



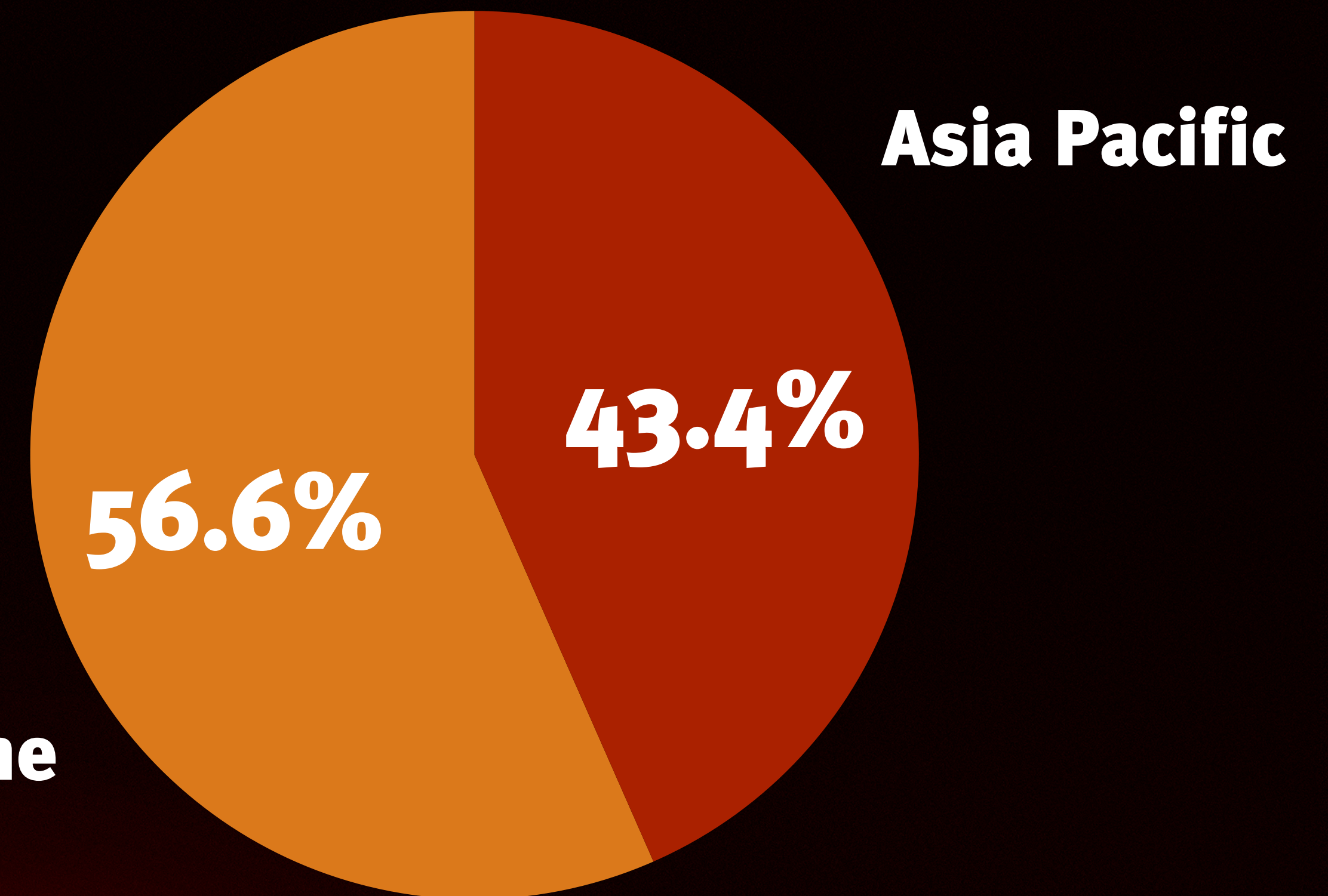
ASIA
PACIFIC
TRAVEL
RETAIL
ASSOCIATION

APTRA: PREPARING TOMORROW, TOGETHER

JAYA SINGH

PRESIDENT, ASIA PACIFIC TRAVEL RETAIL ASSOCIATION

SHARE OF GLOBAL DUTY FREE & TRAVEL RETAIL SALES 2016



**Rest of the
World**

Asia Pacific

SOURCE: GENERATION RESEARCH



**ASIA
PACIFIC
TRAVEL
RETAIL
ASSOCIATION**

OVER 120 APTRA MEMBERS



APTRA CONSUMER BEHAVIOURAL RESEARCH



Travel Retail Research Chinese Travellers from 1st Tier Cities

Sponsored by



April 2017

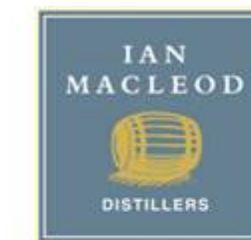


AUS/NZ Travel Retail Research Survey

Kindly sponsored by



&



August 2016



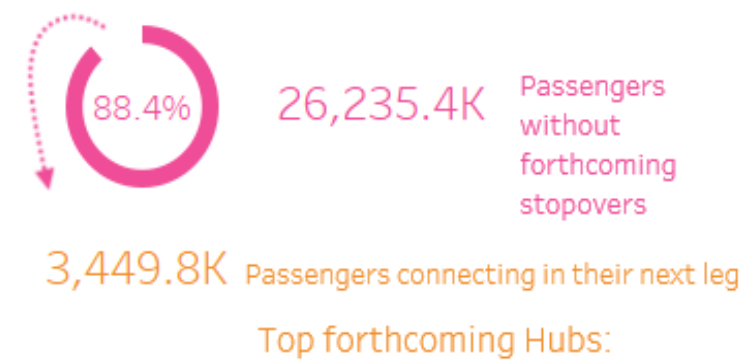
China beyond Tier 1



APTRA AIRPORT STUDIES

Top Destinations

Destinations from **SIN - Singapore, SG**

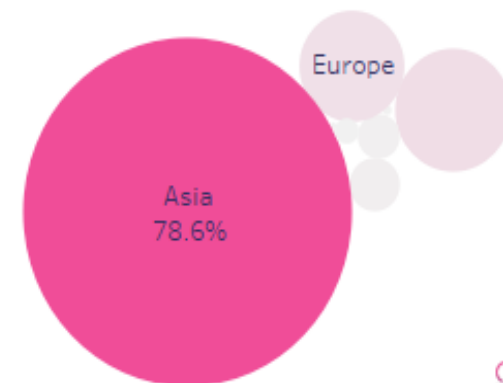


KUL - Kuala Lumpur, MY	14.3%
