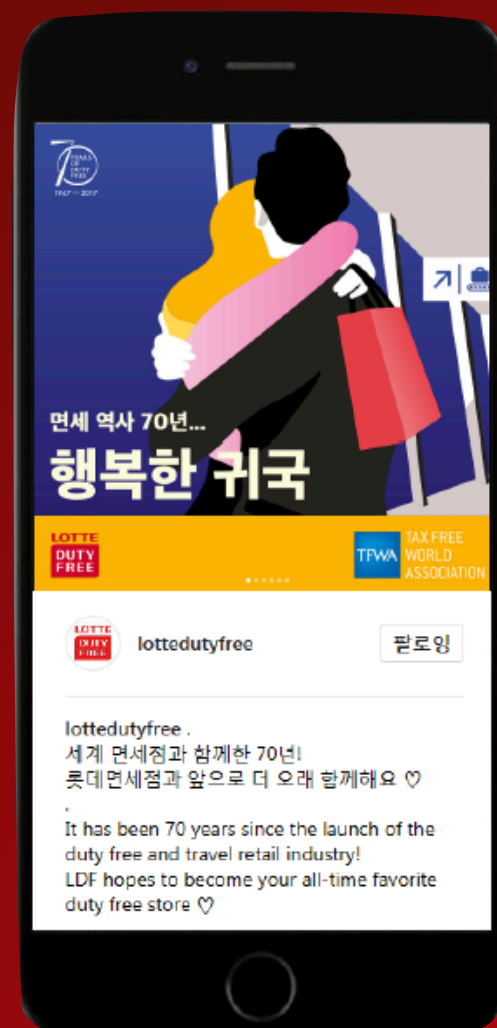
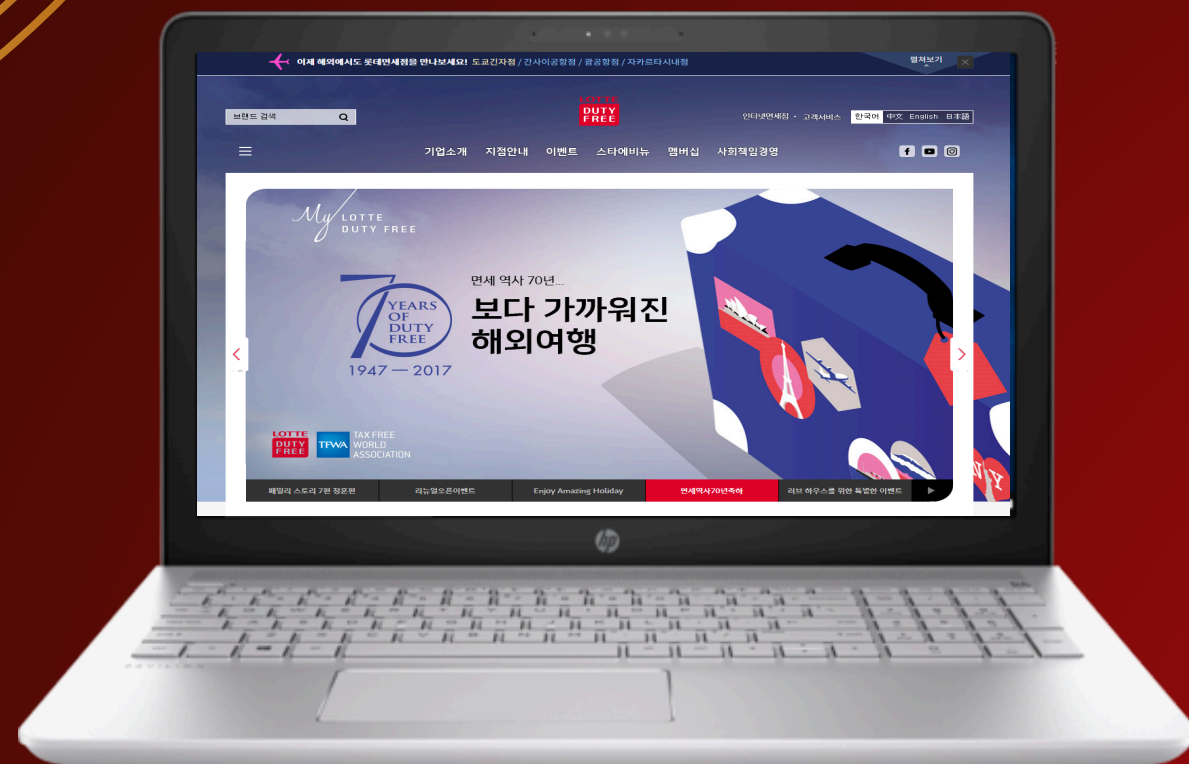


