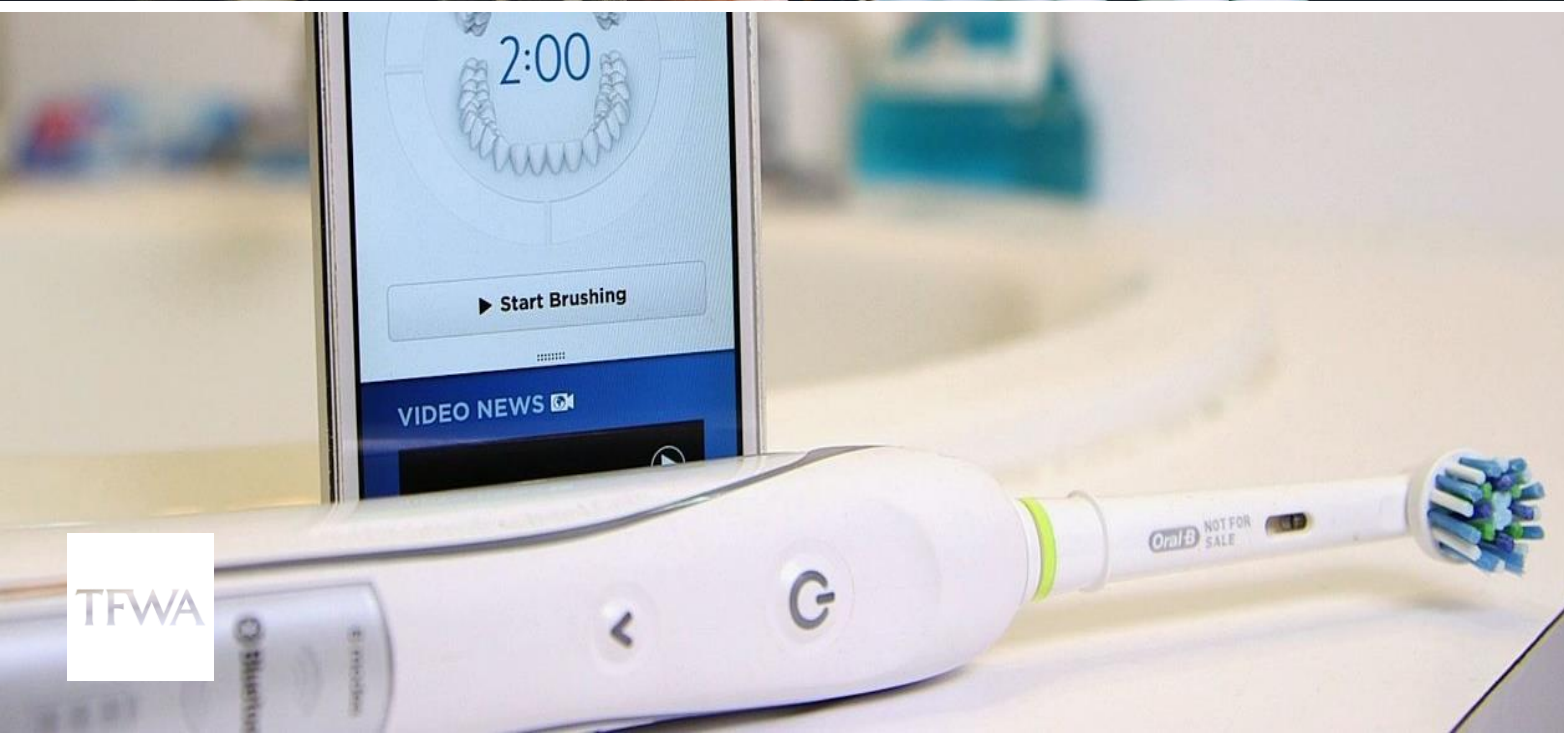




# REDEFINING TRAVEL RETAIL

TFWA



TFWA

# 4.8Bn

Mobile devices

---

But only

# 4.2Bn

Toothbrushes  
worldwide

Source: Emarketer.com

**3Sixty**<sup>™</sup>



# *How to develop a healthy travel retail industry?*

## **WHO IS 3SIXTY**

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- **Formerly Duty Free Air and Ship Supply “DFASS”**
  - **Inflight retail specialist**
- **Retail store expansion over the last 10 years**
  - **Privately owned and operated**

## 3SIXTY HIGHLIGHTS

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*Operating since 1987*



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*Operating over 50 duty free  
and specialty stores throughout  
the Americas*



