



DRIVING INNOVATION WITH PASSENGER INSIGHTS

TFWA, SINGAPORE, 11 MAY 2026



ASIA FACES SAME CHANNEL CHALLENGE AS GLOBAL TRAVEL RETAIL

PENETRATION REMAINS LOW



x2

Passengers spend twice as much time on their personal devices vs. 5 years ago

	2016	2025
Purchase %		
Global	29%	26%
Asia	38%	28%
Average Spend		
Global	\$233	\$130
Asia	\$251	\$135

TRANSACTION VALUE SPEND DECLINES



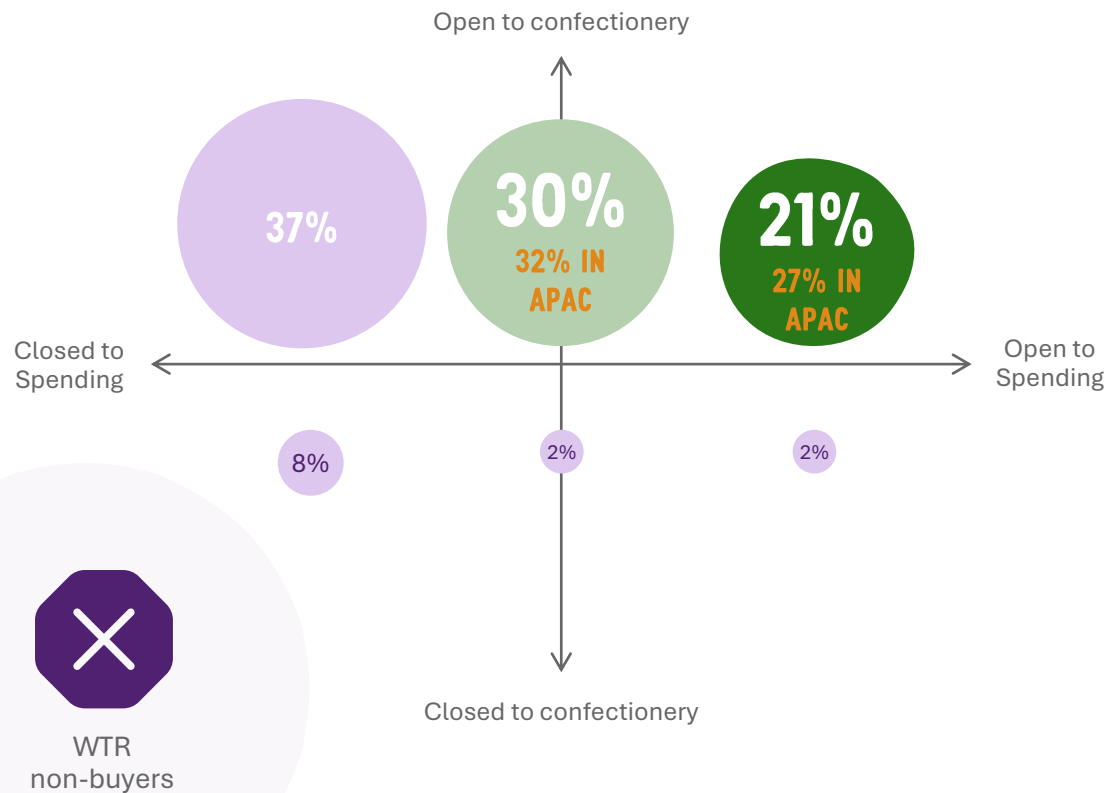
-15%

