TFWA

Identifying the New Asia Pacific Duty Free Shopper

Stephen Hillam
Managing Director
Pi Insight

Pi Insight

Today's Presentation

Identifying Changes in Asian Pacific Duty Free Shopper Behaviours

Understanding the New Chinese Duty Free Shopper

Today's Presentation

TFWA

Identifying Changes in Asian Pacific Duty Free Shopper Behaviours

Understanding the New Chinese Duty Free Shopper

Pi Insight

The Asian Duty Free buyer profile…

	2022	2019
Female	50%	45%
40 & Under	59%	66%
Leisure	78%	91%
1 – 3 trips	79%	69%
Travelling alone	11%	12%

Pi Insight

Consistent category interests...

TFWA

	Alcohol	Beauty	Confect.	Tobacco	Fashion
2022	37%	36%	34%	18%	34%
2019	41%	36%	39%	20%	33%

Pi Insight

A change in the approach to Duty Free shopping…

TFWA

	2022	2019
Take advantage of DF prices	43%	36%
Look for promotions	43%	31%
Looking for a gift	39%	28%
To treat myself	38%	30%
To look for new or different products	34%	27%

Pi Insight

A shift in purchase planning...

55%
Planned their purchase
vs. 62% in 2019

22%
Planned their exact item

26%
Planned their brand

Pi Insight

A more experimental shopper…

2022	2019
54% Purchased a non-regular brand	**43%** Purchased a non-regular brand

Pi Insight

A shift in purchase reasons...

55%

Purchase for themselves

vs. 72% in 2019

15%

Purchase to share

vs. 11% in 2019

30%

Purchase for someone else

vs. 17% in 2019

Pi Insight

But, where core needs remain consistent…

	2022	2019
Good quality	38%	42%
Cheaper than elsewhere	27%	25%
Well known/International brand	27%	31%
Attractive promotion	24%	20%
Looked new & different	20%	17%
Perfect for a treat	20%	17%

Today's Presentation

TFWA

Identifying Changes in Asian Pacific Duty Free Shopper Behaviours

Understanding the New Chinese Duty Free Shopper

Pi Insight

The Chinese shopper will return to Duty Free…

TFWA

89%

Of those expecting to visit the Duty Free store on their upcoming trip, were also visitors pre-pandemic

Pi Insight

High interest in various product types…

TFWA

Alcohol	Beauty	Confect.	Tobacco	Fashion
61%	66%	47%	32%	71%

Pi Insight

Looking for treats, gifts & differentiation…

TFWA

53%
Treat myself

53%
Look for a gift

46%
Look for souvenirs

42%
Look for new items

38%
Look for Duty Free exclusives

36%
Look for specific items

In-store behaviours are likely to have changed…

TFWA

53%
Will be less likely to sample products

38%
Will be less likely to interact with staff

51%
Will spend more time in store vs. previous trips

38%
Will spend more vs. previous trips

Pi Insight

But, clear purchase intent remains...

10%
Are planning to buy a specific item

+

7%
Are planning to buy a specific brand

+

27%
Are planning to buy a product type

=

44%
Will have a direct purchase intent

Today's Presentation

Identifying Changes in Asian Pacific Duty Free Shopper Behaviours

Understanding the New Chinese Duty Free Shopper

In Summary…

The current Asia Pacific shopper has a similar profile and similar Duty Free interests in terms of product categories & purchase drivers

However, their approach to the Duty Free channel has adapted, with lower levels of planning & increased propensity to experiment

The post-COVID Chinese shopper presents a clear opportunity, although we must be mindful of renewed shopper needs & expectations

Pi Insight

Thank you!

Stephen Hillam
Managing Director
Pi Insight