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*Largest inflight  
retailer in the world*



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*Best inflight retailer  
award for past 6 years*



---

*Serving more than  
400 million passengers  
annually*



---

*Generating over \$600 million in  
annual revenues*

# GLOBAL FOOTPRINT

## Operations on Five Continents: 3Sixty Advantage

### North America

Ottawa  
Chicago  
Denver  
Dallas Orlando  
Miami  
Fort Lauderdale  
Charlotte  
Philadelphia  
Newark  
Pittsburgh

*Air Canada*  
*WestJet*  
*Hawaiian Airlines*  
*Caribbean Airlines*

### South America

*AeroGal*  
*Avianca*  
*Lacsa*  
*Taca*

### Europe

*Virgin Atlantic*

### Asia

*Singapore Airlines*  
*Scoot*  
*Air Macau*  
*Far Eastern Air Transport*  
*Hong Kong Airlines*  
*Hong Kong Express*  
*JetStar Asia*  
*Malaysia Airlines*  
*NokScoot*  
*Okay Airways*  
*SilkAir*  
*Tianjin Airlines*

### Middle East & Africa

*El Al*  
*Air Mauritius*  
*Rwand Air*



## INTRODUCING 3SIXTY

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**DFASS rebranded 3Sixty Duty Free & More in late  
2018**

**Rebranding utilized to achieve a cultural change  
needed to compete in a highly evolving retail  
environment**

## 3SIXTY CULTURE

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**Our aim is to constantly evolve, improve,  
and be at the cutting edge of the Industry**



## 3SIXTY VISION

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WE CLIMB HIGHER, TO SEE WIDER

**we continually look for the big picture in our  
market, to share a new perspective on travel  
retail with our partners**

*The retail evolution started  
with eCommerce!*

---

and exploded  
with smartphones...



*The average person  
spends nearly*

**4hrs**

*daily on their  
smartphone*

---

**25%**

*of all eCommerce sales  
in the US are made on  
mobile*

Source: Emarketer.com



**3Sixty**



TFWA



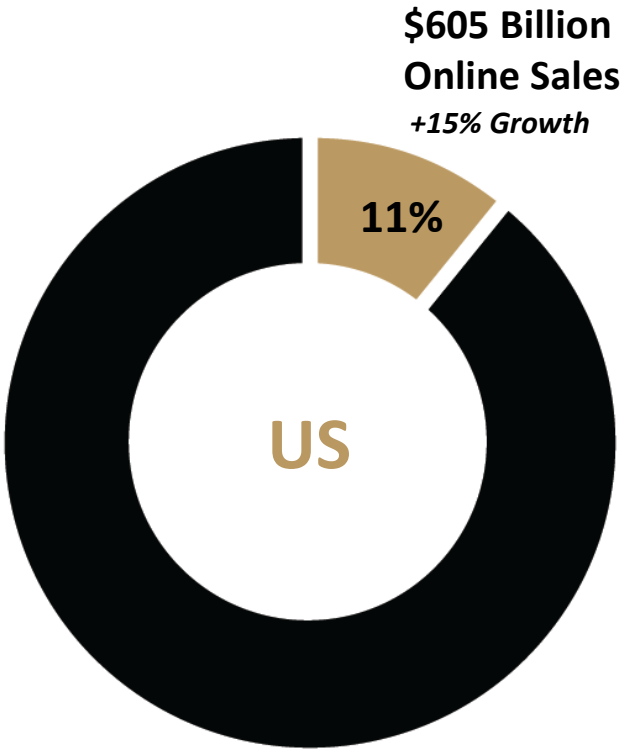
**In China,  
it is already  
approaching**