HKG - Hong Kong, HK	7.8%
DXB - Dubai, AE	6.5%
DOH - Doha, QA	5.9%
FRA - Frankfurt, DE	4.9%
CGK - Jakarta, ID	3.7%
SGN - Ho Chi Minh City, VN	3.6%



Total Pax: 29,685.2K

Destination Regions:



Final Destinations:

1	CGK - Jakarta, ID	7.0%
2	KUL - Kuala Lumpur, MY	5.3%
3	HKG - Hong Kong, HK	4.9%
4	BKK - Bangkok, TH	4.6%
5	MNL - Manila, PH	3.2%
6	DPS - Denpasar-Bali, ID	3.1%
7	TPE - Taipei, TW	2.6%
8	SGN - Ho Chi Minh City, VN	2.4%
9	ICN - Seoul, KR	2.2%
10	PVG - Shanghai, CN	2.2%
11	SYD - Sydney, NS, AU	2.2%
12	PEN - Penang, MY	2.1%
13	MEL - Melbourne, VI, AU	2.1%
14	PER - Perth, WA, AU	1.9%
15	HKT - Phuket, TH	1.8%
16	LHR - London-Heathrow, EN, ...	1.8%
17	HND - Tokyo-Haneda, JP	1.6%
18	DMK - Bangkok, TH	1.6%
19	CAN - Guangzhou, CN	1.4%
20	PEK - Beijing, CN	1.4%
21	BOM - Mumbai/Bombay, IN	1.4%

DDS An ARC/IATA Product

Airport:

