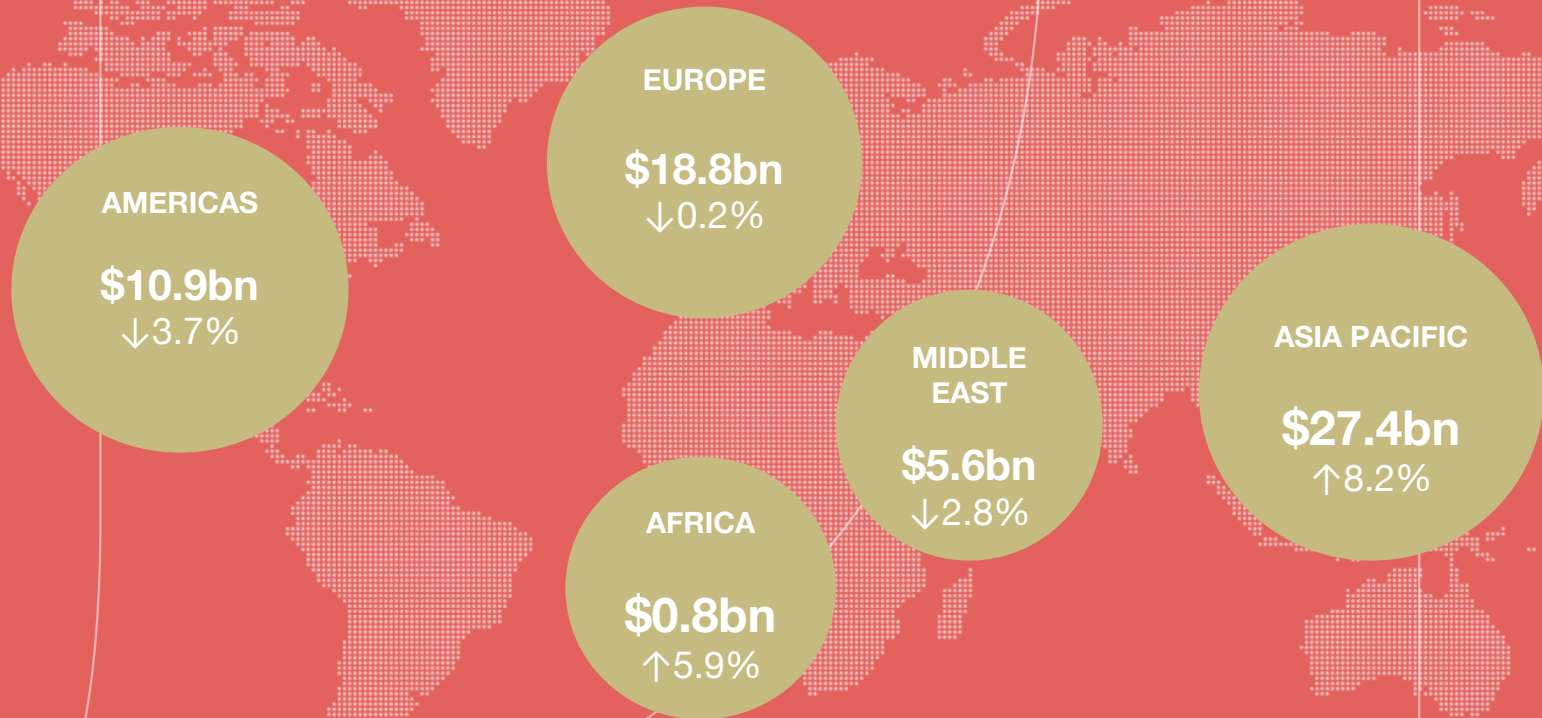




2016 vs 2015 +2,4%



Asia Pacific growth driven by Down-Town Duty free +17.7% vs Airports +1.5%

• Global Airport Shopping	+0,4%	Market share 56.2% vs 57,3% ↓
• Airlines	-6,6%	Market share 3.9% vs 4,3% ↓
• Ferries	-2,7%	Market share 3.2% vs 3,3% ↓
• Other Shops & Sales	+7,3%	Market share 36.8% vs 35.1% ↑