**85%**

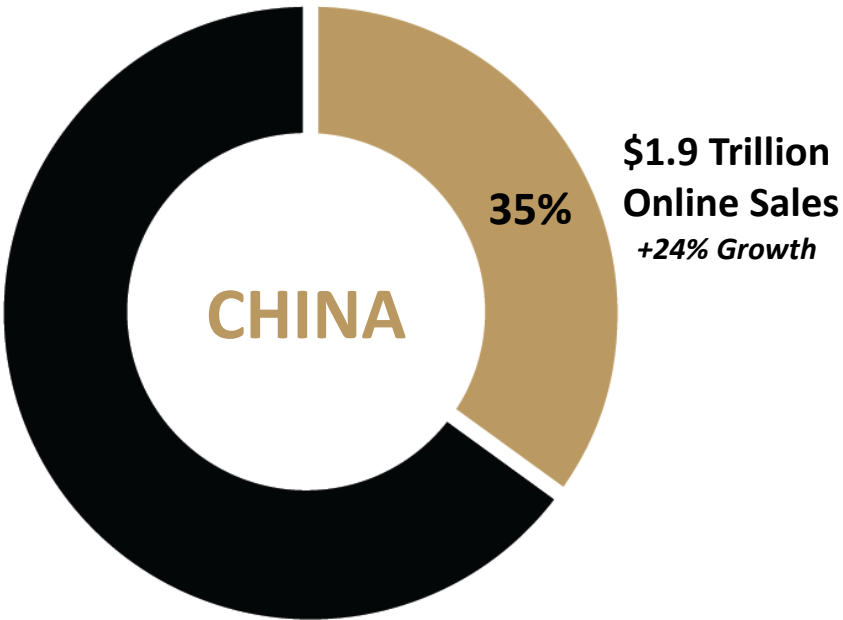
Source: Emarketer.com

**3Sixty**<sup>™</sup>

# 2018 US eCOMMERCE VS CHINA eCOMMERCE



**\$5.5 Trillion**  
Total Retail Sales  
*+3.5% Growth*



**\$5.6 Trillion**  
Total Retail Sales  
*+7.5% Growth*



*Online channels will eventually overtake offline channels for shopping*

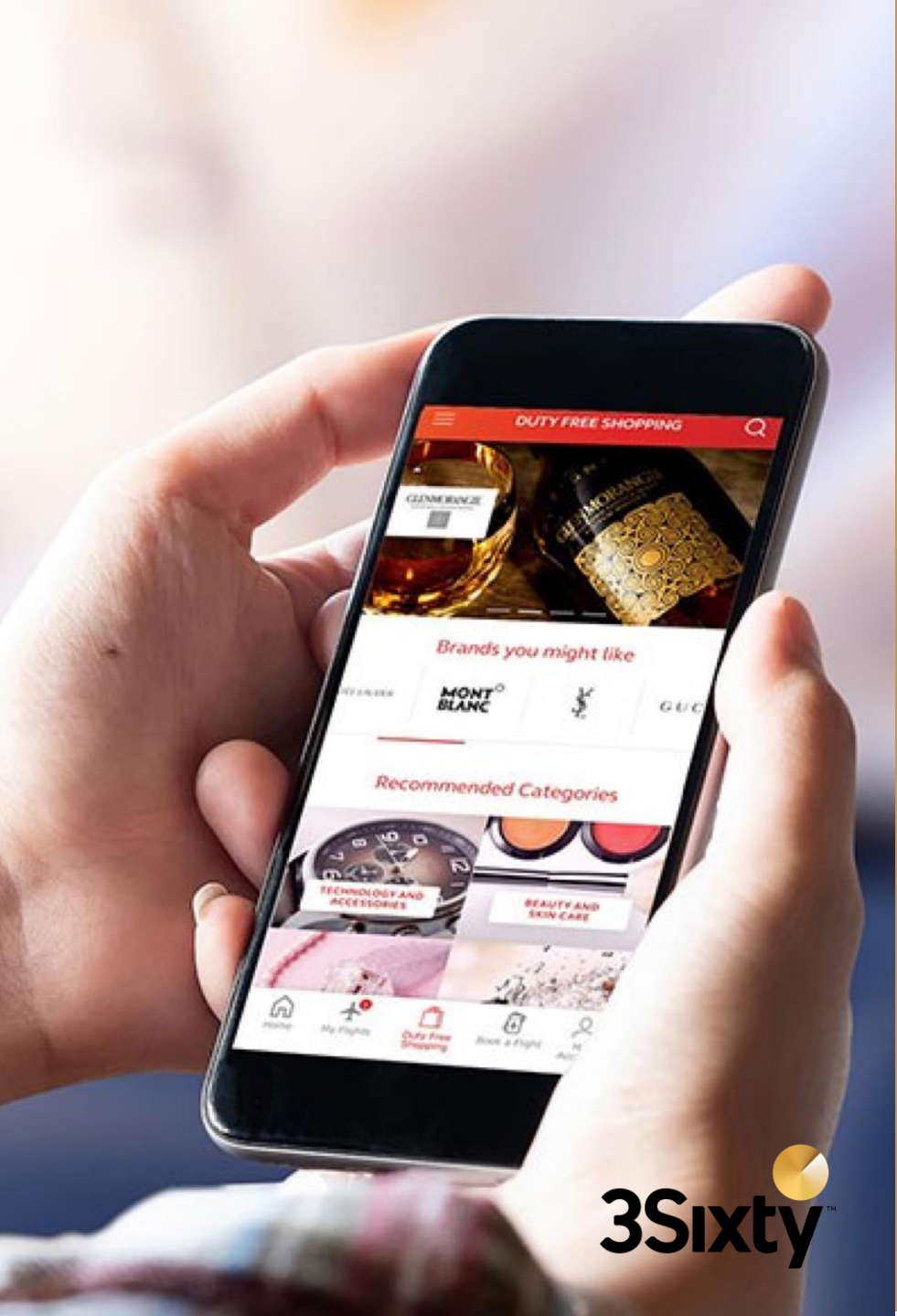
**This will happen faster in travel retail categories**