SIN - Singapore, SG



Domestic/International

- ☒ (All)
☐ Domestic
☐ International

mind-set
expert in travel market research

* Last 12 months

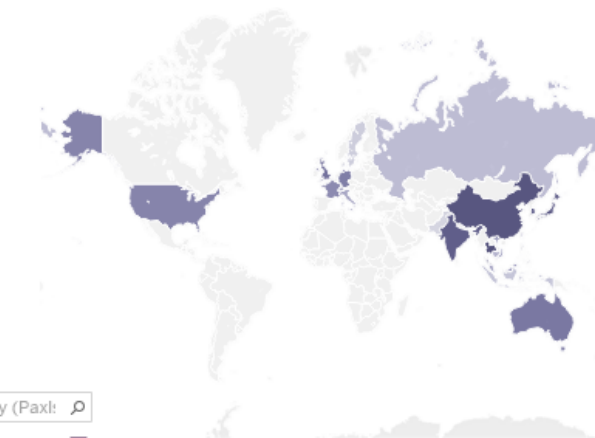
Top Nationalities by Airport - Table

Top Nationalities by Airport

BKK - Bangkok, TH

DDS An ARC/IATA Product

Nationality Region (All) Terminal Airports: BKK - Bangkok, TH



Arrivals/Departures

- ☐ (All)
☐ Arrivals
☒ Departures

Domestic/International

- ☒ (All)
☐ Domestic
☐ International

Connecting

- ☒ (All)
☐ Connecting
☐ Not Connecting

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	2016				2017			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Thailand	1,710,683	1,797,769	1,840,014	1,971,960	1,966,557	1,928,310	1,988,356	2,132,509
China	985,359	847,894	848,161	533,787	887,103	904,517	920,192	944,263
Japan	459,711	350,150	406,933	383,804	451,352	448,156	453,405	458,764
India	329,926	397,382	343,370	360,269	362,276	341,324	344,807	356,179
South Korea	354,528	263,854	303,394	304,823	371,652	316,626	325,633	276,082
Hong Kong	291,675	306,418	309,882	243,958	270,792	279,874	277,001	270,392
Singapore	207,957	228,998	237,283	234,440	239,046	266,499	267,812	271,159
United Kingdom	270,299	190,705	198,600	216,775	273,373	262,860	266,104	266,213
Australia	207,844	232,839	248,987	245,776	233,444	212,982	219,046	218,735
Germany	288,008	170,129	183,316	218,752	261,343	223,123	258,251	282,496
United States	241,781	197,156	183,341	240,134	268,181	233,933	239,914	242,742
France	196,231	94,467	113,384	128,401	224,236	182,231	195,254	237,192
Taiwan	106,083	112,295	117,074	107,559	145,113	172,935	176,613	170,977