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EXHIBITION &
CONFERENCE

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ERIK JUUL-MORTENSEN
PRESIDENT, TAX FREE WORLD ASSOCIATION

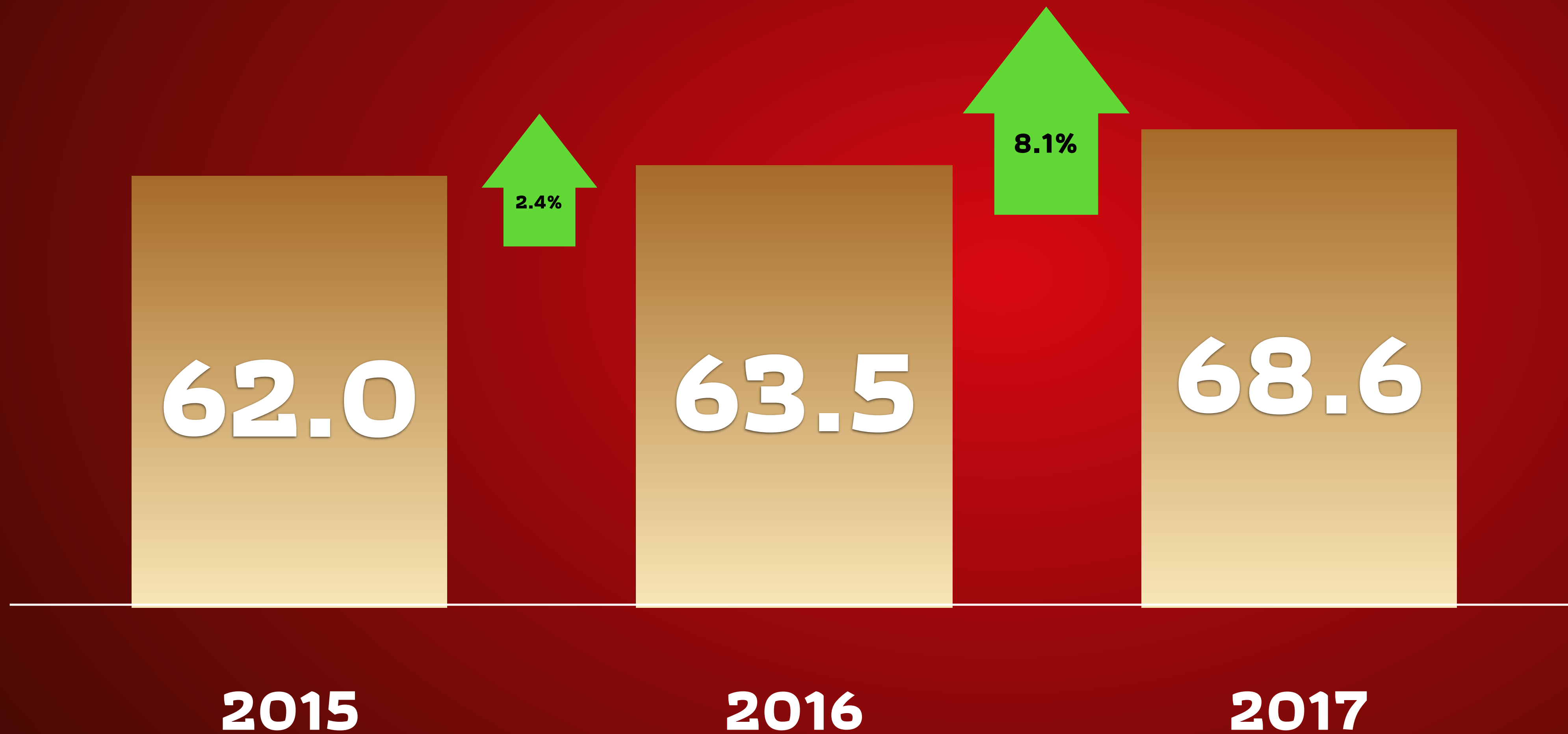




