

Understanding & Influencing the MEA Luxury Duty Free Shopper

Stephen Hillam
Managing Director
Pi Insight



Today's Presentation...

TFWA

All data taken from Pi Insight's Global
Shopper database...

1,500

Duty Free buyer interviews

among key Middle East & African nationalities



Buyers from
categories inc...

Alcohol

Beauty

Confectionery

Tobacco

Fashion & Acc.

Watches & Jewellery



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TFWA

**Identifying the
MEA Luxury
Duty Free
Shopper**

**Understanding
the MEA Luxury
DF Shopper
Behaviours**

**Influencing
the MEA
Luxury Duty
Free Shopper**



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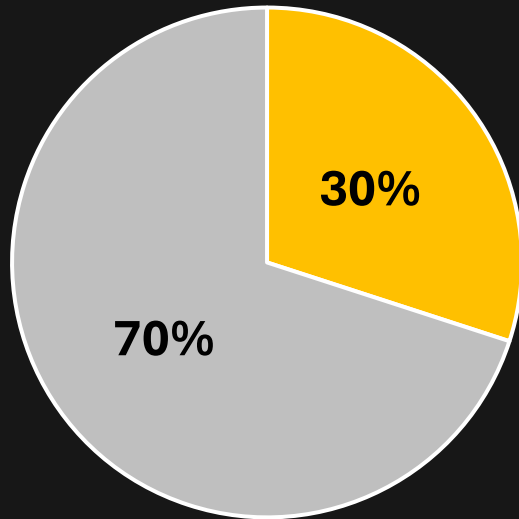
Influencing
the MEA
Luxury Duty
Free Shopper



Defining the MEA Luxury Buyer...

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THE LUXURY BUYER: THE TOP 30% OF SPENDERS



**Average Luxury Shopper
Spend**

US\$ 263



The MEA Luxury buyer profile...

TFWA

	LUXURY BUYER	MEA AVERAGE
Male	58%	53%
40 & Under	66%	67%
Leisure	83%	82%
4+ trips	56%	67%
Travelling alone	7%	13%



Increased interest in...

TFWA



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Predominately buying for ...

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#1

Purchase for themselves

45%

#2

Purchase for a gift

37%

#3

Purchase to share

18%



Quality & recognition key to conversion...

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Key purchase drivers...

Good quality

40%

Well known/International brand

29%

Attractive promotion

24%

Attractive display

23%

Usual brands

22%



A purposeful shopping mentality...

