

# Understanding the Chinese traveller opportunity in the Middle East & Africa

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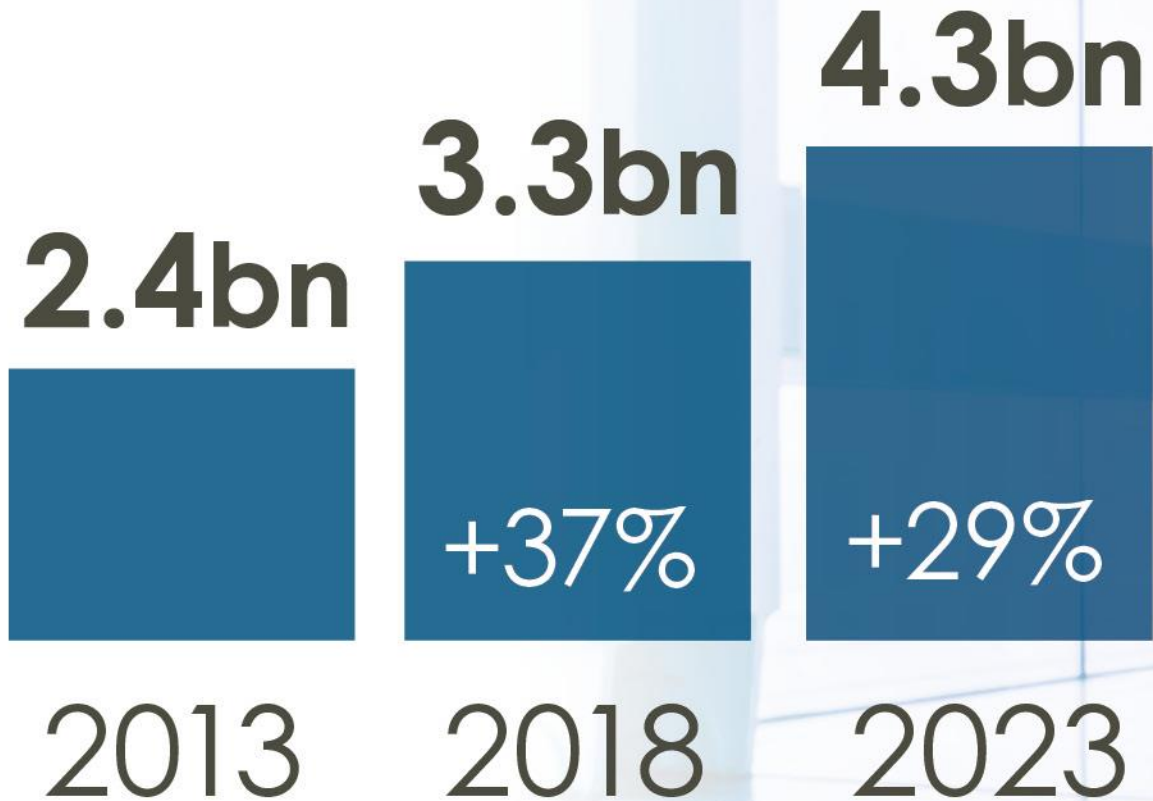
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## Global passenger traffic continues to grow...



Source: CAPA & CiR Traveller Statistics. Based on total (departing & arriving) international PAX at 550 airport locations. MAT to August 2018.



# With Chinese travellers at the forefront

Growth since 2013 and 2018 PAX

S. Korean



**107%**  
43.3M

Indian



**72%**  
36M

Chinese



**71%**  
75.2M

Thai



**48%**  
29.8M

Taiwanese



**46%**  
25.4M

And this growth is causing significant increases in Chinese passengers in the MEA region

71% Chinese global growth since 2013

103% Chinese growth to MENA since 2013

Source: CAPA & CiR Traveller Statistics. Based on scheduled departing international passengers. Nationality is based on residency through place of ticket purchase.



And in some of our key destination countries in the last year...