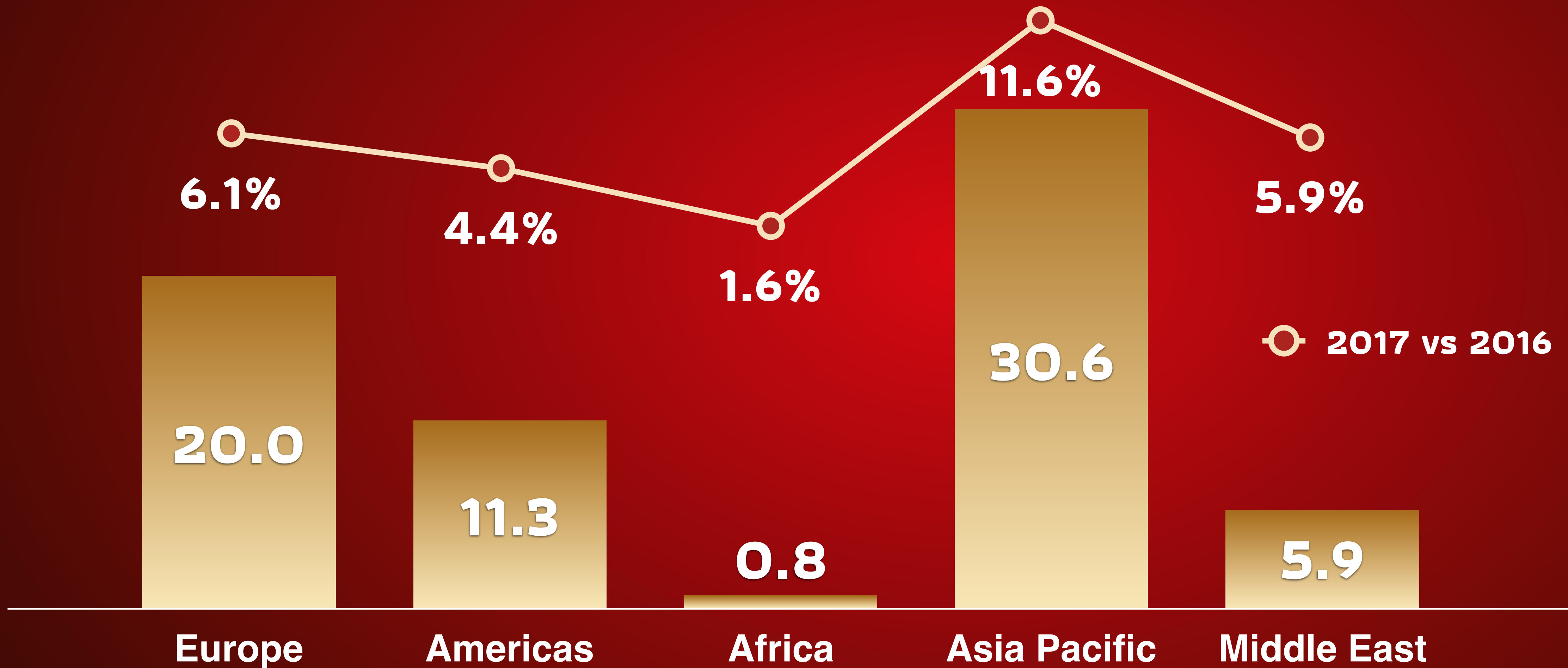


#TR evolution

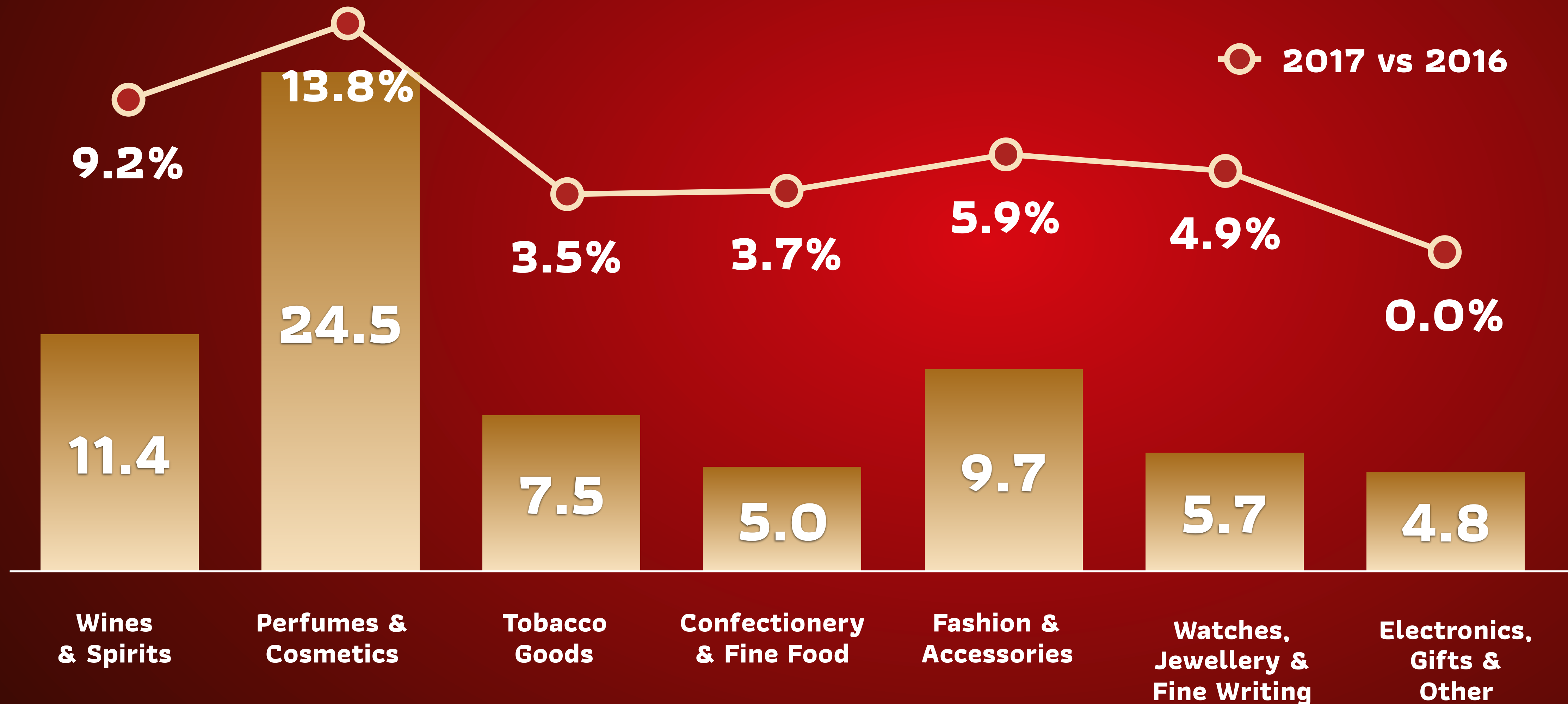
PRELIMINARY DUTY & TAX FREE SALES 2017 GLOBAL (US\$BN)



PRELIMINARY DUTY & TAX FREE SALES 2017 GLOBAL BY REGION (US\$BN)

