

UK Tobacco Display Area

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May 2010

UK Tobacco Display Ban



TOBACCO CONTROL IMPLEMENTATION POST-FCTC

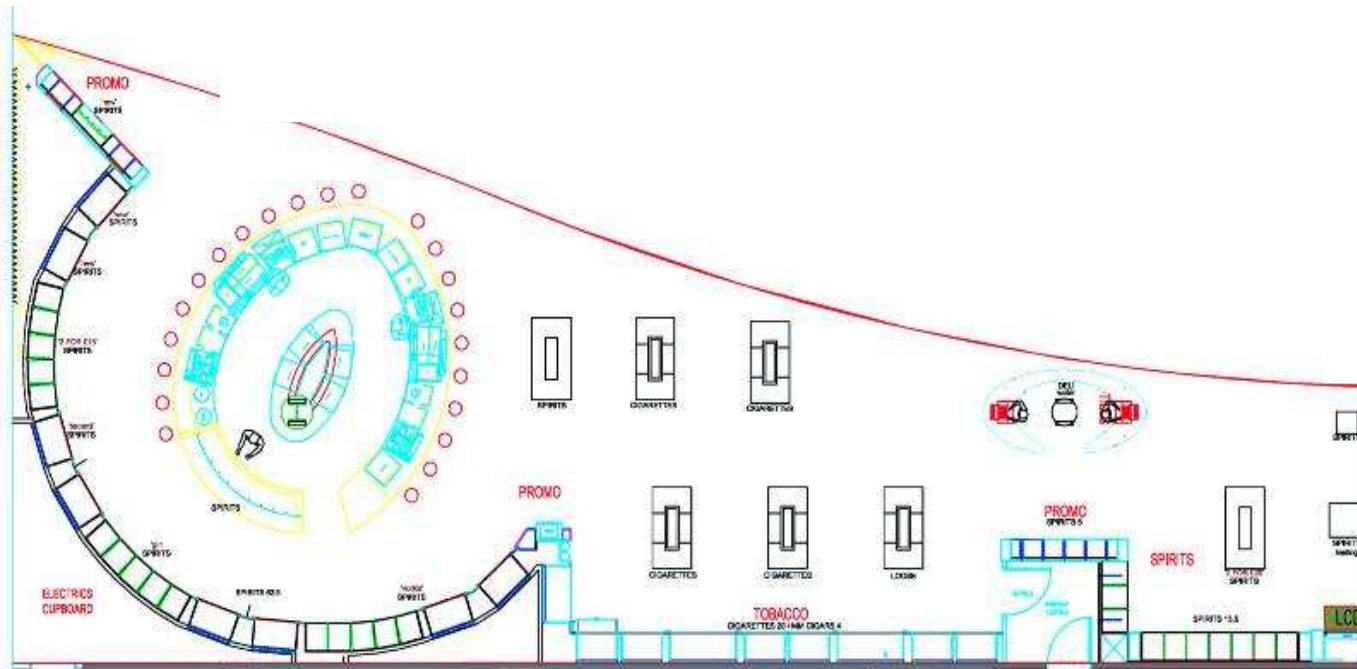
- No tobacco to be on display
- No self-select – assisted service only and on request

