THE MIDDLE EASTERN SHOPPING OPPORTUNITY

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CIR TRAVEL RETAIL'S EXPERTS
AN NPD GROUP COMPANY

MEADFA

TFWA

A Growing Region

An ever increasing opportunity for Travel Retail

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Source: CIR Business Lounge. Unless otherwise stated all data based upon scheduled departing international passengers for the period Nov 16–Oct 17.
Nationality based upon residency of where ticket purchased.

Drivers for Growth

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Growth is coming from our key nationalities in the region

Source: CiR Business Lounge. Unless otherwise stated all data based upon scheduled departing international passengers for the period Nov 16–Oct 17.
Nationality based upon residency of where ticket purchased.

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Who is the Middle Eastern shopper?

55%
Millennials

73%
Male

81%
Travelling for leisure

66%
Travel in groups

37%
Travel 4+ times a year

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What are their shopping preferences?

Average Spend

$152

Purchase Reason

Self	Gift
61%	39%

Purchase Planning

57%

Purchase Drivers

Good Quality	Well-known Brand	Looks New & Different
29%	22%	20%

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However, growth is also occuring among some of travel retail's most important shoppers...

Source: CIR Business Lounge. Unless otherwise stated all data based upon scheduled departing international passengers for the period Nov 16–Oct 17. Nationality based upon residency of where ticket purchased.

...and this presents a real opportunity

Likelihood to spend in the airport

61%

Middle Eastern Benchmark

83%

Russian

74%

Chinese

74%

Thai

73%

South Korean

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Who they are
What they buy
Why they buy
How they can be influenced
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However,
to take
advantage
of this
opportunity
our strategies
need to be
tailored

Who they are

	Middle East Benchmark	Chinese	Thai	Russian	S. Korean
Males	73%	53%	53%	51%	51%
Millennials	55%	55%	67%	54%	53%
Freq. Travellers 4+ trips/year	37%	26%	22%	28%	17%

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What they buy

What they buy

Middle Eastern Benchmark

47%

32%

27%

22%

Russian

S. Korean

Increase in importance

Thai

Chinese

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What they buy
Planned purchasing
Middle East Benchmark 57%
Chinese 55%
Russian 63%
Thai 66%
South Korean 52%
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Why they buy

Leading purchase drivers

1. Good quality
2. Well-known brands
3. Looks new & different
4. Convenient pack size
5. Usual brand

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...but this isn't always the case

Why they buy

Middle Eastern Benchmark

1. Good quality
2. Well-known brands
3. Looks new & different

Russian

To stock up

S. Korean

Souvenir

Thai

Souvenir

Chinese

Usual brand

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...and we also need to consider purchase needs

Why they buy

	Middle Eastern Benchmark	Chinese	Russian	Thai	S. Korean
Self	61%	↑	↑	↓	↓
Gift	39%	↓	↓	↑	↑

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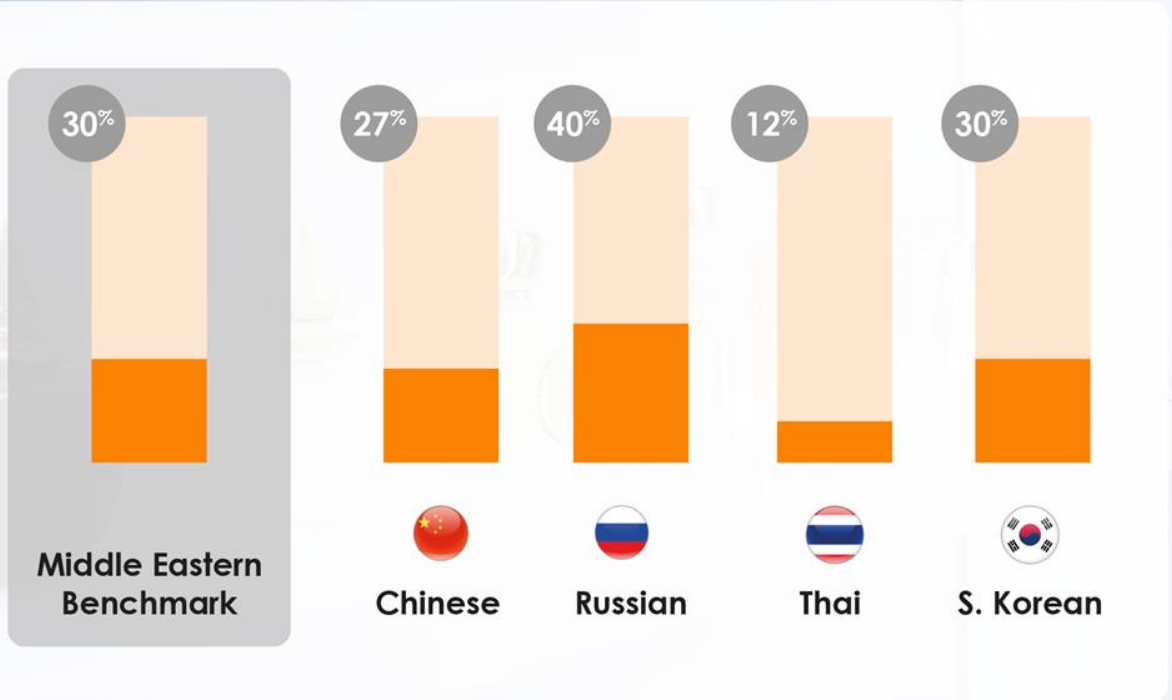
Plan to an exact item level