Average spend per traveler declined and it's below pre-crisis level

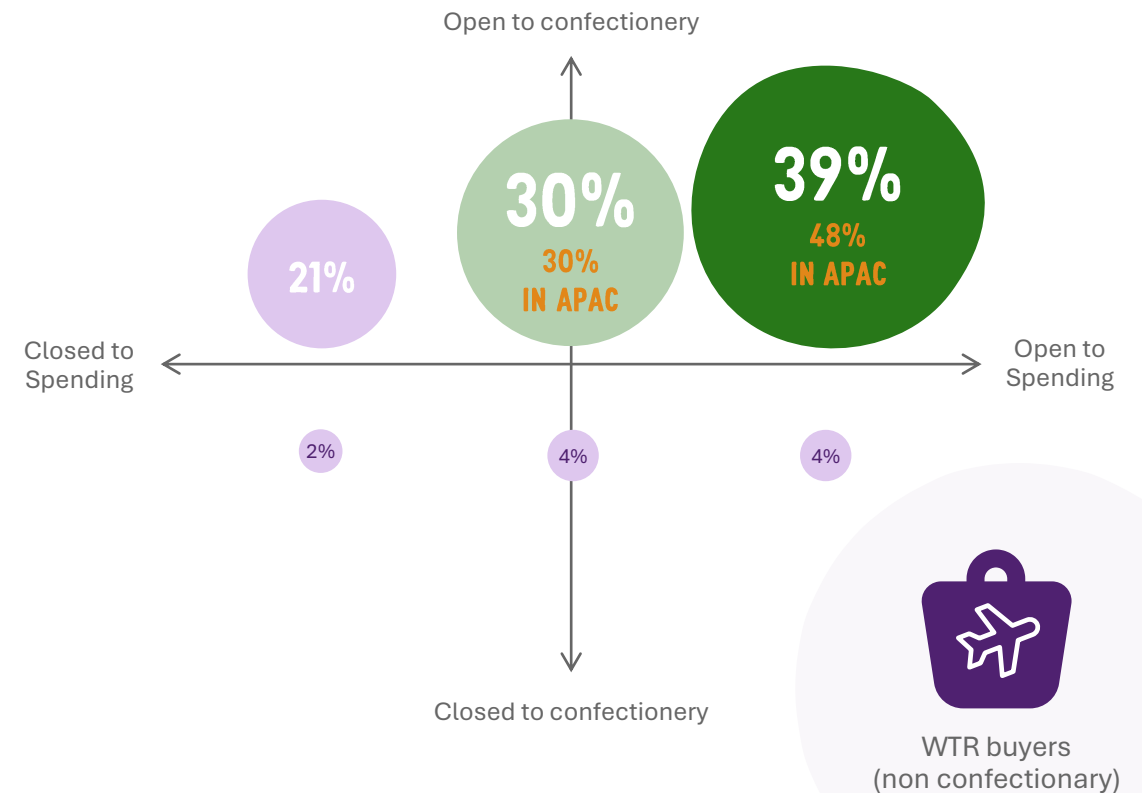
CONFECTIONERY CATEGORY IS KEY TO BOOST PENETRATION AND SPEND

And in Asia the opportunity is even bigger, more passengers are opened to spend and spend on confectionery

HALF OF THE WORLD'S NON-BUYERS ARE OPEN TO BUYING CONFECTIONERY – 59% IN APAC



7 IN 10 WTR BUYERS REPRESENT OPPORTUNITY – 78% IN ASIA



IT'S TIME TO COLLECTIVELY RETHINK WHAT 'VALUE' MEANS FOR TODAY'S TRAVELER.