US primary shoppers who prefer to shop mainly via mobile, online or in-store, by age (Feb 2017)

AGE	75% Online	25% In-Store
18-39		



Source: Market Track as cited in company blog, March 27, 2017



## EVOLVE FROM eCOMMERCE TO OMNICHANNEL

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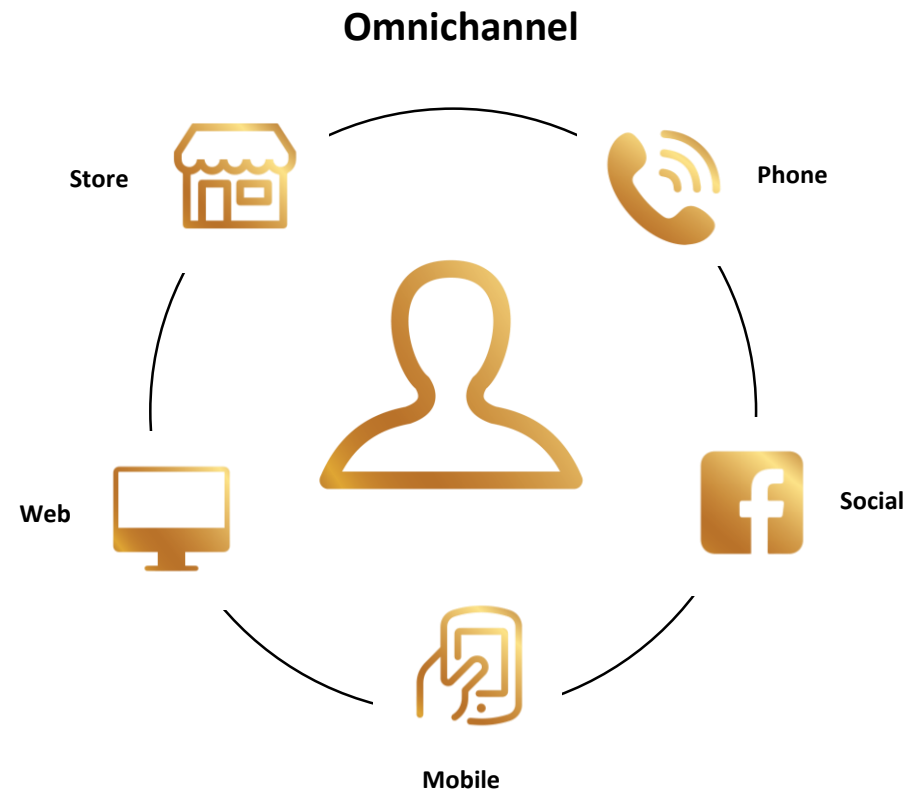
*Consumer needs & expectations are constantly changing.  
Retail is shifting to consumer focused...eCommerce is no  
longer enough!*

**amazon KOHL'S**

**Walmart** 

# CONSUMERS AT THE HEART OF THE STRATEGY

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All channels available to the  
consumer and they are connected.