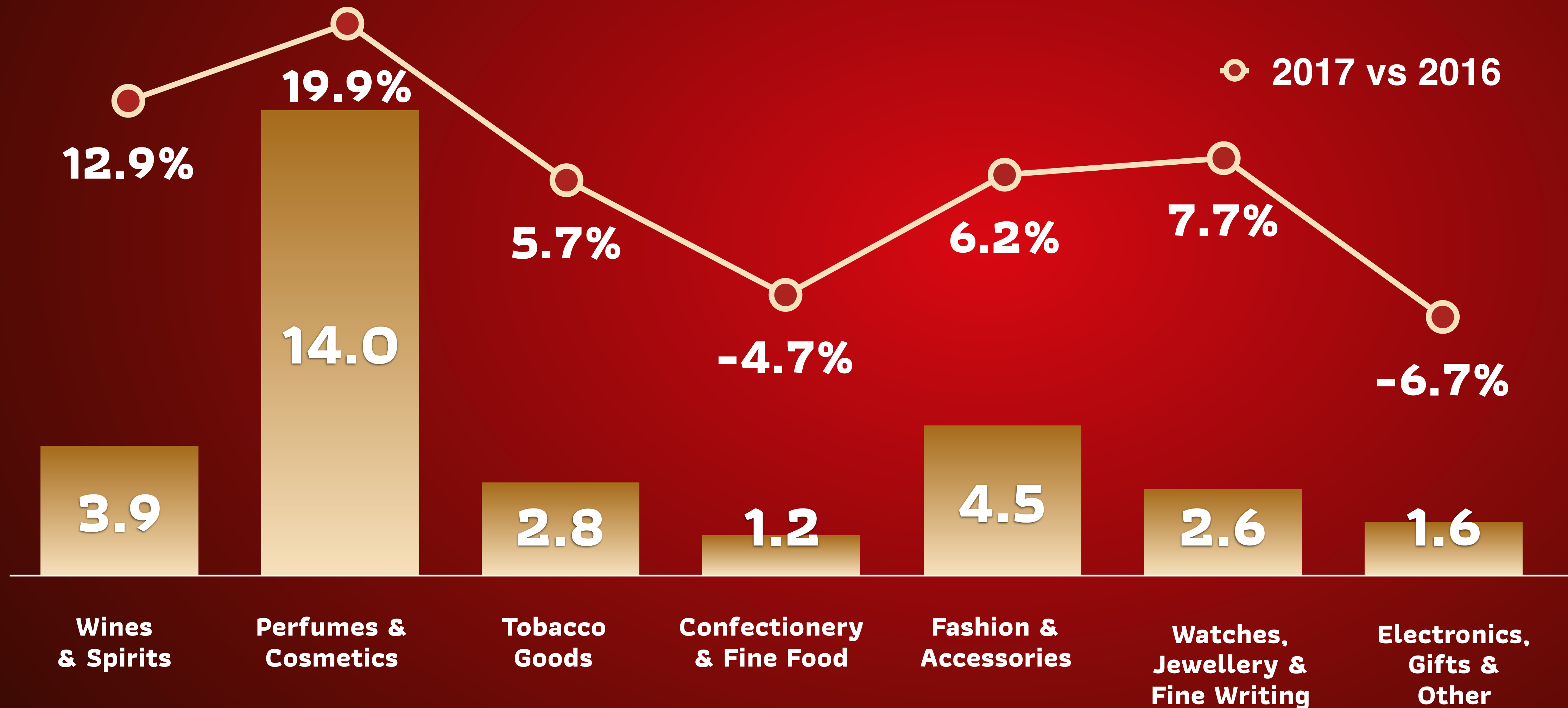


PRELIMINARY DUTY & TAX FREE SALES 2017 GLOBAL BY CATEGORY (US\$BN)



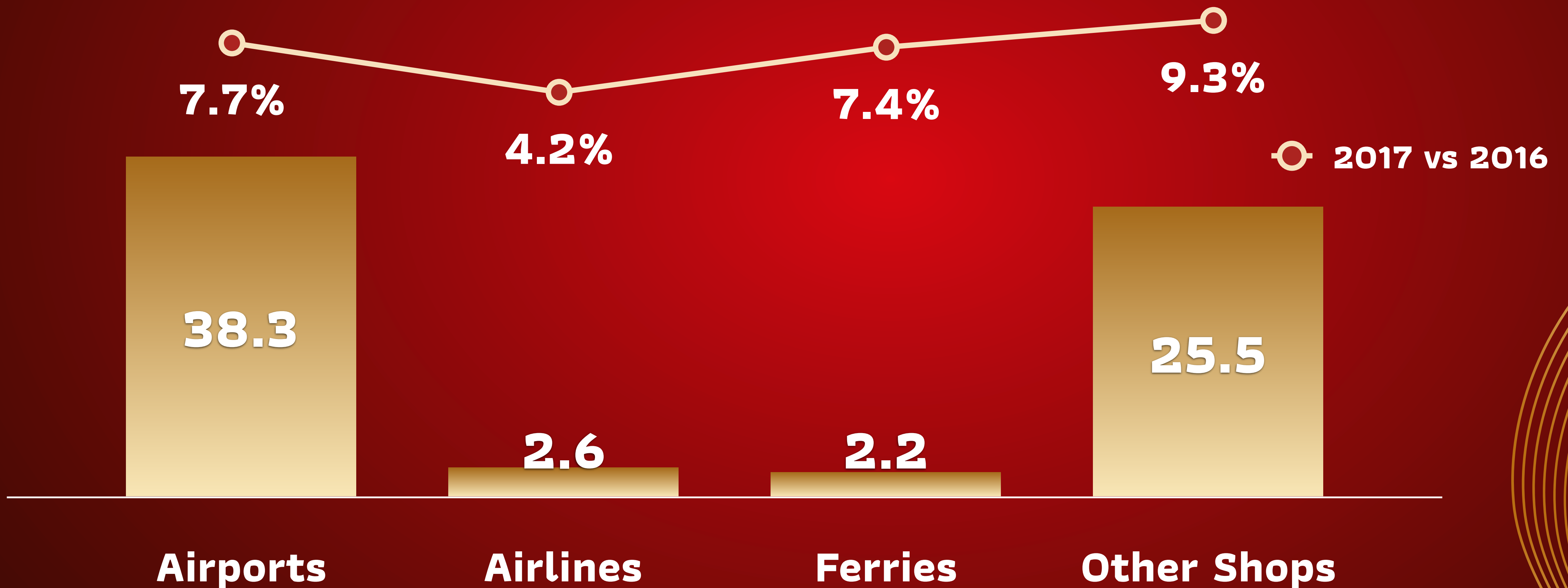
SOURCE: GENERATION RESEARCH

PRELIMINARY DUTY & TAX FREE SALES 2017 ASIA PACIFIC BY CATEGORY (US\$BN)



SOURCE: GENERATION RESEARCH

PRELIMINARY DUTY & TAX FREE SALES GLOBAL BY CHANNEL 2017 (US\$BN)





Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

^

+



Innovation
Branding
Solution
Marketing
Analysis
Ideas
Success
Management

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

+

Innovation
Branding
Solution
Marketing
Analysis
Ideas
Success
Management





KUALA LUMPUR +14.7%



TOKYO NARITA +13.6%

SOURCE: ACI PAX REPORT 2018

60+ MILLION PASSENGER AIRPORTS

AIRPORT	TOTAL PAX 2017 [m]	2017 vs 2016
Beijing	95.9	+1.5%
Hong Kong	72.7	+3.4%
Shanghai Pudong	70.1	+6.1%
Guangzhou Baiyun	65.8	+10.2%
New Delhi	63.5	+14.1%
Jakarta	62.9	+8.1%
Singapore Changi	62.2	+6.0%
Bangkok Suvarnabhumi	60.9	+8.9%

SOURCE: ACI PAX REPORT 2018



4,2711

4,2394

5,0382

3,9234

2,9239

3,7857

5,0569

4,2354

5,0322

8

ECONOMIC GROWTH (%)

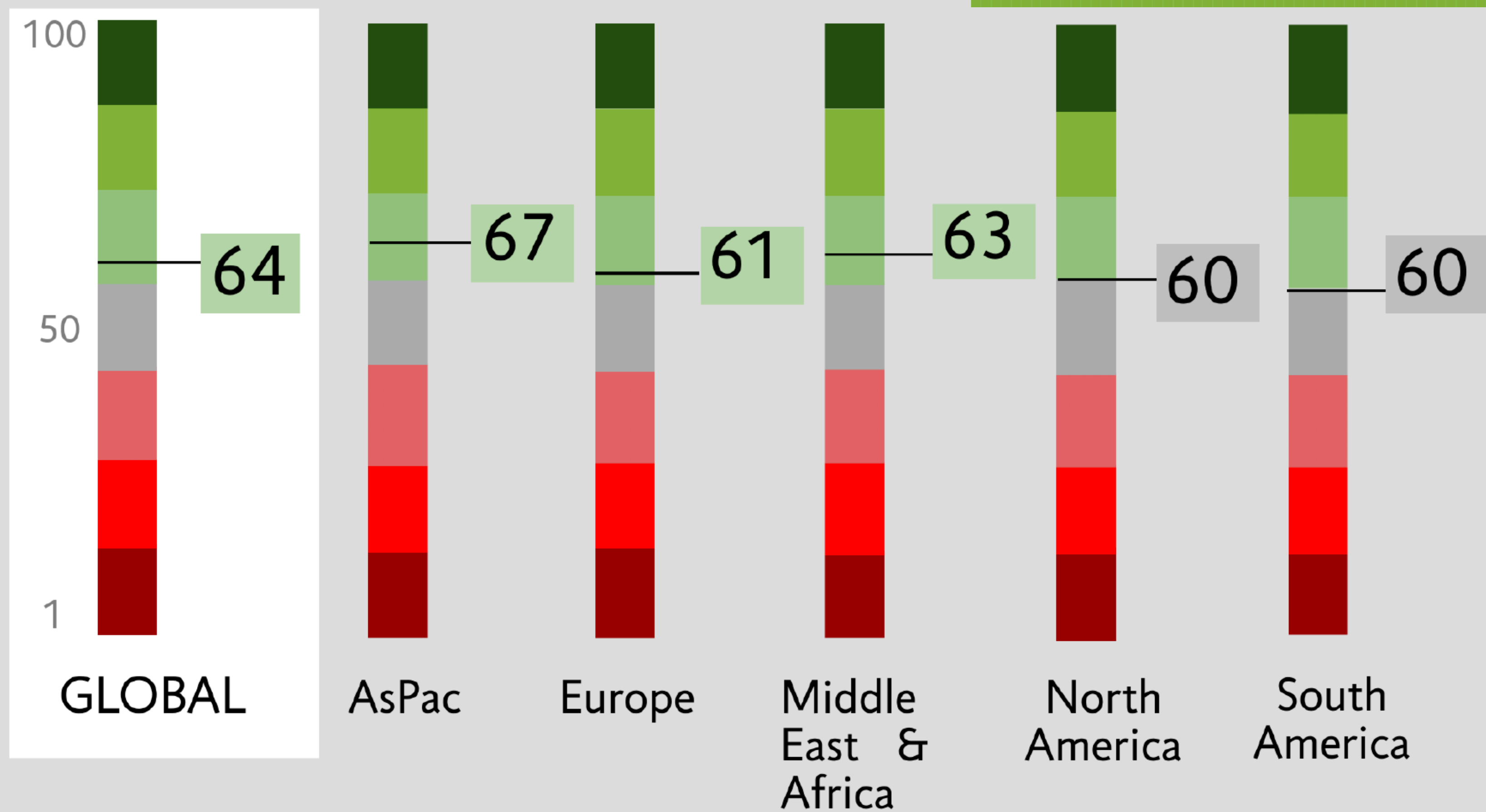
TERRITORY	2017 <small>[Actual]</small>	2018	2019
Advanced Economies	2.3	2.5	2.2
Emerging & Developing Asia	6.5	6.5	6.6
China	6.9	6.6	6.4
India	6.7	7.4	7.8
ASEAN-5	5.3	5.3	5.4
WORLD	3.8%	3.9%	3.9%

SOURCE: IMF





CUSTOMER SATISFACTION INDEX



“ **DFWC**
Quarterly Global Shopping Monitor
Q4 2017 ”

DFWC
DUTY FREE WORLD COUNCIL
Serving duty free and travel retail worldwide

in partnership with **m1nd-set**
expert in travel market research

SOURCE:
DUTY FREE
WORLD COUNCIL



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PHOTOS: THE MOODIE DAVITT REPORT



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BCG report commissioned by TFWA

BCG

THE BOSTON CONSULTING GROUP

TFWA

The Partnership Imperative in Travel Retail

Why working together is key to increasing
customer value



Reserve & Collect by DUFY

*The smart way to enjoy
great airport prices*



Reserve from your home

Singtel 8:08 AM 50%

KING POWER

KING OF DUTY FREE

- Fashion & Accessories
- Electronics
- Perfumes & Cosmetics
- Liquor & Tobacco
- Souvenirs & Thai Crafts