VALUE IS MADE UP OF TWO KEY ELEMENTS



EXPERIENCE

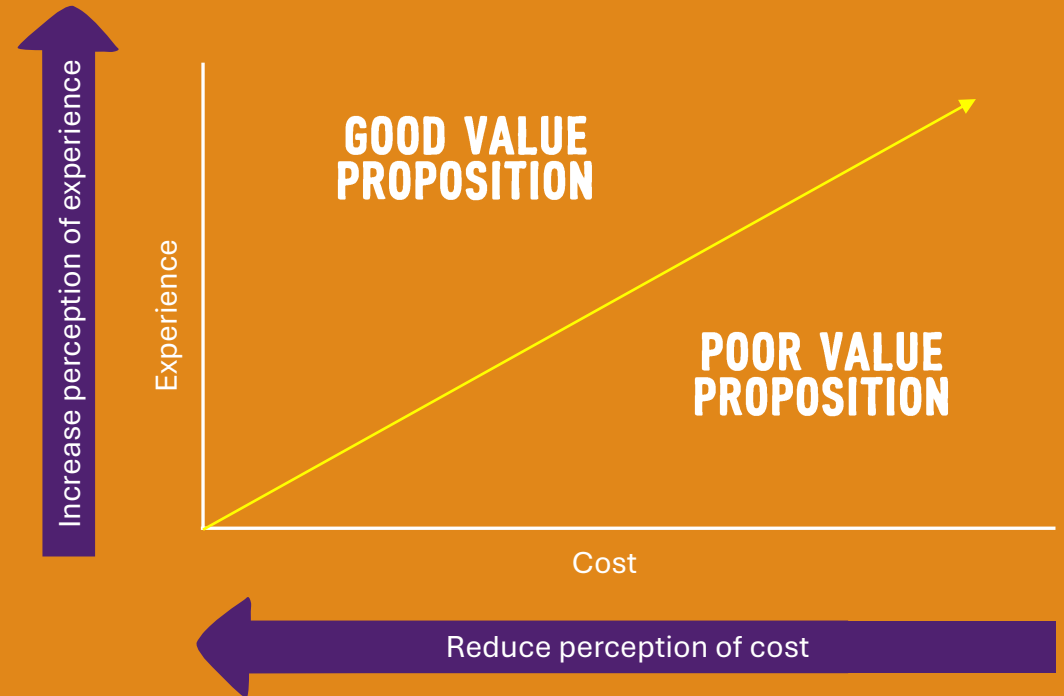
Experience is
a combination of
**quality, relevance
& reward**



COST

Cost is
a combination of
time & price

TO DRIVE VALUE, WE NEED TO SHIFT SHOPPER PERCEPTION



REIMAGINE DUTY FREE WHERE THE JOURNEY IS THE REWARD

Inspiring more passengers to shop, in more stores, and spend more — through experiences they remember



DRIVE CONSIDERATION



MEMORABLE EXPERIENCES



DRIVE PENETRATION



DRIVE VOLUME



DRIVE VALUE



THE HOW

 **BOOST TALKABILITY**

 **REMINDER CLOSER TO TRIP**

 **EMOTIONAL TRIGGER**

 **LOWER ENTRY BARRIER**

 **MORE USAGE OCCASIONS**

 **X-CATEGORY PAIRING**

 **BUNDLE INCENTIVES**

 **SCARCITY DIFFERENTIATION**

 **EXPERIENTIAL ACTIVATION**

 **PRODUCT STORY TELLING**

LET'S EMBARK ON THE JOURNEY & BOOST INDUSTRY GROWTH WITH INNOVATION



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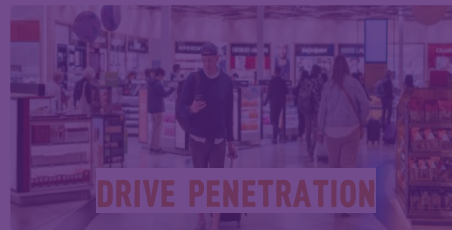
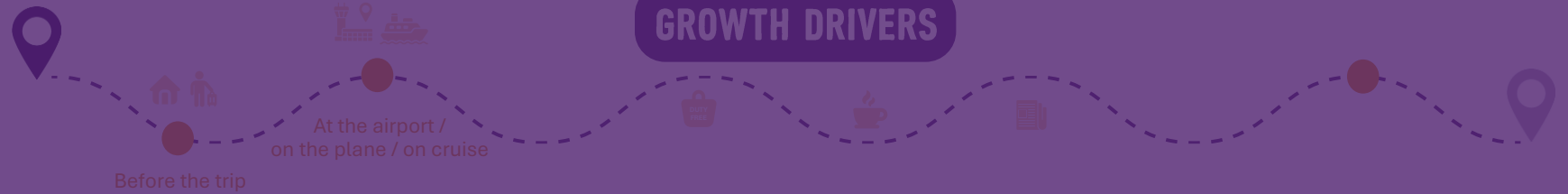
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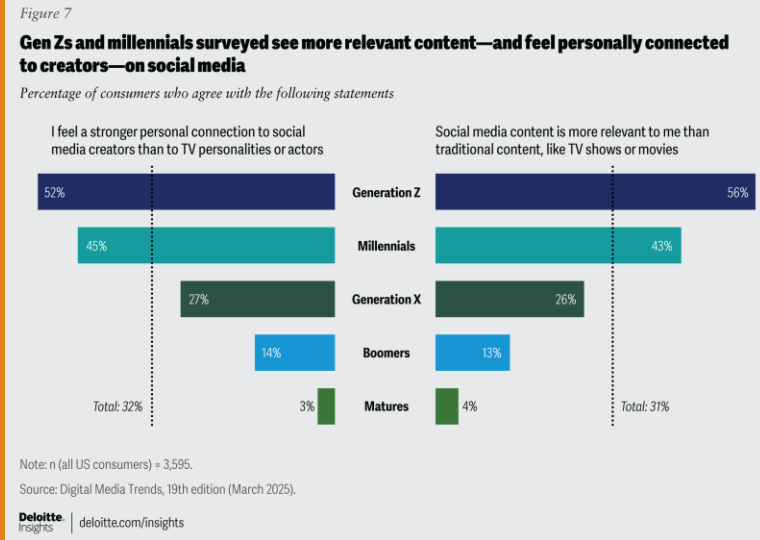
EXPERIENTIAL ACTIVATION