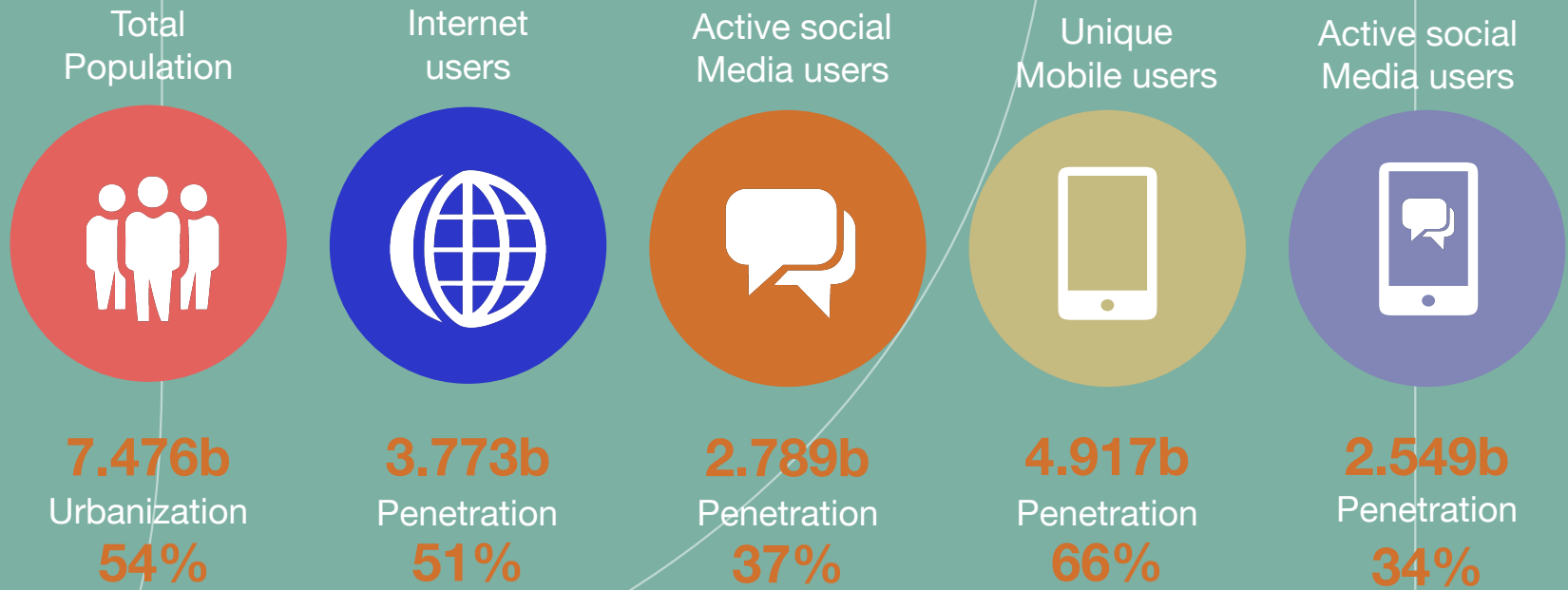
In 2016 Online shopping grew by

24,6%

To 1,95 Trillion \$ and by 2020

4 Trillion \$

Global Digital Snapshot 2017



And what about Travel Retail?

tbp

An aerial photograph of a wooden speedway track, showing the curved lanes and the central area. The track is made of light-colored wood and has several white lines marking the lanes. A blue semi-circular overlay covers the left side of the image, containing the text. In the top right corner, the letters 'tbp' are written in a blue, lowercase, sans-serif font.

Only
physically
there





PRE-TRIP ONLINE TOUCH POINTS

53% of DF buyers Make the decision to buy in DF **before arriving to the airport**

However, only

34% Search for / see information about DF shopping Online



#1: When booking trip



#2: DF shop website / app

40% Would like to do **online DF shopping** before the trip



62% Book their flight **directly online**

83% Find **mobile check-in** to be the most **convenient**



Top **motivators** to search information **online** about **DF shopping**:

#1: Download **vouchers**

#2: Information about **prices**

#3: **Special offers & deals**



AIRPORT ONLINE TOUCH POINTS

70% Go **online** while **at the airport**



24%: search info about DF

54% of **DF non-visitors** prefer to spend time on their **mobile** rather than going to the DF shop