明星爱为你

与明星合照，赏明星风采！
和好友分享照片，共享美好一瞬！

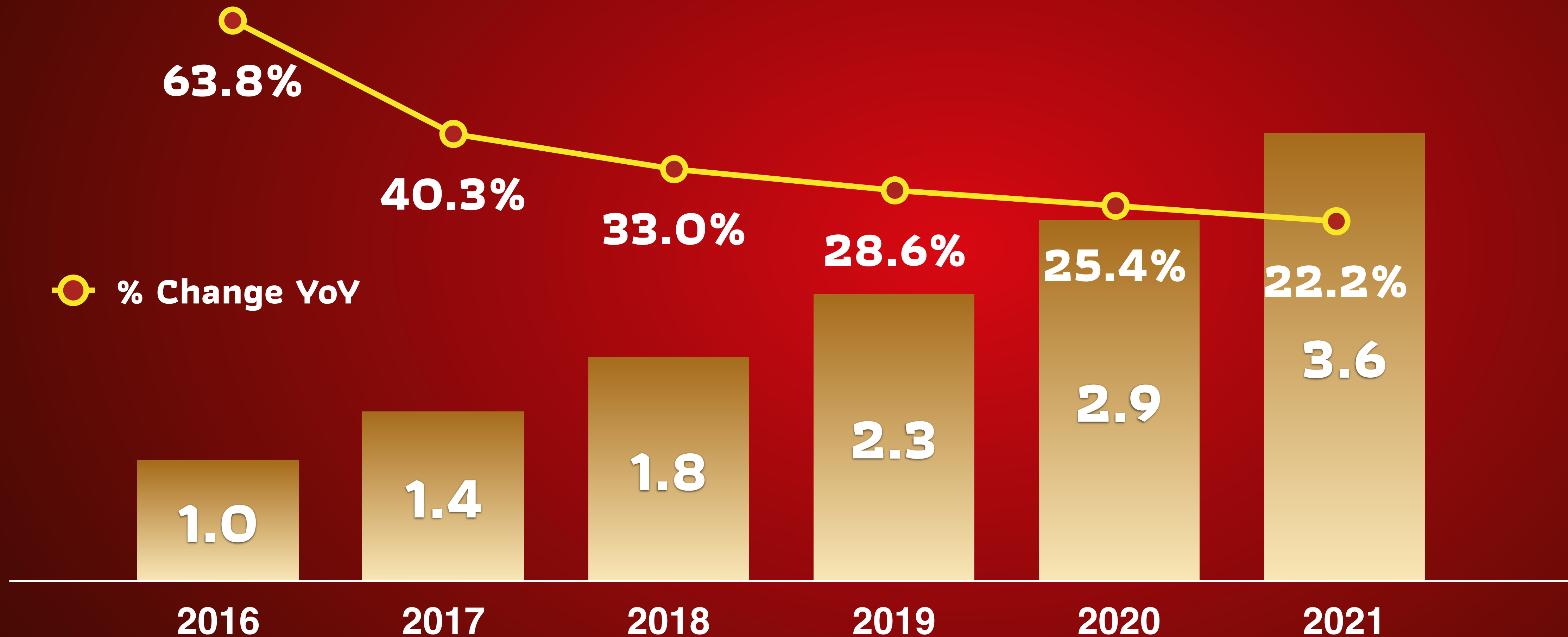
LOTTE DUTY FREE Star Avenue LOTTE TOWN



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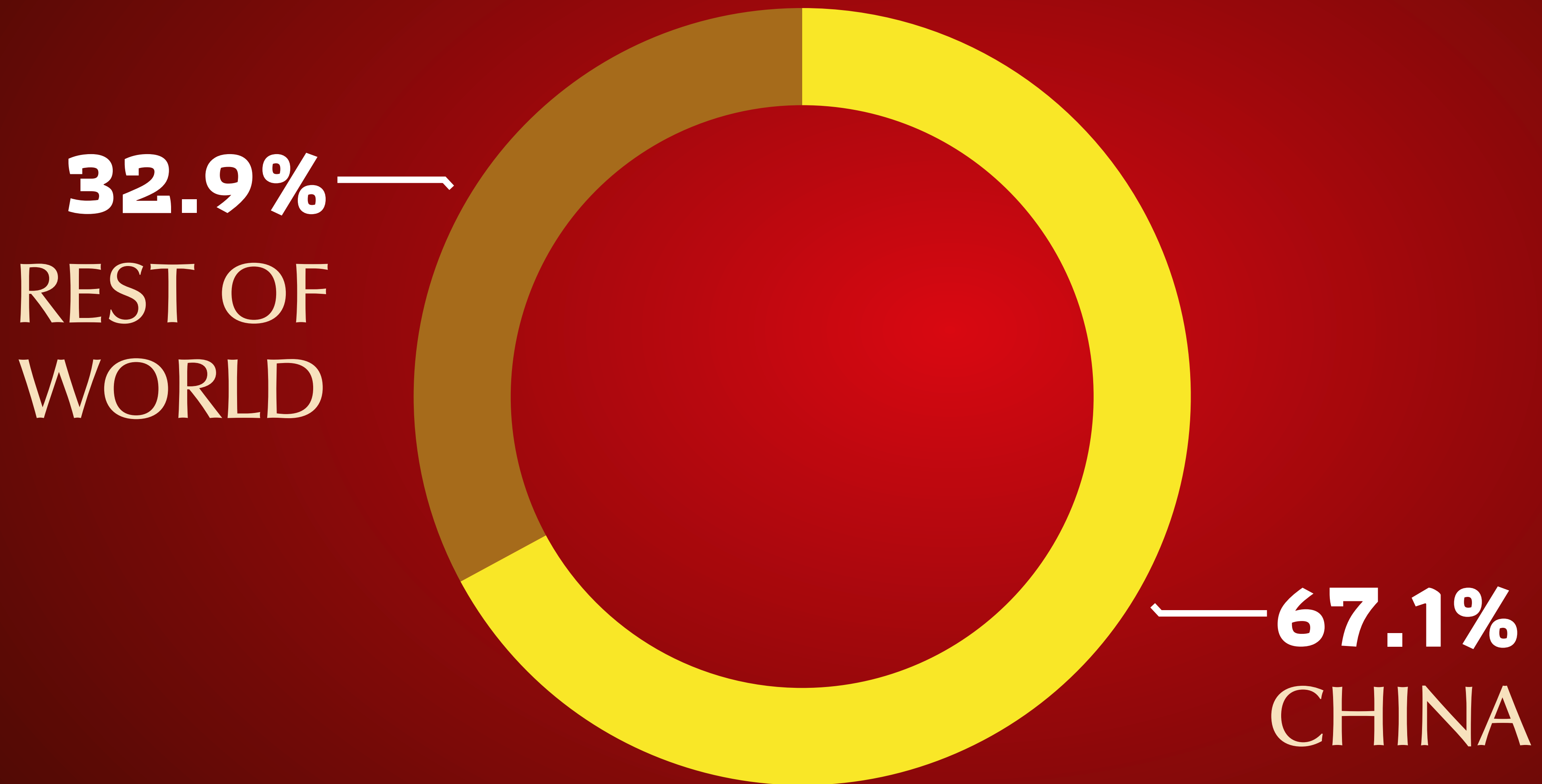
RETAIL M-COMMERCE SALES WORLDWIDE 2016-2021