PRODUCT STORY TELLING

INNOVATION TO BOOST FAME & PLANNING FOR AIRPORT CHANNEL!

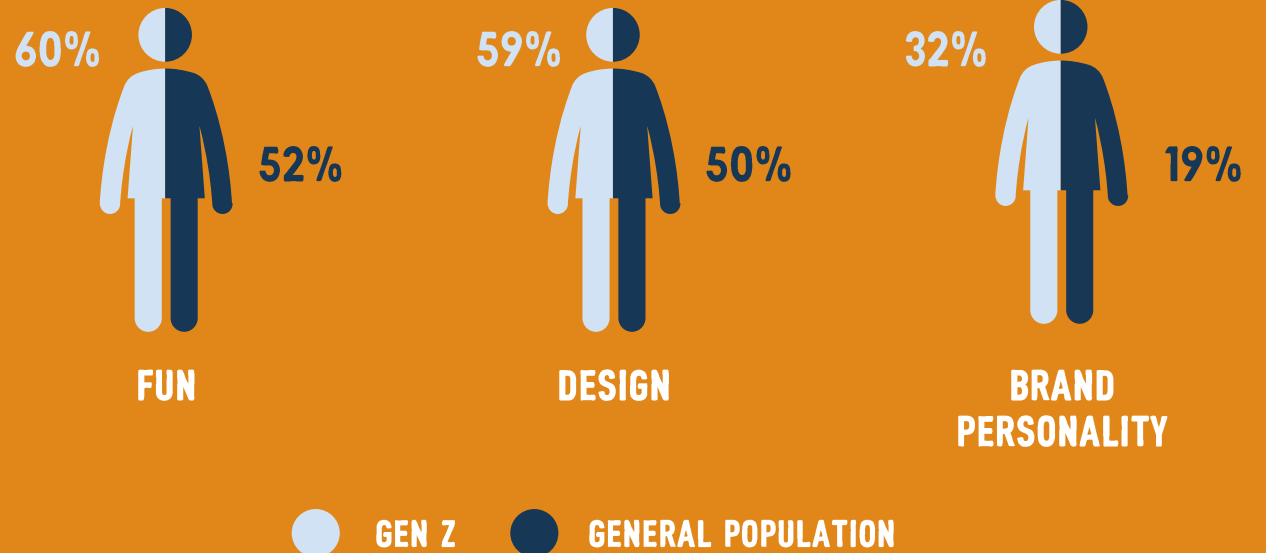
50%

of consumers rely on user generated content in their decision making.



