

Towards a consumer led retail offer...
the '10 in 10' opportunity



Stewart Dryburgh
General Manager



Nestlé | INTERNATIONAL TRAVEL RETAIL

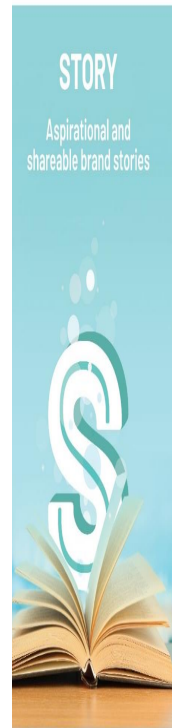
The '10 in 10' opportunity



Understanding needs

Meeting needs

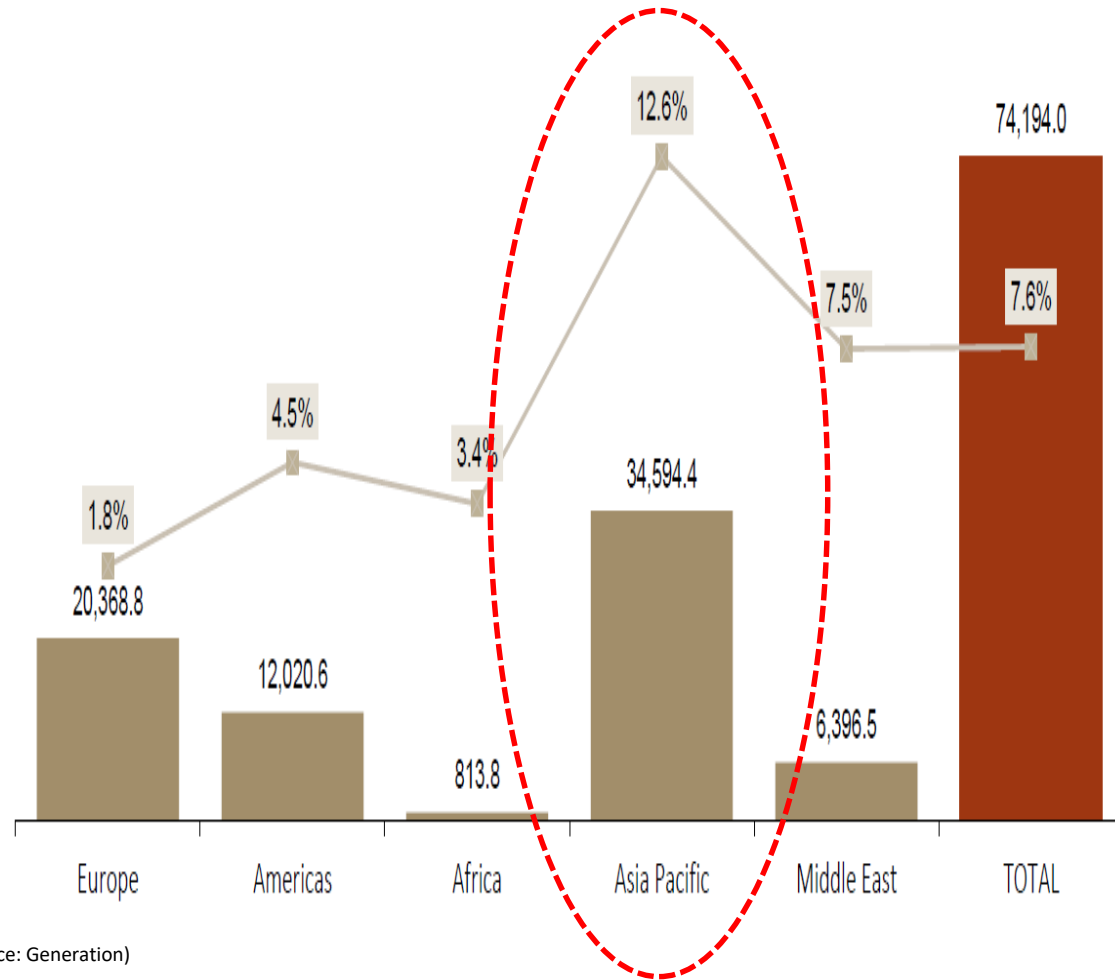
Sharing \$10 bn in 10 years



A great opportunity, particularly in Asia-Pacific

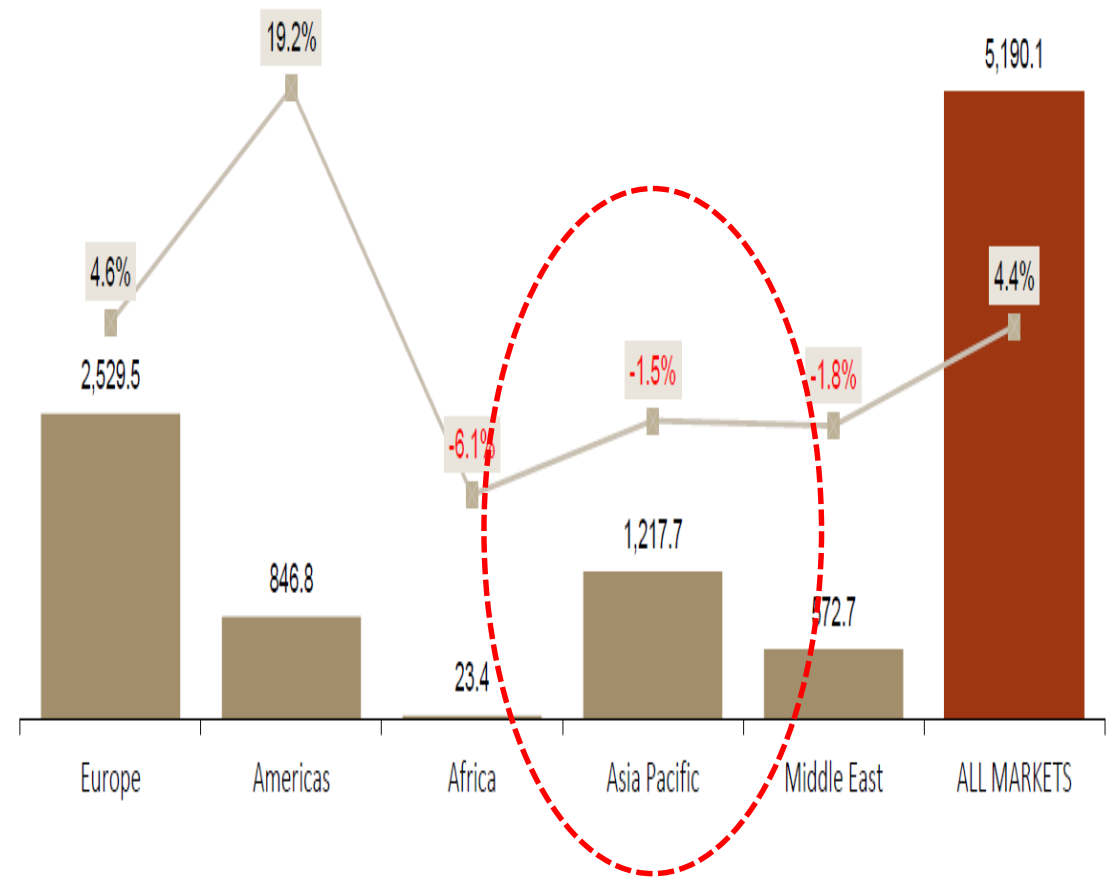


TOTAL - BY REGION



(Source: Generation)

CONFECTIONERY & FINE FOOD - BY REGION



Nestlé: understanding consumers for 153 years



Understanding consumer & shopper needs



The Gifting Demand Moments



Q25 Thinking about the [brand & SKU] that was purchased as a gift, please look at the below list of reasons for the occasion. Q26. Of the gifting occasions chosen, which do you think is best suited to your purchase of ...?
All Gift purchases N=1507

Research conducted globally in:
19 markets
34'000 consumers

The Snacking Demand Moments



Q16 How well does each of the following statements describe the last occasion on which you ate the [brand & SKU] chocolate you bought in Duty Free? – All snack purchases N= 1874
Energizing Recharge N=241; Hunger Buster N=180; Uplifting Break N=250; Boredom Relief N=142; Indulgent Treat N=305; Sweet Finish N=237; Quality Family Time N=316; Social Enjoyment N=203