IMPLEMENTATION

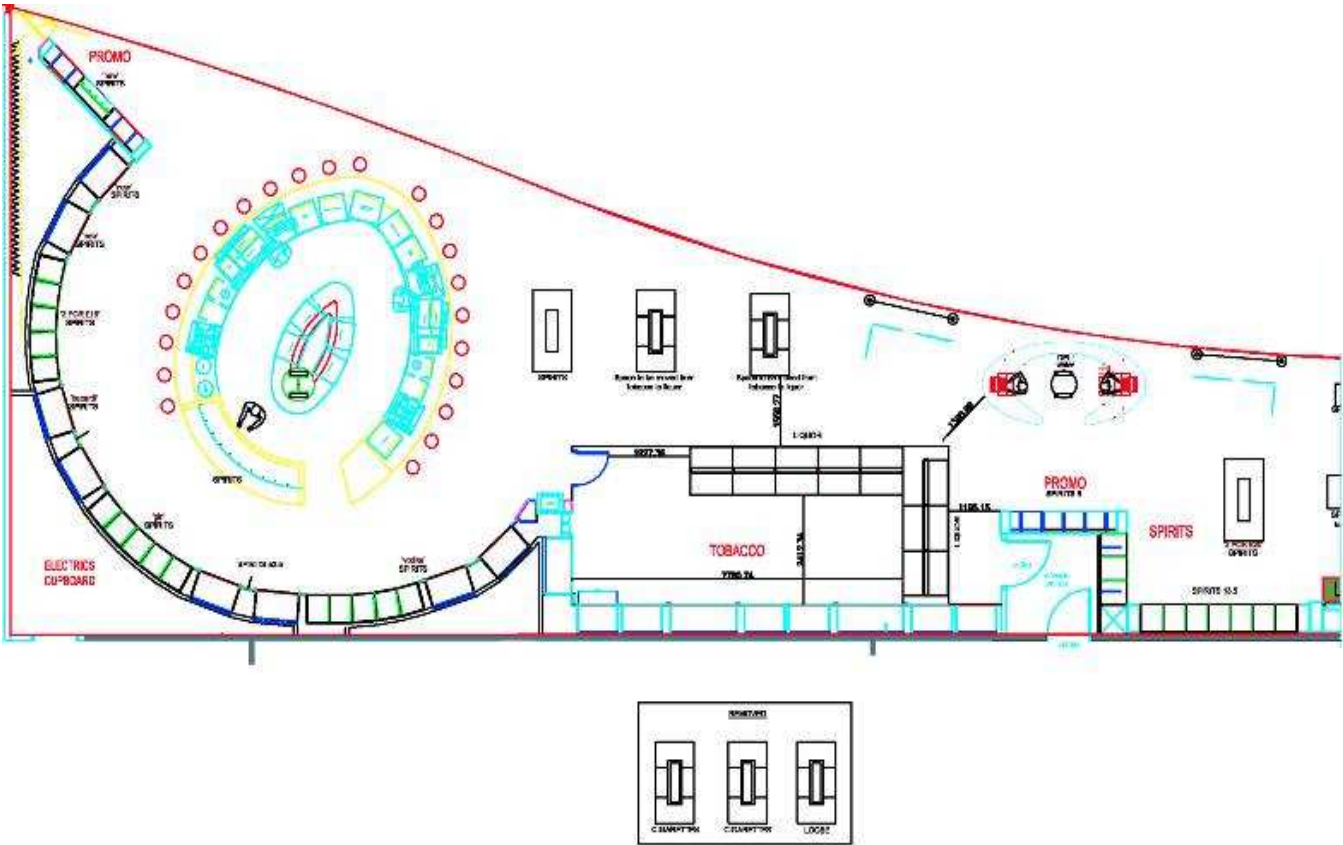
- All stores over 280sqm by 2011
- All other stores by 2013