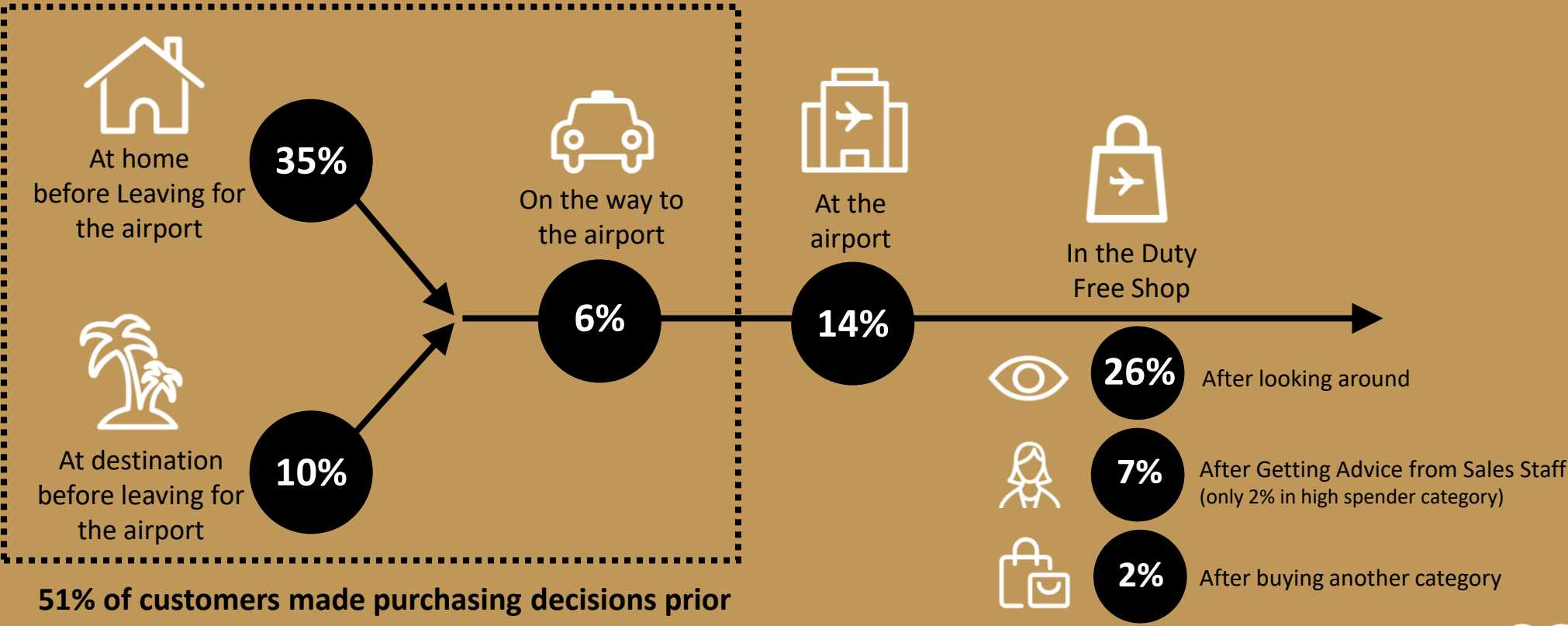
*Is the industry succeeding in the development of  
an Omnichannel strategy?*

---

*Is it possible to succeed?*

# OMNICHANNEL IN TRAVEL RETAIL

*Ensuring full digital engagement prior to travel is essential to capture 65% of potential purchases*



Source: M1nd-set Research

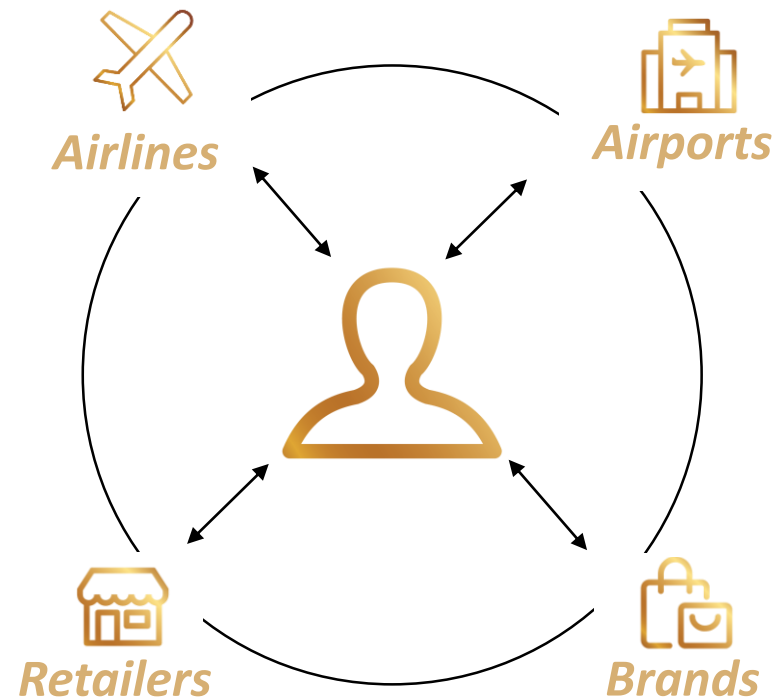




## SUCCESSFUL OMNICHANNEL STRATEGY REQUIRES THE PARTICIPATION OF ALL STAKEHOLDERS

---

***Omnichannel can elevate duty free retail to compete with new domestic omnichannel retailers—  
but only if all stakeholders are partnering effectively***



