

# Identifying the New Affordable Luxury Fashion Shopper in Travel Retail

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Pi Insight

# Introducing Pi Insight...

TFWA

## Specialists in Travel Retail specific research, insights & data management

SERVICES DEDICATED TO IDENTIFYING, UNDERSTANDING, AND MONITORING THE GLOBAL TRAVEL RETAIL SHOPPER

Founded in **January 2019**

Conducted over **200,000** interviews among international travellers

Handle & manage **millions of rows** of data on a quarterly basis

Focused entirely on the **Travel Retail** channel

Expertise in **quantitative, qualitative & advanced** research methodologies

Supporting clients across the **Alcohol, Beauty, Confectionery, Tobacco** and **Luxury** categories

Providing services across **three core pillars**

### Pi Bespoke

Client specific in-location & online shopper behaviour, brand tracking and fixture appraisal studies

### Pi Syndicated

Multi-client research studies into key industry channels, shopper types and themes

### Pi Data

Processing, managing & developing complex data sets into easily manageable & accessible data assets

Pi Insight

# Today's presentation...

TFWA

All data taken from Pi Insight's Recovery  
Series of reports...

**550**

**affordable luxury fashion buyer interviews**  
*among key European nationalities*



**Affordable Luxury in  
Fashion:**

**Brands including:**

Ray-ban, Desigual, Adidas, Nike,  
Superdry, Lacoste, Diesel etc.

**But not including:**

Burberry, Chanel, Prada, Dior,  
Dolce & Gabbana etc.



Today's presentation...

TFWA

**Affordable Luxury in  
Fashion:  
Key Category  
Metrics**

**Affordable Luxury in  
Fashion:  
Shopper  
Behaviours**



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# A changing affordable fashion shopper...

