

Identifying the New Asia Pacific Duty Free Shopper

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Managing Director
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Today's Presentation

TFWA

**Identifying Changes in
Asian Pacific Duty Free
Shopper Behaviours**

**Understanding the
New Chinese Duty Free
Shopper**

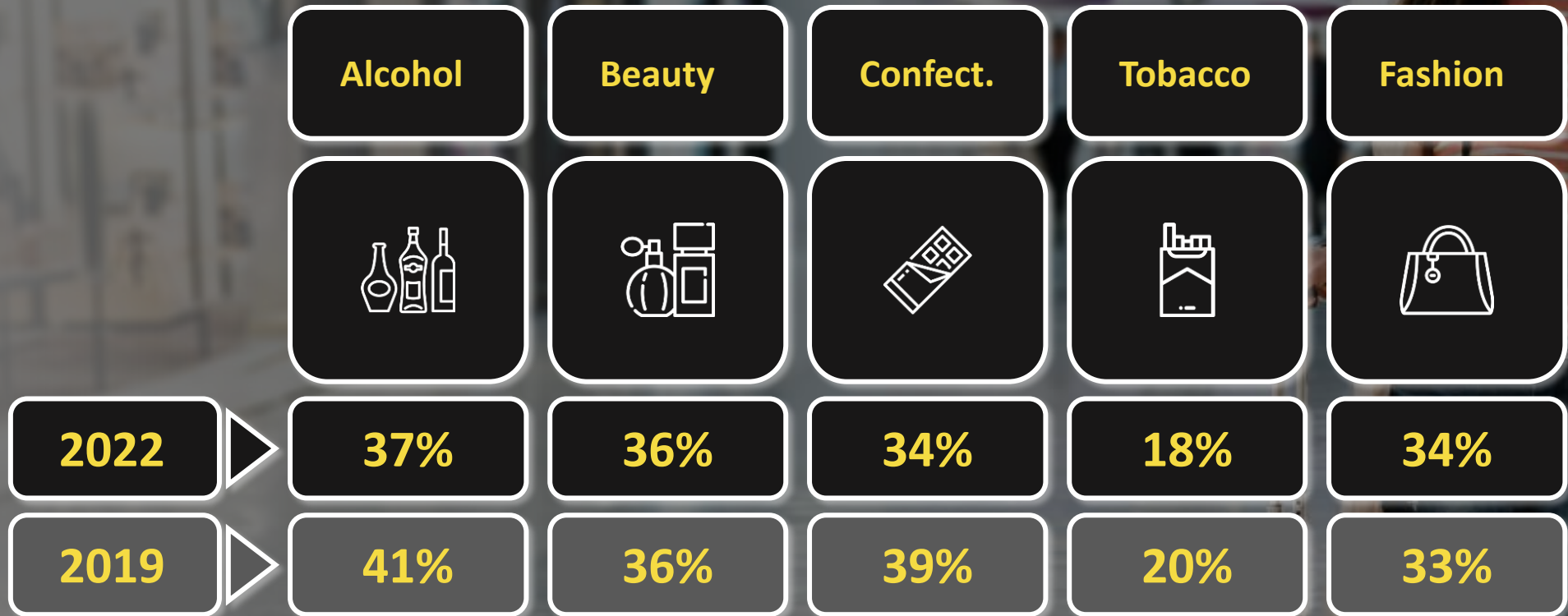
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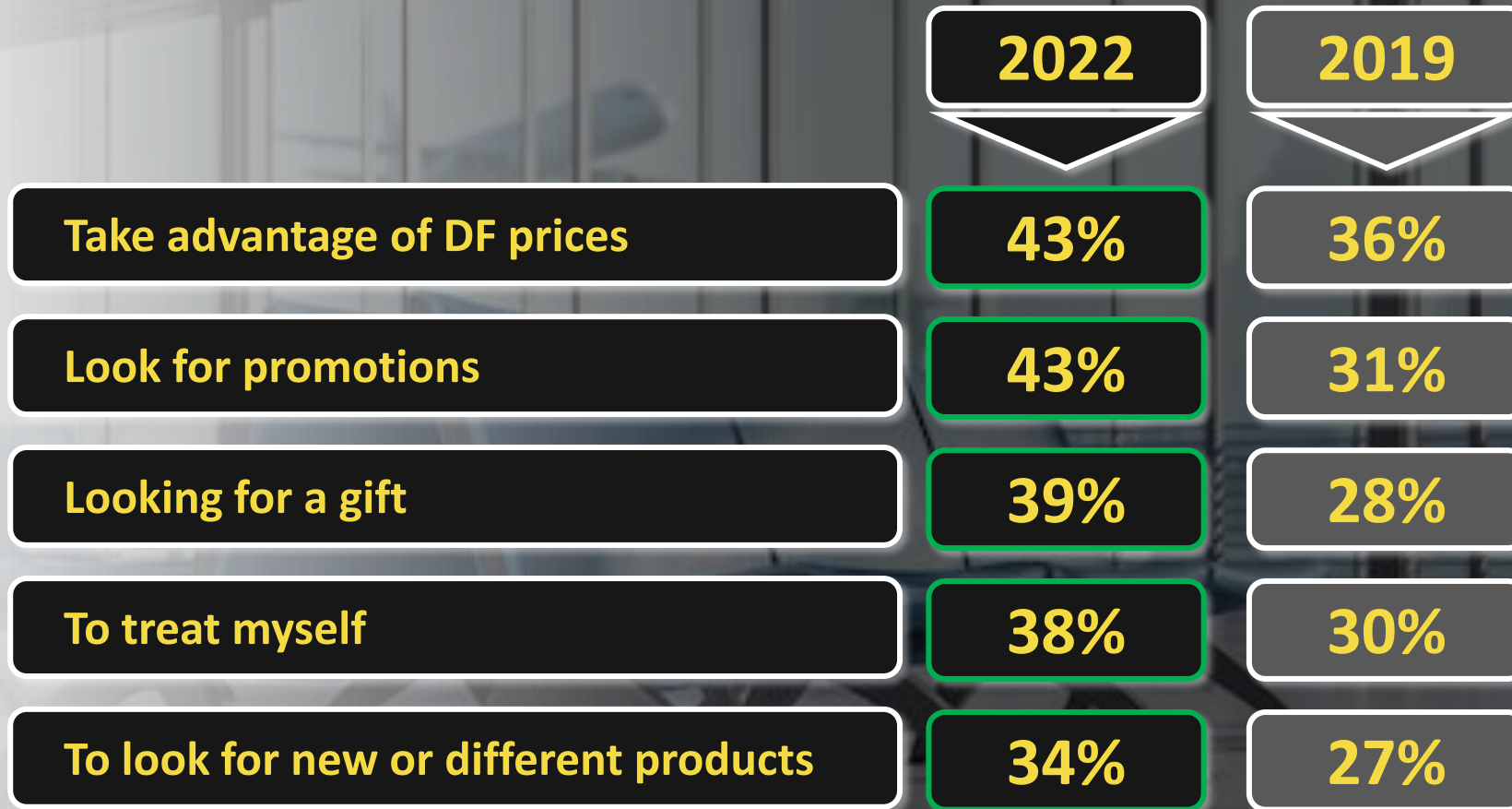
The Asian Duty Free buyer profile...