US\$ TRILLION



SOURCE: E-MARKETERS RETAIL & ECOMMERCE SALES REPORT 2018

RETAIL M-COMMERCE SALES WORLDWIDE 2017

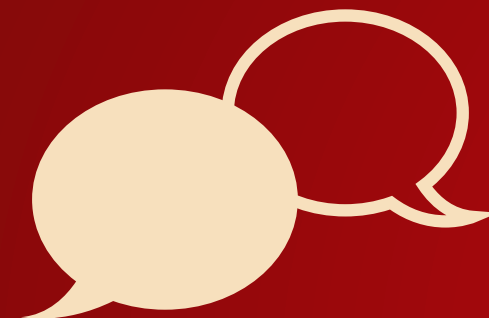


SOURCE: E-MARKETERS RETAIL & ECOMMERCE SALES REPORT 2018

**Social
Media**



Messenger



Pictures



Payment



Calls



**Music
& Audio**



Discounts



E-Shop

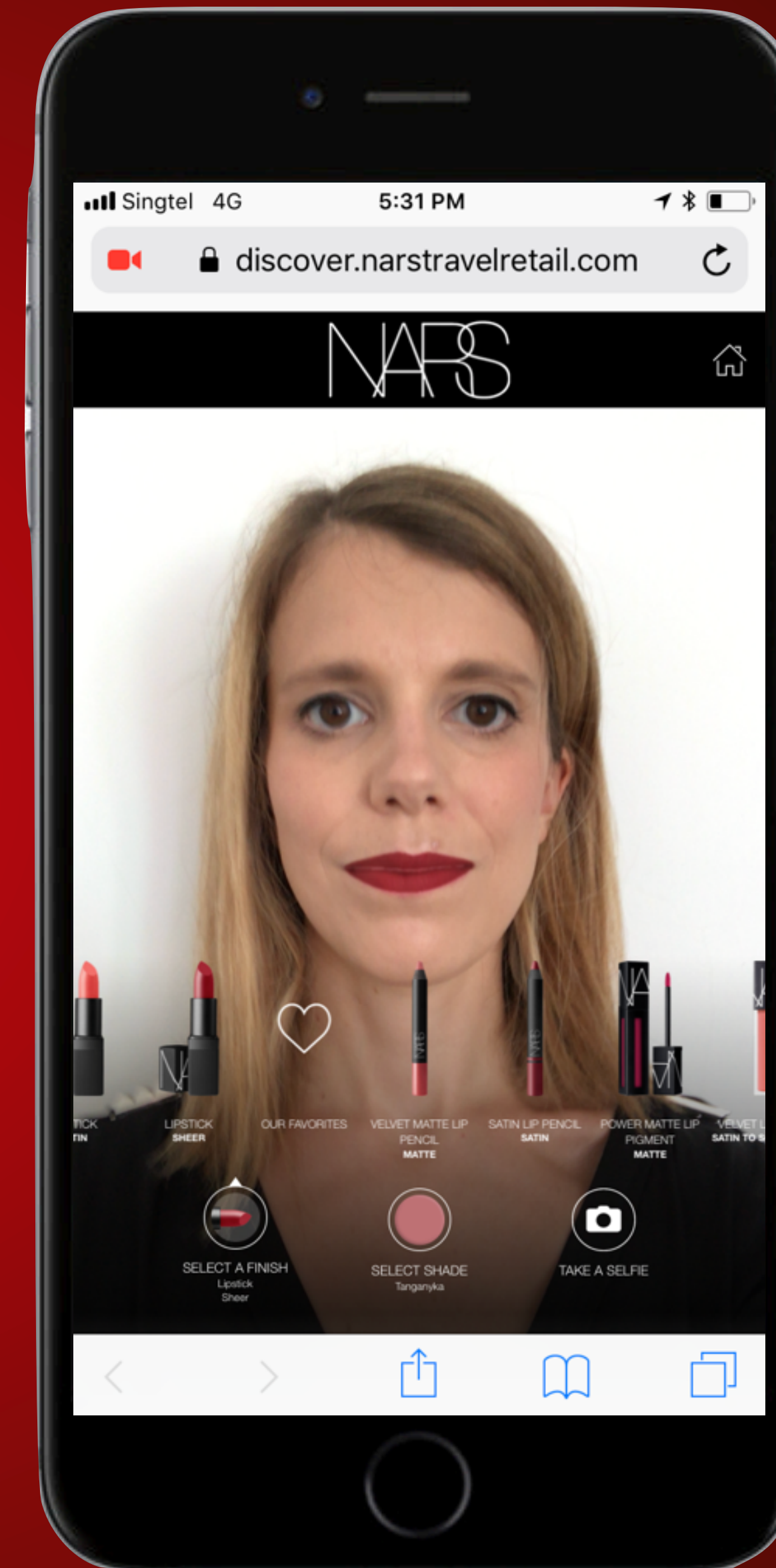
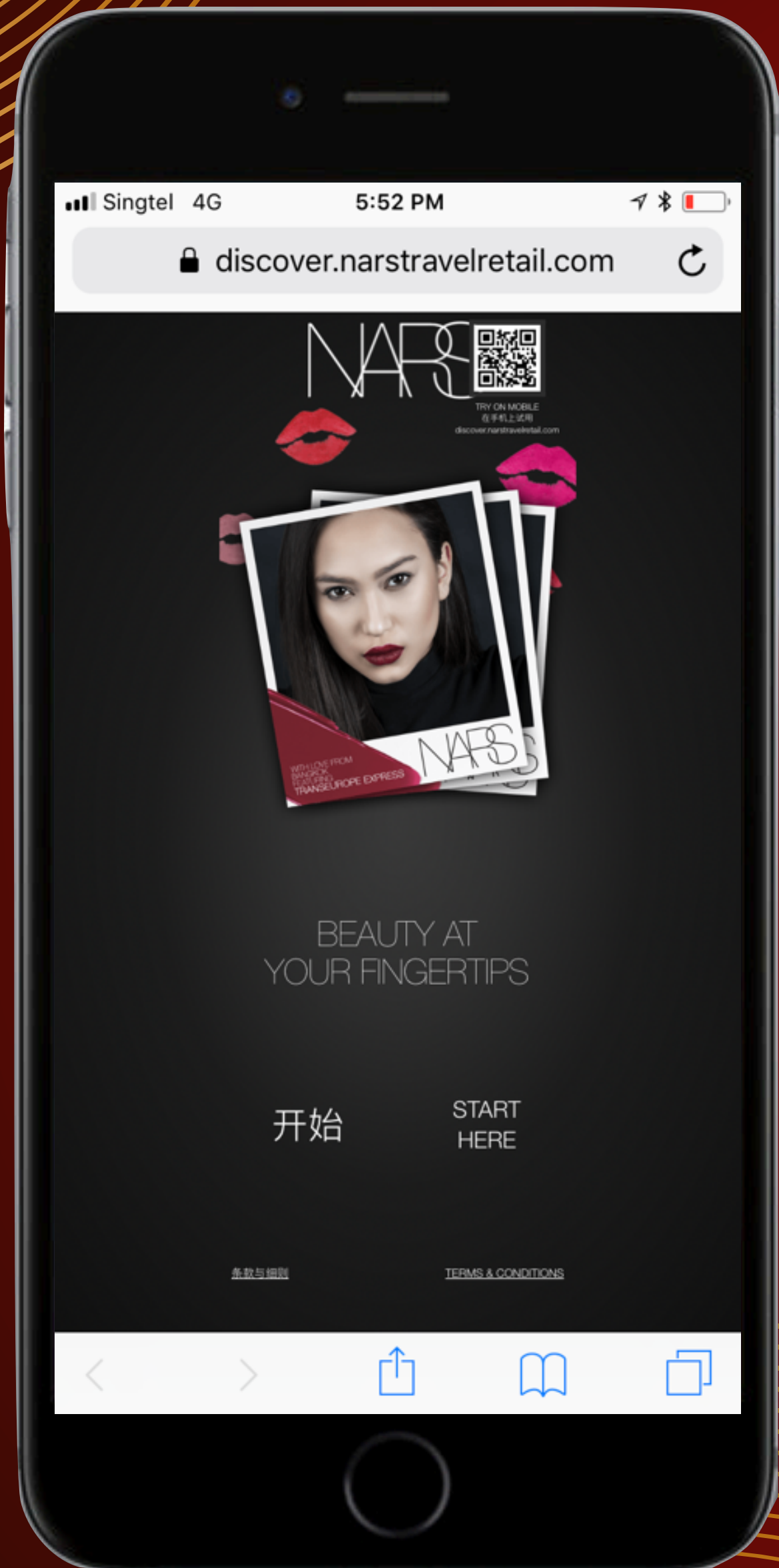


支付宝
ALIPAY



微信
WECHAT









↑ البوابات Gates A13-A24, B, C

↑ صالات الدرجة الأولى ورجال الأعمال First & Business Class Lounges

↑ ATM

A1-A12, B, C

A13-A24

D, F

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ADAM CHEYER



SHIVVY JERVIS



WORKSHOP A

Seamless shopping:
travel retail's frictionless future



WORKSHOP B

Call of Duty Free:
gamifying travel retail



WORKSHOP C

Safeguarding our industry





WORLD
EXHIBITION &
CONFERENCE

The Duty Free and Travel Retail Global Summit

30 September / 5 October 2018 — Cannes



TFWA

CHINA'S CENTURY CONFERENCE

IN PARTNERSHIP
WITH
合作伙伴



ASIA
PACIFIC
TRAVEL
RETAIL
ASSOCIATION

SANYA HAITANG BAY 三亚海棠湾

The Premier Duty Free &
Travel Retail Event in China
高端免税及旅游零售盛会 中国

◇
5-7 March 2019
2019年3月5-7日



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Thank you

ERIK JUUL-MORTENSEN
PRESIDENT, TAX FREE WORLD ASSOCIATION