Understanding the travel retail shopper



mind-set
expert in travel market research

NESTLÉ INTERNATIONAL TRAVEL
Travel Retail Shopper Need State Seg

SNACKING & GIFTING

mind-set
expert in travel market research

DF Shopping Behaviour:
Emerging Middle Class
Chocolate & Confectionery



By mind-set for
THE WORLD OF CHOCOLATE BY
Nestlé | INTERNATIONAL TRAVEL

mind-set
expert in travel market research

DF Shopping Behaviour:
Millennials
Chocolate & Confectionery



By mind-set for
THE WORLD OF CHOCOLATE BY
Nestlé | INTERNATIONAL TRAVEL

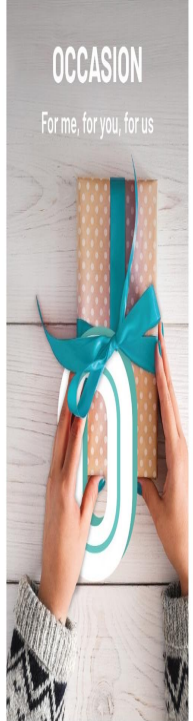


3 core needs & 10 category growth drivers



Understanding needs

Meeting needs



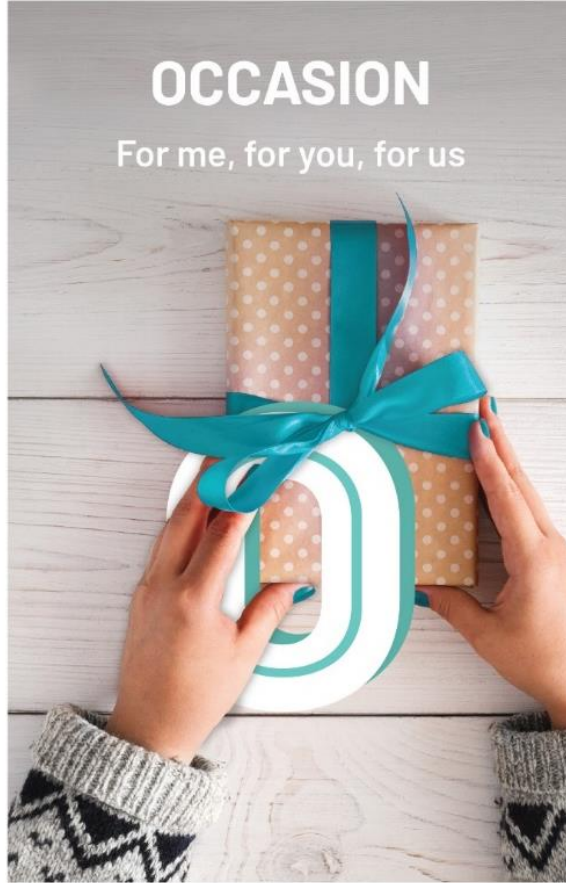
STORY

Aspirational and shareable brand stories



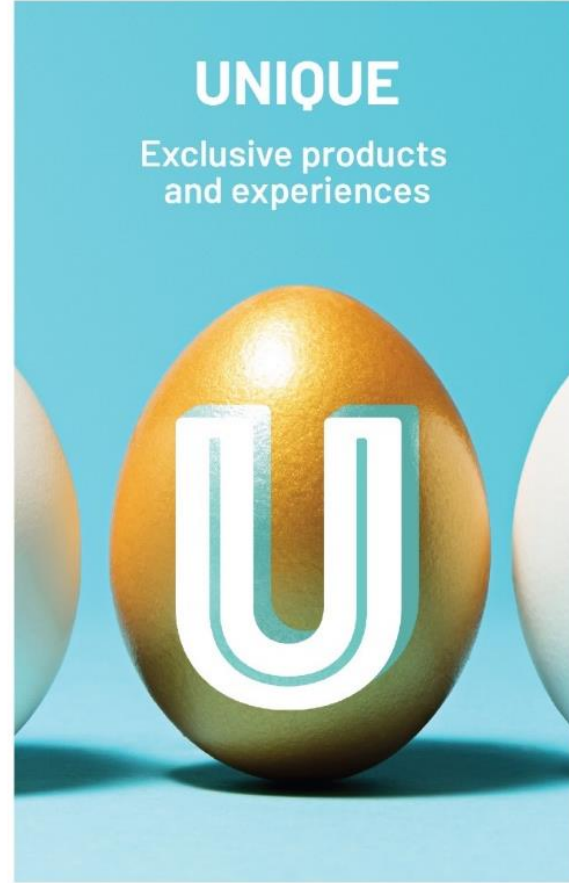
OCCASION

For me, for you, for us



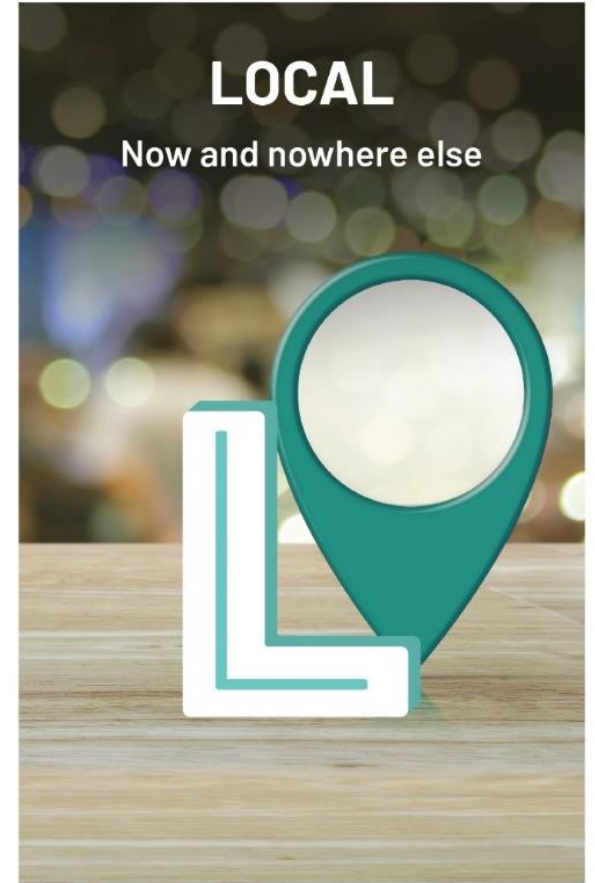
UNIQUE

Exclusive products and experiences



LOCAL

Now and nowhere else





LIVE
YOUR
BREAK



LIVE YOUR BREAK

Story



Occasion



Unique



Local



Sales
+30%
to 40%

Driving footfall, sales & brand building



Global & local..... in Singapore



SOUL works for any brand....

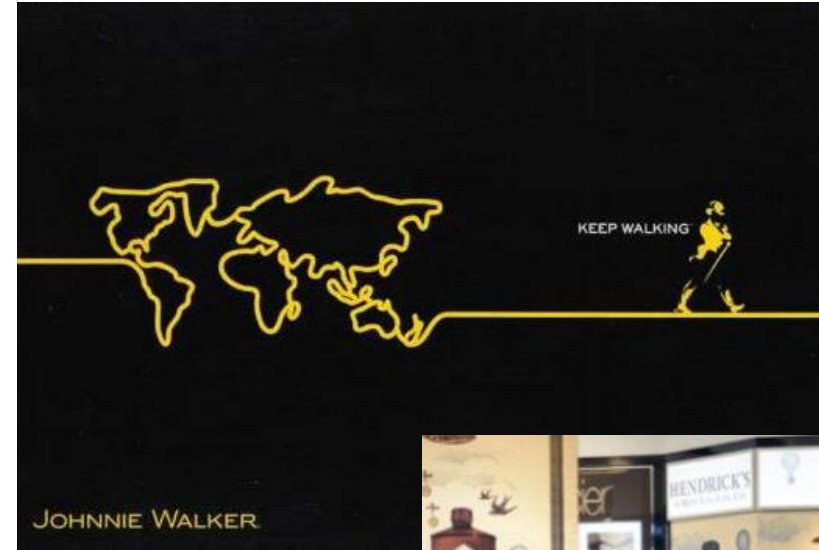


Story

Occasion

Unique

Local



Ensuring the category is set in context

PORTLAND.