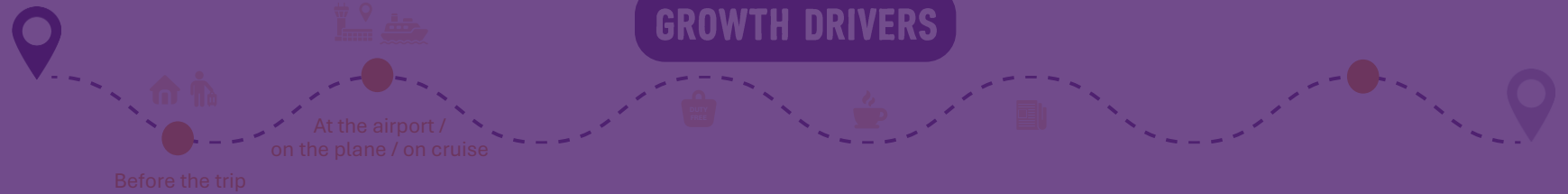
GET TO KNOW WHAT MATTERS TO GEN Z

Percentage of consumers who would pay more for elements of customer experience



**TOBLERONE PINK CRUSH
QATAR PARTNERSHIP**

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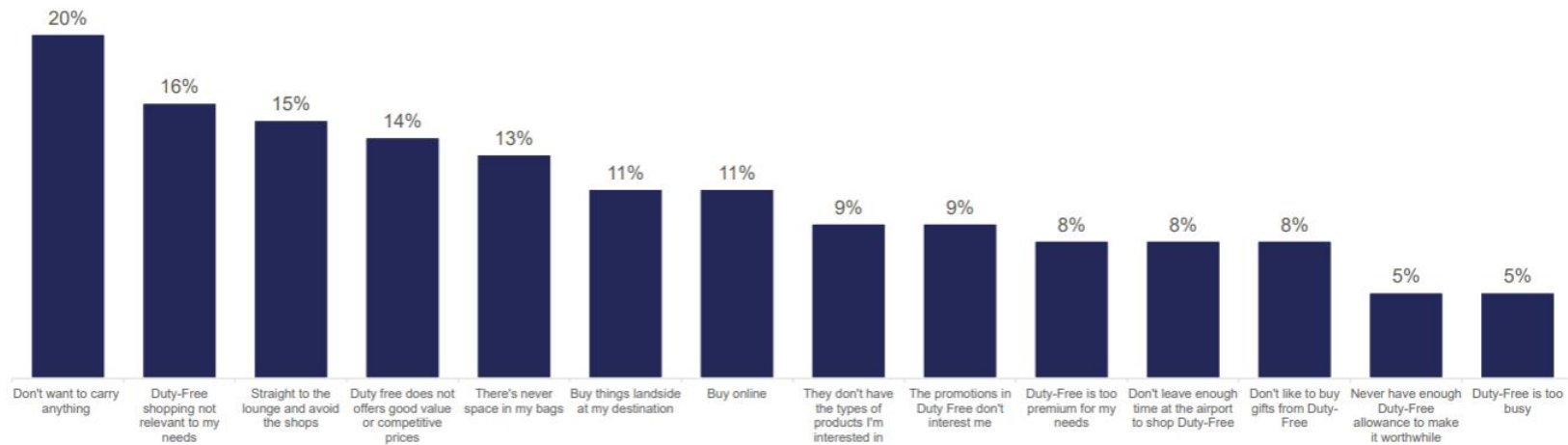
EXPERIENTIAL ACTIVATION

PRODUCT STORY TELLING

INNOVATION TO DRIVE FOOTFALL!

#1 1 barrier of duty free shopping: “I do not want to carry”