**UAE**

12%



**Qatar**

16%



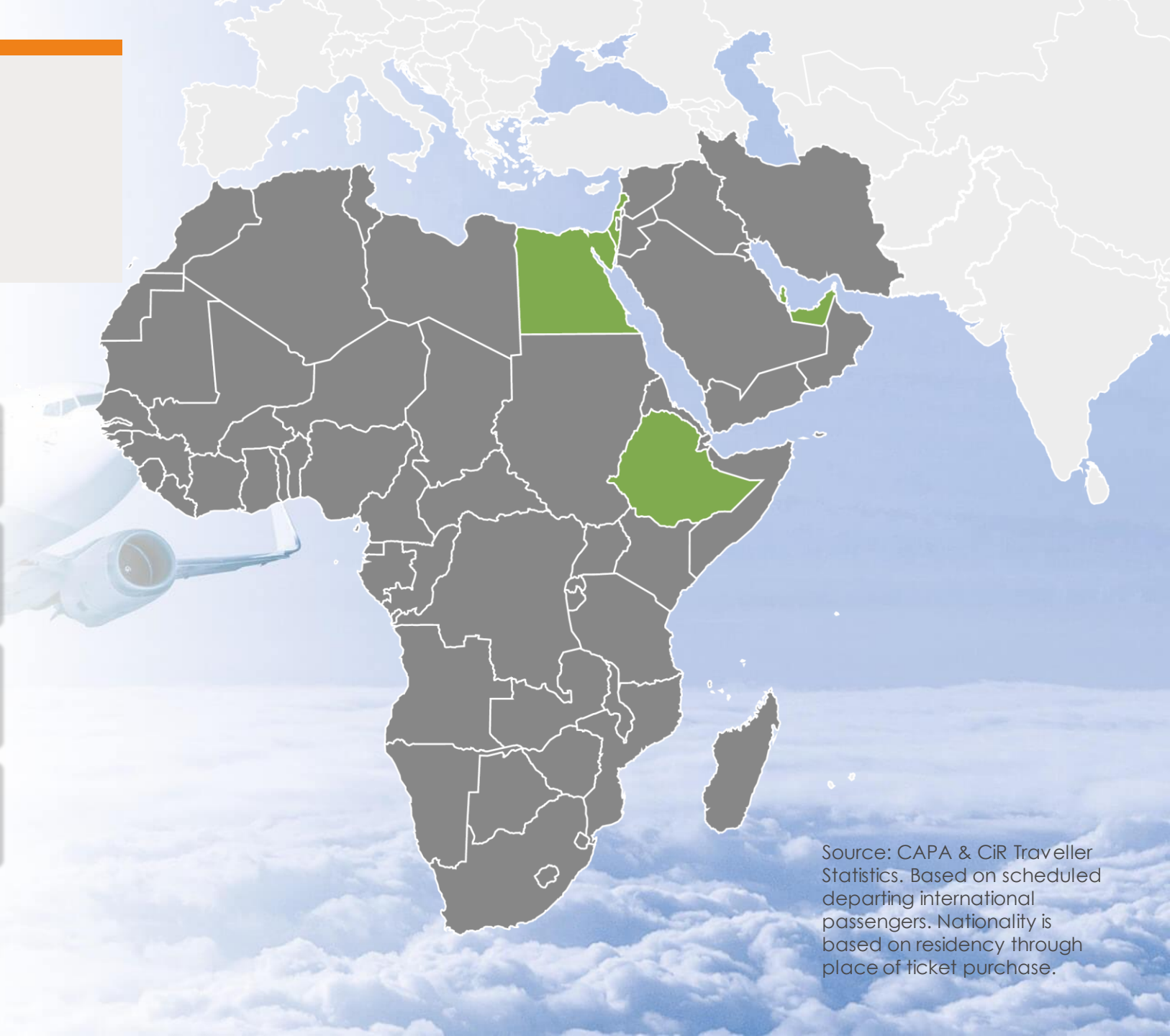
**Ethiopia**

11%



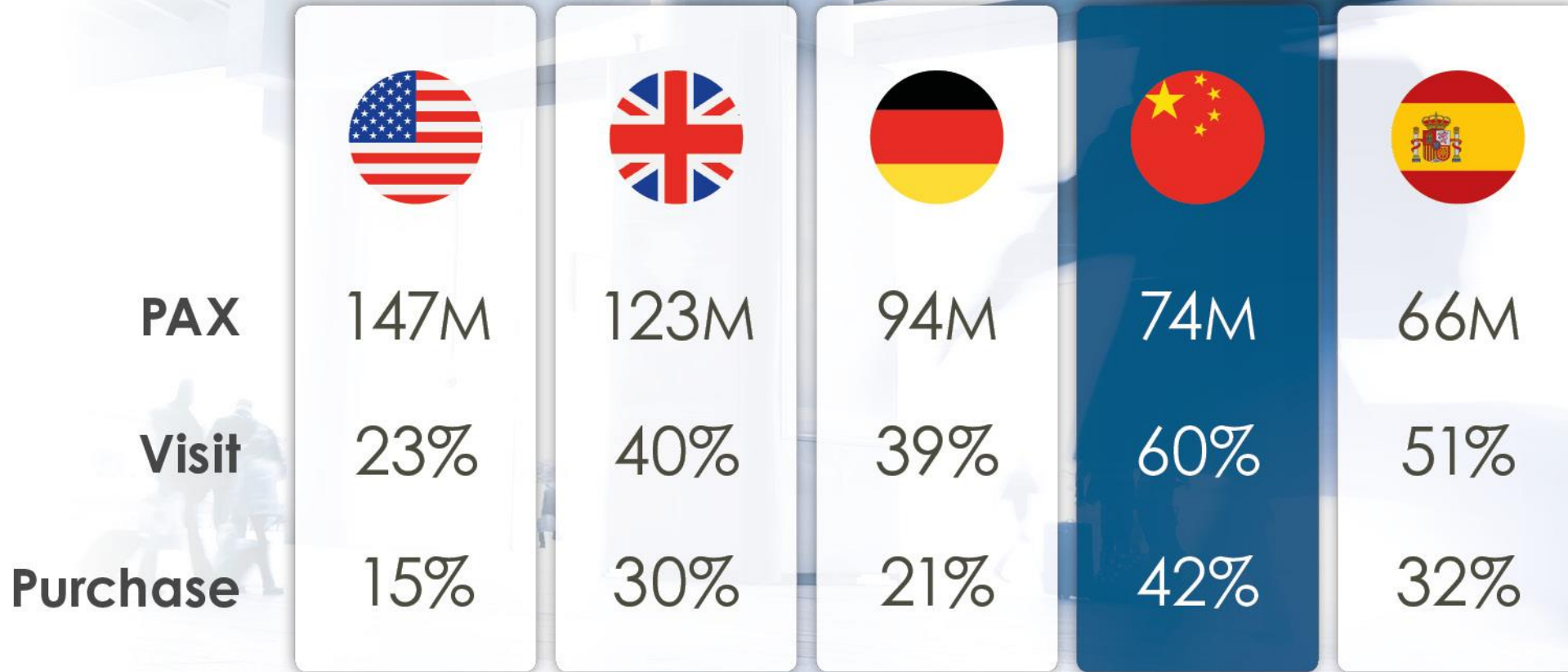
**Egypt**

19%



Source: CAPA & CiR Traveller Statistics. Based on scheduled departing international passengers. Nationality is based on residency through place of ticket purchase.