How they can be influenced



There is **increased opportunity** to **influence shoppers**

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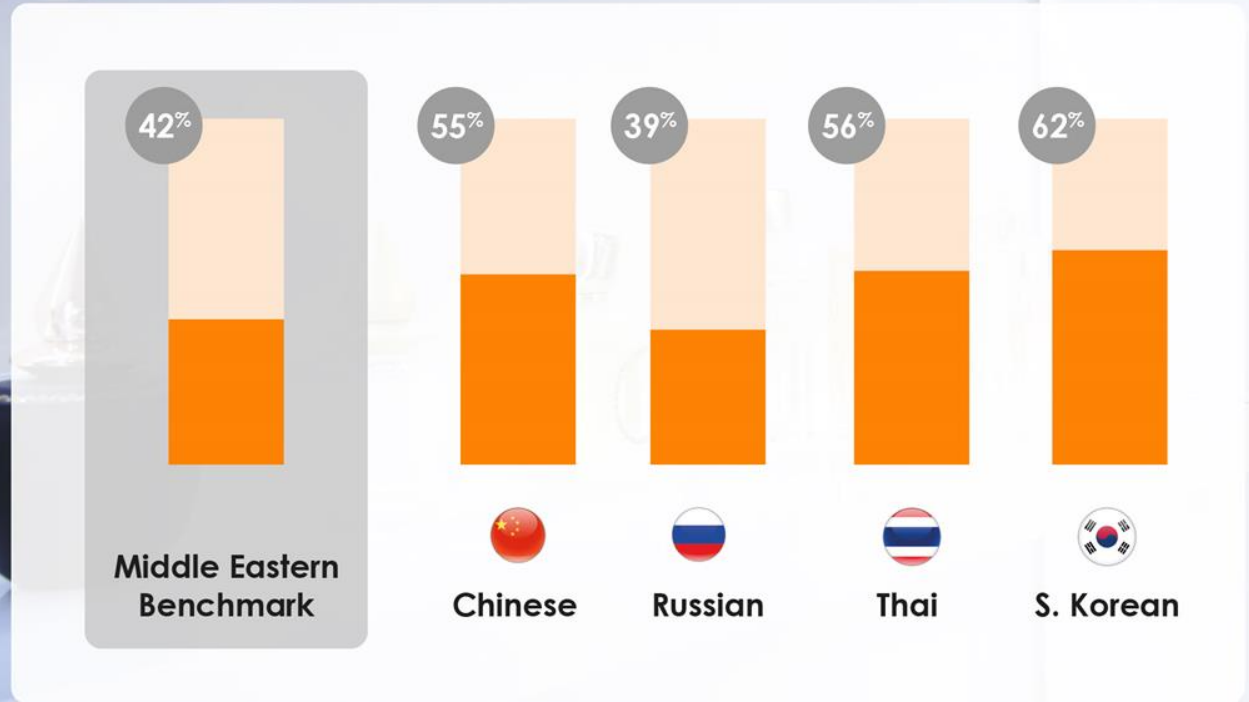
Purchase a non-regular brand

How they can be influenced



There is **increased opportunity** to **influence shoppers**

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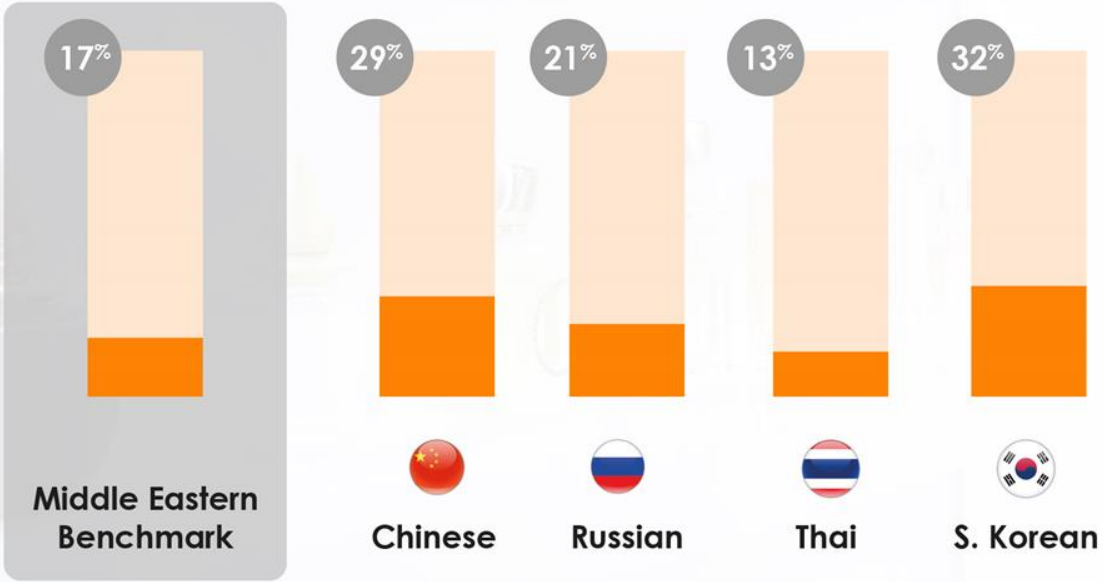
Purchase a more expensive brand

How they can be influenced



There is **increased opportunity** to **influence shoppers**

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Three core areas for influencing shopper behaviour

Staff

Differentiation

Promotional Activity

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Calls to action

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