47% of DF visitors Visit the DF shop **on impulse**



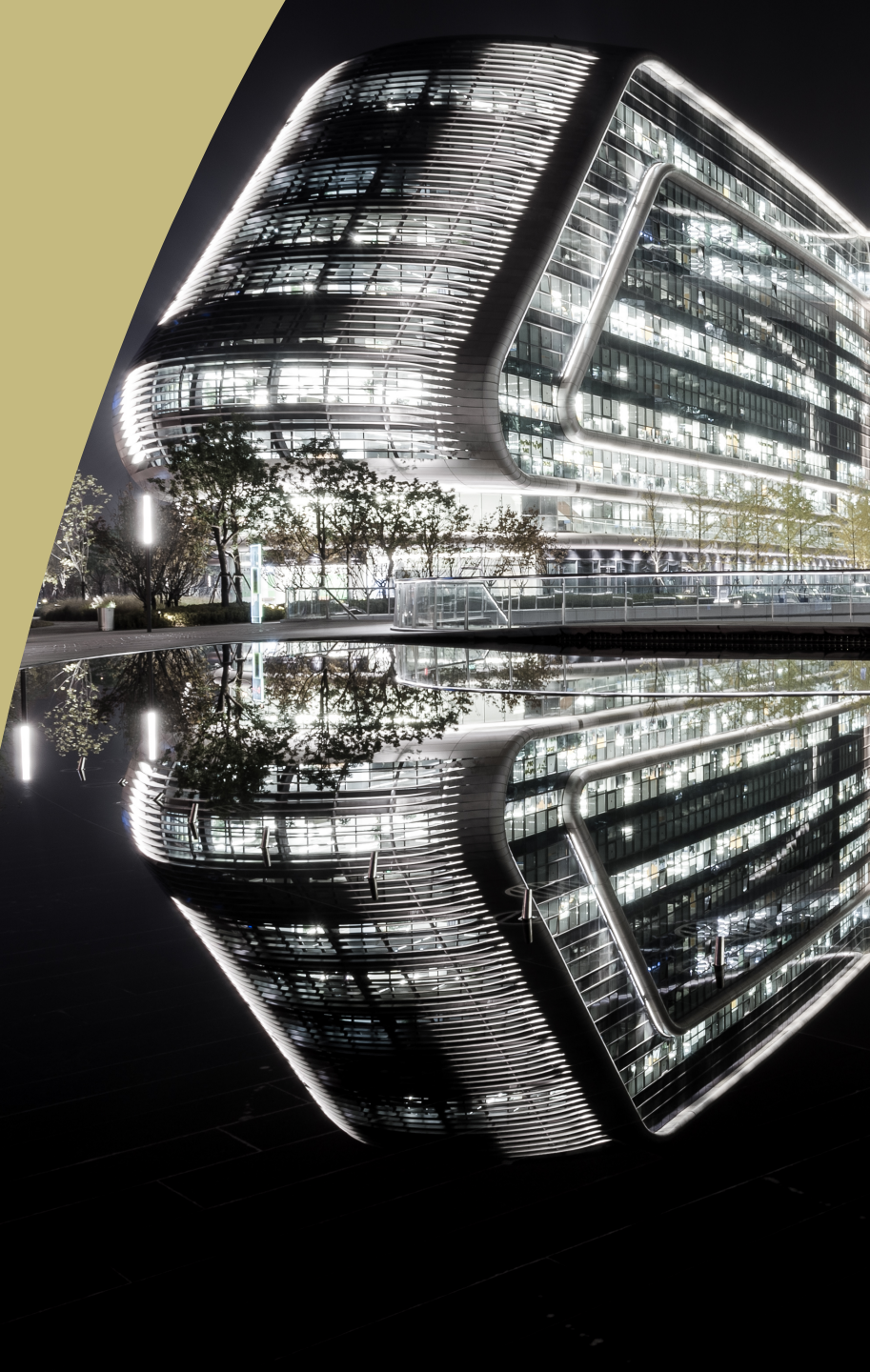
62% Motivated to visit DF if receive **offers /coupons** on their **smartphone**



The aviation industry is amongst the data richest environments & internet traffic comes for free

“Stakeholders so-far have mostly failed to embrace all e-commerce & Omni-channel opportunities whilst travellers crave digital engagement and seamless travel experiences”

**The one
stakeholder
that holds the
key has been
left out most,
the Airlines!**



**Future proof
airports will
eventually
become
marketplaces.**





WP