air, and please specify the frequency of travel? (Analysis of responses across the globe)

- XXXXX
- XXXXX
- XXXXX



Regardless of gender, the majority of travelers spend XX min or less at duty paid airport retail outlets



On average, how much time do you spend per visit at an airport retail outlet? (Analysis of duty paid responses by gender)



Of male travelers, 63% spend XX min or less per visit at a duty paid airport retail outlet
The majority of male and female respondents highlighted that they spend XX min or less per visit to a duty paid retail store. Additionally, 26% and 29% of male and female travelers, respectively, spend XX-XX min per visit to duty paid airport retail outlets.

Overall, XX% of travelers purchased XXXXX products at an airport departure/duty-free area over the past year



Which of these brands have you bought from over the past year?

Brands	At an Airport Departure/Duty Free area	In a regular store, tax/duty paid	Online, tax/duty paid
Adidas	XX%	XX%	XX%
Alfred Dunhill	XX%	XX%	XX%
Armani/Emporio Armani/Armani Jeans/Armani AX	XX%	XX%	XX%
Balenciaga	XX%	XX%	XX%
Bottega Veneta	XX%	XX%	XX%
Burberry	XX%	XX%	XX%
Bvlgari	XX%	XX%	XX%
Cartier	XX%	XX%	XX%
Chanel	XX%	XX%	XX%
CK Jeans	XX%	XX%	XX%
Coach	XX%	XX%	XX%
Dior	XX%	XX%	XX%
Emporio Armani/Armani Jeans	XX%	XX%	XX%
Furla	XX%	XX%	XX%
Givenchy	XX%	XX%	XX%
Gucci	XX%	XX%	XX%
Hermes	XX%	XX%	XX%
Hugo Boss	XX%	XX%	XX%
IWC	XX%	XX%	XX%
Jimmy Choo	XX%	XX%	XX%
Lacoste	XX%	XX%	XX%
Longchamp	XX%	XX%	XX%
Loro Piana	XX%	XX%	XX%

Reasons to buy this report



- The report analyzes the shopping pattern of travelers at airport retail stores and evaluates the average time spent per visit to an airport retail outlet
- The report identifies top selling retail products to enable airport retail outlets to allocate their marketing activities and budgets effectively
- The report provides specific insight on luxury brands, which helps airport retailers to restructure their operations, and store layout as per the passengers' preference towards popular brands
- The report guides airport retailers to understand the key factors that motivate travelers to purchase at airport retail stores
- The report provides information about duty-free product purchasing trends at airport retail outlets

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Conlumino Global Retail offers a comprehensive 360° view of the retail landscape. A team of analysts, with more than 200 years of combined experience, help you identify and understand the most current retail trends. Last year hundreds of retail businesses across the globe used our research to make critical business decisions.

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