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39%

Look for new
products

39%

Look for a
gift

38%

Take advantage
of airport prices

37%

Interesting store
display

37%

Always visit
Duty Free



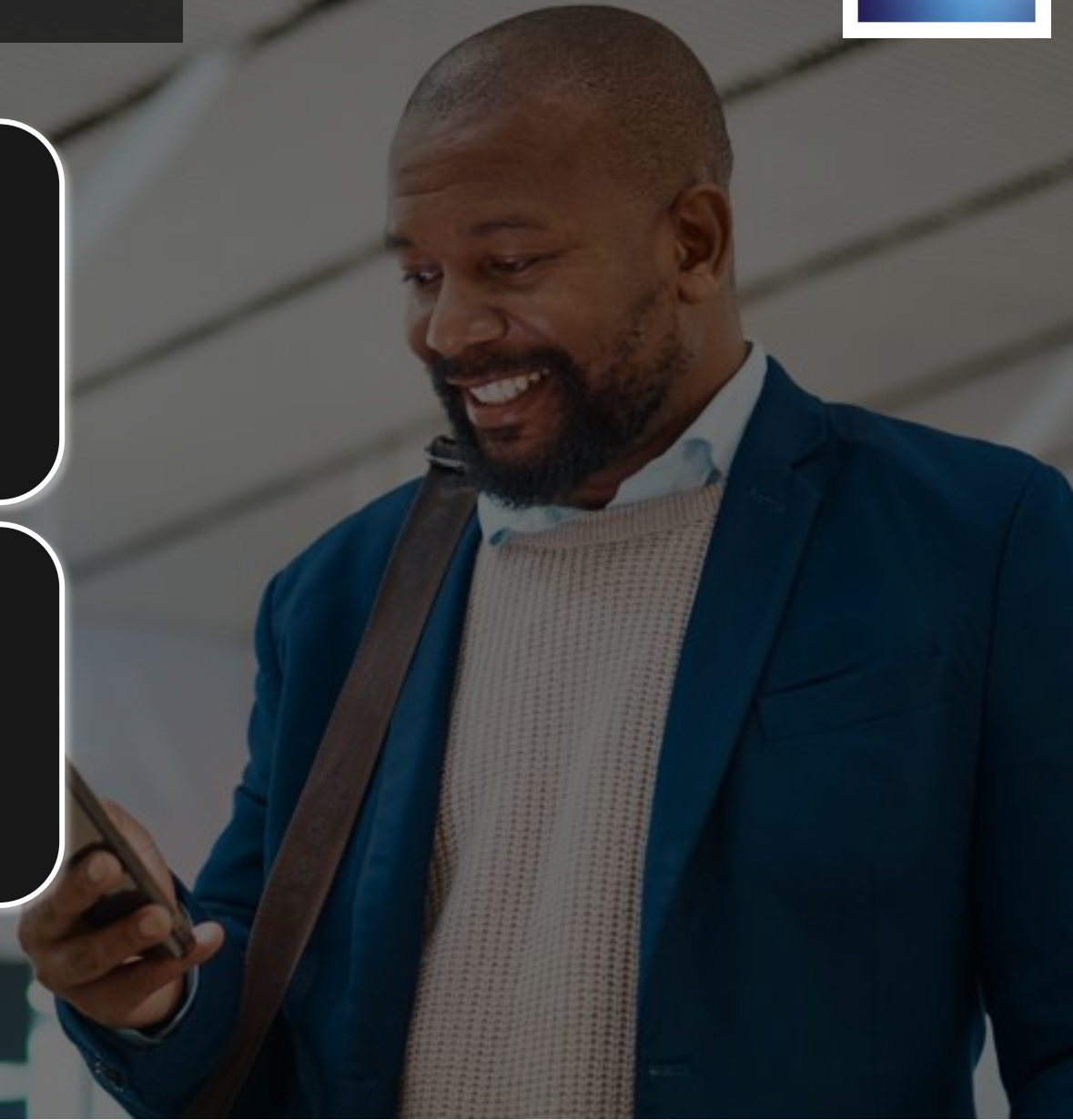
And a significant openness to influence...

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49%
Plan their
purchase

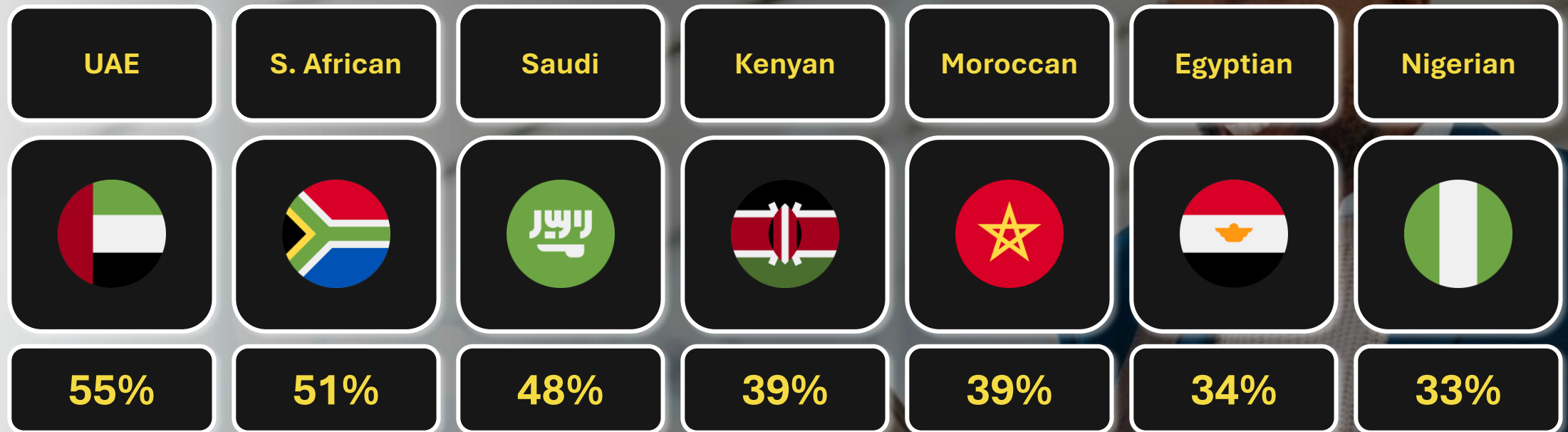
19%
Planned
their exact
item

23%
Planned
their brand



Across each of the key nationalities...