Reasons for rarely/never visiting/ purchasing **Duty Free**

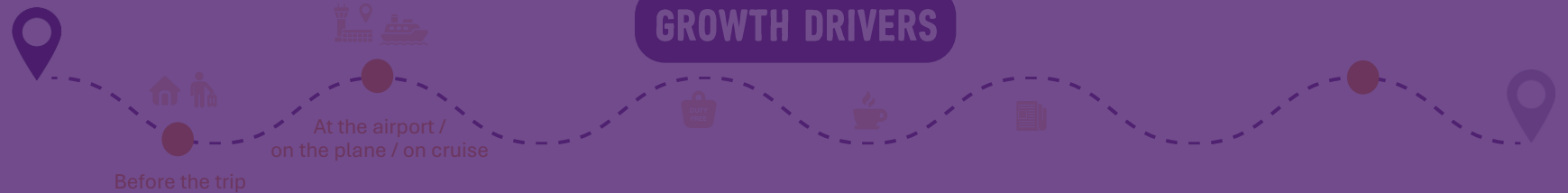




LET'S EMBARK ON THE JOURNEY & BOOST INDUSTRY GROWTH WITH INNOVATION



GROWTH DRIVERS



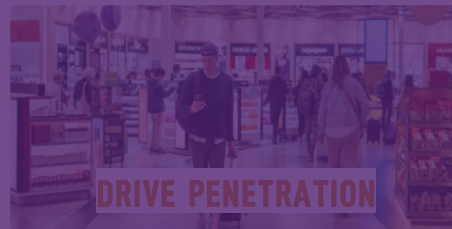
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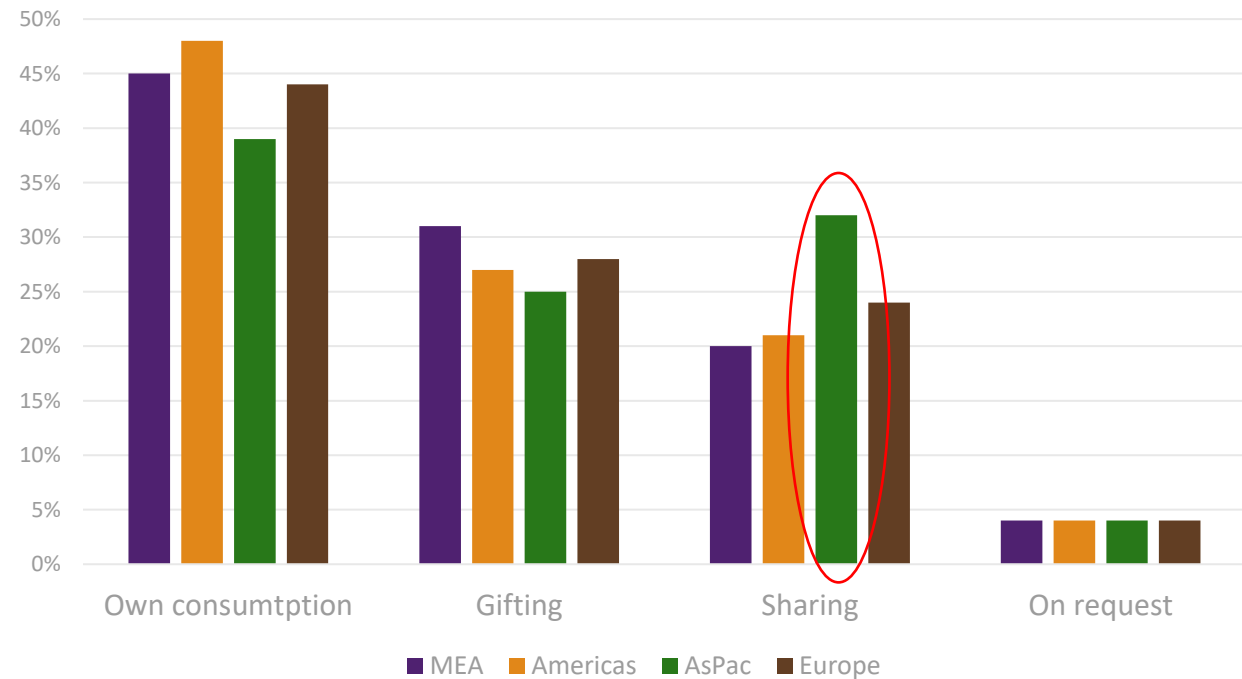
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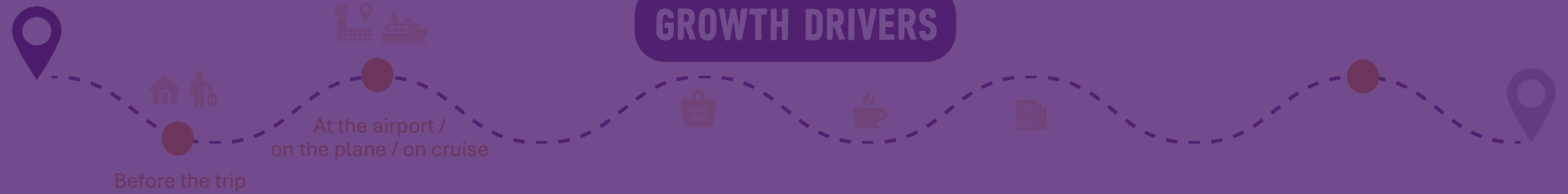
INNOVATION TO DRIVE VOLUME!

