



Centre for Asia Pacific Aviation



CAPA India Travel Retail Report 2011

Objective and actionable analysis to support
informed investment and business planning

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Air travel in India is one of the fastest growing markets in the world. Between 2000 and 2010, airport traffic increased 3.5 fold. CAPA projects that the next decade will see similar growth, this time off a much larger base. By 2020, India's airports are expected to handle 450 million passengers per annum, making it the 3rd largest market in the world.

For any business involved in travel retail, this is a market that cannot be ignored. An economy growing at 9% per annum, a multi-billion dollar airport modernisation program driven by private sector investment, combined with rapid traffic growth and an increasingly sophisticated Indian traveller make this one of the most exciting opportunities in global retail.

But Indian aviation is dynamic and complex, with unique local conditions, all in a rapid state of change. The country's travel retail sector is at a nascent stage of development and the Indian consumer is incredibly diverse. The purchasing decision drivers for the corporate executive from Mumbai are vastly different from the expatriate labourer working in the Gulf or the first time traveller from Chennai.

And consumer behaviour is also evolving rapidly as a result of demographic and socio-economic developments. Urbanisation, the influence of media, changing tastes, aspirations and attitudes as a result of growing wealth, as well as the influx of millions of first time travellers will continue to drive changes that the travel retail industry needs to keep abreast of.

The objective of this groundbreaking report is to support planning and investment decisions by global and Indian airport operators, retailers, brands and investors with an interest in travel retail. CAPA's deep understanding of the overall structure and direction of the Indian aviation sector, combined with an exhaustive quantitative and qualitative consumer survey will provide unprecedented insights into the outlook for Indian travel retail.

Why should I buy this report?

- To gain invaluable insights into the structure and direction of Indian aviation, including traffic and retail forecasts.
- To understand the Indian traveller - includes the largest ever survey of the Indian travel retail sector – 8,000 respondents and extensive focus group analysis.
- To support planning, design and development of appropriate travel retail products and formats for the market, be it duty free, duty paid and inflight sales.
- To support your business case, maximise investment returns and save tens of thousands of dollars in research and analysis.

Coverage of Report

- Historical overview of Indian aviation;
- Review of the current regulatory and policy framework;
- Trends in bilateral policy and international services;
- Profiles of the scheduled Indian airlines;
- Detailed analysis of the ten largest airports;
- Identification of the key emerging cities for retail;
- Experience of private sector modernisation programs;
- Planned investment in brown and greenfield airports;
- Analysis of the drivers of business, tourism and investment;
- Traffic forecasts to 2020 for metro airports, by:
 - Domestic and international;
 - Low cost and full services;
 - Shorthaul and longhaul;
- Experience to date of retailers and global brands;
- CAPA analysis of airport operator performance;
- Assessment of industry partnerships and cooperation;
- Opportunities for growth at AAI airports;
- Airports expected to achieve international status;
- Trends in airport retail and non-aero revenues;
- Drivers of domestic and international retail;
- Opportunities for Inflight Sales;
- Impact of LCCs on retail and F&B;
- Retail revenue forecasts to 2020 for metro airports;
- Airport retail and non-aero strategies;
- Analysis of arrivals and departures retail areas;
- Impact of LAG rules at primary hubs to/from India;
- Impact of emerging restrictions on tobacco sales;
- Indian tax and fiscal regulations affecting travel retail;
- Detailed demographic analysis of retail behaviour;
- Variations by passenger segment and market.



Consumer Retail Survey

The Report will include a comprehensive survey of domestic and international passengers at Indian airports to support analysis of differences in purchasing decisions by market, nationality, key demographics, reason for travel, class of travel and maturity of traveller. Survey features include:

- More than 8,000 respondents;
- Conducted across the 10 largest travel markets in India;
- Complemented by qualitative focus groups;
- Exclusive focus groups on premium traveller behaviour;
- Highlighting emerging market segments such as first time travellers, children and youth, female travellers and family groups;
- Identifying issues related to what they buy, why they buy, who do they buy for, what influences their choice of brand, whether they are satisfied with the current offer in terms of product, price, quality, service and environment.

This invaluable report will for the first time reveal an accurate and realistic picture of the travel retail sector in India – both duty free and duty paid. The consumer section alone will save any travel retail business tens of thousands of dollars in research.

About CAPA India

CAPA India is a division of the Centre for Asia Pacific Aviation, the globally recognised provider of industry research and analysis. The India practice offers an extensive range of consulting and advisory services.

CAPA's activities are strongly research-driven, we believe that effective advice and analysis can only be achieved through close collaboration and consultation with industry. Our market analysis and data services are used to support strategic decision making at hundreds of the most recognised organisations in the global aviation industry.

In India, most of the leading airlines, airports, suppliers and investors have turned to us for sound advice. For foreign companies and investors we can assist with the development of market entry strategies, customised intelligence and data, opportunity identification and public and government affairs.

CAPA India's breadth of knowledge, research capabilities, databases and extensive contacts with key stakeholders in government and industry are unmatched. Our undoubted strengths are in the fact that we continuously monitor developments in the industry across every point in the value chain.

In addition to the Indian Travel Retail Report, other recent and upcoming studies include Business & General Aviation; Airline Distribution; Maintenance, Repair & Overhaul; Aerospace Manufacturing; Cargo & Logistics and Ancillary Revenue.

1st

Projected global ranking of the growth rate of Indian aviation over the next 20 years

3rd

Projected global ranking of the size of the Indian aviation industry by 2020

140 million

Passengers handled by the Indian airport system in 2010

450 million

CAPA projection for the number of passengers to be handled by the Indian airport system in 2020

US\$30bn

Projected investment in Indian airport expansion programs over the next 15 years

Order Form

CAPA's India Travel Retail Report 2011 will be released in hard copy format on 30 September 2011. This groundbreaking report is now available for purchase, with significant discounts available for advance orders and for APTRA and TFWA members.

Early Bird Special: Valid for payments received on/before 30 June 2011.

Advance Purchase: Valid for payments received from 1 July until 29 September 2011.

Regular: Valid for payments received on/after 30 September 2011.

Indian Companies: Companies based in India may make local payments in Indian Rupees converted at the fixed rate of US\$1 = INR45.3. In such instances the payments will be inclusive of service tax.

Multiple Copies: Additional discounts will be available for orders for multiple copies of the report. A complimentary update on the status of the airline and airport sectors will be provided after 12 months to subscribers ordering 5 or more copies.

Release Date: A hard copy version of the report will be couriered to the nominated address on 30 September 2011. The rates below include shipping costs.

	EARLY BIRD SPECIAL deadline 30 Jun 40% discount	ADVANCE PURCHASE deadline 29 Sep 20% discount	REGULAR on/after 30 Sep
Standard	US\$9,495	US\$11,995	US\$14,495
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