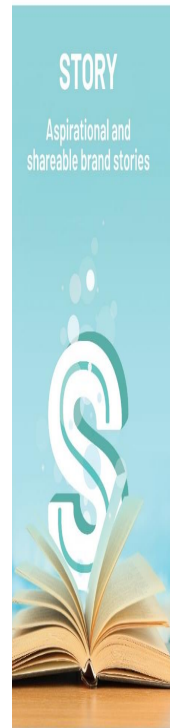
Moments of decisions of Duty Free purchases



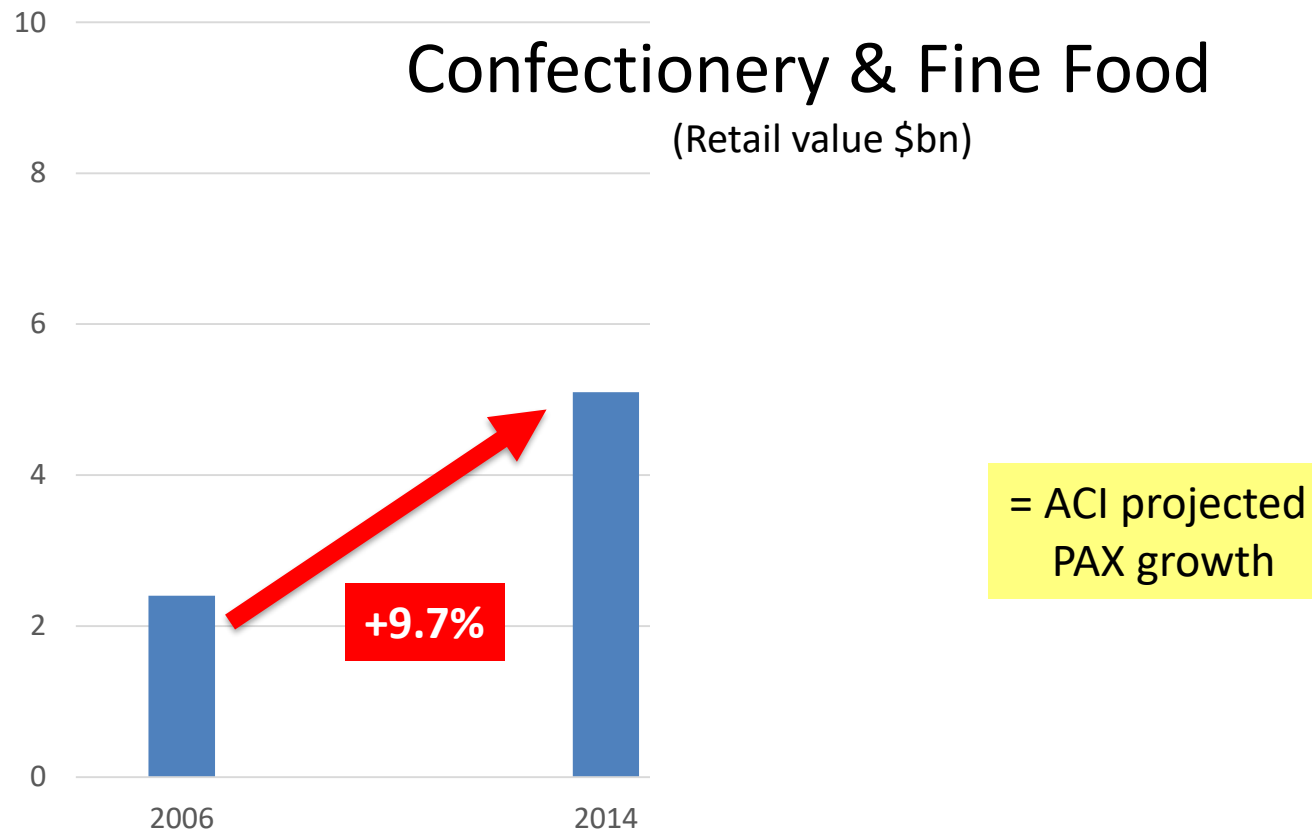
Understanding needs

Meeting needs

Sharing \$10 bn in 10 years



\$10 bn in 10 years