## **3SIXTY BUSINESS MODEL**

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- **Capture data at booking and engage our passengers**
  - **Offer multiple shopping touchpoints**
  - **Offer multiple fulfillment options**
- **Offer multiple payment options (digital wallets, credit cards & airline miles redemption)**
  - **Develop curated offers through data analytics**
  - **Leverage inflight training and direct sellers**

## 3SIXTY BUSINESS MODEL

---

- **Data analytics**
- **Integration of channels**
- **Multiple fulfillment options**
- **Improved user experience**
- **Enhanced productivity**



## WHERE 3SIXTY IS TODAY

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KRISSHOP 

SIA, 3Sixty and SATS joint venture to operate Krisshop  
and all airlines in the group

**Avianca** 

Partnership with all airline group partners

virgin atlantic 

3Sixty and Virgin Atlantic partnership

## 3SIXTY & KRISSHOP

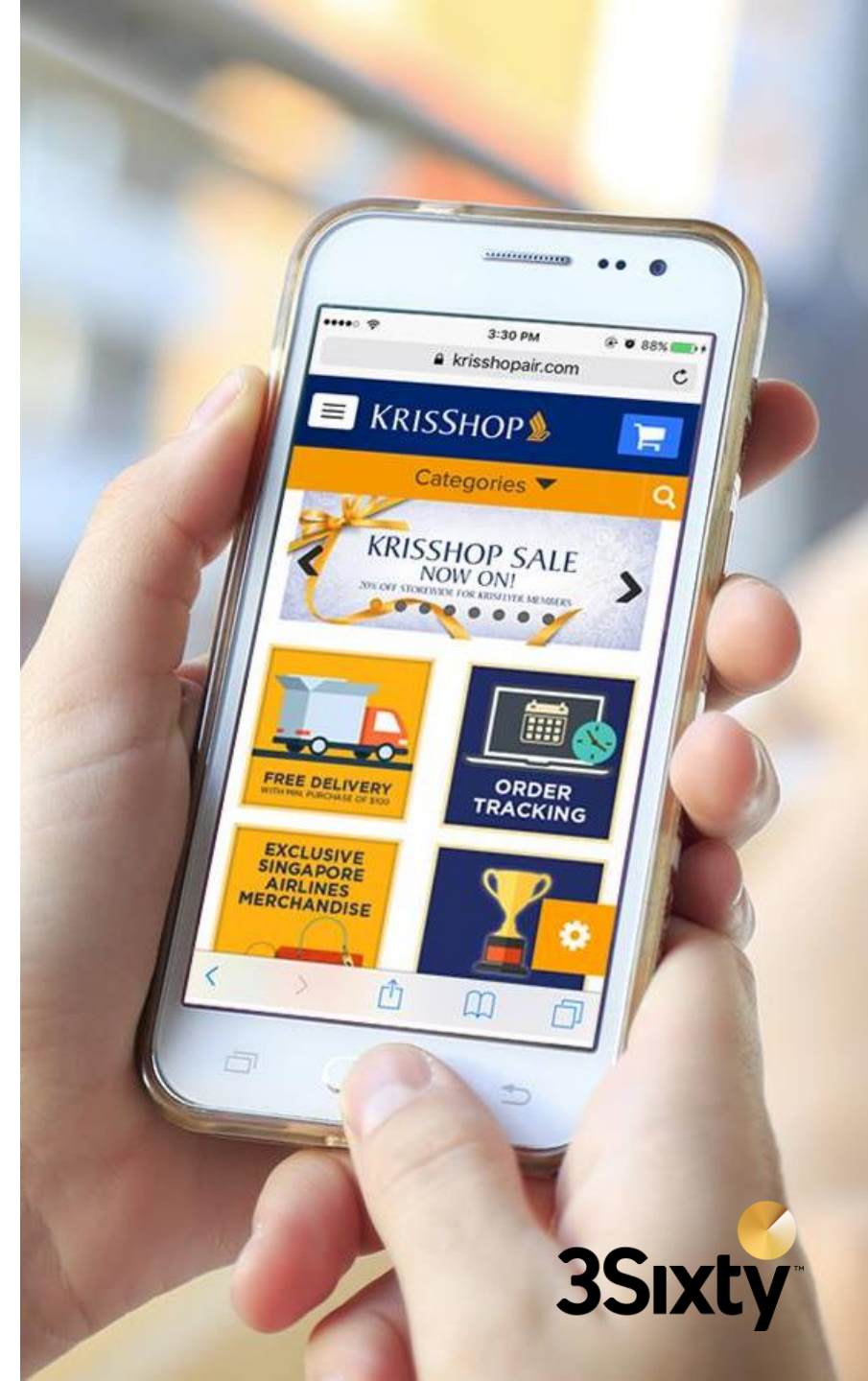
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### Data analytics