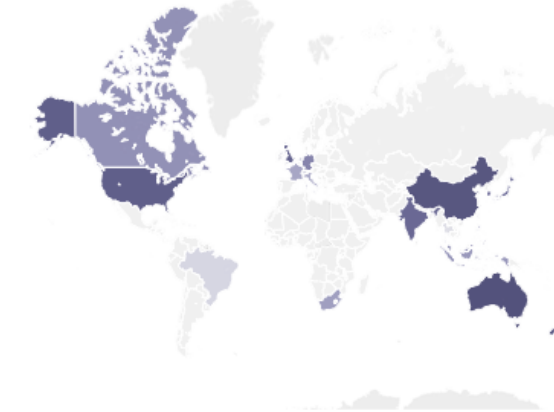
Top Nationalities by Airport - KPIs

Top Nationalities by Airport

SYD - Sydney, NS, AU

DDS An ARC/IATA Product

Nationality Region (All) Terminal Airports: SYD - Sydney, NS, AU



Arrivals/Departures

- ☐ Arrivals
☒ Departures

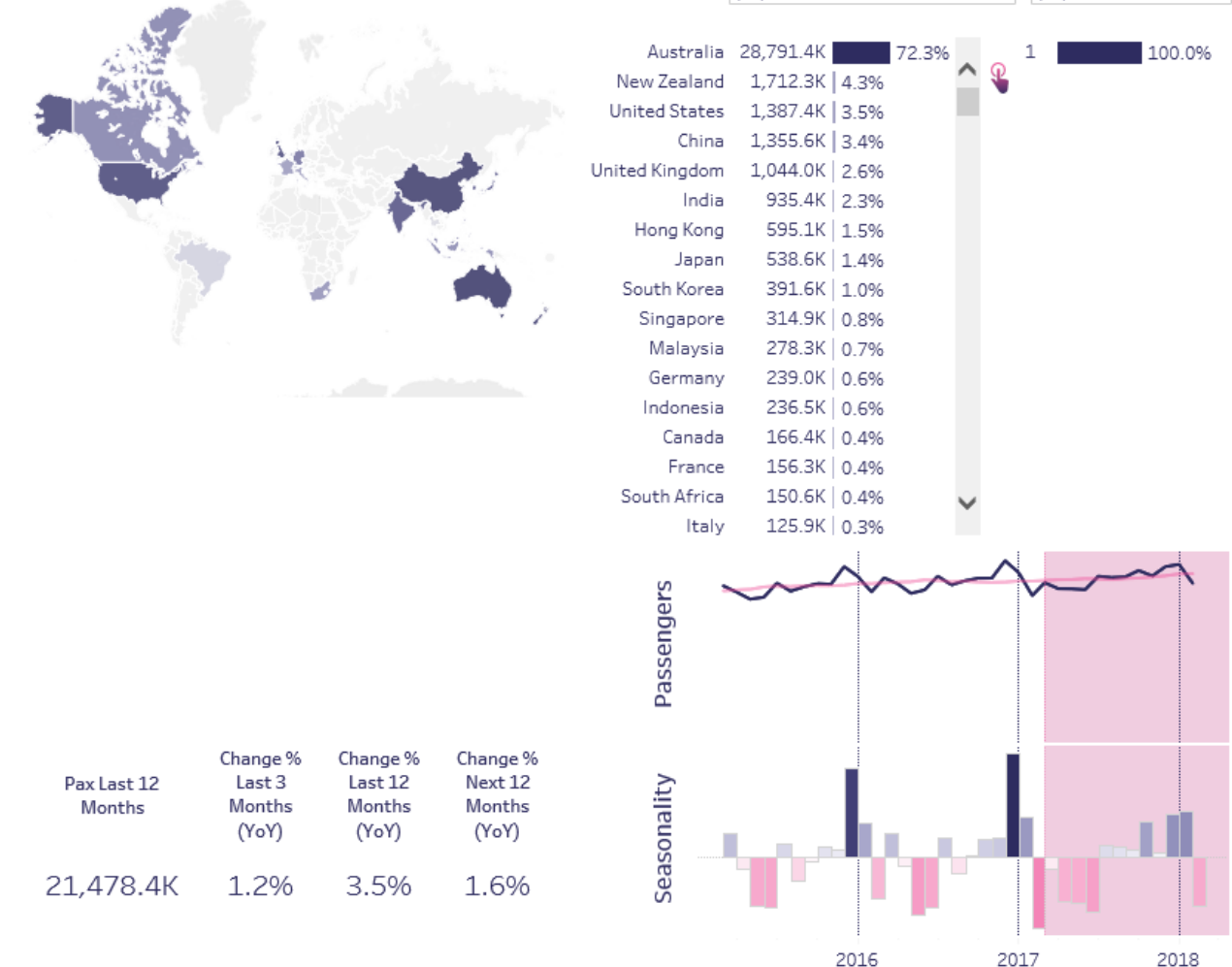
Domestic/International

- ☒ (All)
☐ Domestic
☐ International

Connecting

- ☒ (All)
☐ Connecting
☐ Not Connecting

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APTRA AIRPORT FORUM



APTRA AIRPORT RESOURCE CENTRE

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ASIA
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PREPARING TOMORROW, TOGETHER

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MEMBERS RESEARCH

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NEWS

APTRA NEWS, ASSOCIATION NEWS

Encouraging response to call for advocacy support



Following the call to members for support of the Association's various advocacy missions, a number of member companies have volunteered to increase their annual contribution via their membership fee. APTRA is investing further into various initiatives to strengthen the industry's position on advocacy.