TFWA

Females

54%

Under 40s

71%

Leisure travellers

83%

1 – 3 trips per year

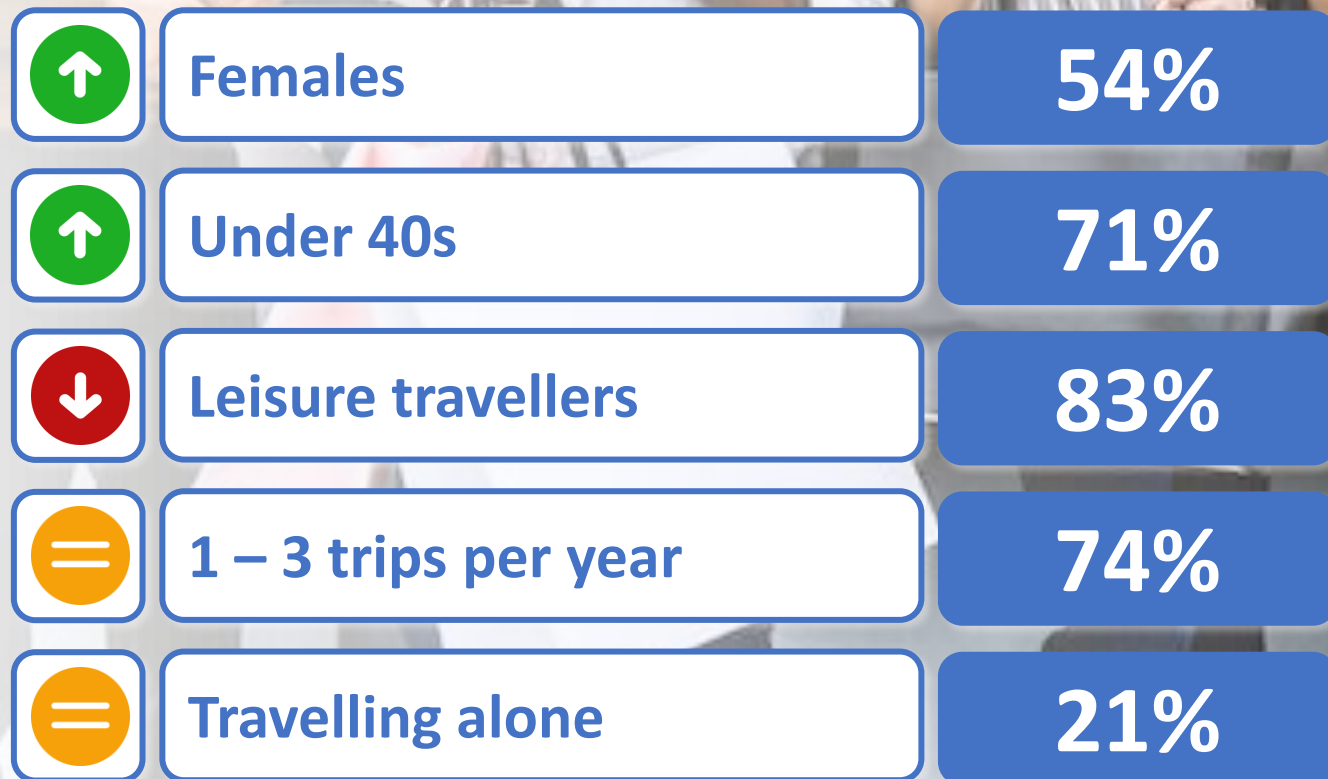
74%

Travelling alone

21%

# A changing affordable fashion shopper...

TFWA





With a lower average item spend level...

TFWA

Average item spend in 2021

**US\$ 71**

Average item spend in 2019

**US\$ 76**



## And changing category preferences...

Sunglasses



43%



Female Clothing



36%



Men's Clothing



31%

Handbags



27%

Shoes



24%

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TFWA

Affordable Luxury in  
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Behaviours



But also, significantly changing shopping behaviours...