Terminal 5: Main Shop Current Layout



Terminal 5: Main Store Tobacco Option



What we have achieved



Starting point

- Under the counter
- No visibility
- > 280sqm by 2011
- < 280sqm by 2013



What we have achieved



Starting point

- Under the counter
- No visibility
- > 280sqm by 2011
- < 280sqm by 2013

Result

- Tobacco display area
- Product only visible within area
- All stores by 2013

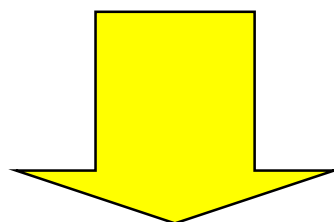


Tobacco Display Area



IMPACT ON RETAIL REVENUES

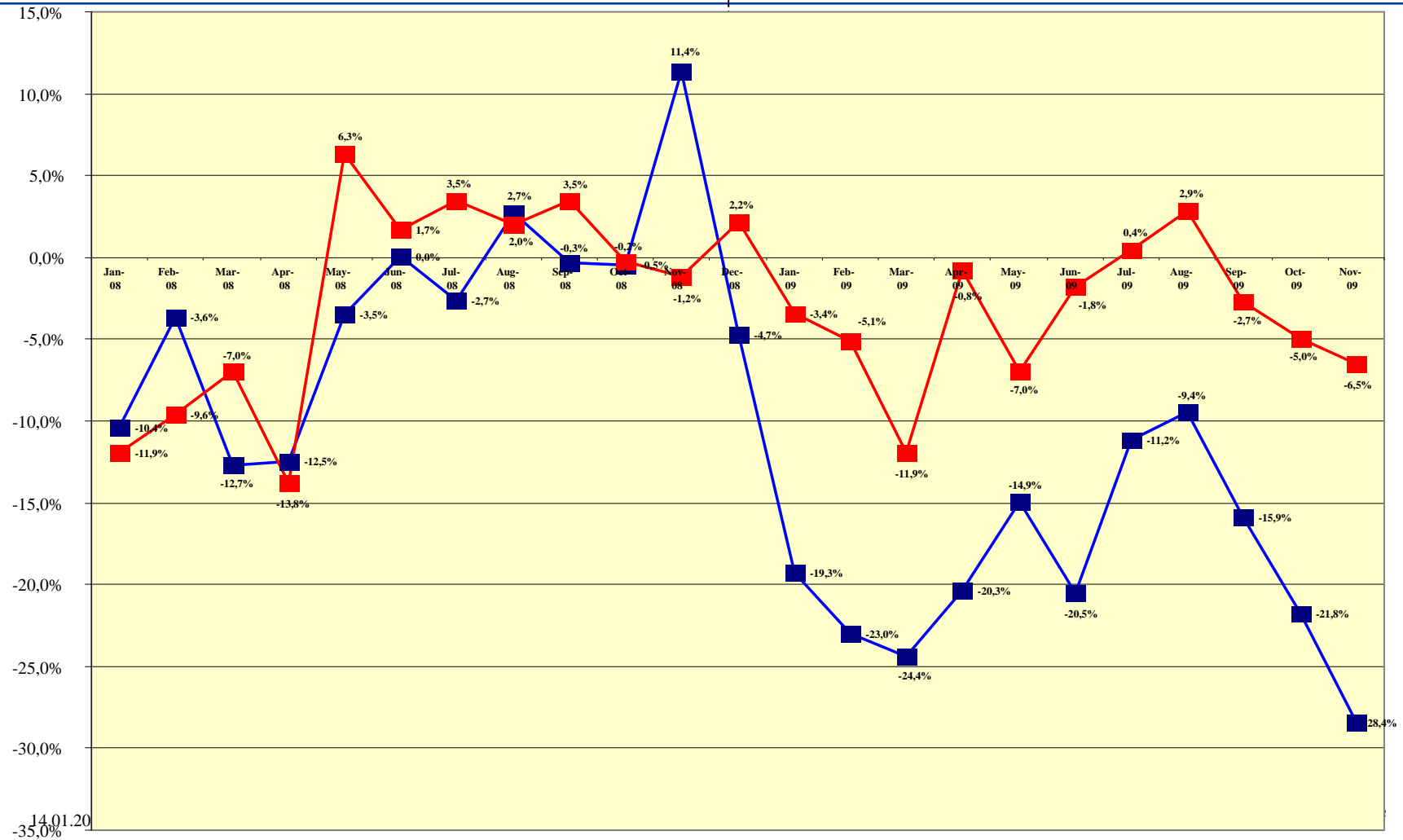
- Up to **-40% decrease in revenues** at airport shops
- At one UK regional airport, **33% of surveyed Ryanair passengers** said they would not buy duty-free because of the one-bag rule



*Business model of regional airports under pressure:
low aeronautical charges
AND
low non-aeronautical income?*

Retail Turnover Duty Free/Travel Value vs. Traffic

January 2008 until November 2009 (Month to Month)



Net-Sales Passengers