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

Consistent category interests...



A change in the approach to Duty Free shopping...



A shift in purchase planning...

55%
Planned their
purchase
vs. 62% in 2019



22%
Planned their
exact item



26%
Planned their
brand

A more experimental shopper...

2022

54%

Purchased a non-regular brand



2019

43%

Purchased a non-regular brand

A shift in purchase reasons...

55%

**Purchase for
themselves**

vs. 72% in 2019



15%

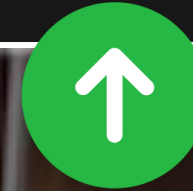
**Purchase to
share**

vs. 11% in 2019

30%

**Purchase for
someone else**

vs. 17% in 2019



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%

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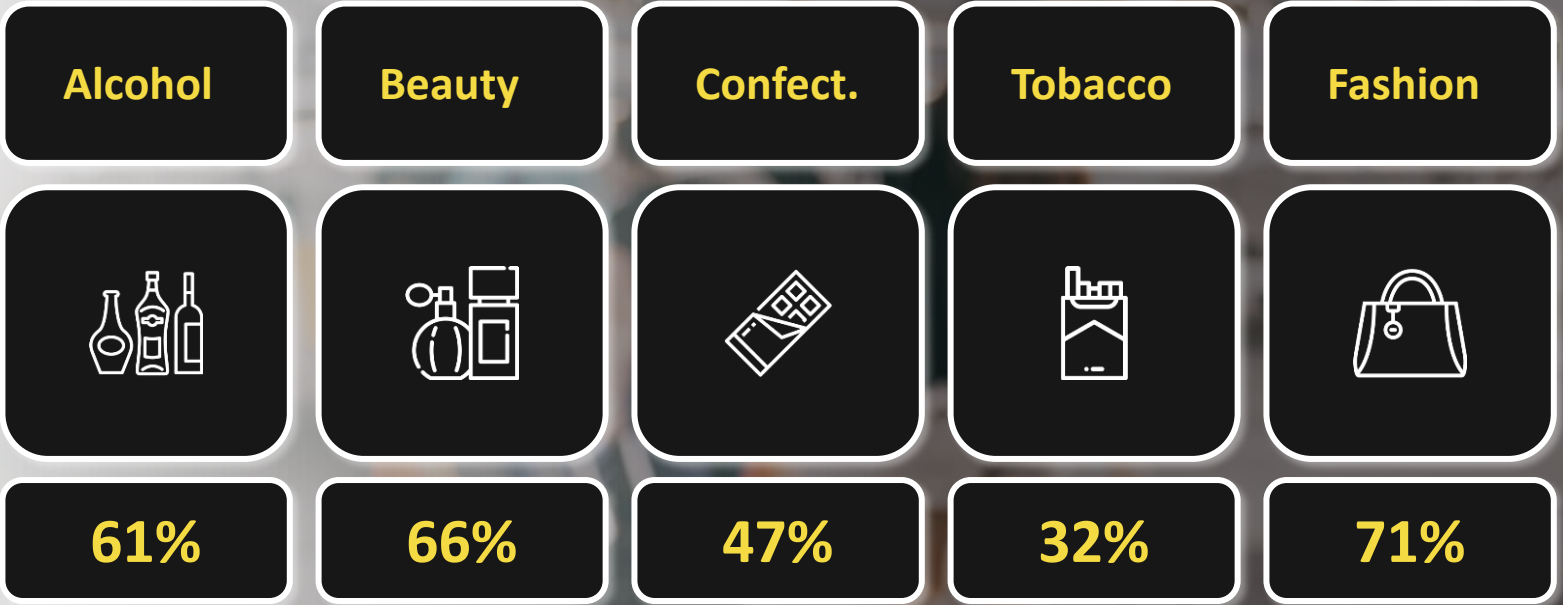
The Chinese shopper will return to Duty Free...

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89%

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

High interest in various product types...



Looking for treats, gifts & differentiation...

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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...

53%

Will be less likely to sample products

38%

Will be less likely to interact with staff

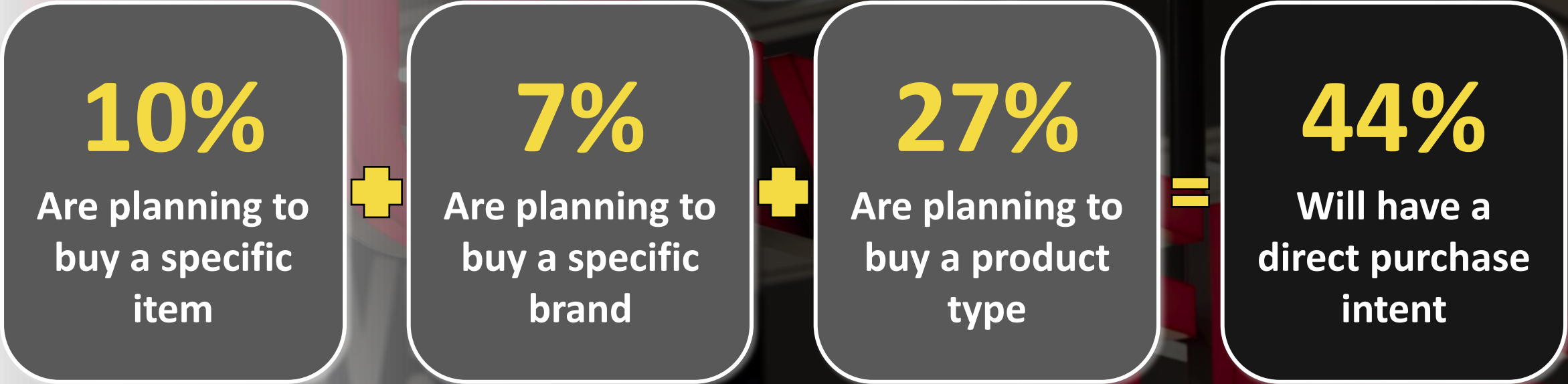
51%

Will spend more time in store vs. previous trips

38%

Will spend more vs. previous trips

But, clear purchase intent remains...



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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

Thank you!

Stephen Hillam
Managing Director
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