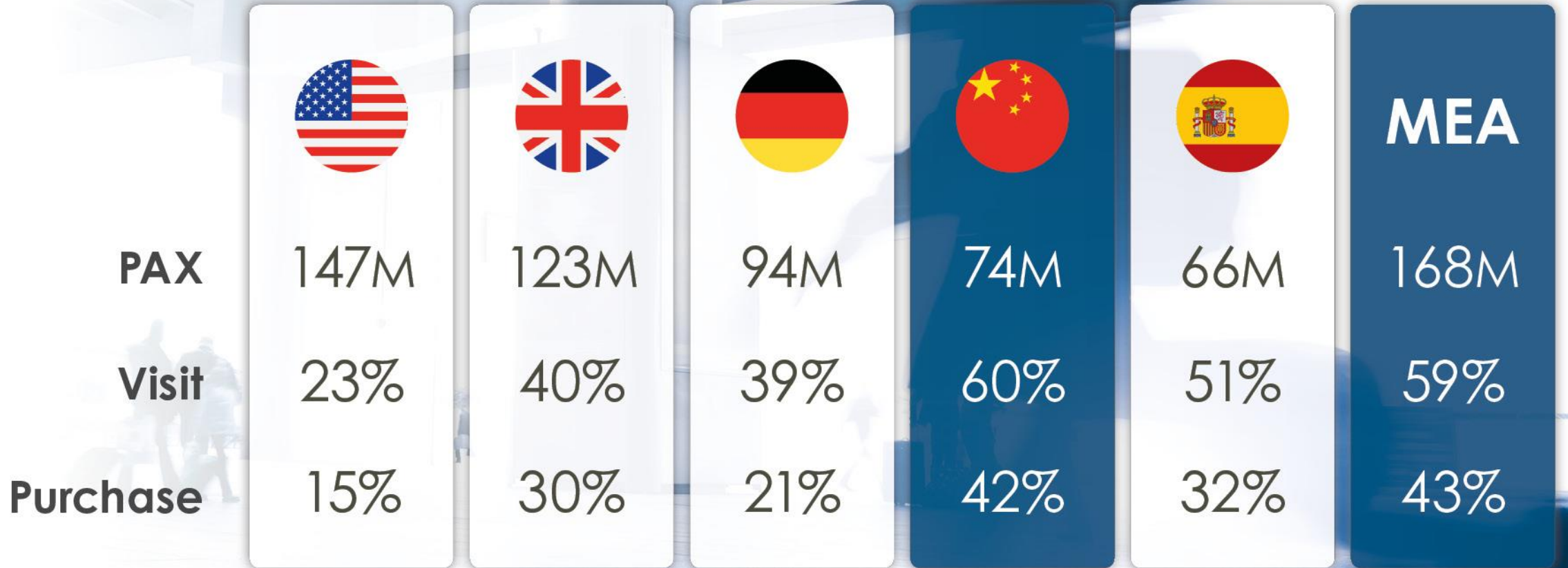
## A significant opportunity



Source: CAPA & CiR Traveller Statistics. Based on scheduled departing international passengers. Nationality is based on residency through place of ticket purchase.



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## Two key MEA opportunities

**1** Take advantage  
of the current  
Chinese shopper

**2** Drive increased  
Chinese traveller  
visiting & purchasing





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# We must know the Chinese shopper

## Gender



52%

## Age

under  
35

61%

## Travel Party



66%

## Items bought



2.2

## Purchase reason



54%



46%

## Average spend



US\$98



# We must know the Chinese shopper

Gender



52%



Age

under  
35

61%



Travel  
Party



66%



Items  
bought



2.2

Purchase  
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54%



46%

Average  
spend



US\$98



## The Chinese shopper is interested in a different product mix



25% 



21% 



17% 



17% 



15%



10%





The Chinese shopper is interacting with the channel in a different way to our current shopper



Planned  
store visit

56%

72%



Impulse  
store visit

44%

28%

### Impulse visiting drivers

- ⚡ To browse
- ⚡ Needed a gift
- ⚡ Travel partner wanted to visit
- ⚡ Remembered I needed something
- ⚡ Had more time than expected

## The Chinese shopper has a different purchasing dynamic

**Experimenters**

23% 

**I Like What I Know**

16%

**Here & Now**

14%

**Quality Seekers**

17% 

**Value Conscious**

19% 

**Easily Influenced**

11%



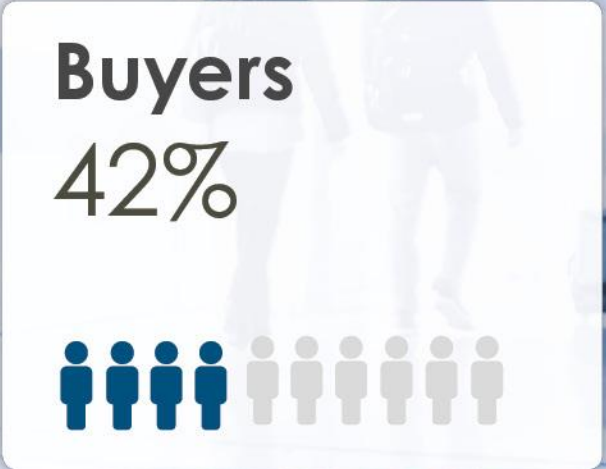
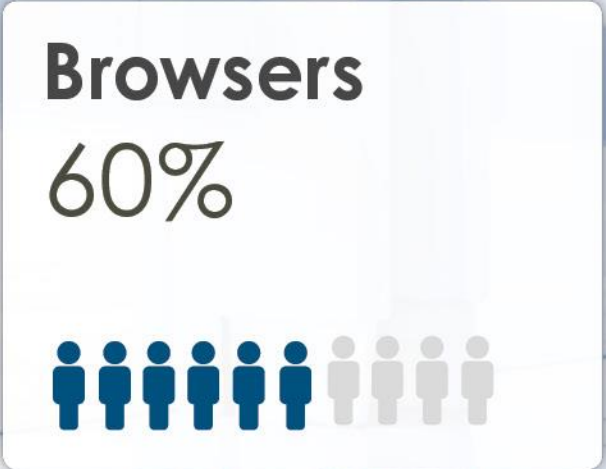


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**1** Take advantage  
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**2** Drive increased  
Chinese traveller  
visiting & purchasing