TFWA



And also, an interest in experimentation...

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52%

**Purchase a
non-regular
brand**



And also, an interest in experimentation...

TFWA

52%

**Purchase a
non-regular
brand**

Egyptian

Moroccan

S. African

Kenyan



70%

67%

60%

56%



And increased time to be influenced...



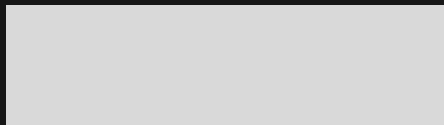
Shoppers Spending 30+ Minutes in-store

Luxury Buyers



49%

MEA Average



36%



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Influencing the purchase decision making process...

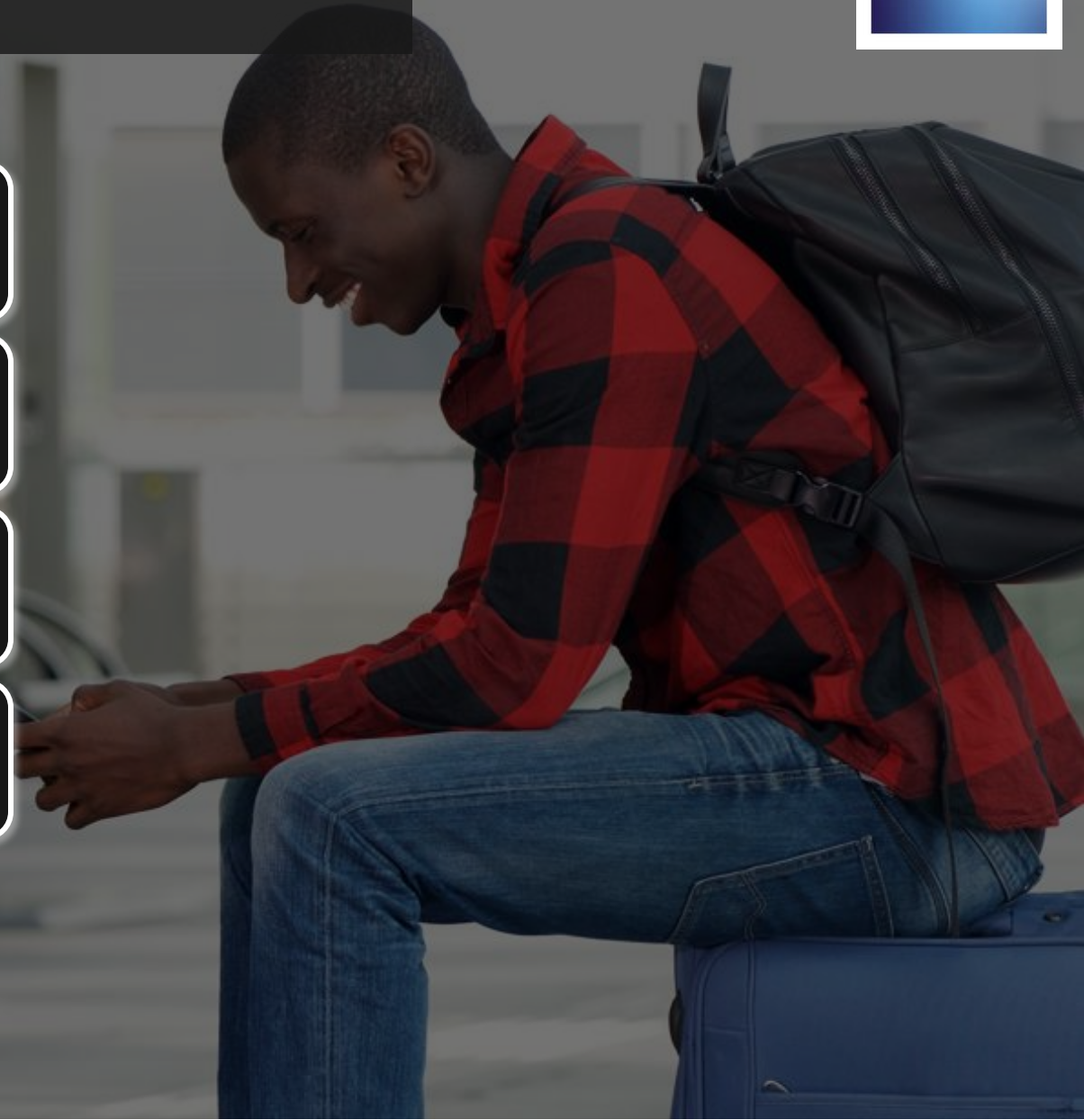
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Staff Interactions

Differentiation & Exclusivity

Sustainability

Pre-trip Communications



Staff interaction his high among Luxury shoppers...

