FUTURE READY DESIGN



1. Pick a category

2. Say why you like it

Who We Are & What We Do

Hello. We are Portland

Portland is an award-winning, multi-disciplinary design consultancy specialising in the retail, leisure and travel sectors.

We boast an integrated team of insight and trends specialists, branding specialists, interior, architectural and graphic designers.



1. Pick a category

2. Say why you like it

Who We Are & What We Do

We are airport and travel retail specialists. Our international experience covers the whole spectrum of projects from airport commercial strategy and planning, to the design of commercial and public spaces including retail design guidelines, signage and wayfinding and environmental branding and graphics.

Our Approach

Portland Design's standalone Strategic Insights Unit (SIU) provides tailored consumer insights and trends research to give businesses an antenna to the future.

People

People - We dig deeper to understand consumer and shopper attitudes, motivations, behaviours and future expectations

Products

Products - We research the factors affecting consumers' product choices, decision-making and purchase behaviour



Places

Places – We investigate the factors that influence people's shopping destinations and retail environment preferences

Platforms

Platforms - We probe the multiple digital and physical touchpoints consumers use to connect with brands and retailers

Our Impact

By giving our clients, brands, retailers and operators an all-round understanding of current trends that drive consumer choices, the SIU helps brands become predictive businesses.

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Our aims for TFWA members

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To deliver biannual reports outlining new and emerging retail and consumer trends set to impact travel retail and duty-free in 2017 and beyond.

To provide a compelling, inspiring, insightdriven backdrop to what existing and future travellers will expect from duty-free and the travel retail experience.

Our reports are underpinned with

- Global and informed perspective
- Directional, original insights
- Insight driven strategic thinking
- Transformational output
- Commercial translation
- Visually impactful, clear and concise communications
- Expert opinion and insight that is easily accessible
- Relevant and future-proof directions and solutions
- New and emerging consumer and retail trends

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In this first TFWA Monitor report, we provide an in-depth analysis of Retail 4.0 – the 'fourth industrial revolution' – and why it's profoundly disrupting and transforming the traditional retail landscape.



We highlight how artificial intelligence (AI), virtual and augmented realities, machine learning and almost human robotics are creating opportunities for brands to achieve deeper, more intimate and personalised retail and brand experiences.



A recent analyst report from Citigroup suggests virtual and augmented reality could become a \$674 billion market by 2025.





We underscore why it will be essential for brands and organisations operating within travel retail to adopt new omnichannel retail strategies that incorporate the latest phygital and machine-led, automated shopping applications in-store.

660 million people in China have a smartphone and it is becoming their primary way to access information, entertainment, ideas and shopping.

Source: eMarketer





We uncover how young, sophisticated Millennials are leading a paradigm shift in Chinese consumers' attitudes towards outbound travel and overseas spending habits.

57% of Chinese millennials choose to travel independently, preferring travel freedom over tour group packages. The travel industry refers to these tourists as Free Independent Travellers (FITs).

Source: Nikkei Asian Review



We unvestigate the rise of affluent Asian travellers for whom shopping is no longer their primary reason for travel.

Their numbers are rising at a rate of 11% to 25% worldwide, with 59% of global hoteliers having seen an increase in Chinese millennial travellers over the past year.

Source: Hotels.com China International Travel Monitor report



We explore how travel is fast becoming one of Chinese consumers' favourite ways to spend their money. Experience-hungry consumers have an unparalleled appetite for enjoying a new world of inspiring, exciting overseas cultural and shopping experiences.

More than 70 million Chinese consumers travelled abroad in 2015, making an average of 1.5 trips each. Shopping plays no small part in their wanderlust, with 80% of consumers shopping abroad, and almost 30% basing their destination choice on its shopping opportunities.

Source: McKinsey & Company

We discover how cruise ships with expanded duty-free stores and the development and spread of duty-free malls in Southeast Asia, are racing to attract a new generation of digitally savvy and aspirational Asian shoppers.

Over the last two years, the cruise market has grown 11%, reaching \$60bn in 2015, and is expected to rise to \$76bn by 2019. The cruise sector are looking at reinvigorating their cruise portfolios via new markets such as China and new destinations in Africa and Asia.

Source: Euromonitor



We present travel retail and duty-free category trends and examples of new retailing innovations in the key markets of APAC, the undisputed driving force behind the travel retail and duty-free industry.

THE FUTURE PASSENGER JOURNEY

Today's Changes in retail are not cyclical, they are structura

A Combination of Changing Shopper Attitudes and The Digital Mobile Revolution Has Created a New Retailing Paradigm Based On Consumer-Driven Innovation

Generation



The key demand from future customers

CONTROL

CONNECTED COLLABORATE **CO-CREATE** COMMUNITIES CONSCIENCE

DIFFERENT



PEOPLE



PEOPLE + JOURNEYS

ENGAGEMENT

Can I book a room tonight?

Hi James. We have a room available tonight- room rate \$219+tax.



Hyatt Regency Hotel

PORTLAND.

Talk to me...



EASE



APA

EDUCATION

Teach me something new...

MSHTIVE

ENTERTAINMENT

Keep me interested...

EXCLUSIVITY PAR



Show me something special...

END-USE

Tell me what I can do with it...

SAMSUNG

BETTER



3 Universal Shopper Behaviours


NavigationReasurance



BrowseInformationStories



Ideas Surprise Newness

3 Universal Journey Missions



Ikea Order & Collection Point - Dale End Birmingham, UK

NOW TO ELV

Coming soon

TRANSACT

Lowe's Build and Grow Clinics

Gabriel

Annuals

CADO

Dean

LOWE'S"

RECRUI

Johnnie Walker House Amsterdam

Sie

0

RETAIN

JOHNNIE WALKER HOUSE

AMSTERDAM AIRPORT SCHIPHOL

Universal Service Mission

Hyper-Connetion

Hyper-Connection = In Sync Service

True Religion Apple Watch London, UK

FUTURE PASSENGER JOURNEYS WILL BE

PHYSICAL



PHYSICAL VIRTUAL



PHYSICAL VIRTUAL HUMAN



560 Degree Journeys



BEFORE

BEFORE DURING



BEFORE DURING R AFTER

SEAMLESS SHOPPING

NOT ONLY SALES PER SQ METRE

ldeas per sq m engagement per sq m Sense per sq m Surprise per sq m delight per sq m smiles per sq m clicks per sq m shares per sq m dwell per sq m

New Revenue New Revenue Model

News just in: The Internet will not kill shops, it will liberate them!

Let's Get Future Ready

Thank you

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