In addition to the day-to-day advocacy work, addressing current challenges the industry is facing, the strategy involves a rapprochement with airport authorities around the region through a series of APTRA and industry events. This includes the investment in advocacy support agency Hume Brophy as announced in the press earlier this month. Investment will also be made in the economic impact report which will be produced in collaboration with the Duty Free World Council. The Association is also working on achieving a more holistic

News Archives

February 2017

November 2016

October 2016

September 2016

August 2016

July 2016

June 2016

APTRA Road Show

English

简体中文

GIN

AIRPORT RESOURCE CENTRE

Coming soon to
www.aptra.asia



**ASIA
PACIFIC
TRAVEL
RETAIL
ASSOCIATION**



APTRA Responsible Retailer Training & Accreditation

Introduction to the APTRA Online Training Centre

Self-Regulatory Code of Conduct for the Sale of Alcohol Products in Duty Free & Travel Retail

Introduction

This Self-Regulatory Code of Conduct for the Sale of Alcohol Products in Duty Free & Travel Retail (the “Code”) is designed specifically for manufacturers, distributors, wholesalers and retailers in the duty free and travel retail industry (the “Industry”), due to its unique nature and differences from domestic retailing. Members of the Industry should fully understand and implement this Code.

Industry members should ensure that their external advertising, marketing and public relations consultants are aware of and comply with this Code. Where appropriate, Industry members should partner with airport operators, airlines and other third-party duty free & travel retail stakeholders to achieve this Code’s objectives.

Above all the Code seeks to harness the potential of duty free and travel retail, an industry which has long been at the vanguard of responsible alcohol consumption thanks to its emphasis on luxury, premium quality brands and limited editions and on an adult consumption experience. The Code is designed to address in a holistic manner, all the aspects of duty free and travel retail alcohol sales, from commercial communications to labelling, staff training and conduct, as well as sampling.

Purpose

In recent years, retailers, manufacturers, national authorities and industry associations such as the International Centre for Alcohol Policies have adopted voluntary codes and guidelines for the responsible sale and advertising of alcohol products. This Code works alongside such other codes by establishing working principles designed specifically for the duty free & travel retail channel.

Why a separate Code for Duty Free & Travel Retail?

A separate code is warranted for duty free & travel retail due to unique features that distinguish it from domestic retail:

- a. Its unique customer base which consists of international travellers frequently unable to speak the local language and potentially unfamiliar with national laws on age of purchase, etc.
- b. Duty free & travel retail customers are travellers with little time to spare or who visit duty free & travel retail shops as an inherent part of the travel experience.
- c. Children and minors represent a very small proportion of visitors to duty free & travel retail shops in which alcoholic beverages are sold, and



Self-Regulatory Code of Conduct for the Sale of Alcohol Products in Duty Free & Travel Retail

INTRODUCTION

This Self-Regulatory Code of Conduct for the Sale of Alcohol Products in Duty Free/Travel Retail across the Asia Pacific region is designed specifically for the duty free and travel retail industry, due to its unique nature and differences from domestic retailing environments. Alcohol business operators in Duty Free/Travel Retail should fully understand the purpose of this Code and work to comply with its guidelines.

Alcohol business operators in Duty Free/Travel Retail should ensure that their advertising, promotion and sale of alcohol complies with relevant national laws. In case of inconsistency between this Code and any more restrictive national law, the more restrictive national law shall apply.

Operators should also ensure that their external consultants in advertising, marketing and public relations are aware of this Code and its guidelines. Where appropriate, alcohol business operators shall work with airport operators, airlines and other third-party Duty Free/Travel Retail stakeholders to uphold the guidelines and the principles in this Code.

Purpose

In recent years, retailers, manufacturers, national authorities and industry associations such as the International Centre for Alcohol Policies have developed and implemented voluntary codes and guidelines for the responsible sale, promotion, marketing and advertising of alcohol products. These codes address the personal, societal and health implications of alcohol consumption and establish principles for responsible and ethical behavior.



COLLABORATION



ASIA
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THANK YOU

JAYA SINGH
PRESIDENT, ASIA PACIFIC TRAVEL RETAIL ASSOCIATION