**FULFILL
MULTIPLE
OCCASIONS**

Share of occasions by regions – Confectionery 2025



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INNOVATION TO DRIVE **VALUE!**

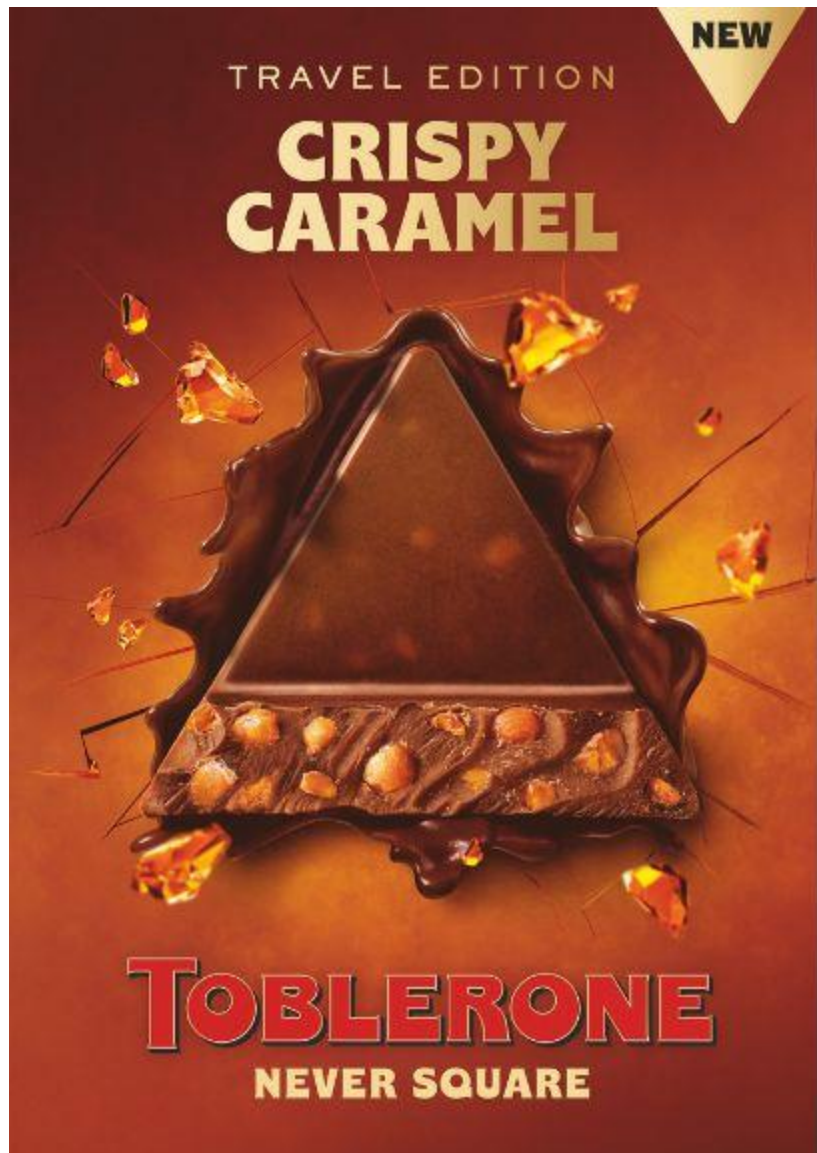
TASTE

is the **#1**
purchase driver
in confectionery

74%

of consumers say the
**NOVELTY OF FLAVOR AND
TEXTURE COMBINATIONS**
are important when
choosing a treat.

TOBLERONE



SOON IT IS TIME TO TASTE!

Please note allergen information on the signs.

INSIGHT DRIVEN INNOVATION BOOSTS INDUSTRY GROWTH



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PRODUCT REVEAL!

THE HYPER EXCLUSIVE DRAW!



**THIS KNOWLEDGE IS IMPORTANT TO ALL OF US!
IT'S NOT ABOUT COMPETING, IT'S ABOUT GROWING THE TOTAL**