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65%

Of shoppers interact
with staff when in the
Duty Free store

Advice on specific items

44%

Help locating a product

40%

Advice on promotions

34%



And is also influential in the decision making process...

TFWA

74%

Of those that interact
with staff are positively
influenced

50%

Had assistance
choosing between
items

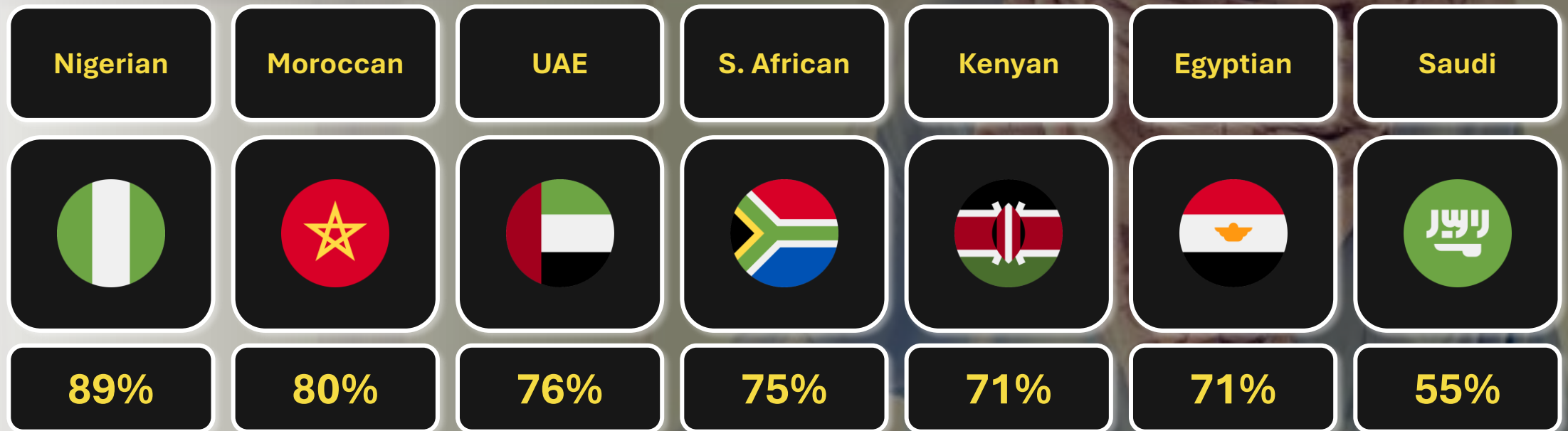
24%

Would not have
made a purchase
without staff



Influence is high across each of the key groups...

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Duty Free Exclusives are an important expectation...

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96%

**Consider exclusives
to be an important
element of their
shopper experience**



That influence conversion...

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79%

Would be more likely
to buy an item if it is a
Duty Free exclusive
vs. a standard product

Saudi



95%

Egyptian



93%

Nigerian



92%

Kenyan



83%



Sustainability drives item consideration...

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If deciding between two items and one had greater sustainability credentials...

12%

Slightly
more likely
to buy item



34%

Much more
likely to buy
item



42%

Definitely
decide to
buy item



88%

Would be
positively
influenced



A highly active shopper pre-trip...

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70%

Research shopping
opportunities
before their trip

53%

Research airport
Duty Free
shopping

42%

Research in-
location shopping



With a focused interest in certain aspects...

TFWA

57%

Exclusives &
Limited Editions

50%

Product
availability

50%

Product
pricing

50%

Duty Free
allowances

49%

Promotional
discounts

45%

Store
location



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In Summary...

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The MEA Luxury Shopper offers **one of the largest regional opportunities**; but have super-charged expectations

They are **open to influence, thrive on experience & differentiation**, and also know what they want to see

We need to **focus on the key influencers to cater to their needs**, but also develop the Luxury shopper opportunity





Thank you!

Stephen Hillam
Managing Director
Pi Insight