# The Chinese traveller offers a significant additional footfall & purchasing opportunity





## Clear footfall barriers exist

Could not carry  
any more

19%



Did not need to  
buy anything

18%



Chose to do  
something else

14%



Did not have  
the time

11%



Don't enjoy  
DF shopping

10%





## Clear footfall barriers exist

Could not carry any more

19%



Chose to do something else

14%



Did not need to buy anything

18%



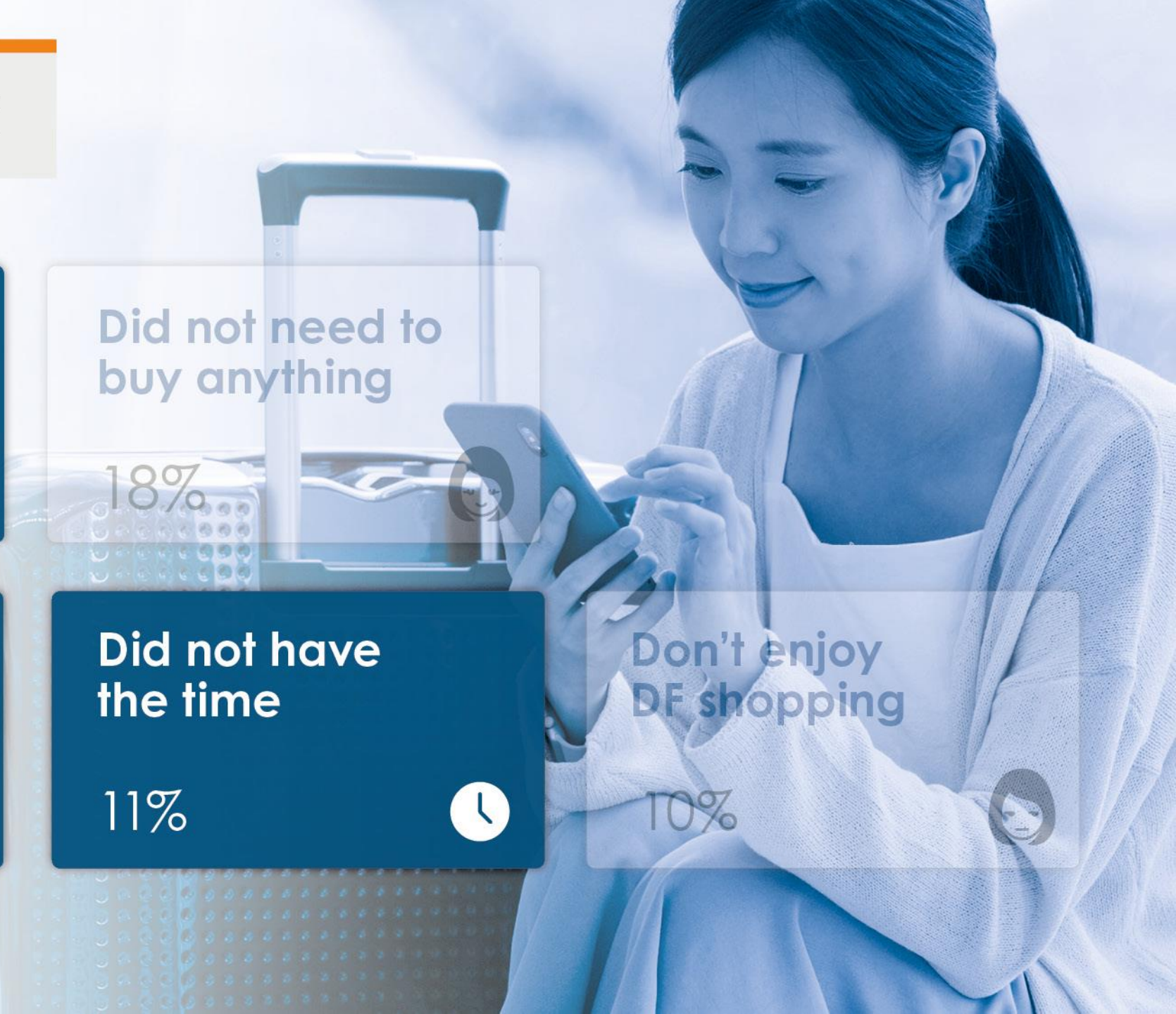
Did not have the time

11%



Don't enjoy DF shopping

10%





## Clear conversion barriers exist

Just browsing

38%



Nothing suitable for gifting

19%



Nothing of interest

17%



Item wanted was not available

17%



Lack of attractive promotions

13%





## Clear barriers exist

Just browsing

38%



Nothing of interest

17%



**7/10**  
Chinese  
non-buyers  
had considered  
making a  
purchase

Lack of attractive  
promotions

1/3

1/3

1/3





Which can be overcome through focusing on our key strengths

**Gift solutions**



**Product sampling**



**Best sellers displays**



**Clear promotional activity**



**Product personalisation**



**Brand ambassadors**



## Summary



**The Chinese traveller presents a significant opportunity**



**Know who they are, what they want and how they shop**



**Attract a greater proportion of travellers to the duty free store**



# Thank you



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