- *35 million airline passengers*
- *More than 5 million frequent flyers*

### Fulfillment

- *Seat delivery*
- *Luggage belt delivery*
- *Home & hotel delivery*





## 3SIXTY & KRISSHOP

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### Product curation

- *To target our customers & new trends*

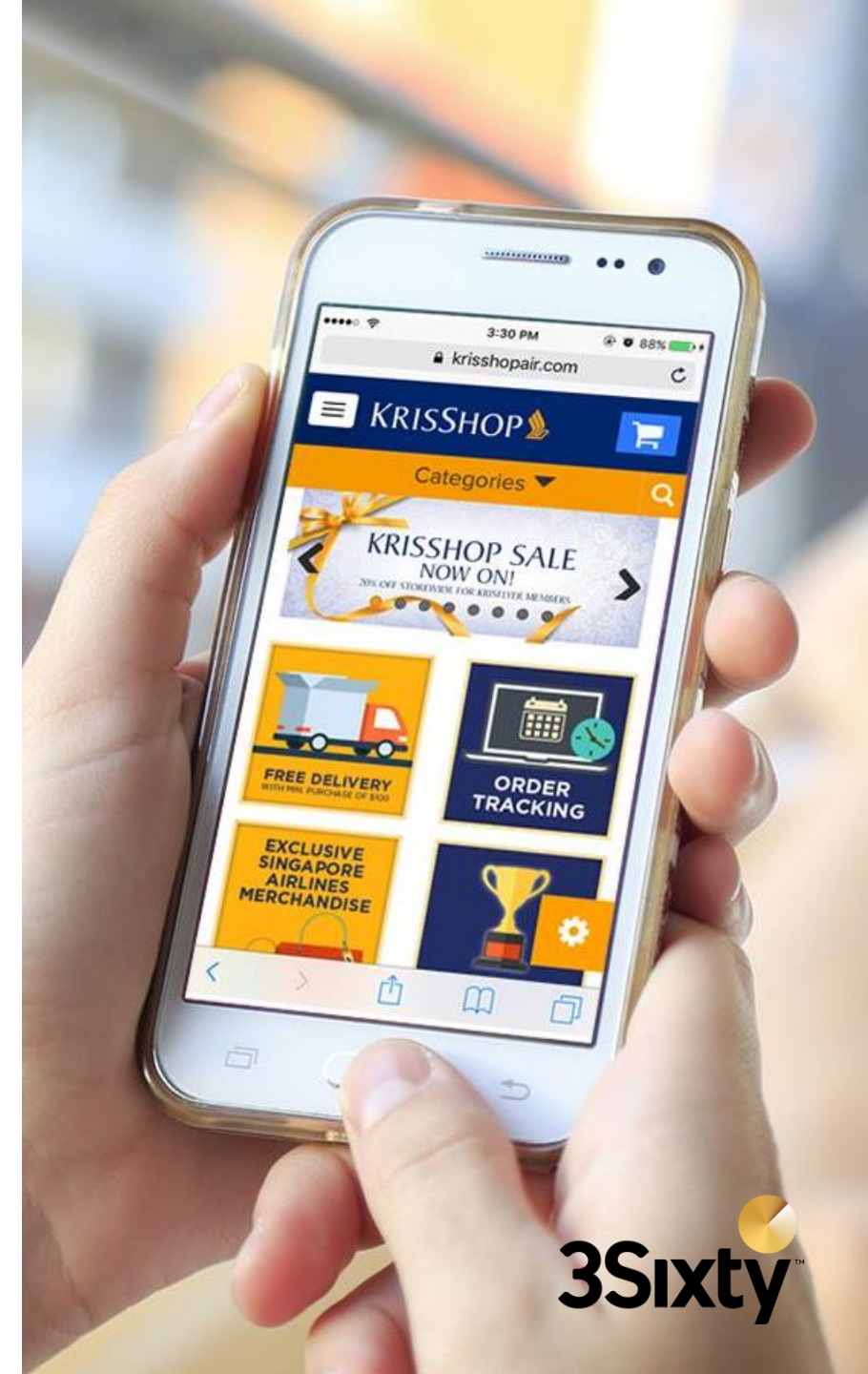
### Direct engagement

- *Online*
- *At check-in*
- *Lounges*
- *On board*

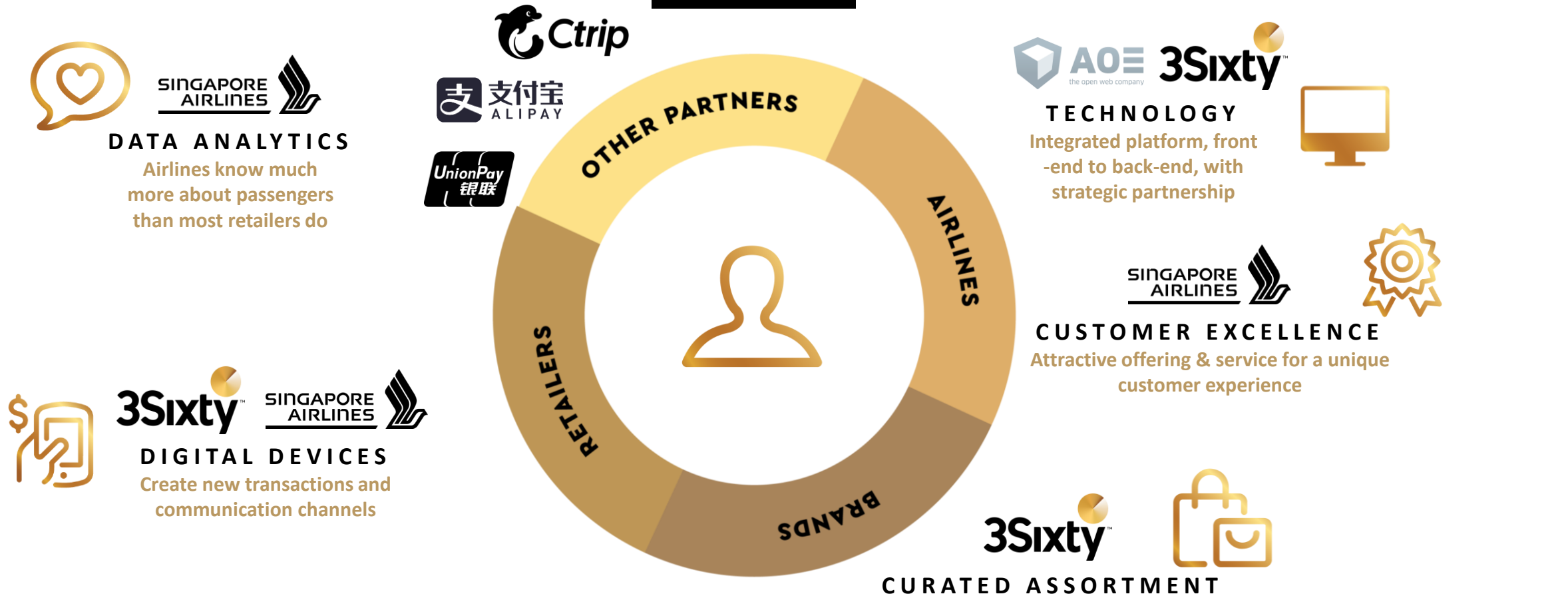
### Technology

- *AOE OM3 platform*
- *Technology guarantees we only sell to passengers*

First website released Q2 2019



BRINGING OMNICHANNEL TO LIFE  
IN PARTNERSHIP WITH SINGAPORE AIRLINES





**Singapore Airlines is just the beginning. 3Sixty is working towards expanding omnichannel airline and customer integration to all its current and future airline partners.**

**Current partners:**



**Future partners:**



**and more...**





## OUR CONTRIBUTION

---

- Consumer at core
- Partnering with Airlines to leverage consumer data
- Data Analytics and curated assortments
- Innovate continuously

*3Sixty is committed to pave the way—it is at the core of our vision*

**WE CLIMB HIGHER,  
TO SEE WIDER**

TFWA

**3Sixty**<sup>™</sup>



***Thank you!***

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