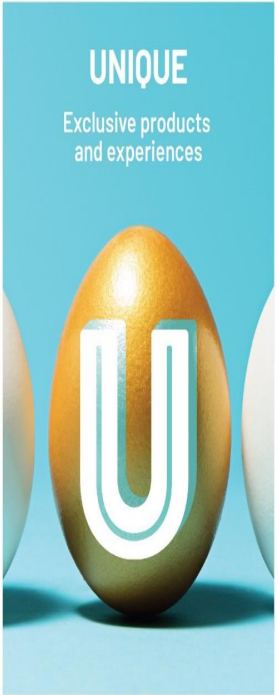
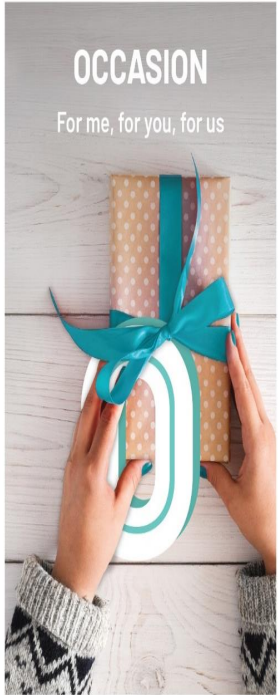
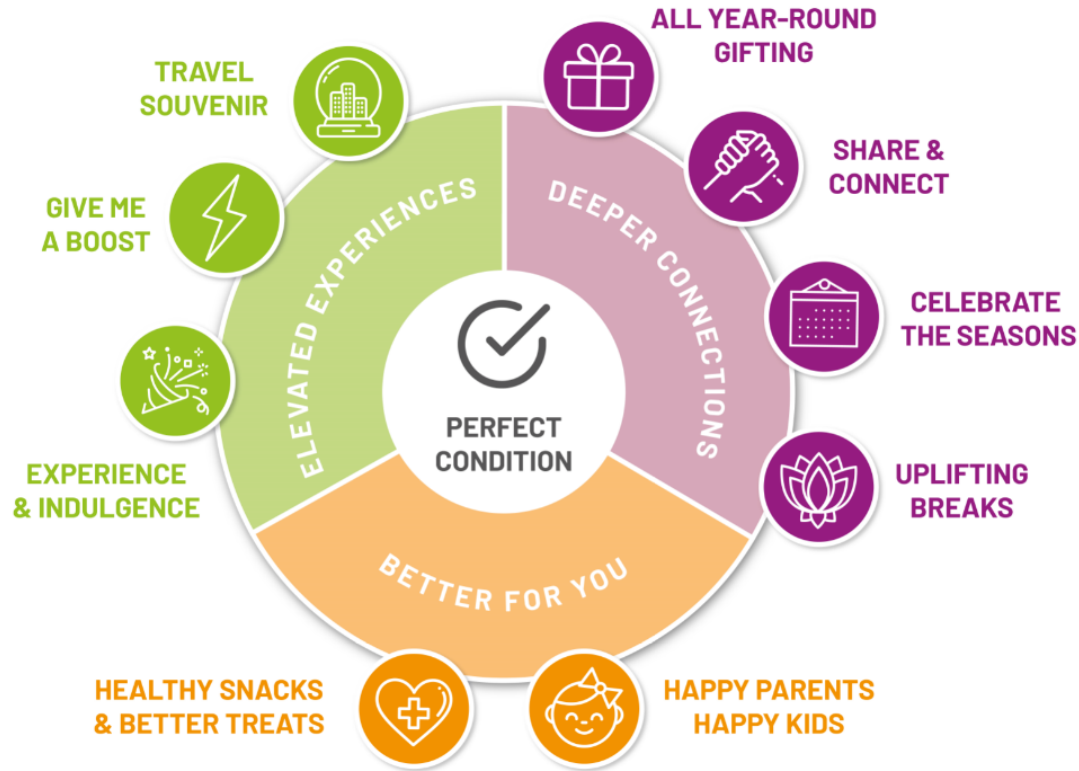
(Source: Generation)

\$10 bn in 10 years

Category growth drivers



SOUL



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