TFWA

## A more purposeful shopper...

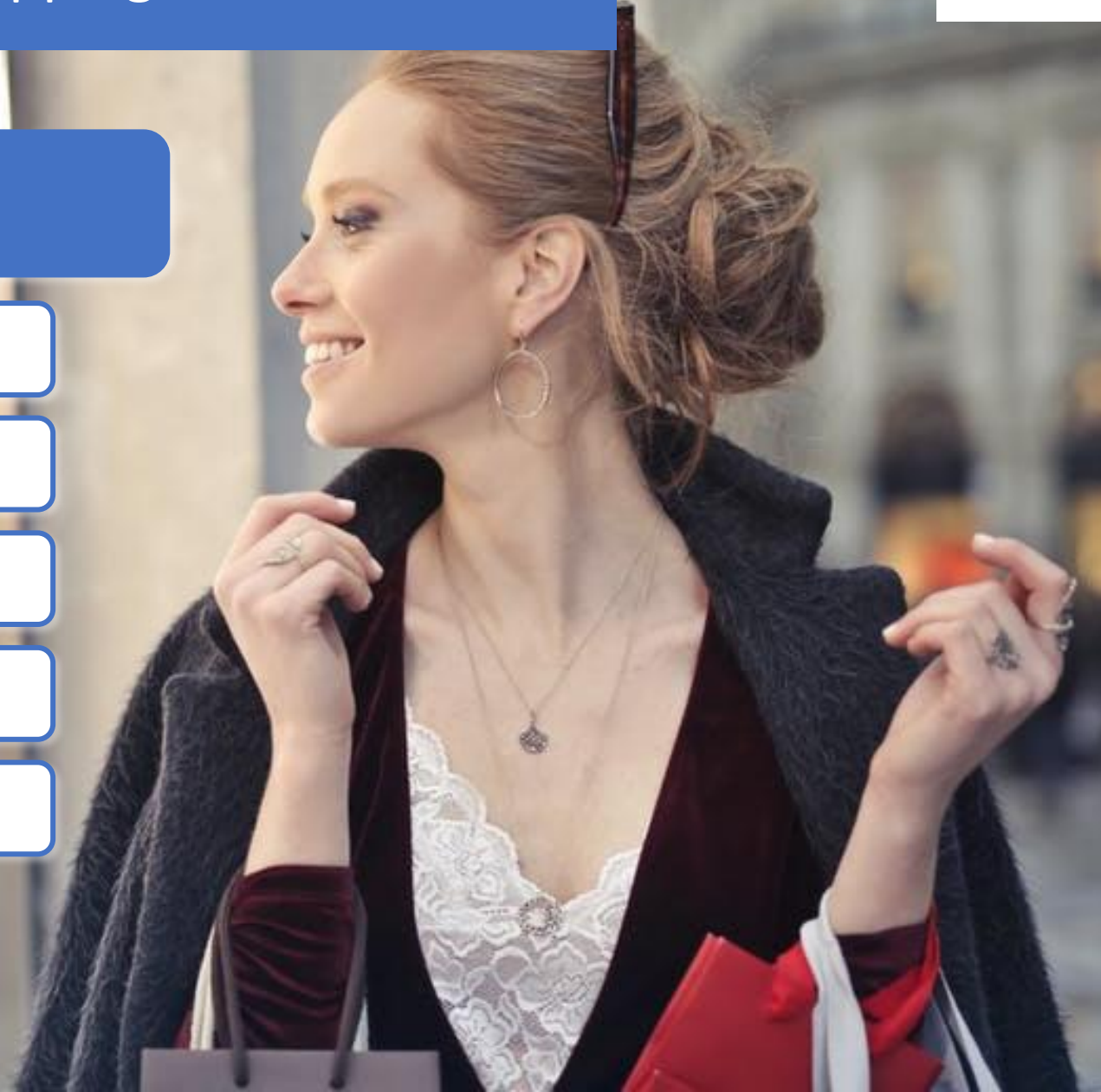
To treat myself: **48%**

Take advantage of airport prices: **34%**

To look for a gift: **34%**

Look for promotions: **30%**

To look for new products: **23%**



But also, significantly changing shopping behaviours...

TFWA

## A more purposeful shopper...

To treat myself: **48%**



Take advantage of airport prices: **34%**

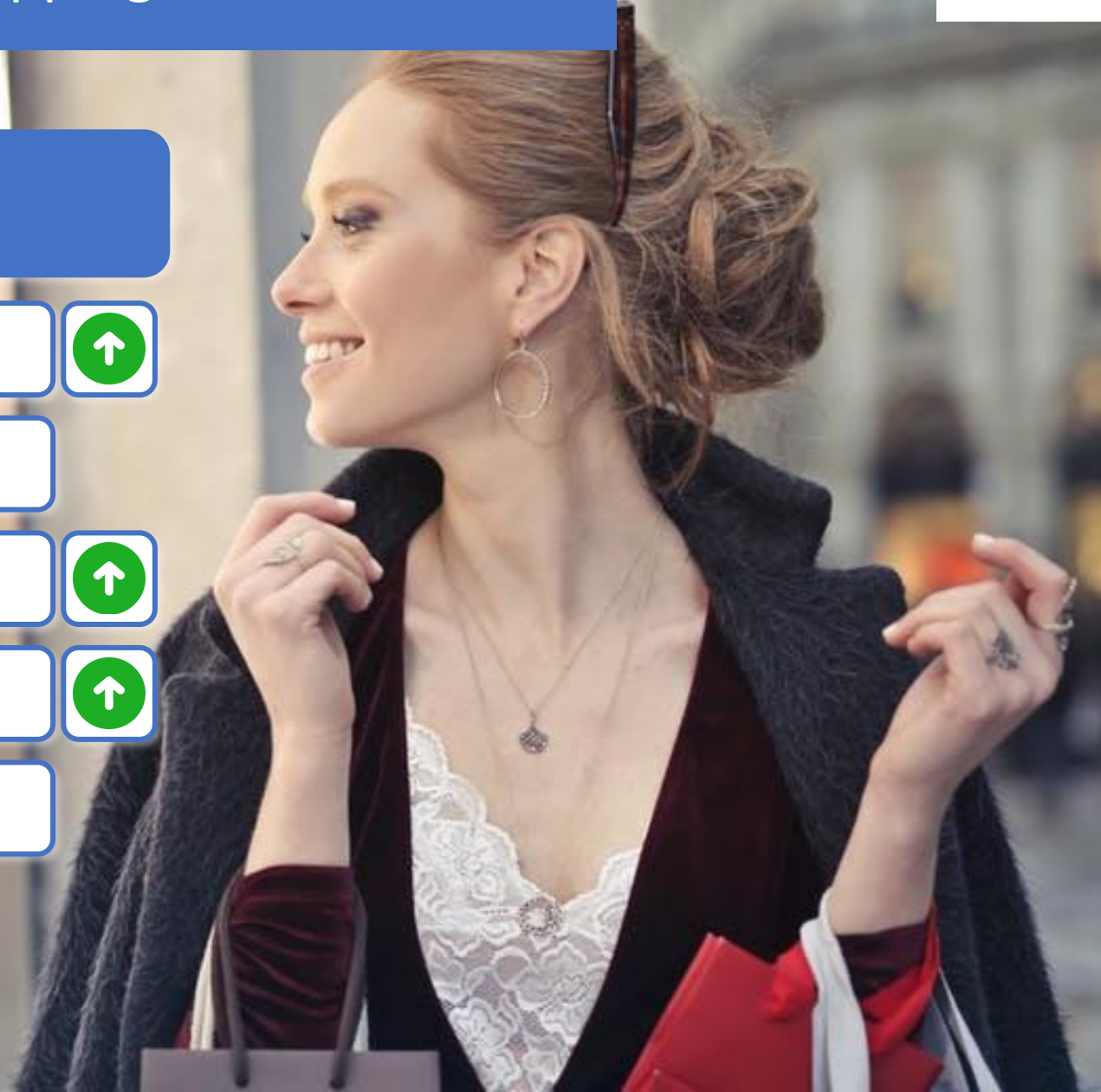
To look for a gift: **34%**



Look for promotions: **30%**



To look for new products: **23%**





They are more impulsive when purchasing...

TFWA



**35%**

**Plan to purchase  
their affordable  
luxury Fashion  
item**



**12%**

Exact item

**20%**

Brand



**19%**

Range of brands



More likely to be buying for others...

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An increasing trend towards purchasing for others...



Purchasing for self

72%



For someone else

28%



Pi Insight





And increasingly experimental...

TFWA

A significant increase in non-regular brand purchasing...



**30%**

**Purchase a regular  
brand**

vs. 50% in 2019

**70%**

**Purchase a non-regular  
brand**

vs. 50% in 2019



And increasingly experimental...

TFWA

A significant increase in non-regular brand purchasing...



**30%**

**Purchase a regular  
brand**

vs. 50% in 2019

**38%**

Alcohol

**40%**

Beauty

**37%**

Confec.

**70%**

**Purchase a non-regular  
brand**

vs. 50% in 2019



**62%**

Alcohol

**60%**

Beauty

**63%**

Confec.



## Purchase drivers...

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**33%**

Good quality  
items

**22%**

Cheaper  
prices

**20%**

New or  
different

**19%**

Attractive  
promotions

**18%**

Liked it after  
trying it on

**17%**

Well-known  
brands

Wanting to come to these conclusions alone...

TFWA

Staff remain key but are having a reduced impact...



**48%**

**Interact with  
staff**

vs. 53% in 2019

**27%**

**Alcohol**

**41%**

**Beauty**

**22%**

**Confec.**

**66%**

**Are influenced by staff  
interaction**

vs. 73% in 2019

**64%**

**Alcohol**

**57%**

**Beauty**

**62%**

**Confec.**





Sustainability is a key issue...

TFWA

**71%**

consider sustainability  
to be important when  
shopping in Duty Free  
stores



Very important when shopping in DF: **30%**



Quite important when shopping in DF: **41%**

## With packaging & materials the most important areas...

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**40%**

Recyclable  
packaging

**38%**

Single-use plastic  
reductions

**37%**

Biodegradable  
materials

**36%**

Items made from  
recycled material

**33%**

Reusable items or  
packaging

**33%**

Carrier bag  
reductions



In summary...

TFWA

Subtle changes in  
affordable Fashion  
shopper interests from  
a category & spend  
perspective

Core purchasing drivers  
of quality, pricing and  
differentiation remain  
key purchasing  
considerations

Significant changes in  
how shoppers approach  
the category & are more  
purposeful, impulsive &  
experimental

# Thank you...

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